Brazil ServiceNow AI Platform Administration

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Administer the ServiceNow AI Platform

As a platform administrator, you have the power of the ServiceNow AI Platform at your fingertips. The ServiceNow AI Platform is an application platform as a service that automates business processes across the enterprise.

Get started

Choose one of these tiles to get started.

Start here to learn about the ServiceNow AI Platform



Learn how the ServiceNow AI Platform works.

Configure ServiceNow AI Platform core features



Configure settings that affect global ServiceNow AI Platform behavior and behavior for ServiceNow AI Platform applications.

Maintain and monitor the ServiceNow AI Platform



Identify health issues and settings that you need to change. Optimize ServiceNow AI Platform performance using performance monitoring and diagnostics.

Upgrade to the latest version



Plan and manage your ServiceNow AI Platform upgrades using Upgrade Center. Monitor upgrade progress and view a summary of upgrade results with Upgrade Monitor.

Additional Resources



Upgrade your platform administrator experience to the next level

Start here to learn about the ServiceNow AI Platform

Learn about the ServiceNow AI Platform and these important applications:

Admin Center

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A central hub for platform owners and admins to access platform capabilities, discover new applications, and get intelligent, actionable insights.

ServiceNow Store

Listings of ready-to-use applications, integrations, and products to help you accelerate your digital transformation.

Application Manager

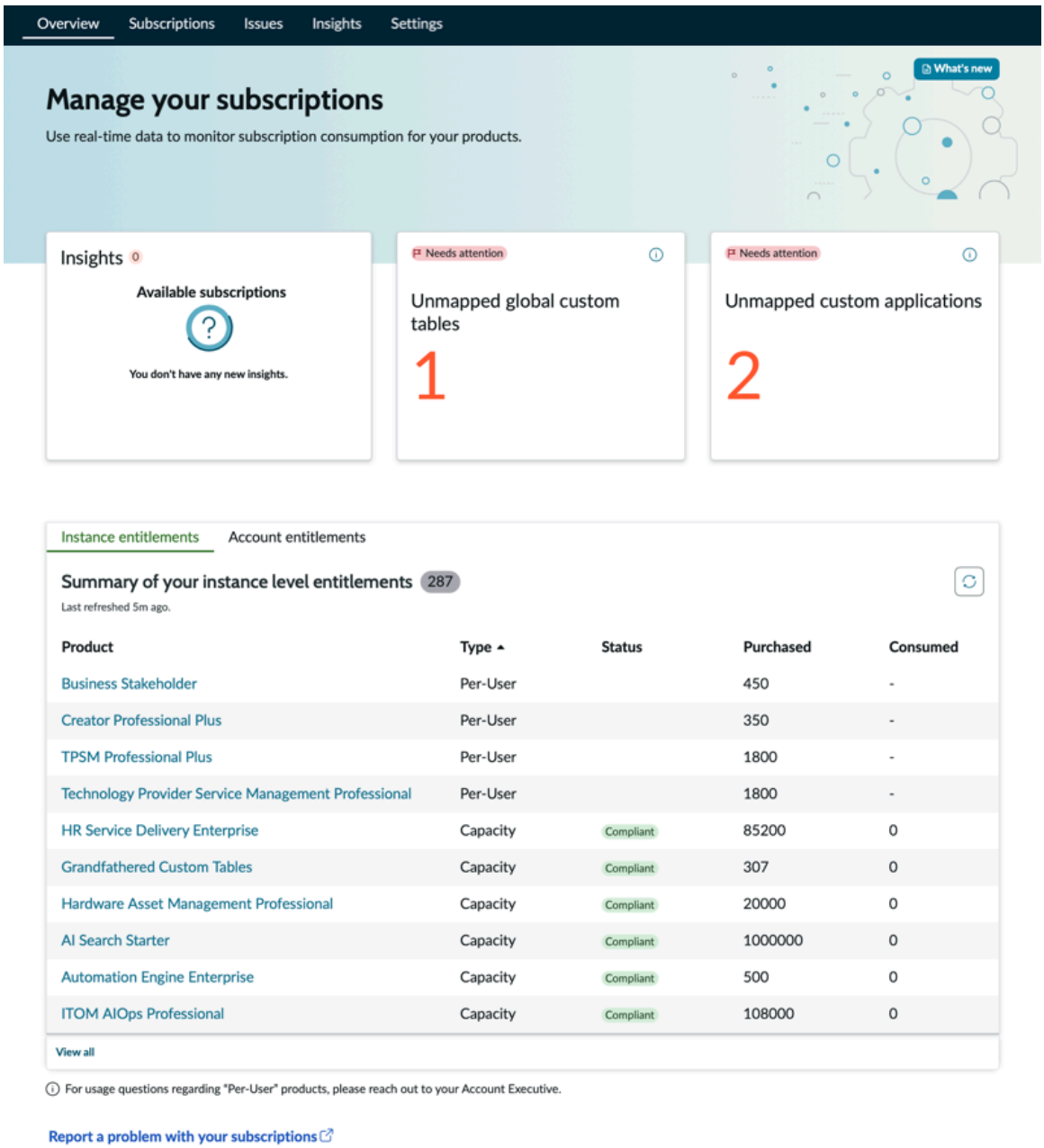
One location to install, update, and manage licensed applications and plugins for your instance.

ServiceNow Otto for Setup

A guided experience to install, configure, and deploy certain ServiceNow products.

Subscription Management

A centralized management experience to help you understand your subscriptions and entitlements.



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Configure ServiceNow AI Platform core features

Explore core features that affect global ServiceNow AI Platform behavior as well as behavior in some ServiceNow AI Platform applications.

User administration

Configure users, groups, and roles to provide access to ServiceNow AI Platform applications and settings.

ServiceNow AI Platform tables and data

Learn how to work with ServiceNow AI Platform records in the classic environment.

Instance Clone

Copy data and metadata from one ServiceNow instance (source instance) to another ServiceNow instance (target instance).

Search administration

Configure search engines and interfaces for the ServiceNow AI Platform. Select AI Search for a consumer-grade search experience, or use the legacy Zing text search engine. Use Contextual Search to let service agents view relevant results based on an Incident or Problem record's query context and user intent.

Time configuration and currency configuration

Configure date and time fields, time zones for your users, and calendars.

Translation and localization

Provide service around the globe with language translation and localization for specified regions.

Integrations

Learn about integrating third-party applications into the ServiceNow AI Platform.

Notifications

Use Notifications to manage system email, create system notifications, and configure how your system responds to inbound email.

Service Level Management

Configure the Service Level Management (SLM) application to gather your service requirements, monitor your SLAs, and report on your SLA compliance.

Maintain and monitor the ServiceNow AI Platform

Instance Scan

Identify ServiceNow AI Platform health issues and incorrectly configured settings.

System Events and Scheduled Jobs dashboard

Monitor system events and determine which the system should process them.

Platform performance

Ensure system optimization through performance monitoring and diagnostics.

Plan and manage your ServiceNow AI Platform upgrade

Upgrade Center and Upgrade Console

Plan and manage your ServiceNow AI Platform upgrades using Upgrade Center or the latest experience, Upgrade Console.

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Getting started on the ServiceNow AI Platform

ServiceNow AI Platform is the exclusive ServiceNow platform. It provides a range of options to improve and automate your business processes.

How the ServiceNow AI Platform works



The ServiceNow AI Platform is the foundation of ServiceNow. It enables data to flow seamlessly across applications and existing systems.

Basic system configuration



Customize UI and forms, create a mobile experience, and adjust other settings in applications across the ServiceNow AI Platform.

Admin Center



Admin Center provides a central hub for you to access platform capabilities, discover new applications, and get intelligent, actionable insights.

Subscription Management



With the ServiceNow® Subscription Management application, you can manage how your ServiceNow subscriptions are used on your instances.

How the ServiceNow AI Platform works

Learn how the ServiceNow AI Platform can provide the solutions that you need to improve your business and manage risk effectively. Powerful automation, AI, and embedded analytics optimize your workflow processes, with a wide variety of resources made to help you respond to business changes quickly and easily.

Basic system configuration

Modify your UI to suit your business operations, with various core configuration settings at your disposal. Use Form Administration to customize the appearance of forms and lists. Provide tailored UI through User Interface Configuration, and improve the navigation and search experience for users with Navigation and UI. Enhance your instance and applications with Localization and Time settings, and stay on the go with Mobile Device Support. A wide range of plugins expand the platform even further, with each customizable to your needs.

Admin Center

Discover the capability of available applications and how to implement them to work toward achieving your business goal. Your administrators will be able to get started quickly with setting up apps, loading initial data, and establishing roles, groups, and users. The admin center gives your team the power to customize user interfaces, update versions, applications, and modules

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configurations, handle user access, monitor system performance and UI policies, and much more.

Subscription Management

Manage your ServiceNow subscriptions and how they're used on your instances with Subscription Management. This app helps you allocate and monitor subscriptions, and display current subscriptions in your instance. Active management of user-based subscriptions and monitoring of capacity subscriptions lets you track usage and adjust allocation efficiently. Enabled by default, this management app means you can plan for subscription renewals with no added costs.

How the ServiceNow AI Platform works

The ServiceNow AI Platform is the unified foundation for every ServiceNow product, bringing together AI, data, workflows, and security on a single data model.

Video overview

https://player.vimeo.com/video/980759261?badge=0&autopause=0&player_id=0&app_id=58479

Watch this video for an introduction to ServiceNow AI Platform architecture.

Overview of the ServiceNow AI Platform

The ServiceNow AI Platform is the unified foundation for every ServiceNow product. It brings together AI, data, workflows, and security to execute work across areas such as IT, CRM, employee experience, risk and security, and application development.

Built on unified data and enterprise governance, the platform enables AI that goes beyond recommendations to take action. ServiceNow AI Agents run workflows across enterprise systems, all governed by your business rules and policies.

With a single data model connecting to hundreds of systems, the platform gives AI the business context it needs to interpret what's happening and act accordingly across every department. This eliminates fragmented tools and enables organizations to put AI to work at scale—without compromising control.

Architecture

The ServiceNow AI Platform supports customization, live reports and monitoring, and strong data privacy. Services on the ServiceNow AI Platform are provided on a multi-instance basis, instead of running one instance with multiple users. Administrators can segregate their data between business entities in a multi-instance architecture, offering different experiences per instance while they all remain centrally managed through the platform. Customization options are available in all instances, with software installation, data importing, and creation of workflows, processes, applications, and UIs.

Performance, reliability, and scalability

The ServiceNow AI Platform is built for enterprise scale, with global datacenter availability and infrastructure that grows with your organization—whether you run a single department or a worldwide operation.

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Administration

The ServiceNow AI Platform Admin Center gives business administrators at-a-glance information and access to configuration management and AI-powered implementation with ServiceNow Otto for Setup.

Localization is available in more than a dozen languages and currencies. In-house and third-party translation services handle communications, virtual agent chat, user input translation, and more. For more information, see Translation and localization.

Upgrade and release management

The ServiceNow AI Platform delivers regular releases on a predictable cadence, with automated testing tools and upgrade options that keep your operations running through every update.

Ecosystem and marketplace

Extend the platform through the ServiceNow Store, where partner-built applications and integrations are available for deployment. A robust partner ecosystem means solutions exist for many industries, use cases, and technology environments.

Subscription Management

Subscription Management provides full visibility into active subscriptions and license consumption from a single location. Use it to right-size your deployment, add capabilities as needs evolve, and maintain budget control across your organization.

Integration

The Workflow Data Fabric enables connections between instances and external services on the ServiceNow AI Platform. Both unidirectional and bidirectional data integrations are available, along with email-based connection, and various other methods and technologies, all through the platform's MID Server system. Connection and automation occur in one place, with full instance and data replication, importing and exporting, and prebuilt processes to address various tasks and third-party services.

AI and automation capabilities

The ServiceNow AI Platform delivers AI experiences and intelligent AI Agents that go beyond recommendations to take action—running workflows across enterprise systems, all governed by your business rules and policies. Now Assist, generative AI, and flexible large language model (LLM) integration bring AI capabilities across every department.

The platform supports prompt customization and prebuilt AI experiences, with full visibility through AI Control Tower (legacy). Customize and extend capabilities with AI Agent Fabric to fit your organization's needs.

Platform agentic workflows

Prebuilt platform agentic workflows consisting of AI Agents help organizations accelerate AI-powered automation while maintaining governance, orchestration, and business rules. These out-of-the-box workflows address common enterprise tasks, enabling teams to reduce manual effort, shorten time to value, and scale adoption within a governed framework. Organizations can copy, extend, and customize these workflows to fit their unique processes and business needs.

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Security and compliance

The ServiceNow AI Platform protects enterprise data with end-to-end encryption, role-based access controls, and data residency options that meet global regulatory requirements. Check your entitlements to determine whether you have access to specific security and compliance features.

For more information, see Secure your instance.

Identity and access management

Secure every entry point with SSO, SAML, OAuth, and multi-factor authentication, combined with granular role-based access controls. The platform integrates with your existing identity providers so the right people have the right access across every instance and application.

For more information, see Identity and Access Management.

Workflow automation and Playbooks

The ServiceNow AI Platform executes work through a combination of structured workflows and agentic workflows. Playbooks provide stage-gated processes, decision logic, SLA enforcement, and audit trails that ensure AI agents act within the boundaries your organization defines. Agentic workflows break down complex, unpredictable tasks into manageable steps assigned to specialized AI agents. Together, Playbooks and agentic workflows support deterministic process execution and adaptive, context-driven agent action across every department.

Developer and low-code/no-code tooling

Build and extend applications faster with Build Agent, App Engine Studio, Workflow Studio, Integration Hub, and Playbooks, and more. The platform supports server-side JavaScript development, integration configuration, drag-and-drop workflow creation, user interface design, and AI-assisted application building. Create custom workflows, automate processes, and ship production-ready applications without sacrificing governance or control.

For more information, see App development, agentic development, and low-code.

Knowledge Management

The Knowledge Management capability on the ServiceNow AI Platform provides AI agents with continuous access to verified, current, and structured content across every department. The Knowledge Center closes gaps identified from live incident and case patterns, detects duplicates before they affect agent decisions, and continuously optimizes content for accuracy and accessibility. With knowledge, data, and agentic workflows running on a single unified model, the knowledge layer that governs agent actions scales as AI agents scale across the enterprise.

Platform Analytics and Process Mining

Distribute and consume Platform Analytics through data visualizations and dashboards with optional filters. Explore KPIs and receive insights into significant events in the data. Use dashboards to create a visual story with Platform Analytics data that you can share with multiple users. Use data visualizations based on table, indicator, or other data in dashboards across the Analytics Overview. Administrators can use Usage Insights to get information on user engagement with both mobile and web applications, including user population, retention, and behavior.

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Process Mining helps you discover ways to streamline your business, find bottlenecks and deviations in workflows, and filter and compare processes. Process Mining identifies where new agentic opportunities exist, measures the impact of agents already deployed, and connects improvement opportunities directly to action on the same platform.

For more information, see Platform Analytics and Process Mining.

Mobile

Your employees can find answers and get things done across IT, HR, facilities, and other departments—all from a mobile application powered by the ServiceNow AI Platform. The platform provides native mobile for the enterprise, delivering tailored experiences for routine employee needs from a single mobile app.

Take advantage of ready-to-use workflows for common use cases with direct connection to data. Simplify development with low-code mobile developer tools that create and customize apps for both iOS and Android. Brand your application completely—add your own logo, color theme, splash screen, and more.

For more information, see Mobile Platform.

Basic system configuration

Basic system configuration encompasses changes made to the platform as well as supporting applications. These changes can affect global settings as well as settings for particular applications.

Learn about these ServiceNow AI Platform basic system components and settings:

- ServiceNow plugins
- Find components installed with an application
- Available system properties
- Query join and complexity size limits
- Web proxy

Experimentation framework

The experimentation framework enables ServiceNow to test and release new features using A/B testing in order to collect feedback to improve product experiences.

Each experiment includes information about its scope and which feature variants are being tested. Only single customer instances or Gen AI Innovation Program participants have early access to new innovations via the experimentation framework.

The framework captures only aggregated usage metrics (such as feature usage, performance) to assess the impact of a feature. No personally identifiable information is collected, and all data handling aligns with our standard privacy and security practices.

You have full transparency and control over your instance's use of the experimentation framework. You can view active experiments by navigating to **All** > **Experimentation Framework** > **All Experiments**. You can also choose to opt out of individual experiments or turn off the framework entirely.

Opt out of an individual experiment

Opt out of a specific experiment while remaining enrolled in others.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Experimentation Framework** > **All Experiments**.
2. Select the experiment that you want to opt out of.
3. Select **Opt Out**.
4. Select **OK**.

Note: You can opt back in at any time.

Turn off experimentation framework

Turn off experimentation framework to opt out of all current and future experiments.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Experimentation Framework** > **All Experiments**.
2. Select **Disable Experimentation Framework**.
3. Select **OK**.

Note: You can re-enable experimentation framework at any time.

Feature Preview Program

The Feature Preview Program provides access to pre-release capabilities on your instance. You can activate, test, and provide feedback on individual features before they are generally available.

When a pre-release feature is added to your instance, you can access the Feature Preview Program to review feature details, activate the feature for testing, and provide feedback. You're fully in control of the feature preview experience and can turn features on or off at any time.The program displays all available pre-release features with information about what each feature includes and how it works. Your feedback on pre-release features helps identify issues, and refine functionality.

Each feature is made available on a per-feature basis, you must explicitly activate each feature you want to use, and you can deactivate any feature at any time. You can activate or deactivate pre-release features. For each feature, you can review the following information:

- Feature name
- Feature overview describing what the feature does
- Details about what is included in the feature

How the program works

Before a feature appears on your Feature Preview Program page, the product team that owns the feature works directly with a targeted set of customers to confirm their participation. Once your organization agrees to participate, the feature is released on your instance and is visible on the Feature Preview Program page.

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When a new pre-release feature is added to your instance, a toggle notification appears to alert you. Selecting the notification takes you to the Feature Preview Program page, where you can review available features and choose which ones to activate.

Activation is per-feature. When you activate a feature, you provide consent for that specific feature only. Activating one feature does not affect other features listed on the page.

What to consider before activating a feature

Before you activate a pre-release feature, review the following considerations.

- **Environment:** Features activate directly on your production instance. Review the feature details carefully and confirm that activation is appropriate for your environment before proceeding.
- **Support:** If you experience issues with a pre-release feature, you can contact the product team directly through the Feature Preview Program page.
- **Access control:** The admin role is required to activate features. Review who in your organization has the authority to accept the consent agreement on behalf of your organization. If you're unsure, consult your platform owner or legal team before proceeding.
- **Reversibility:** You can deactivate a feature at any time. However, deactivating a feature disables its functionality but does not remove all artifacts it installed on your instance.

Accessing the Feature Preview Program

You can access the Feature Preview Program in the following ways:

Notification

When a pre-release feature is added to your instance, you receive a notification indicating that a pre-release capability is available. Select the notification to open the Feature Preview Program page.

All menu

Navigate to **All** > **Feature Preview Program**.

Providing feedback

Feedback is an important part of the Feature Preview Program. When you test pre-release features, your feedback helps improve the feature before it reaches general availability. You can provide feedback on feature functionality, usability, and performance. Your feedback helps identify issues, refine features, and confirm that the features meet customer needs when they are released.

You can activate or deactivate pre-release features from this page. After activating and testing a feature, provide feedback to the product team.

Activate a pre-release feature

Activate a pre-release feature on the instance so your users can try it out and provide feedback to the product team.

Before you begin

Before activating a feature, review the feature details, including its description, any dependencies, and the support terms that apply to pre-release features.

Role required: admin

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About this task

When you activate a pre-release feature, you can test the feature and provide feedback before it reaches general availability. Accept the terms and conditions before activating the feature.

Important:

Features activate directly on your instance. Confirm that activation is appropriate for your environment before proceeding. Activation is per-feature. Activating one feature does not automatically activate others listed on the Feature Preview Program page. You can deactivate any feature at any time after activation.

Procedure

1. Access the Feature Preview Program using one of the following ways:
   - Select the notification when a pre-release capability is added to your instance.
   - Navigate to **All** > **Feature Preview Program**.
   - On the admin page, select **See all pre-release features** from the onboarding modal.

   If you received a notification that a new pre-release feature was added to your instance, you can select the notification to go directly to the Feature Preview Program page.
2. Review the feature details for the pre-release feature to activate.

   The feature detail page includes a description of the feature and information about what it includes.
3. Select **Activate**.
4. Review the terms and conditions.

   The consent agreement applies to this feature only, you're not providing consent for any other features listed in the program.
5. Select the check box to confirm that you have read the terms and conditions.
6. Select **Accept and activate**.

Result

The feature is now activated on your production instance. Your users can now access and try out the feature.

Note: If you have any queries or need clarifications about the pre-release feature, reach out to the product team.

What to do next

After activating a feature, you can contact the product team directly to share feedback.

If you decide to stop using the feature, you can deactivate it at any time. For more information, see Deactivate a pre-release feature.

Deactivate a pre-release feature

Deactivate a pre-release feature if it is not working as expected or if you no longer need the feature.

Before you begin

Role required: admin

You can deactivate a pre-release feature at any time. When you deactivate a feature, the functionality is removed from your instance.

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About this task

Deactivating a feature disables the feature's functionality on your instance. However, deactivating is not the same as uninstalling. When you deactivate a feature, artifacts that were installed as part of the feature may remain on your instance.

Important:

Residual artifacts left by a deactivated feature don't affect your instance's functionality, but they aren't automatically removed. After deactivating, review your instance for any artifacts that require manual cleanup.

Procedure

1. Navigate to **All** > **Feature Preview Program**.
2. Locate the active feature you want to deactivate.
3. Select **Deactivate**.

Result

The pre-release feature is deactivated and removed from your instance.

What to do next

After deactivating a feature, review your instance for any residual artifacts that the feature installed.

If you have questions or need assistance after deactivating a feature, contact the product team.

ServiceNow plugins

Plugins are software components that provide features and functionalities within a ServiceNow instance.

Differences between plugins and applications

Plugins and applications are separate components on the ServiceNow AI Platform.

- A plugin adds features to installed applications and extends functionality on the ServiceNow AI Platform. For additional details about plugins, see Plugin frequently asked questions for ServiceNow instances [KB0716626].
- An application is a standalone piece of code that implements a collection of features on the ServiceNow AI Platform. You can install applications from the ServiceNow Store or create your own applications.

Activating plugins

All plugins are provided by ServiceNow, but some plugins are activated differently.

- A set of plugins are activated on your instance by default. You can activate additional plugins on your instance depending on your business needs. For details, see Activate a plugin.
- Other plugins require activation by ServiceNow personnel. To request activation, follow the steps in Request a plugin.

There are some plugins that you can't activate or upgrade on your instance and the button is greyed out. This situation can happen in the following cases:

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- The plugin requires a subscription that you haven't purchased. To purchase a subscription, contact your ServiceNow account manager.
  - Some features are not included in the ServiceNow AI Platform and require a separate subscription. To purchase a subscription or to find plugin costs, contact the account manager in your company.
  - When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance. If the plugin doesn't appear in the instance, submit a request via the Now Support Service Catalog.
  - You can't activate a plugin in your production instance. However, you can test a plugin by activating it in a non-production instance. This includes plugins that are associated with a for-fee subscription. When you're ready to activate the plugin in your production instance, request the plugin from Now Support.
- The plugin depends on other plugins being activated.
  - When you activate a plugin with dependent plugins, the system notifies you of the dependencies before it completes the activation. If you opt to continue with activation, the system automatically activates all the plugins required.
  - In some cases, the plugin works, but certain features that don't apply to your system aren't installed. When you ask to activate a plugin in this category, the system notifies you of the dependencies before it completes the activation. If you opt to continue, the system activates the requested plugin but doesn't include the features that depend on other plugins.
- The plugin is already activated on your instance.
  - To determine if a plugin is already activated, see Plugin Activation Status [KB0678767].
  - After a plugin is activated, you can't disable or deactivate it. If needed, you can hide the functionality. You should thoroughly test, in a non-production instance, the features that are installed when you activate the plugin before using them in a production instance.

After a plugin is activated, you cannot disable or deactivate it. You should thoroughly test, in a non-production instance, the specific features and functionalities that are installed when you activate the plugin before using them in a production instance. See Uninstall a ServiceNow plugin [KB0716414].

- If necessary, you can hide or disable the functionality by restricting access through the use of roles and ACLs.
- Some plugins support rollback contexts. For details on using rollback contexts, see Roll back and delete recovery.

A warning message appears if the alter table or create table operation fails when you activate or upgrade a plugin. Contact Customer Service and Support for help with processing any skipped tables.

Personal developer instances

You can test a plugin on your personal developer instance (PDI) before launching it in a production instance. If a plugin isn't active by default on a PDI, you can activate the plugin without requesting or purchasing it.

To activate a plugin on a PDI, use the All Applications page on your instance. If the plugin isn't available on the All Applications page, activate it from the . For more information, see Activate a plugin on a personal developer instance.

Note: Some plugins aren't available for activation on PDIs.

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Related topics

List of plugins (Brazil)

Activate a plugin

You can activate most plugins to expand features and functionalities in the ServiceNow AI Platform.

Before you begin

Role required: admin.

Note: Before requesting or activating a plugin, check whether the plugin has already been activated on your instance. For details on how to check a plugin activation status, see the Plugin Activation Status [KB0678767] article in the Now Support knowledge base.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

Activate a plugin on a personal developer instance

You can test a plugin on your personal developer instance (PDI) before launching it in a production instance.

Before you begin

Request a PDI on the .

Role required: admin

About this task

If a plugin isn't active by default on a PDI, you can activate the plugin without requesting or purchasing it.

To activate a plugin on a PDI, use the All Applications page on your instance. If the plugin isn't available on the All Applications page, activate it from the .

Note: Some plugins aren't available for activation on PDIs.

Procedure

Activate the plugin from the All Applications page or the Developer Site.

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Activation method	Procedure
All Applications page	In your PDI, navigate to **System Applications** > **All Available Applications** > **All**. Find the plugin and then activate it. For more information on using the All Applications page, see Activate a plugin.
Developer Site	**a.** Sign in to the . **b.** On the home page, select **Manage my instance**. **c.** In the **Plugins for your instance** section, filter for plugins that are not activated. **d.** Hover over the plugin you want to install, and select one of the activation options.

Request a plugin

If a plugin does not appear in the Application Manager, you cannot activate it yourself. Request activation of the plugin by ServiceNow personnel.

Before you begin

Note: Before requesting or activating a plugin, check whether the plugin has already been activated on your instance. For details on how to check a plugin activation status, see the Plugin Activation Status [KB0678767] article in the Now Support knowledge base.

Role required: admin

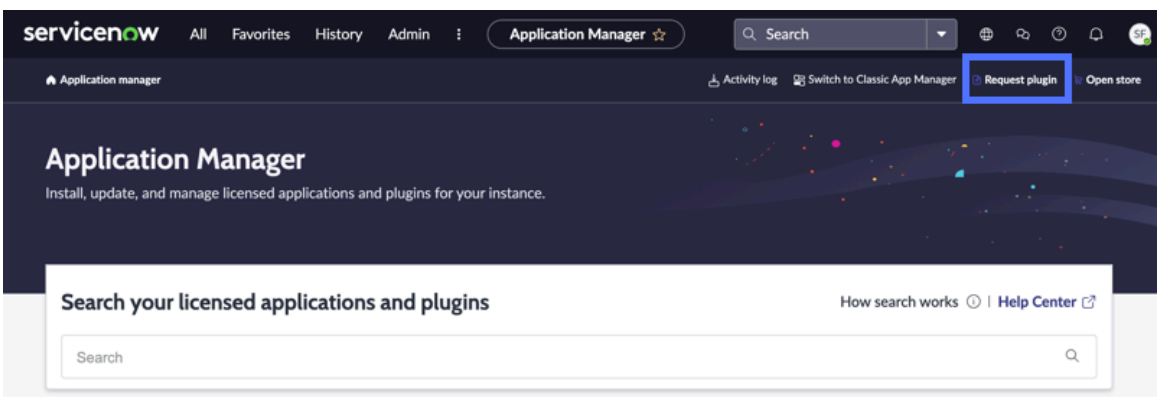
About this task

There are two ways to request a plugin:

- Access the Now Support Service Catalog on Now Support. Open the Activate Plugin page using this link: Activate Plugin.
- Access the Now Support Service Catalog through the Application Manager on your instance by following the procedure.

Procedure

1. Navigate to **Admin** > **Application Manager**.
2. From the Application Manager, select **Request Plugin** to open the **Activate Plugin** form on Now Support.



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3. On the **Activate Plugin** form on Now Support, provide the following information.

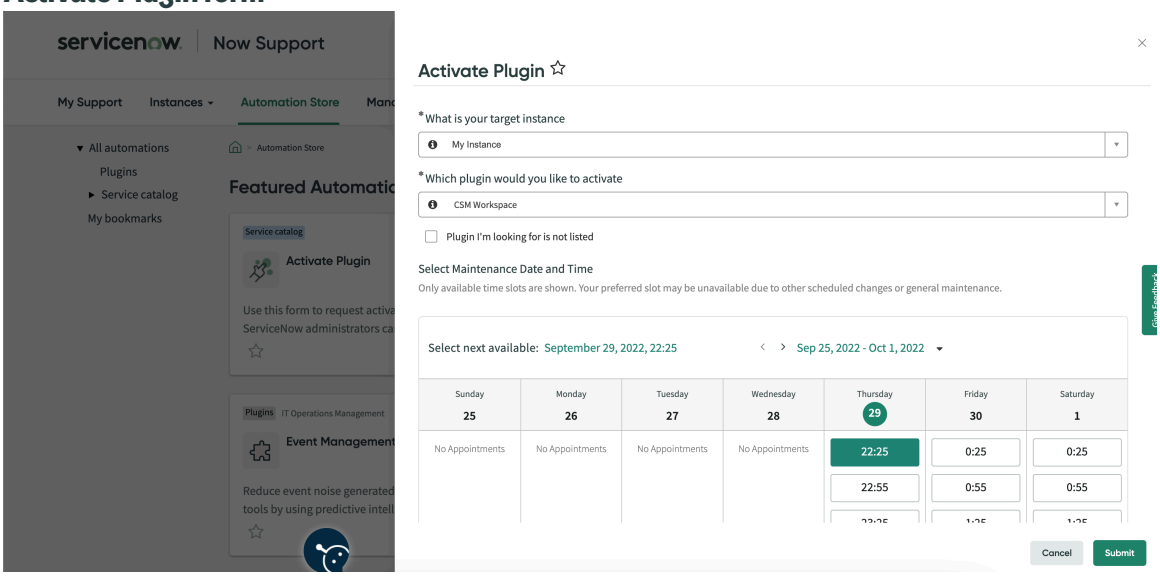
Activate Plugin request form

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:** 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 request to activate the CSM Workspace plugin on an instance named My Instance.

Activate Plugin form



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4. Click **Submit**.
   For additional details about requesting a plugin, see Requesting a Plugin from the Service Catalog [KB0751715] article in the Now Support Knowledge Base.

Available plugins and applications

You can view all plugins available to you in the Application Manager if you have the admin role.

Application Manager provides admins the ability to install, update, and manage licensed applications and plugins for their instance.

If a plugin does not appear within the Application Manager, it may require activation by ServiceNow personnel. Request these plugins through the Now Support Customer Service System instead of activating them yourself.

- For a list of all new and changed plugins for the Brazil release, see Plugin information for all Brazil features and products.
- For steps on activating a plugin yourself, see Activate a plugin.
- For steps on requesting a plugin that you cannot activate yourself, see Request a plugin.
- For steps on installing a ServiceNow Store application, see Install a ServiceNow Store application.

Find components installed with an application

Activating a plugin installs an application on your instance. Each application consists of components such as tables, user roles, and scheduled jobs. To view all components that are installed with an application, see the Application Files table.

Before you begin

- The application plugin must be activated.
- Roles required: admin or the application admin role

> **Note:** The application admin role is only required for applications that use the Application administration feature. For example, Vulnerability Response.

About this task

In the Application Files table, look up the components that are installed with the plugin for the application. If the application comprises multiple plugins, look up each plugin individually.

Procedure

1. In the navigation filter, enter: `sys_metadata.list`
   The list of Application Files records is displayed.
2. Click the personalize list icon ( ), and add the **Package** column to the list.
3. Filter the list with these conditions to show only the components for the plugin:
   [Package] [is] [*<plugin name>* **]**
4. In the **Class** column heading, click the menu icon ( ) and select **Group by Class**.
5. Select the class of information that you want to view.

Select an application from the application picker

Use the application picker to select the application scope to which any new records and updates apply.

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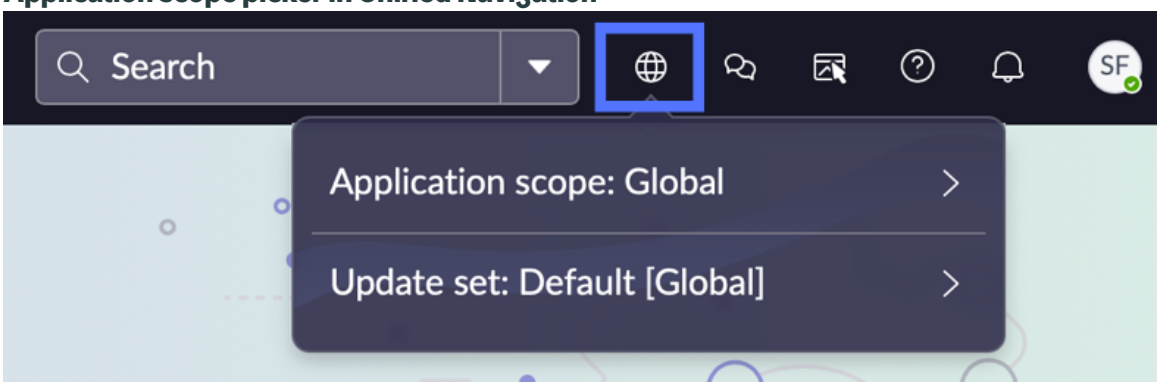
Before you begin
Role required: delegated_developer or admin.

About this task
Application developers must select an application as their current scope context. Any new records become part of this application. The ServiceNow AI Platform also uses the current application scope to determine if the developer can view or make changes to records in other scope contexts.

Procedure

1. In the Unified Navigation menu, select the picker icon( ).
   When your application scope is set to a non-Global scope, the picker icon displays with a red ring ( ).
2. Select **Application scope** to open a list of scopes available to you.

Application scope picker in Unified Navigation



3. **Optional:** When admins change the application scope, the system automatically switches the current update set to be the application's default update set.
   Admins can modify this by selecting **Update set** and choosing a different one from the list.

What to do next
The application picker is part of the Next Experience picker. For more information, see Exploring Next Experience pickers.

For more information about application scoping, see Application scope.

For more information about selecting update sets, see Select the current update set in Unified Navigation.

Available system properties

Some properties are available on a system properties form, but some lesser-used properties are available only from the System Property [sys_properties] table. Sometimes, the property does not exist in a base instance, but can be added if you change the value.

Note: The Instance Security Hardening Settings content contains detailed descriptions, and compliance values, for the security-related system properties and plugins in the ServiceNow AI Platform. To learn more about each of these properties, see Instance Security Hardening Settings.

cdu.record.watcher.timeout

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Maximum waiting period for the Cloud Discovery schedule configuration wizard to stop watching the record watchers while validating account, member account Discovery, and logical database Discovery.

- Type: integer
- Default value: 120,000 milliseconds
- Location: System properties

com.cmdb.baseline.max_changes

Maximum number of changes and relationships for a CI that can appear in the baseline diff for the CI.

- Type: integer
- Default value: 100
- Location: **Configuration** > **CMDB Properties** > **Baseline Properties**

com.glide.acl_check_all_filter_on_new

Enforce ACL checks when a user creates a new record from a list in ui16/workspace.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

com.glide.attachment.max_size

Sets the maximum file attachment size in megabytes. An empty value in this field allows attachments up to a maximum of 1 KB.

- Type: integer
- Default value: 1024
- Location: **System Properties** > **Security**

com.glide.cs.collab.event_queue.enabled

Switch to enable the event queue for badge count calculation and publish.

Note: If you set com.glide.cs.collab.event_queue.enabled to **true**, you must manually enable the Sidebar notification events process schedule record ("sys_trigger") by changing its *trigger_type* value.

com.glide.cs.collab.event_queue.threshold

Calculates the unread count for each member of a chat. If the chat has too many members, this responder thread will be slow so offload this to the event queue. Default value: 50.

com.glide.cs.collab.notify_all_members

If Sidebar is unable to deliver messages to a Microsoft Teams user, this property determines who a "message not sent" notification is sent to. If this property is **true**, then a notification is sent to all Sidebar users in the discussion. If **false**, then the notification is sent only to the sender of the message.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

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com.glide.cs.collab.teams_outage_timer

Length of time the "message not sent" notification (see com.glide.cs.collab.notify_all_members) displays.

- Type: integer
- Default value: 5
- Location: System Property [sys_properties] table

com.glide.cs.conversation_history_cross_channel.enabled

Enables (**true**) or disables (**false**) the display of cross-channel conversation history in the chat panel when an agent is having a conversation with a requester.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

com.glide.cs.field.boolean.show.choice_picker

Enables (**false**) or disables (**true**) a Boolean option to requesters whenever a dynamic choice node only has a single value associated. When set to **true**, the dynamic choice node displays to requesters with only the single value selection option and no Boolean option.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

com.glide.cs.gen_ai.enable_mid_topic_ai_search

Enables or disables AI Search result in Mid Topic Discovery using this flag.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

com.glide.cs.instance_uri_override

Enables Virtual Agent to use this URL value to override the instance URL for link generation. The value entered must be a direct, full URL such as http://www.example.com to work correctly.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

com.glide.cs.notification.create_llm_actions_after_topic_migration

Enables (`true`) or disables (`false`) whether actions for Virtual Agent notifications and Proactive Triggers are created after LLM topics are published during the NLU to LLM topic migration workflow.

- Type: true | false
- Default: true
- Location: System Property [sys_properties] table

com.glide.cs.proactive_trigger.create_llm_actions_after_topic_migration

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Enables (true) or disables (false) whether actions for Proactive Triggers are created after LLM topics are published during the NLU to LLM topic migration workflow.

- Type: true | false
- Default: true
- Location: System Property [sys_properties] table

com.glide.csp.self_script_src_svg

WHen enabled, prevents malicious file attachments that store cross site scripting (XSS) attacks from running in an instance. For more information, see Set safe content security policy for SVG files.

- Type: true | false
- Default: true
- Location: System Properties [sys_properties] table

com.glide.csv.loader.ignore_non_parseable_lines

Enables (`true`) or disables (`false`) ignoring one or more lines (rows) in an import set that contains bad data, such as a row that is missing a column of data.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

com.glide.csv.loader.max_errors_allowed

Sets the maximum number of lines (rows) that an import can ignore before failing. If the import succeeds, the import lists the number of rows ignored due to errors.

- Type: integer
- Default value: 100
- Location: Add the property to the System Property [sys_properties] table.

com.glide.email.max_read

Specifies the maximum number of emails a POP3 reader should process concurrently.

- Type: integer
- Default value: 20
- Location: Add the property to the System Property [sys_properties] table.

com.glide.event_handler.CollabNotificationEventHandler

Specifies the event handler for the sidebar_notification queue.

com.glide.event_manager.sidebar_notification.claim_limit

Specifies the number of sidebar_notification events the job on each node polls each time.

com.glide.interaction.autocreate_relationships

Specifies whether auto-logging of records in the interaction_related_record table is turned on or off during active interactions.

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- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

com.glide.loader.verify_target_field_size

Enables dynamic resizing of import set fields. With the default setting of **false**, up to 20 records of the source data are sampled to determine the import set field length. If the field is empty in all the sampled records, the default length of 40 is used. Any data loaded that exceeds the import set table field length is truncated. Set this property to **true** to allow any import set field to increase the column size by 100 to match the length of the data. For example, if the incoming source data has a length of 60, the system sets the length of the column to 160.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

com.glide.par.coreui_single_migration.enabled

Allows users with the sys_admin role to hide the banner on Core UI dashboards that enables dashboard owners to migrate their dashboards to Next Experience.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

com.glide.par.coreui.migration.admin_redirection.enabled

Migrated responsive dashboards automatically redirect to the Platform Analytics experience library. Set this property to specify redirection for sys_admins. Set the value to false to enable users with the sys_admin role to open responsive dashboards in the Core UI experience. If Active Experience=Next for dashboards in the bridging tables, redirection is to the migrated version of the dashboard.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

com.glide.par.pae.drilldown_to_core_ui

Applies only to Platform Analytics experience:

When true, **Go to data** chart interactions for visualizations of tables open the Core UI list of table records. Redirections in general that open lists or charts open Core UI lists and charts.

When false, **Go to data** chart interactions for visualizations of tables open the Platform Analytics list of table records. Redirections in general that open lists or charts open Platform Analytics lists and charts.

For more information, see Chart interactions in a data visualization.

- Type: true | false (Boolean)
- Default value: true
- Location: System Property [sys_properties] table

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com.glide.script.fencing.secure_child_tables

Controls whether to apply cross-scope access rules when querying application-administered child tables with `GlideRecord` from a parent table. When false, administrators can view child table data from the parent table, even if the child table scoping configuration is set to avoid this. If you set this property to true, you can change it back to false only by contacting Customer Service and Support.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

com.glide.script.scoped_evaluator.allow_dynamic_cross_scope_eval_scoped_administration

Controls whether to allow scripts in applications with Scoped Administration enabled to be modified and executed by scripts in the global scope. When false, scripts in applications with Scoped Administration can't be modified or executed by scripts in the global scope.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

com.glide.scripting.module.use_module_sandbox

Separates the JavaScript module runtime environment from scripts. Setting this property to false may improve performance.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

com.glide.soap.include_non_db_fields

Controls whether non-database fields, such as the sys_tags field, are included in WSDLs and SOAP responses (**true**) or not (**false**).

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

com.glide.ssl.read.timeout

Sets the time-out value in seconds for SSL connections during read operations. Typically, this setting is used as part of LDAPS. If you enter timeout values for both this system property and the LDAP **Read timeout** field, the lowest timeout value takes precedence.

- Type: integer
- Default value: 10
- Location: Add the property to the System Property [sys_properties] table.

com.glide.ui.virtual_host

Specifies Guided Tour Designer callout icons. When set, callout icons appear in the designer instead of letters.

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- Type: String
- Value: pa,html,script,include scripts,glide,custprefix,_sn
- Location: System Property [sys_properties] table

com.glideapp.canvas

Enables (**true**) or disables (**false**) responsive canvas for dashboards. When enabled, all new dashboards use responsive canvas.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

com.snc.apps.publish.include_inactive_choices

Specifies whether choice table selections marked as inactive (`sys_choice inactive attribute = true`) should be included when publishing an application (**true**) or not (**false**).

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

com.snc.apps.publish.maxrows

Defines the maximum number of data records to include when publishing an application.

- Type: integer
- Default value: 1,000
- Location: System Property [sys_properties] table

com.snc.assessment.decision_matrix_filter_max_entries

Defines the maximum number of items to show for a decision matrix field filter.

- Type: integer
- Default value: 1,000
- Location: System Property [sys_properties] table

com.snc.assessment.signature_authentication

Requires authentication for a user signature.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

com.snc.dd.publish_to_app_repo_enabled

Enables (**true**) or disables (**false**) display of the **Publish To App Repo** permission in Manage Developers.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

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com.snc.dd.publish_to_app_store_enabled

Enables (**true**) or disables (**false**) display of the **Publish To App Store** permission in Manage Developers.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

com.snc.dd.publish_to_update_set_enabled

Enables (**true**) or disables (**false**) display of the **Publish To Update Set** permission in Manage Developers.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

com.snc.dd.upgrade_app_enabled

Enables (**true**) or disables (**false**) display of the **Update App** permission in Manage Developers.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

com.snc.hr.core.impersonateCheck

Allows a user to have identical permissions/access as the person they are impersonating. If **true**, access and restrictions apply when impersonating another user. If **false**, the user has identical permissions/access as the person they are impersonating.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

com.snc.iam.log_level

Logging level for the business rule MapUpstreamImpactedCI. Debug is the most detailed option with full trace of how the Impacted CI List is calculated. Error is the minimal logging option with only severe errors being logged.

- Type: string
- Default value: info
- Possible values: debug, info, error
- Location: System Property [sys_properties] table

com.snc.on_call_rotation.reminders.showtz

Specifies whether to show the user time zone (**true**) or not (**false**).

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

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com.snc.pa.activate_kpi_signals

Create this property and set to 'false' to deactivate the KPI Signals feature.

- Type: Boolean true | false
- Default value: Does not exist but is treated as 'true'
- Location: Add the property to the System Property [sys_properties] table.

com.snc.pa.correlation.enable_insights

Enables the generation of key contributor insight cards.

- Type: true/false (Boolean)
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

com.snc.pa.dc.batch_score_insert

When true, Performance Analytics data collection jobs insert indicator scores to the database in batches. When false, indicator scores are inserted one by one. Even when true, batch score insertion is performed only as a fallback when nested data collection (com.snc.pa.dc.nested_collection) has been disabled.

- Type: Boolean true | false
- Default value: true
- Location: System Properties [sys_properties] table

com.snc.pa.dc.flush_snapshot_count

Maximum number of Performance Analytics snapshots to store in the memory during data collection. When this number is reached, the snapshots are offloaded to the database, freeing memory.

- Type: integer
- Default value: 1000
- Location: System Properties [sys_properties] table

com.snc.pa.dc.nested_collection

Activates a hierarchical approach to score collection, where Indicator > level 1 breakdown > level 2 breakdown. This approach is more resource efficient than a flat hierarchical approach, which creates redundant objects.

- Type: Boolean true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

com.snc.pa.dc.max_breakdown_elements_limit

Maximum number of breakdown elements retrieved by data collection for each breakdown source. This property is handled differently depending on whether nested collection is enabled. If nested collection is enabled, only those elements that have non-null scores count against this limit. If nested collection is disabled, such as under optimized data collection, all elements on the breakdown source count against the limit. When a breakdown source exceeds this limit, breakdown scores are not collected from that source.

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- Type: integer
- Default value: 10000
- Location: System Property [sys_properties] table

com.snc.pa.dc.max_error_count

Maximum errors that may occur before data collection is stopped.

- Type: integer
- Default value: 500
- Location: System Property [sys_properties] table

com.snc.pa.dc.max_records

Maximum number of records that are stored during a data collection.

- Type: integer
- Default value: 5000
- Location: System Property [sys_properties] table

com.snc.pa.dc.max_row_count_indicator_source

Maximum number of rows that are allowed to be fetched from an indicator source. This property only applies to jobs that do not use Optimized data collection.

- Type: integer
- Default value: 50000
- Location: System Property [sys_properties] table

com.snc.pa.dc.hsql.max_row_count_indicator_source

Maximum number of rows that are allowed to be fetched from an Indicator Source. This property only applies to jobs that use Optimized data collection.

- Type: integer
- Default value: 1 million
- Location: System Property [sys_properties] table

com.snc.pa.dc.script_timeout

Maximum time in seconds that a script is allowed to run during a data collection cycle.

- Type: integer
- Default value: 30
- Location: System Property [sys_properties] table

com.snc.pa.dc.use_hashcode_for_distinct

Sets whether Count Distinct aggregations are stored as separate values in memory or as a HashCode. When the value of this property is True, a HashCode is used, which consumes less memory than storing individual values.

- Type: Boolean true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

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com.snc.pa.insight.max_days_in_past

By default, retrieve insights created within the number of days in the past that this property specifies.

- Type: Integer
- Default value: 14
- Location: Add the property to the System Property [sys_properties] table.

com.snc.pa.insights.query_limit

Limit the number of rows when querying the par_computed_insight table in the GET response to the Insights API.

- Type: Integer
- Default value: 1000
- Location: The System Properties [sys_properties] table

com.snc.pa.target_batch_operation_limit

Applies only to KPI Details: The maximum number of targets that can be inserted or updated in one bulk action on the Targets Configuration page.

- Type: integer
- Default value: 100
- Location: System Property [sys_properties] table

com.snc.pa.dc.script.use.sandbox

Controls whether Performance Analytics data collection scripts use the sandbox. Only users with the security_admin role can modify this property.

> **Important:** Exercise caution when turning off this property. When set to false, unauthorized users may be able to execute malicious actions on your instance.

- Type: Boolean true | false
- Default value: true
- Location: System Property [sys_properties] table

com.snc.pa.formula_indicator_valid_breakdown

Controls whether users can apply a breakdown to a formula indicator when not all contributing indicators in the formula use that breakdown. When true, all contributing indicators must use the formula. When false, a breakdown can be applied when at least one of the contributing indicators uses it.

- Type: Boolean true | false
- Default value: true
- Location: System Property [sys_properties] table

com.snc.pa.xmr.processes.limit

The maximum number of KPI Signals Configurations (pa_xmr_processes) that can be evaluated by the KPI Signals Insight Job. After this number of processes have been evaluated, the remaining processes are ignored.

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- Type: Integer
- Default: 1000
- Maximum: 10,000

com.snc.pdf.whitelisted_urls

Stores a list of URLs allowed to be rendered in a PDF generated by the PDFGenerationAPI - Scoped, Global. This list is only verified if the glide.pdf.url.whitelisting.enabled property is set to true.

- Type: string
- Location: System Property [sys_properties] table

com.snc.project.default_schedule

Stores the sys_id of the default schedule attached to projects.

- Type: string
- Location: System Property [sys_properties] table

com.snc.project.loglevel

Automatically resubmits timed-out Ajax requests.

- Type: choice list
- Default value: 0 (debugging disabled)
- Location: System Property [sys_properties] table

com.snc.project.wbs_gantt

Automatically resubmits timed-out Ajax requests.

- Type: true | false
- Default value: false
- Location: **Project** > **Administration** > **Properties**

com.snc.task.associate_ci

List of all task types where user wants to associate CIs using a List system.

- Type: string
- Default: incident,problem,change_request
- Location: System Property [sys_properties] table

com.snc.task.refresh_impacted_services

List of all task types where **Refresh Impacted Services** UI action is enabled.

- Type: string
- Default value: incident,change_request
- Location: System Property [sys_properties] table

com.snc.time_card.default_rate

(Cost Management plugin) Sets a default hourly rate to use if no labor rate cards apply to the user.

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- Type: integer
- Default value: 50
- Location: System Property [sys_properties] table

com.snc.time_worked.update_task_timer

Enables (**true**) or disables (**false**) updating the task timer value based on changes to the task time worked records. Uses the Update task time business rule.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

csm_auto_account_domain_generation

When new account in Customer Service application is created, domain is created and placed under TOP domain. If parent field on account form is populated, and new record is inserted, it creates that account as a subdomain of the parent.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

css.assessment.caption.background.color

Sets the background color of the caption on assessment and survey questionnaires.

- Type: color
- Default value: #eee
- Location:
  - **Assessments** > **Admin** > **Assessment Properties**
  - **Survey Management** > **Administration** > **Properties**

css.assessment.caption.font.color

Sets the font color of the caption text on assessment and survey questionnaires.

- Type: color
- Default value: #ffffff
- Location:
  - **Assessments** > **Admin** > **Assessment Properties**
  - **Survey Management** > **Administration** > **Properties**

css.assessment.question.header.background.color

Sets the background color of question headers on assessment and survey questionnaires.

- Type: color
- Default value: #767676
- Location:

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- **Assessments** > **Admin** > **Assessment Properties**
- **Survey Management** > **Administration** > **Properties**

css.$nav-highlight-main

Sets the color for the navigation expanded items highlight background.

- Type: color
- Default Value: #3D4853
- Location: System Property [sys_properties] table

css.$nav-hr-color

Sets the color for the navigation separator.

- Type: color
- Default Value: #303A46
- Location: System Property [sys_properties] table

css.$navpage-header-bg

Sets the color for the header background.

- Type: color
- Default Value: #303A46
- Location: System Property [sys_properties] table

css.$navpage-header-color

Sets the color for the banner text.

- Type: color
- Default Value: #FFFFFF
- Location: System Property [sys_properties] table

css.$navpage-nav-bg-sub

Sets the color for the background for navigator and sidebars.

- Type: color
- Default Value: #455464
- Location: System Property [sys_properties] table

css.$navpage-nav-border

Sets the color for the border for Core UI.

- Type: color
- Default Value: #DDD
- Location: System Property [sys_properties] table

css.$navpage-nav-color-sub

Sets the color for module text in Core UI.

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- Type: color
- Default Value: #BEC1C6
- Location: System Property [sys_properties] table

css.$navpage-nav-selected-bg

Sets the color for navigator selected tab background.

- Type: color
- Default Value: #4B545F
- Location: System Property [sys_properties] table

css.$navpage-nav-selected-color

Sets the color for the currently selected navigation tab icon color for Core UI.

- Type: color
- Default Value: #FFFFFF
- Location: System Property [sys_properties] table

css.tablet.gradient.start

Start color of the gradient for the tablet UI header.

- Type: color
- Default value: #666
- Location: **System Properties** > **Tablet UI Properties**

css.tablet.gradient.end

End color of the gradient for the tablet UI header.

- Type: color
- Default value: #111
- Location: **System Properties** > **Tablet UI Properties**

css.tablet.headerfooter.text.color

Color of the text and icons in the tablet UI header and footer.

- Type: color
- Default value: #ffffff
- Location: **System Properties** > **Tablet UI Properties**

glide.activity.last_viewed_timestamp.local_storage_limit

Specify the maximum number of last viewed timestamps to be stored in local storage.

- Type: integer
- Default value: 1000
- Location: System Property [sys_properties] table

glide.activity.last_viewed_timestamp.local_storage_retention_days

Specify the number of days for which the last viewed timestamps data should be retained in local storage.

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- Type: integer
- Default value: 30
- Location: System Property [sys_properties] table

glide.allow.new.cert_follow_on_task

Allow Desired State audit to create a new follow-on task for the same failure at each audit run. Applies only to audits that aren't scripted.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.amb.session.logout.overlay.style

Specifies a cascading style sheet (css) that defines an overlay. The overlay masks all onscreen data on timeout, and the login screen appears on top of the overlay.

Limited to core ServiceNow AI Platform functions, not applications.

- Type: string

  Example: `background-color: #000; opacity: 0.5`

- Default value: empty (no overlay)
- Location: System Property [sys_properties] table

glide.analytics.cache.enabled

When true, caching capability is turned on for data visualizations and Platform Analytics dashboards. Caching still needs to be turned on for individual dashboard and data visualizations in UI Builder and the inline dashboard editor, respectively.

- Type: true | false (Boolean)
- Default value: true
- Location: System property [sys_properties] table

glide.analytics.cache.enable_dashboard_default

When true, caching is enabled by default on dashboards newly created in the inline editor.

- Type: true | false (Boolean)
- Default: false
- Location: System property [sys_properties] table

glide.analytics.cache.expiration.age.in.seconds

Value in seconds of the expiration_time field in analytics cache records. Applies only when glide.analytics.cache.enabled is true.

- Type: integer
- Default value: 86400 (24 hours)
- Minimum value: 3600 (1 hour)
- Location: System property [sys_properties] table

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glide.analytics.cache.dashboard_default_value

Default expiration time in hours for caches on dashboards created in the inline editor.

- Type: choice
- Choices: 1, 2, 4, 8, 12, 24 (hours)
- Default value: 24
- Location: System property [sys_properties] table

glide.analytics.cache.prefetch.max_refresh_counter

Number of times a cache entry can be re-fetched after expiring.

- Type: integer
- Default value: 10
- Location: System property [sys_properties] table

glide.analytics.cache.prefetch.min_age_in_seconds

Minimum cache entry age that allows cache prefetching, in seconds. Decreasing this value may impact instance performance.

- Type: integer (seconds)
- Default value: 28800 (8 hours)
- Location: System property [sys_properties] table

glide.angular.legacy

When true, enables legacy AngularJS behavior. When false, integrates AngularJS sanitizeUri and $http security patches. If you set this property to false, existing JSONP requests with cross-domain endpoints will fail. You can address this issue in your scripts by doing one of the following:

1. Add the domains of any newly failing requests to the *angular.jsonp.inclusion_list.urls* system property.
2. Opt out of this behavior by changing *angular.jsonp.inclusion_list.enabled* to false.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.apps.hub.current

URL of the team development parent instance.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.attachments.allow_html_in_ics

It governs the handling of .ics files with embedded HTML content. When set to **true**, the system permits the attachment of .ics files containing HTML content. This enhancement provides greater flexibility in managing calendar event attachments,

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ensuring that files with HTML content can be included when necessary, while maintaining MIME type integrity.

- Type: text/html
- Default value: null
- Location: System Properties [sys_properties] table

glide.attachment.extensions

Comma-separated list of file extensions that can be attached. No value means that there are no restrictions.

- Type: string
- Default value: none
- Location: **System Properties** > **Security**

glide.attachment.role

Comma-separated list of roles that can create attachments.

- Type: string
- Default value: public
- Location: **System Properties** > **Security**

glide.authenticate.multisso.login_locate.user_field

Identifies a common login identifier.

- Type: string
- Default value: user_name
- Location: Add the property to the System Property [sys_properties] table.

glide.authenticate.sso.saml2.require_signed_authnrequest

Enables the Identity Provider Single sign-on service to receive a signed AuthnRequest.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.banner.image.url

URL used when clicking the banner image.

- Type: string
- Default value: home.do
- Location: System Property [sys_properties] table

glide.banner.image.url_target

Target frame used when clicking the banner image. Use `gsft_main` for the main frame, `_top` to replace the current browser window, `_blank` for a new window or tab.

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- Type: string
- Default value: gsft_main
- Location: System Property [sys_properties] table

glide.basicauth.update_last_login_time

Controls whether the Last login and Last login time fields in a user record [sys_user] are updated when an integration user sends a web request to an instance using basic authentication. If true, the Last login and Last login time fields in the user's record are updated with web requests. To turn off this functionality, set this property and the *glide.oauth.update_last_login_time* system property to false.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.bsm.color.affect_neighbors

Color of an affected neighbor node. When a node has a service issue, all nodes that depend on that node are considered affected nodes. In the map, the affected nodes are parents or grandparents of the node with the service issue.

- Type: color
- Default value: Beige
- Location: **BSM Map** > **Map Properties**

glide.bsm.map.style.font_family

Font family name used in the map text. If you designate a font that is not on the user system, the browser substitutes another font and the text may not render as you expect.

- Type: font name
- Default value: Arial
- Location: **BSM Map** > **Map Properties**

glide.bsm.map.style.font_size

Font size of the text that appears with a CI node. The default size is magnified for nodes with more connections and reduced for downstream nodes.

- Type: integer
- Default value: 14
- Location: **BSM Map** > **Map Properties**

glide.bsm.map.style.selection_background_color

Background color of a selected CI node. This color is also used with a node's Highlight Hierarchy option.

- Type: color
- Default value: RoyalBlue
- Location: **BSM Map** > **Map Properties**

glide.bsm.map.style.selection_text_color

Color of the text that appears under a selected CI node.

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- Type: color
- Default value: White
- Location: **BSM Map** > **Map Properties**

glide.bsm.map.style.text_color

Color of the text that appears under an unselected CI node.

- Type: color
- Default value: Black
- Location: **BSM Map** > **Map Properties**

glide.bsm.max_levels

Maximum level depth from the root CI that can be initially displayed in business service maps. Level depth is the graph distance between the root CI and a node. This value must be an integer.

- Type: integer (1-10)
- Default value: 5
- Location: **BSM Map** > **Map Properties**

glide.bsm.new_node_color

Color for nodes that became viewable from the last expand operation.

- Type: color
- Default value: PaleGreen
- Location: **BSM Map** > **Map Properties**

glide.bsm.max_nodes

Maximum number of downstream nodes to retrieve from the database for a CI. If more nodes exist in the database, they are not displayed in the map.

- Type: integer
- Default value: 1000
- Location: **BSM Map** > **Map Properties**

glide.bsm.refresh_interval

Seconds between each automatic reloading of troubles and tasks.

- Type: integer
- Default value: 30
- Range of possible values: 1 to 3600
- Location: **BSM Map** > **Map Properties**

glide.bsm.task_threshold

Change the CI glyph color from orange to red when the number of tasks reaches this threshold.

- Type: integer
- Default value: 3
- Location: **BSM Map** > **Map Properties**

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glide.bsm.too_many_children

Maximum number of child nodes to display. Nodes are collapsed for the map to meet this limit.

- Type: integer, valid values 1 or greater
- Default value: 10
- Location: **BSM Map** > **Map Properties**

glide.businessrule.async_condition_check

Specifies whether the instance checks the condition statement of async business rules (the **When** field is set to async) prior to running the business rule. If **true**, the instance evaluates the async business rule conditions a second time before running the rule. If **false** or missing, the instance does not evaluate the conditions a second time.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.businessrule.callstack

Specifies whether business rule executions are logged in the daily log when they start and finish (**true**) or are not logged (**false**). Logging is useful for troubleshooting a problem where you must know which business rules are running and in which order.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.cache.size.service_cache

- Type: integer
- Default value: 20
- Location: Add the property to the System Property [sys_properties] table.

glide.canvas.grid.widget_render_concurrent_max

Defines the maximum number of widgets that can render simultaneously on a dashboard. With smaller values, individual widgets load more quickly. With larger values, fewer Ajax requests to the server are needed. Set the value of this property to half of the number of widgets that are visible when your most-used dashboard loads. For example, if six widgets are visible on the dashboard set the value to 3.

Note: This system property applies to responsive dashboards only.

Two is the minimum value, and 1 is interpreted as 2. For values of zero or lower, all widgets load simultaneously.

- Type: integer
- Default value: none
- Location: System Property [sys_properties] table

glide.cmdb.query.batch_time_limit_in_sec

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Time limit (in seconds) for running one batch to get one batch of query results (100 results).

- Type: integer
- Default value: 300
- Location: **Configuration** > **CMDB Properties** > **Query Builder Properties**

glide.cmdb.query.max_results_limit

Limits the number of results for a scheduled query and in the results section in the Query Builder when you click **Load All Results**.

- Type: integer
- Default value: 10,000
- Location: **Configuration** > **CMDB Properties** > **Query Builder Properties**

glide.cmdb.query.non_cmdb.black_listed_tables

Exclusion list of non-CMDB tables that appear in the CMDB Query Builder when creating a CMDB query.

- Type: string
- Default value: empty
- Location: **Configuration** > **CMDB Properties** > **Query Builder Properties**

glide.cmdb.query.query_time_limit_in_sec

Time limit (in seconds) for running an entire query to get all results.

- Type: integer
- Default value: 1,800
- Location: **Configuration** > **CMDB Properties** > **Query Builder Properties**

glide.cmdb.statemgmt.max_bulk_count

Maximum number of CIs that CI Lifecycle Management can process in a bulk update operation.

- Type: integer
- Default value: 1000
- Location: System Property [sys_properties] table

glide.cmdb.statemgmt.max_lease_expired_days

Maximum number of days that lease expiration can be set with for CI Actions.

- Type: integer
- Default value: 15
- Location: System Property [sys_properties] table

glide.cms.dashboards.sharing_with_secure_search

When enabled, the list of users, user groups, and roles that are visible in the sharing panel is restricted. The restriction is based on the configuration of the sys_user, sys_user_group, and sys_user_role ACLs. For more information, see Access control list rules.

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There is a performance penalty associated with enabling this property. Performance degradation may be based on the number and complexity of business rules and ACLs on your instance.

- Type: true | false
- Default value: false
- Location: **System Properties** > **Dashboard Properties**

glide.cms.share_dashboards.role

When this property is empty, all users can share their own dashboards.

Note: This property does not apply to users with the admin and dashboard_admin roles. Users with these roles can always share any dashboard.

- Type: string
- Default value: empty
- Location: **System Properties** > **Dashboard Properties**

glide.chart.decimal.precision

Controls the rounding precision of non-currency numeric values displayed on reports. A **Decimal Precision** value specified in a report's style options overrides this property. Currency values always have a precision of 2.

- Type: integer
- Default value: 2
- Maximum value: 4
- Location: Add the property to the System Property [sys_properties] table.

glide.chat.invite_fields

(Chat plugin) Comma-separated list of fields (glide_list or references to sys_user or sys_group) used to generate the invitations when creating a chat room from a task. Users can select a check box for each of the specified fields to invite to the chat room users that are referenced by the fields.

- Type: string
- Default value: none
- Location: **Social IT** > **Chat Administration** > **Properties**

glide.chat_room.create_roles

(Chat plugin) Comma-separated list of roles that are allowed to create chat rooms.

- Type: string
- Default value: none
- Location: **Social IT** > **Chat Administration** > **Properties**

glide.chat.show_emoticons

(Chat plugin) Enables (**true**) or disables (**false**) rendering text emoticons as images.

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- Type: true | false
- Default value: true
- Location: **Social IT** > **Chat Administration** > **Properties**

glide.class.downgrade.enabled

Flag for allowing class downgrade during identification and reconciliation.

- Type: true | false
- Default value: true
- Location: System Properties [sys_properties] table

glide.class.switch.enabled

Flag for allowing class switching during identification and reconciliation.

- Type: true | false
- Default value: true
- Location: System Properties [sys_properties] table

glide.class.upgrade.enabled

Flag for allowing class update during identification and reconciliation.

- Type: true | false
- Default value: true
- Location: System Properties [sys_properties] table

glide.cmdb.health.metricProcessor.maxRunningTime

Max time in minutes for which individual metric processor runs in each scheduled cycle.

- Type: integer
- Default value: 120
- Location: Navigate to **All** > **Configuration** > **Health Preference**, and then click **System Properties** in the right hand-side navigator.

glide.cmdb.health.src.cmdb_health_audit_only

When set to **true**, disables health results from sources other than CMDB Health audit (such as cloud discovery). Only results generated by CMDB Health audit appear in the CMDB dashboard.

For example, by default, if a CI is determined to be stale by Discovery, then that CI appears as stale in the CMDB dashboard even though CMDB Health audit did not determine that CI to be stale. To disable these stale CI health results, set the property to **true**.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.cmdb.health.staleness_exclude_dependent_cis

Exclude dependent CIs for the staleness CMDB Health metric.

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When enabled, dependent CIs are not checked for staleness, regardless of any staleness or inclusion rules that are defined for the respective CI types.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.cmdb.logger.source.identification_engine

Enable and configure what type of details the system logs when using IRE outside the scope of identification simulation. For example, when using an API, ECC queue or scheduled jobs.

- Type: string
- Default value: info, warn, error, debug, or debugVerbose
- Location: Add the property to the System Property [sys_properties] table.

Note: Depending on the setting, the system can generate large amounts of data that might affect overall system performance. Set the value with caution, limiting the level of details and use time to the minimum necessary for testing or debugging.

glide.cmdb.logger.use_syslog.CMDBHealth

A comma-separated list that controls the level of logging of CMDB Health jobs. Logging creates entries in the system logs to capture messages generated by the health auditing process each time they run. This logging helps debugging if there is a failure.

- Type: string
- Default value: error
- Location: System Property [sys_properties] table

glide.cmdb_model.display_name.shorten

If **true**, generates shorter display names for product models if the name of the product model contains the manufacturer name.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.cookies.http_only

Enables (**true**) or disables (**false**) the generation of HTTP-only cookies. Set this property to **false** to use Approval with E-Signature.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.cost_mgmt.calc_actual_cost

(Cost Management plugin) When an expense line is created for any task with a **Type** of **Planned task**, sums all task expense lines and adds the total to the **Work cost** field on the task record.

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- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.cost_mgmt.debug

(Cost Management plugin) Enables debugging of cost management processing. All logging events are recorded in the Financial Management Log [fm_log] table.

Note: This feature can generate a large number of log records. Enable the feature only during initial testing or when troubleshooting.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.cost_mgmt.process_task_cis

(Cost Management plugin) Creates expense lines affected configuration items when creating a task expense line.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.cost_mgmt.service_allocation.method

(Cost Management plugin) Defines whether business service to cost center allocation costs should be calculated based on total units or allocated units.

For example, if the service supports 100 units but only has 50 units allocated, and cost center ABC is allocated 25 units. Using the **All units** method results in an allocation cost of 25/100, or 25% of the total cost of the service. In this case, we track unallocated costs separately. Using **Allocation units** method results in an allocation cost of 25/50, or 50% of the total cost of the service. In this case, all costs are allocated (recovered).

- Type: choice list
- Default value: all_units
- Location: System Property [sys_properties] table

glide.csv.export.line_break

Enables the user to control how exported CSV data appears in Notepad. Valid values are LF for a line feed between records and CRLF for a carriage return followed by a line feed.

- Type: string
- Default value: LF
- Location: System Property [sys_properties] table

glide.csv.use_row_currency

If false, exports currency and price field values in the user's currency. If true, exports currency and price field values in the currency of the row.

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- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.custom.ip.authenticate.allow

Comma-separated list or dash-separated range of IP addresses that are allowed access to view the stats.do, threads.do, and replication.do pages.

- Type: string
- Default value: none
- Location: Add the property to the System Property [sys_properties] table.
- Instance Security Hardening Settings: Restrict performance monitoring access

glide.db.aggregates.trend.use_iso_week

If set to true, reports weekly trend by data according to ISO weeks. If false, data trended per week reports according to the first day of the week set by glide.ui.date_format.first_day_of_week.

- Type: true | false
- Default value: none
- Location: Add the property to the System Property [sys_properties] table.

glide.db.audit.ignore.delete

Specifies the tables where the sys_audit_delete file is not updated when records are deleted.

- Type: string — comma-separated list of tables
- Location: System Property [sys_properties] table

glide.db.forced.chunk.threshold

Sets the threshold above which to forces chunk record deletions and updates. Chunking helps to prevent non-primary key deletions on huge tables from causing replication problems. Use this property to set a force chunk threshold when using the GlideRecord – UpdateMultiple methods.

- Type: integer
- Default value: 100000000 (100 million)
- Location: Add the property to the System Property [sys_properties] table.

glide.db.clone.allow_clone_target

Enables (**true**) or disables (**false**) use of a non-production instance as the target for a system clone.

- Type: true | false
- Default value: **false** for production instances, **true** for non-production instances
- Location: System Property [sys_properties] table

glide.db.impex.XMLLoader.max.file.size.mb

Controls the maximum file size allowed when importing an XML file, in megabytes. Attempting to import an XML file larger than this limit results in an error.

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> **Warning:** Use caution when modifying this property. Uploading a large XML file may impact performance and can cause an instance outage.

- Type: integer
- Default value: 100
- Location: **System Properties** > **Import Export**

glide.db.large.threshold

Sets the number of rows above which a table is considered large and uses a different method of querying for results. When this property is absent, the instance uses the default query method.

- Type: integer
- Default value: none
- Location: Add the property to the System Property [sys_properties] table.

glide.db.loguser

Display (**true**) or suppress display (**false**) of database errors such as `Unique Key violation detected by database (Duplicate entry 'ABC' for key 'name').` to logged-in user.

- Type: true | false
- Default value: none
- Location: Add the property to the System Property [sys_properties] table.

glide.db.max.aggregate.size

Sets the maximum number of groups that a grouped report or list renders. Larger values may affect system performance.

- Type: integer
- Default value: 20
- Location: Add the property to the System Property [sys_properties] table.

glide.db.max_view_records

Sets the maximum number of records returned when running a GlideRecord query in a script. Do not use values larger than the default because they may cause queries to consume excessive memory on the application server and can, in extreme cases, cause a system outage. This property does not control the maximum number of records that appear in a list, report, or exported file.

- Type: integer
- Default value: 10000
- Location: Add the property to the System Property [sys_properties] table.

glide.db.table.update_inactive_choices_enabled

Specifies whether choice table selections marked as inactive (`sys_choice inactive attribute = true`) should be loaded into client databases when applications are installed (**true**) or not (**false**).

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- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.debug.log_point

Specifies whether the log points feature should be enabled or not.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.debugger.log.ui

Specifies whether logs should be displayed under forms and lists and in the Session Log tab, or only in the Session Log tab.

- Type: choice list
- Default value: Page
- Location: System Property [sys_properties] table

glide.discovery.application_mapping

Enables or disables the Application Dependency Mapping (ADM) feature.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.discovery.log_debug_info

An optional property to populate debug information in Discovery log. If this property is set to **true**, the Discovery sensor extracts the debug information from ECC input message and writes this information to the Discovery log table, so that it is visible when inspecting discovery status.

- Type: true | false
- Default: false

glide.discovery.log_message_chars

When a log message is longer than this value, ServiceNow creates a preview of the message with an ellipsis at the end of the message to indicate that there is content that is not shown. The preview size prevents any one list row from taking up the entire screen.

- Type: integer
- Default value: 200 (characters)
- Location: **Discovery Definition** > **Properties**

glide.discovery.multi_page_serial_mode

This property controls the processing of multi-page pattern input records. **false** sets the pages to process in parallel and **true** sets the pages to process serially.

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- Type: true | false
- Default value: false

glide.discovery.sam_batch_update_size

Enables batching the updates to table cmdb_sam_sw_install when only the field last_scanned in the table has changed. This optimizes the overall discovery execution as it reduces the multiple single update queries on the database. The default value is 100 which means 100 records at a time in the table are batched and updated. By setting this property to 1, this switches to sequential updates.

- Type: integer
- Default value: 100

glide.discovery.use_cmdb_identifiers

Controls whether Discovery uses the CMDB Identification and Reconciliation Framework (introduced with the Geneva release) or the legacy identifiers from previous releases.

- Type: true | false
- Default value: true
- Location: **Discovery Definition** > **Properties**

glide.domain.notify_change

Displays a notification message telling the user that the domain picker automatically changed.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.domain.notify_record_change

Displays a notification message telling the user that the domain picker automatically changed because the record that the user is viewing changed the domain of the user.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.duplicate_ci_remediator.dry_run

Determines whether the Duplicate CI Remediator actually remediates CI duplication by updating records in the CMDB, or not.

- Type: true | false
- Default value: false
- Location: **Configuration** > **CMDB Properties** > **Duplicate CI Remediator Properties**

glide.duplicate_ci_remediator.max.cis

Threshold for the number of duplicate CIs, which if exceeded, support for reconciliation in the Duplicate CI Remediator is limited (1,000 by default).

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- Type: integer
- Default value: 1000
- Location: **Configuration** > **CMDB Properties** > **Duplicate CI Remediator Properties**

Note: This threshold never exceeds 5,000, even if you set the property to a value greater than 5,000.

glide.duplicate_ci_remediator.max.field_length

Attributes in which max_length exceeds this property value (4000 by default) are excluded from the **Select Main CI**, **Merge Attribute Values**, and **Determine Duplicate CI Actions** tabs in the Duplicate CI Remediator wizard.

- Type: integer
- Default value: 4000
- Location: **Configuration** > **CMDB Properties** > **Duplicate CI Remediator Properties**

Note: This property impacts the performance of de-duplication tasks, therefore be cautious about setting this value.

glide.eccprobe.longrunner.class

Identifies the name of a script include that manages long running commands.

- Type: string
- Default value: LongRunner
- Location: System Property [sys_properties] table

glide.eccprobe.longrunner.retry_minutes

Allows bursts of polling errors up to specified minutes in duration.

- Type: integer
- Default value: 10
- Location: System Property [sys_properties] table

glide.eccprobe.longrunner.interval.initial_seconds

Initial polling period for long running commands in seconds.

- Type: integer
- Default value: 20
- Location: System Property [sys_properties] table

glide.eccprobe.longrunner.interval.backoff_percent

Percentage that polling period grows per poll.

- Type: integer
- Default value: 15
- Location: System Property [sys_properties] table

glide.eccprobe.longrunner.interval.max_seconds

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Maximum polling period. As the polling period decays, it gets longer until it reaches this maximum.

- Type: integer
- Default value: 300
- Location: System Property [sys_properties] table

glide.eccprobe.longrunner.debug

Allows LongRunner logs status on successful polls in addition to the usual messages on unsuccessful ones when set to **true**.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.eccprobe.longrunner.max_poll_count

Maximum number of polls that is executed per 5- second polling period. This number is generally not relevant, but may be used to contain polling under extreme loading conditions.

- Type: integer
- Default value: unlimited
- Location: System Property [sys_properties] table

glide.ecmdb.all_relationship_role

An example value is: itil,asset,configuration.

- Type: string
- Default value: none
- Location: Add the property to the System Property [sys_properties] table.

glide.element.use_object_display_value

It ensures that the display value for GlideElementGlideObject fields like glide_date_time is calculated correctly.

- Type: true|false
- Default value: true
- Location: System Properties

glide.element.reference.use_actual_display_value

It controls the display value of GlideElementGlideObject fields like glide_date_time on Forms and Lists, and you would need to opt-in (set property value to true) to see the correct display value in these views.

- Type: true|false
- Default value: false
- Location: System Properties

`glide.email_address_filter.max_domains`

Sets the maximum number of domains that can be associated with a single email address filter.

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- Type: integer
- Default value: 100

glide.email_address_filter.max_exceptions

Sets the maximum number of exceptions that can be associated with a single email address filter.

- Type: integer
- Default value: 1000

glide.email.append.timezone

Specifies whether to append the time zone to all dates and times in outbound emails (**true**) or not (**false**).

- Type: true | false
- Default value: true
- Location: **System Properties** > **Email**

glide.email_client.quick_message.insert

Controls how quick messages are inserted in the email client. If the property is set to **true**, quick message content is inserted at the place of the cursor. If **false**, quick message content replaces existing content in an email draft.

- Type: true | false
- Default value: true

glide.email.forward_subject_prefix

Specifies the comma-separated list of prefixes in the subject line that identify a forwarded email.

- Type: string
- Default value: fw:,fwd:
- Location: Add the property to the System Property [sys_properties] table.

glide.email.journal.lines

Specifies the number of entries from a journal field (such as Additional comments and Work notes) included in email notifications. A value of **-1** includes all journal entries.

- Type: integer
- Default value: 3
- Location: **System Properties** > **Email**

glide.email.mail_to

Specifies the email address to send notifications that use the *${mailto:}* variable.

- Type: string
- Default value: SMTP email address that is active by default
- Location: Add the property to the System Property [sys_properties] table.

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glide.email.name_split

Delimiter between the first and last name in an email address to identify users from incoming emails. For example, a delimiter of "." in the email address john.smith@company.com tells the system to look for a user record for John Smith.

- Type: string
- Default value: period (.)
- Location: **System Properties** > **Email**

glide.email.notification.save_when_no_recipients

Controls whether (**true**) or not (**false**) a notification-generated sys_mail record is saved even if there are no recipients. Used in conjunction with other notification recipient logging properties, this property enables troubleshooting problems with notifications.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.email.override.url

Sets the URL to use in emailed links in place of the instance URL. The URL should end with nav_to.do. An example value is: https://servicenow.customerdomain.com/production/nav_to.do.

- Type: string
- Default value: Instance URL
- Location: Add the property to the System Property [sys_properties] table.

glide.email.read.active

Enables (**true**) or disables (**false**) the inbound mail server.

- Type: true | false
- Default value: true
- Location: **System Properties** > **Email**

glide.email.reply_subject_prefix

Specifies the comma-separated list of prefixes in the subject line that identify an email reply.

- Type: string
- Default value: re:aw:,r:
- Location: System Property [sys_properties] table

glide.email.smtp.active

Specifies whether to enable (**true**) or disable (**false**) the outgoing mail server.

- Type: true | false
- Default value: true
- Location: **System Properties** > **Email**

glide.email.smtp.max_recipients

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Specifies the maximum number of recipients the instance can list in the To: line for a single email notification. Notifications that would exceed this limit instead create duplicate email notifications addressed to a subset of the recipient list. Each email notification has the same maximum number of recipients.

- Type: integer
- Default value: 100
- Location: Add the property to the System Property [sys_properties] table.

glide.email.smtp.max_send

Specifies how many emails to send through each new SMTP connection. The instance establishes a new SMTP connection if there are more emails to send than the specified value.

- Type: integer
- Default value: 100
- Location: Add the property to the System Property [sys_properties] table.

glide.email_system_address_filter.max_address_filters

Sets the maximum number of email filters that can be associated with a single system address filter.

- Type: integer
- Default value: 100

glide.email.test.user

Specifies the comma-separated list of email addresses to which the instance sends all email messages. Typically used in non-production instances for testing purposes.

- Type: string
- Default value: none
- Location: **System Properties** > **Email**

glide.email.text_plain.strip_xhtml

Indicates whether both outbound and inbound emails that are shown in comments convert the XML to plain text (**true**) or preserve the XML (**false**).

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.email.watermark.visible

Indicates whether the watermark in email notifications is visible (**true**) or is wrapped in a hidden div tag (**false**).

Note: Email clients that use the plain text version of the email show the watermark.

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- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.email_client.show_sms_option

Specifies whether a check box appears in the email client for sending the message to the user's SMS device (**true**) or not (**false**). If no SMS device exists, the email client sends the message to the primary email device.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.entry.loggedin.page_ess

Specifies the page that an ESS user, who by definition has no roles, is redirected to when the user logs in.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.excel.boolean.display_value

If true, translates columns of type boolean to the user's language when exporting records in Excel format. If false, exports the values in English, regardless of the user language.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.excel.max_cells

Sets the maximum number of cells in an Excel export.

- Type: integer
- Default value: 500000
- Location: Add the property to the System Property [sys_properties] table.

glide.excel.use_user_date_format

Specifies whether Excel exports use the date/time format specified in a user's profile (**true**) or not (**false**). If **false**, exports the instance date/time format defined by the `glide.sys.date_format` property.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.export.csv.charset

Specifies the character set used to export CSV files. See Supported Character Encodings for a list of supported character encoding options.

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- Type: string
- Default value: windows-1252
- Location: Add the property to the System Property [sys_properties] table.

glide.export.csv.raw.value

When **true**, raw database values are exported instead of the display values when you export to CSV. When **false**, display values are exported.

- Type: true | false
- Default value: false
- Location: **System Properties** > **Import Export**

glide.export.escape_formulas

When **true**, string values that start with the characters +, -, =, or @ are prepended with a single apostrophe when you export to CSV, XLS, or XLSX files.

- Type: true | false
- Default value: **true** for new instances starting with Istanbul
- Location: System Property [sys_properties] table for new instances starting with Istanbul. For upgraded instances, Add the property to the System Property [sys_properties] table.

glide.export.excel.general_formatting

When **true**, values in cells in exported Excel files have the general format. When **false**, the cells in exported Excel files have the text format.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.export.excel.wrap_cells

When **true**, values in cells in exported Excel files are wrapped automatically. When **false**, the width of exported Excel columns is resized to fit 256 characters and values are not wrapped.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.fdih.retry.max_count

Specifies the maximum number of retry attempts when no value is specified in **Count** for a retry policy.

- Type: Integer
- Default value: 0
- Location: System Property [sys_properties] table

glide.glidesoap.proxy_host

Specifies the proxy server hostname or IP address for SOAP clients.

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- Type: string
- Default value: value of *glide.http.proxy_host*
- Location: System Property [sys_properties] table

glide.glidesoap.proxy_port

Specifies the port number for the proxy server for SOAP clients.

- Type: string
- Default value: value of *glide.http.proxy_port*
- Location: System Property [sys_properties] table

glide.guest.active.session.life_span

Sets the maximum session time for a guest session regardless of user activity, in minutes.

- Type: integer
- Default value: 0
- Location: System Property [sys_properties] table

glide.guest.session_timeout

Sets the inactive session timeout for a guest session, in minutes.

> **Note:** This setting decouples a guest session timeout from the *glide.ui.session_timeout* property. Any changes to the *glide.ui.session_timeout* property do not affect a guest session timeout.

- Type: integer
- Default value: 30
- Location: System Property [sys_properties] table

glide.hd.payload_multi_page.device_history.mutex_expires

Total time the thread waits to update the Discovery history before giving up.

- Type: integer
- Default value: 1 minutes
- Location: System Properties

glide.hd.payload_multi_page.device_history.mutex_spin_wait

The time between when we check if the Discovery history database is free.

- Type: integer
- Default value: 100 ms
- Location: System Properties

glide.hd.payload_multi_page.device_history.mutex_max_spins

The number of times the Discovery history is checked before giving up.

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- Type: integer
- Default value: 600
- Location: System Properties

glide.hd.payload_multi_page.discolog.mutex_expires

Total time the thread waits to update the Discovery log before giving up.

- Type: integer
- Default value: 1 minutes
- Location: System Properties

glide.hd.payload_multi_page.discolog.mutex_spin_wait

The time between when we check if the Discovery log database is free.

- Type: integer
- Default value: 100 ms
- Location: System Properties

glide.hd.payload_multi_page.discolog.mutex_max_spins

The number of times the Discovery log is checked before giving up.

- Type: integer
- Default value: 600
- Location: System Properties

glide.help.default.page

Sets the overall help URL for the system if you are using context-sensitive help. This URL is used when there is not any context-sensitive help available for the form, list, or record.

- Type: string
- Default value: http://wiki.servicenow.com/
- Location: System Property [sys_properties] table

glide.history.max_entries

Sets the number of characters to display as a preview of journal input fields.

- Type: integer
- Default value: 250
- Location: System Property [sys_properties] table

glide.history_set.pull_journal_entries_from_journal_table

Determines whether journal field values in history sets are retrieved from the journal table (**true**) or the audit table (**false**). If auditing is disabled for a GlideRecord by setting `setWorkflow(false)`, journal entries will be missing from history sets unless set to **true**.

- Type: true | false
- Default value: true
- Location: Add a system property to the System Property [sys_properties] table.

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glide.home.page

Specifies which page to load when a user selects a homepage from the banner.

- Type: string
- Default value: `home_splash.do?sysparm_direct=true`
- Location: System Property [sys_properties] table

glide.home.refresh_disabled

Enables (**true**) or disables (**false**) homepage refresh.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.home.refresh_intervals

Comma-separated list of refresh intervals available on homepages.

- Type: string
- Default value: 300,900,1800,3600
- Location: Add the property to the System Property [sys_properties] table.

> **Important:**
>
> The functionality found in homepages, arranging information from your instance to tell a story about your data, is found in dashboards on new instances. On upgraded instances with Next Experience enabled, users can view existing homepages if they have a direct URL, but they can't create or edit them. Responsive dashboards and Analytics Overview dashboards take over homepage functionality.
>
> Use the Homepage deprecation help tool to convert the homepages on your instance to responsive dashboards.
>
> For more information, see:
>
> - Dashboards in the Analytics Center.
> - Working with responsive dashboards.

glide.hosts.allowlist

Enables control over what hosts that a Fetch action can access. This affects HTTP APIs, like RESTMessageV2 - Scoped, Global and Fetch Fetch - Scoped, Global. Features of `glide.hosts.allowlist`:

- Supports a comma-separated list of URLs or IPs.
- Allows "*" for all.
- Allows subdomains via *.example.com.
- Has a global and a per-scope setting (prefix with the scopename to specify an entry is for a specific scope).
- Default value is an empty string, which is interpreted as no hosts are allowed for Fetch. For existing HTTP APIs, like RestMessageV2, empty is interpreted as all hosts are allowed (other than those restricted by the existing deny list).

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- Type: string
- Default value: "" (empty string)
- Location: System Property [sys_properties] table

glide.html.enable_media_sites

Enables a URL option for media in the HTML Editor. The media attaches, but doesn't load in the HTML Editor.

- Type: string
- Default value: youtube.com,player.vimeo.com,vimeo.com
- Location: System Property [sys_properties] table

glide.html.escape_script

Enables (**true**) or disables (**false**) JavaScript tags in HTML fields.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.html.sanitize_all_fields

Specifies whether all HTML fields are sanitized to remove unwanted code (**true**) or not (**false**).

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table
- Instance Security Hardening Settings: HTML sanitizer (instance security hardening)

glide.http.connection_timeout

Specifies the maximum number of milliseconds an outbound HTTP request (such as Web Services) waits to establish a connection.

- Type: integer
- Default value: 10000 (10 seconds)
- Location: System Property [sys_properties] table

glide.http.outbound.max_timeout

Specifies the number of seconds that RESTMessageV2 and SOAPMessageV2 APIs wait for a response from a synchronous call. The maximum value is 30 seconds.

To define a timeout longer than 30 seconds, set the *glide.http.outbound.max_timeout.enabled* system property to **false** and use the *waitForResponse()* method to set the timeout. For example, see Asynchronous SOAPMessageV2 example. If *glide.http.outbound.max_timeout.enabled* is set to true and a value is passed in the *waitForResponse()* method, the system uses the smallest value from either the *waitForResponse()* method or the *glide.http.outbound.max_timeout* system property.

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- Type: integer
- Default value: 30
- Location: Add the property to the System Property [sys_properties] table.

glide.http.outbound.max_timeout.enabled

Enables setting a timeout in the *glide.http.outbound.max_timeout* system property.

To define a timeout longer than 30 seconds, set the *glide.http.outbound.max_timeout.enabled* system property to **false** and use the *waitForResponse()* method to set the timeout. For example, see Asynchronous SOAPMessageV2 example. If *glide.http.outbound.max_timeout.enabled* is set to true and a value is passed in the *waitForResponse()* method, the system uses the smallest value from either the *waitForResponse()* method or the *glide.http.outbound.max_timeout* system property.

- Type: boolean
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.http.proxy_bypass_list

Specifies the semicolon-separated list of addresses that bypass the proxy server. Use an asterisk (*) as a wildcard character to specify all or part of an address.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.http.proxy_host

Specifies the proxy server hostname or IP address.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.http.proxy_ntdomain

Specifies the domain used to authenticate the proxy server with NTLM authentication.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.http.proxy_nthost

Specifies the hostname used to authenticate the proxy server with NTLM authentication.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

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glide.http.proxy_ntpassword

Specifies the password used to authenticate the proxy server with NTLM authentication.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.http.proxy_ntusername

Specifies the user name used to authenticate the proxy server with NTLM authentication.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.http.proxy_port

Specifies the port number for the proxy server.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.http.proxy_password

Specifies the password used to authenticate the proxy server.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.http.proxy_username

Specifies the username used to authenticate the proxy server.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.http.timeout

(Web service Consumer Plugin) Specifies the maximum number of milliseconds to wait before an outbound transaction times out.

- Type: integer
- Default value: 175000 (175 seconds)
- Location: Add the property to the System Property [sys_properties] table.

glide.i18n.force_index

Enables (**true**) or disables (**false**) indexing all translated fields, regardless of the value of the table attribute text_index_translations.

- Type: true | false
- Default value: true

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glide.identification_engine.batch_update_last_discovered

Controls batch update of last_discoveredfield in CIs that are being processed by the identification engine.

Set to **false** if there are business rules that apply to last_discovered field, and you want to trigger these rules when calling Identification and Reconciliation API.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.identification_engine.dependent_items_local_cache_count

For optimization, a custom number of locally cached query result entries of dependent CIs.

- Type: integer
- Default value: 10000
- Location: Add a system property to the System Property [sys_properties] table.

Note: If there is a memory issue due to optimization related to using local cache, set the *glide.identification_engine.related_items_local_cache_count* and the *glide.identification_engine.dependent_items_local_cache_count* properties to 0.

glide.identification_engine.granular_insert_locking

Determines whether to use multiple granular insert locks or single global insert lock.

Set to **false** if there are performance issues associated with the usage of multiple granular insert locks.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.identification_engine.independent_items_local_cache_count

For optimization, a custom number of locally cached query result entries of independent CIs.

- Type: integer
- Default value: 100000
- Location: Add the property to the System Property [sys_properties] table.

Note: Setting the value to 0 avoids using local cache for independent CIs and might affect performance.

glide.identification_engine.related_items_local_cache_count

For optimization, a custom number of locally cached query result entries of related/lookup items.

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- Type: integer
- Default value: 15000
- Location: Add the property to the System Property [sys_properties] table.

Note: If there is a memory issue due to optimization related to using local cache, set the *glide.identification_engine.related_items_local_cache_count* and the *glide.identification_engine.dependent_items_local_cache_count* properties to 0.

glide.identification_engine.skip_duplicates

Controls how identification processes a small set of duplicate CIs.

- When **true**: If the number of duplicate CIs is less than the threshold specified by *glide.identification_engine.skip_duplicates.threshold*, then one of the duplicate CIs is picked as a match and gets updated. The rest of the duplicate CIs are tagged as duplicates.
- When **false**: Matching a CI fails, and an error is logged.
- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.identification_engine.skip_duplicates.threshold

Maximum number of CIs that can be in a set of duplicate CIs to allow identification to process the duplicate CIs according to the setting of *glide.identification_engine.skip_duplicates*.

If the number of duplicate CIs exceeds the threshold, then identification processes the duplicate CIs as if *glide.identification_engine.skip_duplicates* is set to **false**, regardless of the setting.

- Type: integer
- Default value: 5
- Location: Add the property to the System Property [sys_properties] table.

glide.identification_logs.max_run_ids

Maximum number of log runs that can be displayed when navigating to **Configuration** > **Identification Logs**.

- Type: integer
- Default value: 1000
- Location: **Configuration** > **CMDB Properties** > **Identification/Reconciliation Properties**.

glide.image_provider.security_enabled

Controls the security settings for images. If **true**, images are visible only to authenticated and authorized users. If **false**, images are visible to anyone with a URL to the attachment.

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- Type: true | false
- Default value: true
  - New/zbooted instances: property is present and set to **true**
  - Upgraded instances: **false** if property is not present, unchanged if property is present
- Location: System Property [sys_properties] table

glide.imap.secure

Enables (**true**) or disables (**false**) SSL encryption for connections to the IMAP server.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.imap.secure_port

Specifies the communications port for IMAP secure connections.

- Type: string
- Default value: 995
- Location: Add the property to the System Property [sys_properties] table.

glide.imap.tls

Enables (**true**) or disables (**false**) starting the IMAP server in Transport Layer Security (TLS) mode.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.import.debug

Enables (**true**) or disables (**false**) debug logging for all import processes.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.import.error_message.generic

Enables (**true**) or disables display (**false**), failed imports to display a generic error instead of a verbose SQL message. This property should be enabled.

- Type: true | false
- Default value:
  - New/zbooted instances: **true** for starting with Istanbul
  - Upgraded instances: false
- Location: System Property [sys_properties] table

glide.import_excel.use_only_user_session_date_format

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If true, any Date or Date/Time value in an Excel spreadsheet is converted to a user session date format in the staging table upon Excel file import.

If false, any Date/Time explicit cell type in Excel is imported into a staging table with the user session date format, and any date value that is not explicitly in a Date/Time cell type in Excel is imported into a staging table using the system date format.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table if you want to change the value to false.

glide.import.sftp.debug

Enables (**true**) or disables (**false**) additional debug logging for SFTP imports. Enabling this property causes the instance to log all outgoing and incoming messages during the SSH session.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.import.scp.debug

Enables (**true**) or disables (**false**) additional debug logging for SCP imports. Enabling this property causes the instance to log all outgoing and incoming messages during the SSH session.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.import_set.preserve.leading.spaces

Specifies whether the import process preserves leading spaces in Excel data cells (**true**) or not (**false**). When **false**, the import process removes leading spaces from Excel data cells.

Note: The import process always removes trailing spaces from Excel data cells.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.import_set_row.dynamically_add_fields

Specifies whether an import set can add new columns to the staging table (**true**) or not (**false**). Instances that contain large numbers of import sets can sometimes become unresponsive when an import adds a column because the instance must alter every row in the staging table. Sometimes the database alter table action causes an outage. Setting this property to **false** prevents an import set from adding columns to the staging table and produces a log message. As a workaround, administrators can manually add a column to the staging table by creating a new dictionary entry and then reimporting the import set.

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- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ir.query_method

Sets the query method for global text search. Only the **Simple query** method is supported.

- Type: choice list
- Default value: simple
- Location: **System Properties** > **Global Text Search**

glide.active.session.timeout.invalidate.session

Specifies whether integration sessions can be invalidated by configuring a maximum active session time.

- Type: Boolean true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.integration.session_timeout

Sets the inactive session timeout for integration sessions, in minutes.

- Type: integer
- Default value: 1
- Location: Add the property to the System Property [sys_properties] table.

glide.integration.update_last_login_time.window.seconds

Controls the frequency of updates to integration user records.

- Type: integer
- Default value: 60
- Minimum value: 5
- Maximum value: 86400 (one day in seconds)
- Location: Add the property to the System Property [sys_properties] table.

glide.integrations.active.session.life_span

Sets the maximum session time for a integration session regardless of activity, in minutes.

- Type: integer
- Default value: 0
- Location: System Property [sys_properties] table

glide.invalid_query.returns_no_rows

Controls how invalid GlideRecord queries are handled with respect to invalid or undefined field names. When this property is **true**, invalid queries containing invalid or undefined field names always return no rows. When this property is **false** (default), if a query is incorrect, and includes invalid or undefined field names, the

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invalid part of the query condition is ignored and results are based on the valid part of the query.

To override this logic at the session level, execute `gs.getSession().setStrictQuery(false)`. To restore strict query, execute `gs.getSession().setStrictQuery(true)`. To use this property, change the line `gr.addQuery('table', arguments.length == 1 ? record.getRecordClassName() : tableName);` in the Workflow script include to `gr.addQuery('table', (tableName) ? tableName : record.getRecordClassName() );`.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.itil.assign.number.on.insert

Controls whether (**true**) or not (**false**) a task number is generated and assigned on load (**Create New**) or when the task is submitted. This feature helps prevent unused task numbers.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.jdbcprobeloader.retry

Sets the number of times a JDBC probe attempts to connect to a JDBC data source.

- Type: integer
- Default value: 60
- Location: Add the property to the System Property [sys_properties] table.

glide.jdbcprobeloader.retry_millis

Sets the number of milliseconds a JDBC probe waits between retry attempts to a JDBC data source.

- Type: integer
- Default value: 5000
- Location: Add the property to the System Property [sys_properties] table.

glide.jquery.legacy

When true, enables legacy JQuery behavior. When false, integrates the JQuery 1.12.3 and 2.2.3 security patches. If you set this property to false, UI pages with incorrect HTML markup may render incorrectly. You can address this issue in your scripts by closing any html element tags that are self-closing and not in the valid list. For example, change `<div />` to `<div></div>`.

- Valid self-closing elements that do not need to be updated include:
  - `<area />`
  - `<base />`
  - `<br />`
  - `<col />`

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- `<embed />`
- `<hr />`
- `<img />`
- `<input />`
- `<link />`
- `<meta />`
- `<param />`
- `<source />`
- `<track />`
- `<wbr />`

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.knowman.search.apply_role_based_security

If **true**, honors read access of knowledge bases or articles specified for roles. If **false**, enables specified user criteria to override read access specified for roles.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.knowman.search_character_limit

Minimum number of characters required for knowledge search. Search terms with fewer than this number of characters return no results.

- Type: integer
- Default value: 3
- Location: System Property [sys_properties] table

glide.knowman.search.default_language

(Knowledge Management Internationalization Plugin v2) Default language for knowledge articles. If empty, defaults to the language of the logged-in user.

- Type: string
- Default value: empty
- Location: System Property [sys_properties] table

glide.knowman.serviceportal.seo_portals

Value contains a comma-separated list of service portal record sys_ids. The SEO indexing of knowledge articles is enabled on the portals mentioned in the list and is blocked by the noindex metatag for other portals. If at least one portal is listed, SEO suggestions display when users author or edit knowledge articles.

- Type: string
- Default value: empty
- Location: System Property [sys_properties] table

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Note: If the property value is empty, the indexing is enabled for all portals.

glide.knowman.show_language_option

(Knowledge Management Internationalization Plugin v2) Specifies whether the **Language** box appears (**true**) or is hidden (**false**) on articles with multiple translations.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.knowman.show_language_option.roles

(Knowledge Management Internationalization Plugin v2) Comma-separated list of roles that can see the Language box on articles with multiple translations.

- Type: string
- Default value: none
- Location: Add the property to the System Property [sys_properties] table.

glide.knowman.show_links

Specifies whether the **Link** line appears (**true**) or is hidden (**false**) in a knowledge article.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ldap.allow_empty_group

Specifies whether all members can be removed from an Active Directory security group (**true**) or not (**false**).

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.ldap.binary_attributes

Comma-separated list of LDAP attributes that should be converted from binary format to encoded64 strings. If you set this property, only the values listed are converted. The most common attributes are *`objectSID`* and *`objectGUID`*. These converted values are unique and can be used as the coalesce field on the LDAP import mapping. If this property is blank, ServiceNow tries to map these binary attributes without the conversion and they are not guaranteed to be unique since they are not properly converted to string values.

- Type: string
- Default value: objectsid,objectguid
- Location: System Property [sys_properties] table

glide.ldap.paging

Enables (**true**) or disables (**false**) LDAP paging query support. LDAP paging is a more efficient LDAP querying method for environments with more than 1000 users.

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- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.legacy.excel.export

Enables (**true**) or disables (**false**) exporting to XLS format when exporting to an Excel file. By default, only XLSX export is enabled. This property does not affect the Excel web service. When **true**, this property also allows users to select XLS or XLSX as the Easy Import template format.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.list.filter_max_length

Sets a maximum character limit for the condition builder query.

- Type: integer
- Default value: 0
- Location: System Property [sys_properties] table

glide.lists.live_list_enabled

Enables a list refresh prompt.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.live_feed.company_feed_exclude_groups

Controls whether messages posted to a public group appear (**true**) or are omitted (**false**) on the Company Feed.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.live_services

(Chat plugin) Enables (**true**) or disables (**false**) Live Services, such as chat support.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.login.no_blank_password

Prevents (**true**) or allows (**false**) logins from users with blank passwords. Often, importing lists of users creates many users with blank passwords. By default, this property is set to **true** on production instances.

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- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.login.home

Sets the default homepage that users see after login. If blank, the last page visited is used. The format is *<page>.do*.

- Type: string
- Default value: home.do
- Location: System Property [sys_properties] table

glide.max_journal_list_size

Sets the maximum size, in megabytes, of journal input fields.

- Type: integer
- Default value: 10
- Location: Add the property to the System Property [sys_properties] table.

glide.messaging.reassign.enabled

Sets property that automatically reassigns messaging if the current agent is unavailable.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.notification.recipient.include_logging

Master switch to enable/disable logging all reasons a recipient was included. If **false**, no include logging is performed.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.notification.recipient.exclude_logging

Master switch to enable/disable logging all reasons a recipient was excluded. If **false**, no exclude logging is performed.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.notification.recipient.exclude_logging.device_inactive

Logs recipients who are excluded because their chosen notification device record is marked as inactive.

- Type: true | false
- Default value: true

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The *glide.notification.recipient.exclude_logging* property in the **System Properties** > **Email** module must be enabled to modify this property.

glide.notification.recipient.exclude_logging.device_schedule

Logs recipients who are excluded because the chosen notification device record's schedule field excludes it.

- Type: true | false
- Default value: true

The *glide.notification.recipient.exclude_logging* property in the **System Properties** > **Email** module must be enabled to modify this property.

glide.notification.recipient.exclude_logging.event_creator

Logs recipients who are excluded because they initiated the notification event, such as updating an incident record, and the **Send to Event Creator** check box is cleared on the notification record.

- Type: true | false
- Default value: true

The *glide.notification.recipient.exclude_logging* property in the **System Properties** > **Email** module must be enabled to modify this property.

glide.notification.recipient.exclude_logging.invalid_email

Logs recipients who are excluded because the email address for that user is invalid, for example the @ is missing, or empty.

To modify this property, you must enable the *glide.notification.recipient.exclude_logging* property in the **System Properties** > **Email** module.

- Type: true | false
- Default value: true

glide.notification.recipient.exclude_logging.user_calendar_integration_disabled

Logs recipients of calendar invitations who are excluded because the **Calendar Integration** field is set to **None** on the user record.

- Type: true | false
- Default value: true

The *glide.notification.recipient.exclude_logging* property in the **System Properties** > **Email** module must be enabled to modify this property.

glide.notification.recipient.exclude_logging.user_inactive

Logs recipients who are excluded because the **Active** check box is cleared on the user record.

- Type: true | false
- Default value: true

The *glide.notification.recipient.exclude_logging* property in the **System Properties** > **Email** module must be enabled to modify this property.

glide.notification.recipient.exclude_logging.user_notification_disabled

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Logs recipients who are excluded because the **Notification** field is set to **Disabled** on the user record.

To modify this property, you must enable the `glide.notification.recipient.exclude_logging` property in the **System Properties** > **Email** module.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging

Enables or disables logging all reasons that a recipient was included. This property is a main switch. If **true**, the subsequent properties dealing with the inclusion of logging are enabled. If **false**, none of the subsequent properties relating to the inclusion of logging are enabled.

glide.notification.recipient.include_logging.delegate

Logs recipients who are included because they are delegates of another user.

- Type: true | false
- Default value: true

The `glide.notification.recipient.include_logging` property in the **System Properties** > **Email** module must be enabled to modify this property.

glide.notification.recipient.include_logging.event_parm

Logs recipients who are included because they are in the **parm1** or **parm2** fields of the event record.

To modify this property, you muse enable the `glide.notification.recipient.include_logging` property in the **System Properties** > **Email** module.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.recipient_fields

Logs recipients who are included via a notification target record, such as an incident record, specified in the **Users/Groups in Field** field for the notification record. The recipient_fields are fields in the target record that contain a recipient to add. For example, if the record that triggered the notification is an incident, and the **assigned_to** field for the incident is listed in recipient_fields, that user is included as a recipient.

To modify this property, you must enable the `glide.notification.recipient.include_logging` property in the **System Properties** > **Email** module.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.recipient_groups.group_email

Logs recipients who are included in a group email for any group provided in the notification record's recipient_groups or the event **parm1** or **parm2** field.

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To modify this property, you must enable the *glide.notification.recipient.include_logging* property in the **System Properties** > **Email** module.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.recipient_groups.manager

Logs recipients who are included because they manage any group provided in the notification record's recipient_groups or the event **parm1** or **parm2** field.

To modify this property, you must enable the *glide.notification.recipient.include_logging* property in the **System Properties** > **Email** module.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.recipient_groups.membership

Logs recipients who are included via membership in any group provided in the notification record recipient_groups or the event **parm1** or **parm2** field.

To modify this property, you must enable the *glide.notification.recipient.include_logging* property in the **System Properties** > **Email** module.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.recipient_users

Logs recipients who are included via notification record's **Users** field (recipient_users).

To modify this property, you must enable the *glide.notification.recipient.include_logging* property in the **System Properties** > **Email** module.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.subscription

Logs recipients because they are subscribed via User Notification Preferences.

To modify this property, you must enable the *glide.notification.recipient.include_logging* property in the **System Properties** > **Email** module.

- Type: true | false
- Default value: true

glide.oauth.update_last_login_time

Controls whether the Last login and Last login time fields in a user record [sys_user] are updated when an integration user sends a web request to an instance using

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OAuth authentication. If true, the Last login and Last login time fields in the user's record are updated with web requests. To turn off this functionality, set this property and the *glide.basicauth.update_last_login_time* system property to false.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.par.export.ppt.max_visualizations_allowed

For the ServiceNow Otto Data and Analytics skill "dashboard and visualization export," this property sets the maximum number of visualizations, and thus slides, that you can export from a Platform Analytics dashboard to Microsoft PowerPoint.

- Type: integer
- Default value: 150
- Location: System Property [sys_properties] table

glide.pdf_export_from_form_list.show_report_attrs

Enables or disables displaying the PDF page header for all PDFs generated from a list.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.pdf.max_rows

Sets the maximum number of rows in an exported PDF file.

- Type: integer
- Default value: 1000
- Location: Add the property to the System Property [sys_properties] table.

glide.pdf.font.size

Sets the font size for exported PDF files.

- Type: integer
- Default value: 8
- Location: Add the property to the System Property [sys_properties] table.

glide.pdf.url.whitelisting.enabled

Enables or disables whether external URLs provided should be rendered in the PDF output generated by the PDFGenerationAPI - Scoped, Global. Verifies against the allowed URLs listed in the com.snc.pdf.whitelisted_urls property.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.pg.any_rejection_rejects

Controls the default process guide rejection handling. If **true**, the first rejection rejects the entity. If **false**, all users must reject the approval.

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- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.phone_number_e164.allow_national_entry

When **true**, users can enter phone numbers in the local format listed in the territory selector. When **false**, users must enter phone numbers in the international format listed in the territory selector.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.phone_number_e164.display_national

When set to **true** or **form**, a Phone Number (E164) field displays phone numbers in a local format on forms but as an international format on lists. When set to **all**, a Phone Number (E164) field always displays phone numbers in a local format. When set to user, a Phone Number (E164) field only displays phone numbers in a local format when the phone number matches the locale setting of the current user.

- Type: string
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.phone_number_e164.display_territory_selector

Specifies whether to display (**true**) or hide (**false**) the territory selector. Hiding the territory selector restricts users to entering only local or national phone numbers.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.phone_number_e164.display_territory_text

When set to all, a Phone Number (E164) always displays the territory label. When set to national, a Phone Number (E164) displays the territory label only if the phone number is in local format. When set to read-only, a Phone Number (E164) displays the territory label in read-only mode regardless of whether the number is in local or global format. When set to read-only-national, a Phone Number (E164) displays the territory label in read-only mode only if the number is in local format. When set to list, a Phone Number (E164) displays the territory label in a list. When set to list-national, a Phone Number (E164) displays territory label in a list if the number is in national format. When set to none, a Phone Number (E164) does not display the territory label.

- Type: string
- Default value: read-only
- Location: Add the property to the System Property [sys_properties] table.

glide.phone_number_e164.display_users_idd

Specifies whether to display the international direct dialing prefix between the territory selector and the input box on forms (**true**) or not (**false**).

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- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.phone_number_e164.strict

Specifies whether all phone number fields must match the display format of the field's select territory. When **true**, the phone number input box displays a red line underneath phone numbers that do not match the territory format listed in the territory selector. Users cannot save an invalid phone number. When **false**, the phone number input box displays a green line underneath phone numbers that do not match the territory format listed in the territory selector. Users can save an invalid phone number, and the territory selector offers the option to select an **Other / Unknown** territory format.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.pop3.ignore_headers

Specifies the comma-separated list of email headers that cause the instance to ignore an email message. Use the format name:value to specify email header types and values. You can use a wildcard (*) for the subtype. For example, `Content-Type:multipart/*; report-type=delivery-status;` ignores emails containing a type of multipart and a parameter of *`report-type=delivery-status`*. For syntax specifications, see http://www.w3.org/Protocols/rfc1341/4_Content-Type.html.

- Type: string
- Default value: Auto-Submitted:auto-replied,X-FC-MachineGenerated:true,Content-Type:multipart/report; report-type=delivery-status;
- Location: **System Properties** > **Email**

glide.pop3.ignore_senders

Specifies the comma-separated list of senders that cause the instance to ignore an email message. Enter only the name before the at (@) sign.

- Type: string
- Default value: mailer-daemon, postmaster
- Location: **System Properties** > **Email**

glide.pop3.ignore_subjects

Specifies the comma-separated list of strings that cause the instance to ignore an email message if they are present at the start of a subject line. Values are case-insensitive.

- glide
- Type: string
- Default value: out of office autoreply, undeliverable:, delivery failure:,returned mail:,autoreply
- Location: **System Properties** > **Email**

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glide.pop3.parse_end

[Legacy] Text indicating the end of the email body section where the instance should parse name:value pairs to change field values when processing inbound email actions. This property is no longer required to set field values from the email body.

- Type: string
- Default value: none
- Location: **System Properties** > **Email**

glide.pop3.parse_start

[Legacy] Text indicating the beginning of the email body section where the instance should parse name:value pairs to change field values when processing inbound email actions. This property is no longer required to set field values from the email body.

- Type: string
- Default value: none
- Location: **System Properties** > **Email**

glide.pop3.process_locked_out

Enables (**true**) or disables (**false**) the ability for locked out users to trigger inbound actions.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.pop3.reply_separators

Comma-separated list of separators that cause the instance to disregard everything below the text string in the message body. This list is case-sensitive.

- Type: string
- Default value: \n\n-----Original Message-----,\n\n _____ \n\nFrom:
- Location: **System Properties** > **Email**

glide.pop3readerjob.create_caller

Controls the behavior when an instance receives an email from an email address not associated with a user record. If **true**, the instance creates a new user record for the email address and places that new user in the **Caller** field of any created tickets. If **false**, the instance associates the new ticket to the **Guest** user record.

- Type: true | false
- Default value: false
- Location: **System Properties** > **Email**

glide.processor.json.row_limit

Specifies the maximum number of rows a JSON query returns.

- Type: integer
- Default value: 250
- Location: Add the property to the System Property [sys_properties] table.

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glide.product.description

The value of this property is displayed as text in the banner next to the company logo.

- Type: string
- Default value: Service Management
- Location: **System Properties** > **Basic Configuration UI16**

glide.product.help_url

Global setting for the URL that the help icon goes to. Value must be empty for context-sensitive help to work.

glide.product.help_show

Controls whether the help icon, help.gifx, appears in (**true**) or is omitted from (**false**) the welcome banner.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.product.image.light

The Banner image displayed for Core UI Interface.

- Type: uploaded image
- Default value: none
- Location: **System Properties** > **Basic Configuration UI16**

glide.product.icon

Stores the favicon image displayed in bookmarks, tabs, and the browser address bar.

- Type: image
- Default value: favicon.ico?v=4
- Location: **System Properties** > **System**

glide.product.name

Specifies text to use in place of Service-now.com in the browser top title bar (and in browser tabs). This text is duplicated in the banner to the right of the logo unless you add `display: none;` to the end of the value field within the *`glide.product.name.style`* property.

- Type: string
- Default value: ServiceNow
- Location: System Property [sys_properties] table

glide.product.name.style

Specifies the CSS properties used to display the *`glide.product.name`* text in the banner to the right of the logo. To not display the text, add `display: none;` to the end of the value field in this property.

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- Type: string
- Default value: padding-bottom: 0px; padding-top: 0px;
- Location: System Property [sys_properties] table

glide.quota.manager.debug

Controls whether to display (**true**) or hide (**false**) additional information related to the Quota Manager, such as running transactions, canceled transactions, and which quotas are matched to transactions.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.quota.manager.heartbeat

Sets the number of seconds between the start of each Quota Manager heartbeat. This value determines how often the Quota Manager checks for transactions exceeding a quota and how often the Quota Manager writes status in the log file.

- Type: integer
- Default value: 1
- Location: Add the property to the System Property [sys_properties] table.

glide.quota.manager.minimum_transaction_time

Sets the minimum number of seconds that a transaction must run before the Quota Manager matches it to a transaction quota. You should set this value to at least 1 second because smaller values decrease performance, and because transactions shorter than 1 second are probably not worth canceling. For optimal performance, set this value to the value of your most restrictive quota. For example, if your most restrictive quota cancels transactions longer than 1 minute, set the minimum transaction time to 60 seconds.

- Type: integer
- Default value: 1
- Location: Add the property to the System Property [sys_properties] table.

glide.reconciliation.override.null

Flag for allowing or disallowing the update of an empty field by a lower priority data source.

- Type: true | false
- Default value: true
- Location: System Properties [sys_properties] table

glide.remote_glide_record.max_count

Control the maximum number of records that the GlideRecord query method returns when using the SOAP web service. The instance primarily uses this property to control the records returned when using a Perl API GlideRecord query.

> ⚠ **Warning:** If you set this property to a large value, such as 10000, socket timeout errors might occur with MID Servers. Keep the value of this property less than 1000.

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- Type: integer
- Default value: 250
- Location: Add the property to the System Property [sys_properties] table.

glide.report.add_to_list_supported

Sets whether to support the add_to_list ACL for reporting on specified columns from the Available columns list when creating or sharing a list report.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.report.calendar.max_more_events_per_day

Specifies the maximum number of calendar events that can appear in the **+ <number>** pop-up for:

- A calendar day when calendar is in month or year view
- The top 'full day' section of a calendar day when a calendar is in day or week view

When this number is exceeded, a **+ many** link appears, which opens a list of events instead of a pop-up. For more information about the maximum number of events that can be displayed in a calendar day, see system property *glide.report.calendar.max_events_displayed_per_cell*.

- Type: integer
- Default value: 30
- Location: Add the property to the System Property [sys_properties] table.

glide.report.calendar.max_events_displayed_per_cell

Defines the maximum number of events that can appear in calendar report for:

- A calendar day when calendar is in month or year view
- The top 'full day' section of a calendar day when a calendar is in day or week view

Events that exceed this value are visible via a link in the calendar cell. See *glide.report.calendar.max_more_events_per_day* for more information.

- Type: integer
- Default value: 3
- Location: Add the property to the System Property [sys_properties] table.

glide.report.new_calendar

Enables (**true**) or disables (**false**) new calendar reports. Internet Explorer 7 and 8 do not support new calendars. If you open a calendar report in one of these browsers, the old version of calendar reports is always used.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

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glide.report_home.group_report.show_usr_grp

Enables (**true**) or disables (**false**) the Reporting preferences link in the user profile.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.required.attribute.enabled

Flag for enforcing required attributes (cannot be null) during identification and reconciliation.

- Type: true | false
- Default value: true
- Location: System Properties [sys_properties] table.

glide.rest.apis.disabled

Controls which REST APIs are available on the instance, along with glide.rest.apis.enabled. The value for this property is a comma-separated list of API names, such as Table API or Aggregate API. If neither this property nor glide.rest.apis.enabled is set, all REST APIs are available. If a particular API is specified in both properties, that API is disabled. If you disable specific APIs without explicitly enabling any APIs, all REST APIs except the disabled APIs are available.

- Type: string
- Default value: all REST APIs are enabled by default
- Location: System Property [sys_properties] table

glide.rest.apis.enabled

Controls which REST APIs are available on the instance, along with glide.rest.apis.enabled. The value for this property is a comma-separated list of API names, such as Table API or Aggregate API. If neither this property nor glide.rest.apis.disabled is set, all REST APIs are available. If a particular API is specified in both properties, that API is disabled. If you enable specific APIs, only those APIs are available.

- Type: string
- Default value: all REST APIs are enabled by default
- Location: Add the property to the System Property [sys_properties] table.

glide.rest.choice.allow_non_existing_value

Enables passing non-existing values to a choice field. Does not apply to Change REST API /api/sn_chg_rest/change.

- Type: true | false
- Default value: false

  If **true**, the choice field is set to a passed value, even if the passed value does not exist in the choice field.

- Location: Add the property to the System Property [sys_properties] table.

glide.rest.debug

Logs all stages of REST processing, including processing times.

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- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.rest.replace_request_host_with_property

Ensures that generated links in an API payload, such as links to more pages and reference fields, are based off of the instance address not the request host address.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.rest.serialize.disable_response_stream_buffering

Enables streaming multipart responses immediately rather than buffering responses until complete. This property applies to only REST APIs that support multipart requests, such as the *Batch* API, and instances configured with Application Delivery Controller, version 2 (ADCv2).

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.rollback.version

Controls whether rollback behavior is used (**true**) or not (**false**).

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.rss.max_rows

Controls the maximum number of records returned by the RSS Feed Generator.

- Type: integer
- Default value: 1000
- Location: Add the property to the System Property [sys_properties] table.

glide.sc.reset_cascade

If **true**, forces variable cascading when navigating between pages in an order guide.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.schedules.repeat_nth

Controls how a schedule entry with **Repeats** set to **Monthly** and **Monthly Type** set to **Day of the Week** is defined. Choices are **Week** or **Day**. The **Week** option is defined as choosing a day of the month in the nth week selects the nth day of the month. The **Day** option is defined as choosing the nth day of the month selects the nth day of the month.

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- Type: choice list
- Default value: day
- Location: System Property [sys_properties] table

glide.schedules.fifth

Controls how a schedule entry that selects the fifth occurrence of a day in month behaves in a month containing only four occurrences of the day. Choices are **Last**, **Next**, and **Strict**. The **Last** option selects the last (fourth) occurrence of the day. The **Next** option selects the first day of the next month. The **Strict** option skips the day completely. This property is valid only when the *glide.schedules.repeat_nth* property is set to **Day**.

- Type: choice list
- Default value: last
- Location: System Property [sys_properties] table

glide.script.ccsi.ispublic

Provides privacy control over client-callable script includes that are accessed by public pages. If **false**, all client-callable script includes are private.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.script.dot_walk.enforce_cross_scope_access_all_tables

Used to enforce dot-walk cross-scope access checks on tables where the associated dictionary attribute *enforce_dot_walk_cross_scope_access* is not set.

Important: If *glide.script.dot_walk.log_and_allow_violations* is set to **true**, the value of this property is ignored.

See KB2793170: Dot-Walk Scoping Security Enhancement for more information.

- Type: boolean
- Default value: true for new and zBooted Instances on Australia; not present for instances upgraded to Australia
- Location: Add the property to the System Property [sys_properties] table.

Note: To help prevent insecure configurations, this property cannot be manually added and set to **false**. For assistance, contact customer support.

glide.script.dot_walk.log_and_allow_violations

Allows dot-walk cross-scope access to unauthorized tables and logs the violation.

When set to **true**:

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- JavaScript accessing a caller restricted table without the proper Cross-Scope Privilege (CSP) or Restricted Caller Access (RCA) records via dot-walk will be allowed to proceed
- A log message will be written to the application node log file
- The message may be displayed to the end user if the session is interactive

When set to **false**, system behavior is determined by the *glide.script.dot_walk.enforce_cross_scope_access_all_tables* property and the presence and value of the table attribute *enforce_dot_walk_cross_scope_access* on an individual table.

See KB2793170: Dot-Walk Scoping Security Enhancement for more information.

- Type: boolean
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.script.log_level

Controls the behavior of gs.log. Set this property to **none** to disable Glide script logging, or to **print** to save log data to the file system instead of the database. Use the default value **all** to save all Glide script logs to the database.

- Type: string
- Default value: all
- Location: Add the property to the System Property [sys_properties] table.

glide.script.dot_walk.log_stack_trace_when_blocked

When conditions prevent access to a protected table, a brief info message is displayed in the following format: "An attempt to dot-walk to table {0} present in {1} scope from {2} scope..." where appropriate values for {0}, {1}, and {2} are inserted.

When this property is set to **true**, a full stack trace is included with the log message.

When this property is set to **false**, no stack trace is included with the log message.

See KB2793170: Dot-Walk Scoping Security Enhancement for more information.

- Type: boolean
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.script_processor.admin

Specifies the user role necessary to access the Scripts - Background module. To require administrators to elevate privileges to access the module, set the value to **security_admin**.

- Type: string
- Default value: admin
- Location: Add the property to the System Property [sys_properties] table.

glide.script.use.sandbox

Enables the "script sandbox" feature. The script sandbox is mainly used when executing client-generated scripts such as query conditions and GlideAjax

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expressions. For more information, see Enable script sandbox [Updated in Security Center 1.3].

- Type: true | false
- Default: true
- Location: System Property [sys_properties] table

glide.script.vtable.log.debug

Enables use of debug logs for remote table script definitions. Set this property to **true**. Prolonged use of this property can affect performance, so it is best to set its value to **false** when you finish a debugging session.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.search.suggestions.enabled

Set it to **true** (default) to enable search suggestions, or set it to **false** to disable search suggestions everywhere. For more information about search suggestions, see Enable search suggestions.

glide.secondary.query.sysid

Controls whether a secondary sort using sys_id as a sort key is automatically applied when sorting requested database records on a list. This property is useful when sorting records that have multiple records found for a single value of the primary sort key. Use this property to ensure that the **Next / Previous** buttons on forms display the proper record. If **false**, there is no secondary sort, therefore records with the same primary sort value are returned as they are found in the database and may be inconsistent.

Note:

- Setting this property to **true** may impact the load and sort processes.
- Secondary sorting using the sys_id is not supported by Document Tables and the ElasticSearch integration in Health Log Analytics. Primary sorting is used instead.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.security.auto.resubmit.ajax

Automatically resubmits timed-out Ajax requests.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.security.checkacl.before.setvalue

Controls how the high security setting glide.security.strict.updates processes ACLs. When **true**, the instance checks ACL rules for all columns before applying any updates to a row. When **false**, the instance applies ACL rules as each column is

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processed in alphabetical order. This behavior may result in one update preventing another update from occurring. For example, suppose that you create a custom ACL rule to prevent updates after a record is closed. If you attempt to close an incident and also add information to a custom resolution code field in the same update, the close action is applied first because it is controlled by the [incident.state] column and the custom field by the [incident.u_resolution_code] column. After the instance applies the close action, the custom ACL rule prevents further write updates to the row.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.security.csrf.handle.ajax.timeout

Handles errors for timed out Ajax requests.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.security.csrf.strict.validation.mode

Enforces strict validation on CSRF tokens so that users cannot resubmit a request if the CSRF token does not match.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table
- Instance Security Hardening Settings: CSRF strict validation (instance security hardening)

glide.security.diag_txns_acl

Controls who can view the stats.do, threads.do, and replication.do pages. If **true**, only administrators or users from a known IP address are allowed to view the pages. If **false**, all users have access to the pages.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.
- Instance Security Hardening Settings: Performance monitoring (ACL) (instance security hardening)

glide.security.disable_ui_pages_sysparm_client_script

The system does not evaluate client scripts that are passed in URL parameters in UI pages. If you use URL parameters to load client scripts, you can add and disable this system property. Use this property only while you change the implementation to no longer depend on clients being passed in by URL parameters. Do not keep the system property disabled.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

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glide.security.file.mime_type.validation

Enables (**true**) or disables (**false**) MIME type validation for file attachments.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table
- Instance Security Hardening Settings: Restrict uploaded MIME types

glide.security.granular.create

Requires users to have write access on all individual fields on a table before they can create a record in that table.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.security.manager

Enables more advanced contextual security manager compared with role-based simple security manager. Contextual security manager is aware of system table hierarchy and record context. It better protects data by controlling CRUD via ACL rules on table and field levels. For more information, see Enable the hardened java security manager

- Type: string
- Default: com.glide.sys.security.ContextualSecurityManager
- Location: System Property [sys_properties] table

glide.security.mime_type.aliasset

Creates customized mime type alias sets. For example, `image/png=image/x-png`.

- Type: string
- Location: Add the property to the System Property [sys_properties] table.

glide.security.strict_elevate_privilege

Forces all elevated roles to be treated equally for users with the administrator role. When enabled, administrators must explicitly, manually elevate themselves to any roles that are marked as elevated.

When disabled, administrators need only to manually elevate to the security_admin role. Other roles are automatically granted to administrators.

- Type: true | false
- Default value: **true** for new instances, **false** for upgraded instances
- Location: For new instances, this property is available on the System Property [sys_properties] table. For upgrades, Add the property to the System Property [sys_properties] table.

glide.security.use_csrf_token

Enables usage or a secure token to identify and validate incoming requests. This token is used to prevent Cross Site Request Forgery (CSRF) attacks. For more information, see Enable anti-CSRF token.

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- Type: true | false
- Default: true
- Location: System Property [sys_properties] table

glide.service_portal.search_as_you_type_behavior

Select search suggestions (Suggestions) or type-ahead functionality (Typeahead). For more information about search suggestions, see Enable search suggestions.

glide.set_x_frame_options

Enables (**true**) or disables (**false**) the X-Frame-Options response header to SAMEORIGIN for all UI pages. The X-Frame-Options HTTP response header can be used to indicate whether a browser should be allowed to render a page in a <frame> or <iframe>. Set this property to **true** to avoid clickjacking attacks, by ensuring that CMS content cannot be embedded into other sites.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table
- Instance Security Hardening Settings: Implement the x-frame-options: SAMEORIGIN security header

glide.short_poll_delay

(Chat plugin) Sets the short polling delay, in milliseconds, for XMPP requests. Polling is the method by which the browser gets information from the server to send instant messages in chat.

- Type: integer
- Default value: 1000 (1 second)
- Location: **Social IT** > **Chat Administration** > **Properties**

glide.shortened_journal_length

Sets the number of characters to display as a preview of journal input fields.

- Type: integer
- Default value: 512000
- Location: Add the property to the System Property [sys_properties] table.

glide.smtp.dateformat

Specifies the date format to use for outgoing email notifications

- Type: string
- Default value: date format [sys_user.date_format] listed in the user record of the email sender.
- Location: Add the property to the System Property [sys_properties] table.

glide.smtp.default_retry

Enables (**true**) or disables (**false**) resending email when an unknown SMTP error code is encountered. The instance recognizes only the SMTP error codes defined in the *glide.smtp.defer_retry_ids* property.

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- Type: true | false
- Default value: true
- Location: **System Properties** > **Email**

glide.smtp.defer_retry_ids

Specifies the comma-separated list of SMTP error codes that force the instance to resend email.

- Type: string
- Default value: 421,450,451,452
- Location: **System Properties** > **Email**

glide.smtp.fail_message_ids

Specifies the comma-separated list of SMTP error codes that prevent the instance from resending email.

- Type: string
- Default value: 500,501,502,503,504,550,551,552,553,554
- Location: **System Properties** > **Email**

glide.smtp.timeformat

Specifies the time format to use for outgoing email notifications.

- Type: string
- Default value: time format listed in email sender's user record [sys_user.time_format].
- Location: Add the property to the System Property [sys_properties] table.

glide.soap.allow_null_numeric_output

When **true**, SOAP XML responses return an empty element for numeric fields with no value. When **false**, numeric fields with no value return a value of 0 in the SOAP response.

Note: The property *glide.wsdl.show_nillable* must be **true** to allow null values in SOAP responses.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.soap.default_security_policy

Specifies the name of SOAP security policy the instance uses when enforcing Web Services Security (WSS) for inbound requests.

- Type: string
- Default value: default security policy
- Location: Add the property to the System Property [sys_properties] table.

glide.soap.import_set_insert_serialized

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Controls the processing of web service inserts. If **true**, the instance processes multiple simultaneous inserts one at a time (serially across nodes) to ensure an accurate transform. Serialized processing slows the speed at which the instance processes inserts. If **false**, multiple simultaneous inserts into an import set table result in simultaneous transforms that may produce duplicate target records due to the coalesce value being created at the same time.

Note: Set this value to **false** only to optimize performance when the related transform map does not have a coalesce value that may be present simultaneously.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.soap.request_processing_timeout

Sets the maximum number of seconds that a SOAP request has to finish processing before the connection times out. This property computes a default value from the value of the property *glide.http.timeout* divided by 1000. There might be network infrastructure (such as proxy servers) in place that implements a shorter timeout. In this case, a socket timeout may occur unless this property is set to a shorter value. In general, you should set this property to a value several seconds less than the shortest socket inactivity timeout in effect anywhere in the network path between the client application and the ServiceNow instance.

- Type: integer
- Default value: 175 (value of *glide.http.timeout* divided by 1000)
- Location: System Property [sys_properties] table

glide.source_control.checksum_required

This property allows you to enable optional checksum validations and sanitizations. When set to **true**, continues to throw an error if the checksum validation of application files fails. This action prevents application developers on your instance from importing application files from source control that have been modified outside of an instance.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.source_control.checksum_quick_install

When set to **true**, bypasses the sanitization step(s) if the checksum matches. This action prevents an application developer from waiting for validation/sanitization steps to be processed if application files linked to a source control repository outside of your instance weren't modified.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.source_control.default_branch_name

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Sets the default GIT repository branch to work in for application files linked to source control.

- Type: string
- Default value: sn_instances/<instance_name>
- Location: System Property [sys_properties] table

glide.spell.dictionary.en

Sets the spell checker dictionary used in the system for English users. Dictionaries are available for Brazilian Portuguese (pb.dic), Czech (cs.dic), Dutch (nl.dic), English US (en.dic), English UK (en_uk.dic), Estonian (et.dic), Finnish (fi.dic), French (fr.dic), German (de.dic), Hebrew (he.dic), Hungarian (hu.dic), Italian (it.dic), Polish (pl.dic), Portuguese (pt.dic), Russian (ru.dic), Spanish (es.dic), and Thai (th.dic).

- Type: choice list
- Default value: en.dic (English US)
- Location: System Property [sys_properties] table

glide.spell.dictionary.max_matches

Specifies the maximum number of spelling errors that the spell-check should detect. By default, spell-check finds only 10 spelling errors. The instance ignores any additional errors after reaching the maximum value.

- Type: integer
- Default value: 10
- Location: Add the property to the System Property [sys_properties] table.

glide.split_journal_audit_records

When set to **true**, ensures one-to-one mapping between [sys_journal_field] table and [sys_audit] table records for consistent synchronization. If *glide.history_set.pull_journal_entries_from_journal_table* is set to **true** and there are missing or duplicate comments in the activity stream, setting *glide.split_journal_audit_records* to **true** might resolve the issue. For more details, see Duplicate/Missing Comments in Activity Stream (UI 16) [KB2122007].

- Type: true | false
- Default value: false
- Location: Add a system property to the System Property [sys_properties] table.

glide.stax.allow_entity_resolution

Determines whether XML entities can be expanded during parsing by the streaming parser. For more information, see Disable Entity Expansion within the XMLDocument2 Streaming Parser.

- Type: true | false
- Default: false
- Location: System Property [sys_properties] table

glide.stax.whitelist_enabled

Enables definition of allowed external entities when entity expansion is needed for customizations. If *glide.stax.allow_entity_resolution* is set to true,

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set *glide.stax.whitelist_enabled* to true and define a listing of comma-delimited FQDN in the *glide.xml.entity.whitelist* property. For more information, see Require XMLdoc2 entity validation with allowlist.

- Type: true | false
- Default: true
- Location: System Property [sys_properties] table

glide.sys.activity_using_audit_direct

[Not Supported] Controls whether the record's history is generated using the Audit table (**true**) or not (**false**).

[Required] Set the value to **false** to generate history with History Sets.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.sys.audit_inserts

Specifies whether the Audit table audits inserts (**true**) or not (**false**).

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.sys.date_format

System date format for all users unless overridden in the user record.

- Type: date format
- Default value: yyyy-MM-dd
- Location: **System Properties** > **Basic Configuration U116**

glide.sys.default.tz

System timezone for all users unless overridden in the user's record.

- Type: timezone
- Default Value: none
- Location: **System Properties** > **Basic Configuration UI16**

glide.sys.domain.domain_change_notify

Domain legacy

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.sys.domain.no_change_roles

Domain legacy

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- Type: string
- Default value: This field should be left empty.
- Location: System Property [sys_properties] table

glide.sys.domain.use_record_domain

Domain legacy

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.sys.domain.use_record_domain_for_client_scripts

Domain legacy

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.sys.fencing.restricted_caller_access.invalidation_mode

Controls how the system invalidates Restricted Caller Access records when a source code record, such as a script include, in a cross-scope access table is committed in an update set. For more information about RCA privileges, see Restricted caller access privilege settings.

- Type: string
- Default value: DB_LISTENER
- Valid values:
  - DB_LISTENER: Enables a database listener that monitors update set commits on source code tables and invalidates RCA records at the time of the commits so that cross-scope access is based on the latest source code updates.
  - SCRIPT_ENGINE: If an update set contains a script with changes, the script engine doesn't invalidate associated RCA records.
- Location: Add the property to the System Property [sys_properties] table.

glide.sys.time_format

System time format for all users unless overridden in the user's record.

- Type: time format
- Default Value: HH:mm:ss
- Location: **System Properties** > **Basic Configuration UI16**

glide.sys_reference_row_check

Specifies whether the script conditions of Access Control Rules apply to a table's reference fields (**true**) or not (**false**).

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

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Note: If the *glide.sys_reference_row_check* system property is not present, or has been set to false, script conditions for Access Control Rules are not applied. This means an ACL containing scripted conditions will pass it's check as long as the other ACL criteria are met (such as role requirements).

glide.template.max_context

Specifies the maximum number of templates displayed in a form's context menu. If more than this number are available, users can click **Apply Template** on the context menu to open the reference list of templates.

- Type: integer
- Default value: 15
- Location: System Property [sys_properties] table

glide.transform.reuse_coalesce_field_value

If **true**, avoid re-evaluation of coalesce scripts to get the values.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.translated_html.sanitize_all_fields

If **true**, all translated_html elements are sanitized using an HTML sanitizer. If **false**, an element is sanitized only if the dictionary attribute *html_sanitize* is set to **true**.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.ts.index.attachment.debug

If **true**, enables log messages for exceptions that occur when indexing attachments. You can leave this property enabled during normal operations to capture stack trace information about any exceptions.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ts.index.attachment.list_terms.debug

If **true**, the system logs all indexed terms when an attachment is indexed.

For optimal performance, set this property to **false** during normal operations. Only enable this property when you are actively debugging an issue.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ts.reindex.sys_metadata.after.upgrade

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If **true**, the system automatically reindexes the sys_metadata table after an upgrade, without noticeable performance impact. To disable automatic reindexing, set the value to **false**.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.activity.displayname

Specifies whether the activity formatter shows **name** values (true) or **user_name** values (false).

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.activity.email_roles

Specifies the list of roles (comma-separated) that can view email in the Activity Formatter.

- Type: string
- Default value: itil
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.activity.email.use_display

Specifies whether to display the email address or the user IDs (display value of the User table) in email headers (**true**) or not (**false**). If **true**, the instance searches for a user record with a matching email address. If the instance cannot find a matching user record, it displays the email address.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.activity_stream.form_button

Removes the activity stream button from forms.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.activity_stream.list_button

Removes the activity stream button from lists.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.activity_stream.page_size

Size of pages for Core UI form activity stream. A value of 0 means no paging.

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- Type: integer
- Default value: 0
- Location: Still appears in the System Properties [sys_properties] table, but is no longer available.

glide.ui.activity_stream.scale_animated_gifs

Creates a thumbnail of animated `.gif` files. The maximum dimensions are 525 px width and 350 px height. The animation is not preserved in the thumbnail, but previewing the image displays the animation at its original size.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.ui.activity_stream.scale_images

Creates a thumbnail of large images to display in the activity stream. The maximum dimensions are 525 pixels wide and 350 pixels high. If the user clicks the image or attachment, the preview is at full size.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.activity_stream.style.comments

Changes the color of the left bar in activity stream comments in Core UI.

- Type: color entry, either a name, such as **blue** or a code, such as **#0000FF**.
- Default value: transparent
- Location: System Property [sys_properties] table

glide.ui.activity_stream.style.work_notes

Changes the color of the left bar in activity stream work notes in Core UI.

- Type: color entry, either a name, such as **blue** or a code, such as **#0000FF**.
- Default value: gold
- Location: System Property [sys_properties] table

glide.ui.activity.style.comments

Changes the background color of the activity stream comments in UI15.

- Type: string
- Default value: background-color: background-color: WhiteSmoke
- Location: System Property [sys_properties] table

glide.ui.activity.style.work_notes

Changes the background color of the activity stream work notes in UI15.

- Type: string
- Default value: background-color: LightGoldenRodYellow
- Location: System Property [sys_properties] table

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glide.ui.allow.field.dependency.for.templates

Checks dependency for choice fields at the time of applying template, preventing invalid values to be set to the dependent field. For example, a subcategory field which depends on category field.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.allow_deep_html_validation

Allows administrators to prevent users from saving invalid HTML in a journal field.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.attachment.force_download_all_mime_types

Forces download of all MIME attachment files.

- Type: true | false
- Default value: true for new instances, false for upgraded instances
- Location: System Property [sys_properties] table
- Instance Security Hardening Settings: Restrict Downloadable MIME types

glide.ui.audit_deleted_tables

Comma-separated list of system tables for which the audit history tracks deletions.

- Type: string
- Default value: sys_user, sys_user_group, sys_user_role, sys_user_has_role, sys_user_grmember, sys_group_has_role, sys_security_acl_role
- Location: System Property [sys_properties] table

glide.ui.auto.recovery

Allows users to recover unsaved changes while working in the Studio.

- Type: true | false
- Default value: true
- Location: **Auto Recovery** > **Properties**

glide.ui.auto.recovery.exclude.field.types

Comma-separated list of field types to exclude from automatic recovery.

- Type: string
- Default value: none
- Location: **Auto Recovery** > **Properties**

glide.ui.auto.recovery.unsupported.field.types

Comma-separated list of field types no supported for automatic recovery.

- Type: string
- Default value: password,password2,glide_encrypted,video,user_image,image

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glide.ui.auto.recovery.unsupported.tables

Comma-separated list of tables to exclude from automatic recovery.

- Type: string
- Default value: v_ws_editor
- Location: **Auto Recovery** > **Properties**

glide.ui.auto_req.extend.session

If **true**, enables the user to extend their user session by selecting a homepage refresh time. If **false**, it enforces session timeout. The session timeout value is ignored when the user specifies an automatic refresh value.

For example, if the user selects **5 minutes** for automatic homepage refresh, the session is renewed every five minutes. By adding this property and setting the value to **false**, administrators can force the user session to time out even if the user page refreshes every **x** number of minutes. The user session times out after the value specified in the session timeout, plus the selected refresh value. This property takes effect when the **Remember me** check box is not selected for the user. Tablet and mobile devices do not support this feature.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.breadcrumb_max_entries

Specifies how many choices will be shown in the condition builder breadcrumb.

- Type: integer
- Default value: 10
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.buttons_bottom

Controls whether UI actions appear at both the bottom and top of the form (**true**) or only at the top (**false**). This property only works in a deprecated version of the UI.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.ui.cert_task_activity.fields

Defines which journal field is the task activity field.

- Type: string
- Default value: work_notes
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.chart.bar.horiz.max_col_slant_labels

Sets the maximum number of columns in a horizontal bar chart before slanting (angling) the labels.

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- Type: integer
- Default value: 5
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.chart.height

Specifies the height of a chart in pixels.

- Type: integer
- Default value: 300
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.chart.pie.labels

Enables (**true**) or disables (**false**) labels on pie chart slices.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.chart.pie.labels.max_items

Sets the maximum number of pie chart slice values that can be returned to display their labels.

- Type: integer
- Default value: 8
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.choice.display_none

Controls the label displayed for the empty option in choice fields. Set to **true** to display **None**. When set to **false**, displays the default **--None--** label.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.ui.clickthrough.popup

- For reference fields, enables (**true**) or disables (**false**) display of the pop-up diamond icon for reference fields, and opening a new window when clicking the icon.
- For document ID fields, enables (**true**) or disables (**false**) displaying the information icon and opening a pop-up window with the document's form. To learn more Document ID field.

Note: Related lists do not appear on forms opened in the pop-up window.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.ui.clickthrough.replace

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Enables (**true**) or disables (**false**) both the pop-up and click-through icons for reference fields.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.ui.date_format.first_day_of_week

Specifies which day of the week that weeks start on for calendar reports (1=Sunday, 2=Monday...).

- Type: integer
- Default value: 1
- Location: System Property [sys_properties] table

glide.ui.date_picker.first_day_of_week

Specifies the first (leftmost) day of the week for the date and date/time picker (1=Sunday, 2=Monday...).

- Type: integer
- Default value: 1
- Location: System Property [sys_properties] table

glide.ui.default.applications

Comma-separated list of application names that open by default in the navigation pane when nothing is opened via user preferences. If the property is specified and is blank, no applications are opened in the navigation pane when no applications are opened via user preferences. If the property is not specified, the first application that is authorized for the user opens if no applications are opened via user preferences.

- Type: string
- Default value: first authorized application for the user
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.dirty_form_support

Enables (**true**) or disables (**false**) display of a confirmation message when a form has unsaved changes and the user leaves the form through any means except a submit (such as using the green back arrow, any form button, or other). This property is not supported in Safari.

- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.email.composer.enabled_plugins

These plugin options are for Seismic Email Client. Removing plugins could cause undesirable side effects.

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- Type: string
- Default values: link lists advlist table powerpaste searchreplace preview fullscreen placeholder readonlynoborder code image align_listitems emoticons anchor charmap media
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.email.composer.toolbar

These toolbar options are for Seismic Email Client.

- Type: string
- Default values: newdocument bold italic underline | strikethrough alignleft aligncenter alignright alignjustify | blocks fontfamily fontsize table cut copy paste | pastetext searchreplace bullist numlist outdent indent blockquote | undo redo link unlink code forecolor backcolor removeformat | hr visualblocks preview subscript superscript charmap image media fullscreen
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.encode_module_uri

Enables (**true**, the default) or disables (**false**) encoding of module URIs in the navigation pane. For information about how ServiceNow encodes module URIs, see Encoding module URIs.

glide.ui.escape_form_message

Specifies whether strings in `GlideForm` functions are sanitized to remove unwanted code (true) or not (false).

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.escape_gwindow_message

Specifies whether strings in `GlideWindow` functions are sanitized to remove unwanted code (true) or not (false).

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.export.choice_list_max_characters

Sets the maximum number of characters that will be included from a condition field type in an export to Microsoft Excel, as well as the maximum number of characters displayed in the list view condition builder in Core UI. (Note: This property has no effect on the length of condition field values in tables.)

- Type: integer
- Default value: 80
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.filter.first_day_of_week

Identifies the first day of the calendar week for the company. By default, the start of the week is Monday, meaning that the calendar week begins with Monday and ends with Sunday. To change this behavior, add the property

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glide.ui.filter.first_day_of_week to the instance as an integer property. Set the value to the integer corresponding with the day of the week that the calendar begins on, where 1 is Sunday, 2 is Monday, and so on. The function impacts all charts and calculations where the day of the week is used as a parameter.

- Type: integer
- Default value: 2
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.first.field.reference

Enables (**true**) or disables (**false**) having the first column in a list always link to the underlying record, even if it is a reference field. For example, if the first column on an Incident list is **Assigned to**, that value links to the Incident if this property is set to **true**.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.form_annotations

Enables (**true**) or disables (**false**) form annotations, which allow you to add Custom, Section Separator, and Line Separator to a form.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.form_multiple_splits

Enables (**true**) or disables (**false**) multiple splits and end splits in the form layout configuration slushbucket.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.gauge.view

Defines which view you want to be the default for homepage gauges.

- Type: string
- Default value: portal
- Location: System Property [sys_properties] table

glide.ui.glide_list.start.locked

Controls whether a glide_list (like the watch list) starts out locked (**true**) or unlocked (**false**) on a form.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.goto_use_contains

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Controls whether the **Go to** navigation performs a "contains" query (**true**) or a "greater than" query (**false**) by default.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.homepage.parallel

Enables (**true**) or disables (**false**) use of parallel rendering.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.homepage.parallelism

Sets the maximum number of threads that should cooperate on rendering any given homepage.

- Type: integer
- Default value: 2
- Location: System Property [sys_properties] table

glide.ui.homepage.preview

Enables (**true**) or disables (**false**) displaying the preview icon for lists on the homepage.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.html.editor

Specifies which HTML field editor to use, TinyMCE or htmlArea (legacy).

- Type: string
- Default value: tinymce
- Location: **System Properties** > **UI Properties**

glide.ui.html.editor.default_target_link

Enables you to set a default target value for links in the TinyMCE.

- Type: string
- Default value: ''
- Location: System Property [sys_properties] table

glide.ui.html.editor.extended_valid_elements

Defines which elements remain in the TinyMCE text when the editor saves. This functionality can be useful to add or override specific elements that should be kept.

- Type: string
- Default value: blank
- Location: System property [sys_properties] table

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glide.ui.html.editor.toolbar.line1

Configures the editing toolbar (first line) for HTML fields when TinyMCE is enabled. The **spellchecker** tool is not supported in Core UI or UI15.

- Type: string
- Location: **System Properties** > **UI Properties**

glide.ui.html.editor.toolbar.line2

Configures the editing toolbar (second line) for HTML fields when TinyMCE is enabled. The **spellchecker** tool is not supported in Core UI or UI15.

- Type: string
- Location: **System Properties** > **UI Properties**

glide.ui.html.editor.v4.paste.html_import

Controls how content being pasted from sources other than Microsoft Word is filtered. This includes content copied from TinyMCE itself.

- Type: choice list
- Default value: clean
- Location: System Property [sys_properties] table

glide.ui.html.image.allow_url

Enables (**true**) or disables (**false**) uploading an image via URL from HTML Fields.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.ui.html.editor.remove_trailing_brs

Specifies whether an empty line containing a `<br>` tag is converted to a `<div> </div>` tag for TinyMCE HTML fields. If **true**, the tag is converted. If **false**, the tag is left as `<br>`.

- Type: true | false
- Default value: true
- Location: **System Properties** > **UI Properties**

glide.ui.html.toolbar

Configures the editing toolbar for HTML fields.

- Type: string
- Default value: list of buttons
- Location: **System Properties** > **UI Properties**

glide.ui.incident_activity.fields

Defines what fields are visible in the activity formatter. If the activities are customized, the system updates this property automatically.

- Type: string
- Default value: list of fields
- Location: **System Properties** > **UI Properties**

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glide.ui.incident_activity.max_addresses

Specifies the maximum number of addresses to list in an email audit record. If the number of addresses exceeds this limit, the instance truncates the list after the maximum value and displays an ellipsis character (...).

- Type: string
- Default value: 5
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.incident_alert_activity.fields

Incident communication plan activity formatter fields — the list of fields tracked from the Incident Communication Plan form in the activity formatter.

- Type: string
- Default value: opened_by, work_notes, comments, severity, estd_distruption_time, actual_disruption_time
- Location: System Property [sys_properties] table

glide.ui.jelly.js_interpolation.protect

Enables or disables interpolation protection. If enabled, potentially dangerous Jelly expressions are wrapped with a filter that escapes the results or generates a SecurityException for possible security issues. For more information, see Enable Jelly JS interpolation protection.

- Type: true | false
- Default value: true
- Location: **System Properties** > **All Properties**

glide.ui.jelly.js_interpolation.protect_nested_expressions

Enables or disables interpolation protection specifically for nested Jelly expressions. For more information, see Enable Jelly JS interpolation protection for nested expressions.

- Type: true | false
- Default: true
- Location: System Properties [sys_properties] table

glide.ui.journal.use_html

Specifies whether TinyMCE is available for journal fields (**true**) or not (**false**).

- Type: true | false
- Default value: false

glide.ui.js_error_notify

Displays client script errors to users with the **client_script_admin** role. Also displays a generic error message to other users who encounter a client script error.

- Type: true | false
- Default value: true
- Location: **System Properties** > **All Properties**

glide.ui.label.enable

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Enables (**true**) or disables (**false**) using labels, such as Most Active, Most Recent, or user-created.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.m.clear_pasteboard_when_backgrounded

Clears the copy/paste clipboard when the application enters the background.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table. In Categories, add the mobile_post_auth category.

glide.ui.max_calendar_duration

Maximum number of days that a single calendar report entry can display.

- Type: integer
- Default value: 90
- Range of possible values: 90 to 400
- Location: System Property [sys_properties] table

glide.ui.max_calendar_records

Maximum number of records saved in a calendar report.

- Type: integer
- Default value if the property is not configured: 10,000
- Location: System Property [sys_properties] table

glide.ui.m_agents

Comma-separated list of browser agents considered as mobile browsers for the Smartphone Interface. These browsers are directed to the mobile pages instead of the full browser pages.

- Type: string
- Default value: iphone,android_phone,IEMobile,Windows Phone,iPod,Windows CE,BlackBerry,BB10
- Location: System Property [sys_properties] table

glide.ui.max_ref_dropdown

Maximum number of records for a reference field that is displayed as a choice list. If the number of available records is greater than this value, the field appears as a reference field, not as a choice list.

- Type: integer
- Default value: 25
- Location: System Property [sys_properties] table

glide.ui.mentions.default_limit

Number of users with same name displayed in Activity Stream Compose editor.

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- Type: integer
- Default value: 5
- Location: System Property [sys_properties] table

glide.ui.mobile_agents

Comma-separated list of browser agents considered as mobile browsers for the Legacy Smartphone Interface. These browsers are directed to the mobile pages instead of the full browser pages.

- Type: string
- Default value: iPod,Windows CE,BlackBerry,Android,Opera Mini,IEMobile,Windows Phone,iphone
- Location: System Property [sys_properties] table

glide.ui.nav.stripe.select.maxchars

Numerical character limit for list menu choices within the nav stripe. The nav stripe appears at the top of the page when using UI11.

- Type: integer
- Default value: none
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.personalize_form

Enables the Personalize Form menu.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.personalize_form_role

Determines which roles can access the Personalize Form menu.

- Type: string
- Default value: none
- Location: System Property [sys_properties] table

glide.ui.polaris.experience

Enables the Next Experience user interface, landing page, and Unified Navigation. For more information, see Next Experience UI.

This property does not affect anything in workspaces, such as Platform Analytics Components. Workspaces, UI Builder, and related features are always enabled.

- Type: true | false
- Default value: true on new instances, false on upgrades from Tokyo or earlier.
- Location: The System Property [sys_properties] table

glide.ui.polaris.global_search

Toggles the Next Experience search function.

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- Type: true | false
- Default value: true when *glide.ui.polaris.experience* is true.
- Location: The System Property [sys_properties] table

glide.ui.polaris.history.url.param_blocklist

URL parameters that are excluded when the system identifies and clears duplicate URLs from the history. This property applies only to the Next Experience Unified Navigation, which is enabled when *glide.ui.polaris.experience* is true.

- Type: string
- Default value: ["tinyId"]
- Location: The System Property [sys_properties] table

glide.ui.polaris.list_style.enable_highlighted_value_style

Enables highlighted value style on list cells. This property applies only when *glide.ui.polaris.experience* is true.

- Type: true | false
- Default value: true when *glide.ui.polaris.experience* is true.
- Location: The System Property [sys_properties] table

glide.ui.polaris.login.show_illustrations

Enables display of illustrative graphics on the stylized login page. This property applies only when *glide.ui.polaris.experience* is true.

- Type: string
- Default value: true when *glide.ui.polaris.experience* is true.
- Location: The System Property [sys_properties] table

glide.ui.polaris.menus

Toggles the Unified Navigation menus in the header. This property applies only when *glide.ui.polaris.experience* is true, meaning that Next Experience Unified Navigation is enabled.

- Type: true | false
- Default value: true when *glide.ui.polaris.experience* is true.
- Location: The System Property [sys_properties] table

glide.ui.reference.readonly.clickthrough

Enables (**true**) or disables (**false**) reference pop-ups on read-only reference fields. Reference pop-ups and click-throughs are hidden by default if a client script, UI policy, or ACL makes the field read-only. Being able to see or click through to the target record is unrelated to the reference field being writable.

If **false**, the administrator can override the system setting for a specific field by adding the *readonly_clickthrough=true* attribute to the dictionary entry.

- Type: true | false
- Default value: false
- Location: **System Properties** > **UI Properties**

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glide.ui.remember_view

Enables (**true**) or disables (**false**) use of user preferences for the last view.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.remember.me.default

Controls whether the **Remember me** check box is selected (**true**) or cleared (**false**) by default.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.report.extend_calendar_choices

Controls which field styles are applied during calendar highlighting. If **false**, field styles in only the Task table are used. If **true**, the calendar first uses field styles from the table that the report is based on. If no applicable styles exist in that table, the calendar uses field styles from the Task table.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.report.old_report_builder

Enables (**true**) or disables (**false**) use of the old report builder UI.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.section508

Enables (**true**) or disables (**false**) rendering of alternate text in place of images.

- Type: true | false
- Default value: false
- Location: **System Properties** > **UI Properties**

glide.ui.show_live_feed_activity

Enables (**true**) or disables (**false**) live feed for a record in the activity formatter.

- Type: true | false
- Default value: false
- Location: **System Properties** > **UI Properties**

glide.ui.show_template_bar

Controls whether the template bar can be displayed on the specified table. For example: `glide.ui.show_template_bar.incident = false`.

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- Type: true | false
- Default value: true
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.session_timeleft

Sets how much time, in minutes, users have to extend a session before it times out due to inactivity.

- Type: integer
- Default value: 2
- Location: System Property [sys_properties] table

glide.ui.active.session.life_span

Sets the maximum session time for sessions regardless of activity, in minutes.

- Type: integer
- Default value: 0
- Location: System Property [sys_properties] table

glide.ui.session_timeout

Sets the inactive session timeout, in minutes.

- Type: integer
- Default value: 30
- Location: System Property [sys_properties] table

glide.ui.stream_icon

Toggles the displaying of the activity stream button on the specified table. For example: `glide.ui.stream_icon.hr_case = true`.

- Type: true | false
- Default value: false

glide.ui.syntax_editor.context_menu

Enables disables the context menu in script editor.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.syntax_editor.linter.eslint_config

Defines linting configurations using the ESLint utility.

- Type: string
- Default value: All recommended ESLint rules are enabled, except no-undef, no-unused-vars, no-empty, and semi.
- Location: System Property [sys_properties] table

glide.ui.table.labels

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Controls whether the system uses verbose labels for table names (**true**) or literal table names (**false**).

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.ui.tablet_enabled

Enables (**true**) or disables (**false**) the tablet UI.

- Type: true | false
- Default value: true
- Location: **System Properties** > **Tablet UI Properties**

glide.ui.tablet_agents

Uses the tablet UI if one of the specified strings (comma-separated) appears in the browser user_agent header.

- Type: string
- Default value: ipad,android_tablet
- Location: **System Properties** > **Tablet UI Properties**

glide.ui.tablet.title

Displays the specified text as a brief page title for tablet UI.

- Type: string
- Default value: ServiceNow
- Location: **System Properties** > **Tablet UI Properties**

glide.ui.tablet.title.ios_webapp

Displays the specified text as the default home screen icon label used in iOS version 6 and later.

- Type: string
- Default value: ServiceNow
- Location: **System Properties** > **Tablet UI Properties**

glide.ui.task.insert

Enables (**true**) or disables (**false**) the use of **Insert** and **Insert and Stay** options on tables derived from Task (such as Incident, Change, and Problem).

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.ui.textarea.character_counter

When **true**, displays a count of available characters for journal and multi-line text fields.

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- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.ui.textarea_initial_rows

Sets the number of rows initially displayed for multiline form elements. When the element is selected for editing, it is expanded. Set this value to 0 or blank to ignore this property. This functionality is used to conserve space on a form when multiline elements take up too much space.

- Type: integer
- Default value: 0
- Location: System Property [sys_properties] table

glide.ui.update_on_iterate

Controls whether updates are saved (**true**) or discarded (**false**) when a user clicks the blue arrows on a form.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.ui.ui_policy_debug

Enables (**true**) or disables (**false**) logging of UI policy processing in the JavaScript debug window

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ui.user_cookie.life_span_in_days

Sets the expiration time period for the 'remember me' cookie.

Note: When a user accesses an instance with 'remember me' enabled, the access resets the cookie expiration period until the maximum (glide.ui.user_cookie.max_life_span_in_days) life span limit is reached.

- Type: integer
- Default value: 15 (days)

Note: Maximum value 30.

- Location: System Property [sys_properties] table

glide.ui.user_cookie.max_life_span_in_days

Sets a maximum cap for the *glide.ui.user_cookie.life_span_in_days* cookie to expire before forcing a user to re-authenticate into the instance.

- Type: integer
- Default value: 30 (days)

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Note: Maximum value 365 days.

- Location: System Property [sys_properties] table

glide.ui.welcome.profile_link

Enables (**true**) or disables (**false**) allowing users to click their name in the welcome message and see their user profile.

- Type: true | false
- Default value: In new instances **true**. In existing instances **false**.
- Location: System Property [sys_properties] table

glide.ui11.show_switch_link

This property only affects a deprecated version of the UI. It is no longer supported. Displays (**true**) or hides (**false**) a banner link for switching between the UI11 and legacy interfaces.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

glide.update.suppress_update_version

Comma-separated list of tables for which updates are not tracked in the Versions [sys_update_version] table. You cannot compare and revert versions for tables in this list.

- Type: string
- Default value: sys_user,sys_import_set_row
- Location: Add the property to the System Property [sys_properties] table.

glide.user.default_password

Default password for new users created from incoming email. Users must reset the password at first login.

- Type: string
- Default value: password
- Location: **System Properties** > **Email**

glide.userauthgate.extauth.check

Enables (**true**) or disables (**false**) the *`UserAuthenticationGate`* checks for both external and internal authentication mechanisms.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.user.trusted_domain

Comma-separated list of trusted domains for which the instance automatically creates a guest user based on incoming emails. Use an asterisk (*) to trust all domains. If an email is not from a trusted domain, the instance processes the inbound email as a "guest user" but does not create a guest user in the instance.

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- Type: string
- Default value: *
- Location: **System Properties** > **Email**

glide.workflow.model.cache.max

Maximum number of models held in the workflow cache. You must restart the instance after changing this property to apply the change.

- Type: integer
- Default value: 300
- Location: **Workflow** > **Properties**

glide.wsdl.definition.use_unique_namespace

Enables (**true**) or disables (**false**) use of a unique WSDL namespace value when publishing a ServiceNow table through web services. If **true**, the WSDL target namespace is www.service-now.com/<table name>.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.wsdl.maximum_hierarchy

Maximum number of hierarchical levels returned in a WSDL when hierarchical SOAP web service is enabled. This property has a maximum value of 3.

- Type: integer
- Default value: 3
- Location: Add the property to the System Property [sys_properties] table.

glide.wsdl.show_nillable

Enables (**true**) or disables (**false**) allowing a WSDL element to be valid if it has no element content despite a {content type} which would otherwise require content.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.ws.use_row_lock

If **true**, avoid using the current web service lock that applies before running the transform. Use the row lock that applies after the OnStart method.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

glide.xmlhttp.excessive

Sets the number of items visible in the Available half of a many-to-many or one-to-many collection box.

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- Type: integer
- Default value: 100
- Location: Add the property to the System Property [sys_properties] table.

glide.xmlprocessor.use_unload_format

Enables (true) or disables (false) unloading the XML using the display_value format. To unload using this format, add the parameter *useUnloadFormat=true* to the request URL.

- Type: true | false
- Default value: false
- Location: Add the property to the System Property [sys_properties] table.

google.maps.auto_close

If **true**, automatically closes the current info window before opening a new one. Clear the check box to enable multiple pop-up windows to remain open at once.

- Type: true | false
- Default value: true
- Location: **System Properties** > **Google Maps**

google.maps.client

Client ID for Google Maps API for Business. This client ID authorizes production use of Google Maps API for Business. By default, this ID is provided by ServiceNow. ServiceNow may require you to purchase a separate Client ID based on your usage.

- Type: string
- Default value: gme-servicenow
- Location: **System Properties** > **Google Maps**

google.maps.key

Map key from Google, tied to the URL of the server. This key is the private key authorizing development use of Google Maps.

- Type: string
- Default value: empty
- Location: **System Properties** > **Google Maps**

google.maps.latitude

Starting latitude of the map. This value determines the starting latitude displayed in Google Maps.

- Type: string
- Default value: 36.008522
- Location: **System Properties** > **Google Maps**

google.maps.longitude

Starting longitude of the map. This value determines the starting longitude displayed in Google Maps.

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- Type: string
- Default value: -95.221764
- Location: **System Properties** > **Google Maps**

google.maps.max_items

Maximum number of items to display on the map. This setting determines how many icons can be displayed on a map.

- Type: integer
- Default value: 500
- Location: **System Properties** > **Google Maps**

google.maps.table

Table used by the map. This setting names the table containing the name, longitude, and latitude fields.

- Type: string
- Default value: cmn_location
- Location: **System Properties** > **Google Maps**

google.maps.zoom

Starting zoom level of the map (1 is the lowest).

- Type: integer
- Default value: 4
- Location: **System Properties** > **Google Maps**

help.base.default

(Context-Sensitive Help plugin) Sets the base URL for help contexts in which ServiceNow wiki is **false** and an absolute URL is not specified.

- Type: string
- Default value: http://servicenow.com/docs/?context=
- Location: System Property [sys_properties] table

help.base.servicenow

(Context-Sensitive Help plugin) Sets the base URL for help contexts in which ServiceNow wiki is **true**

- Type: string
- Default value: http://servicenow.com/docs/?context=
- Location: System Property [sys_properties] table

mid.server.rba_debug_powershell

Enables probe-level debugging for PowerShell probes. With this property enabled, PowerShell probes write detailed activity information to the MID Server log.

- Type: true | false
- Default value: false
- Location: **Orchestration** > **MID Server Properties**

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mid.version.override

Sets an override condition for the current version for all MID Servers in your environment. For more information on version control, see MID Server version control properties.

- Type: string
- Default value: none (If this property is left empty, the MID Servers get their version information from the mid.buildstamp property.)
- Location: Add the property to the System Property [sys_properties] table.

par_vis_config.data_source.can_select_indicator

Specifies roles (comma-separated) which can select indicators as data sources from the Data Visualization configuration panel. If empty, all users can select the indicator sources that they have access to.

- Type: string
- Default value: empty
- Location: System Property [sys_properties] table

par_vis_config.live_refresh_rate_min_value

Specifies the minimum interval in seconds for the **Live refresh rate** setting in the Data Visualization configuration. If set, a user can still set an empty or 0 value.

- Type: integer
- Default value: 30 (seconds)
- Location: System Property [sys_properties] table

par_viz.table_data.max_data_points

Maximum number of data points for data visualization charts based on table sources.

- Type: integer
- Default value: 10000
- Location: System Property [sys_properties] table

par_viz.table_data.max_groups

Maximum number of groups to be displayed for data visualization charts based on table sources.

- Type: integer
- Default value: 50
- Location: System Property [sys_properties] table

password_reset.activity_monitor.incident_threshold

Specifies the maximum number of lockouts before an alert is issued.

- Type: integer
- Default value: 10 (lockouts)
- Location: System Property [sys_properties] table

password_reset.activity_monitor.incident_window

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Specifies the amount of time that is used for recording and counting the number of user lockouts.

- Type: integer
- Default value: 60 (minutes)
- Location: **Password Reset** > **Properties**

password_reset.captcha.ignore

Enables and disables CAPTCHA functionality.

The password reset application uses Google re-CAPTCHA as the default CAPTCHA service. To use the base system CAPTCHA, change the *password_reset.captcha.google.enabled* system property to *false*.

- Type: true | false
- Default value: false
- Location: **Password Reset** > **Properties**

password_reset.qa.num_enroll

Specifies the number of questions a user must select and answer to be enrolled in the password reset program.

Note: This security question property can be overridden by adding a value for the *num_enroll* parameter in a security question verification.

- Type: integer
- Default value: 5 (questions)
- Location: **Password Reset** > **Properties**

password_reset.qa.num_reset

Specifies the number of questions a user must answer to verify their identity during the password reset process.

Note: This security question property can be overridden by adding a value for the *num_reset* parameter in a security question verification.

- Type: integer
- Default value: 3 (questions)
- Possible values: integers that are less than the number specified for the *num_enroll* property.
- Location: **Password Reset** > **Properties**

password_reset.request.max_attempt

Specifies the number of password reset attempts a user has before they are locked out for a period determined by the value in *max_attempt_window*.

- Type: integer
- Default value: 3 (attempts)
- Location: **Password Reset** > Properties

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password_reset.request.max_attempt_window

Specifies how long a user is locked out or prevented from changing their password after trying the maximum number of times.

- Type: integer
- Default value: 1440 (minutes)
- Location: **Password Reset** > **Properties**

password_reset.request.retry_window

Specifies the length of time before the count for password reset attempts refreshes.

- Type: integer
- Default value: 1440 (minutes)
- Location: **Password Reset** > **Properties**

password_reset.request.success_window

Specifies how long a user is locked out after they have successfully reset their password.

- Type: integer
- Default value: 10 (minutes)
- Location: **Password Reset** > **Properties**

password_reset.sms.default_complexity

Specifies the number of characters in the SMS code that are required for a user to reset their password.

Note: This SMS code property can be overridden by adding a value for the complexity parameter in an SMS code verification.

- Type: integer
- Default value: 4 (digits)
- Location: **Password Reset** > **Properties**

password_reset.sms.expiry

Specifies the amount of time, in minutes, until the SMS code sent to the user expires.

Note: This SMS code property can be overridden by adding a value for the expiry parameter in an SMS code verification.

- Type: integer
- Default value: 5 (minutes)
- Location: **Password Reset** > **Properties**

password_reset.sms.max_per_day

Specifies the maximum number of SMS codes that are sent to a user within one 24-hour period. When a user clicks the **Send Verification Code** button, the 24-hour period begins.

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Note: This SMS code property can be overridden by adding a value for the *max_per_day* parameter in an SMS code verification.

- Type: integer
- Default value: 10 (per day)
- Location: **Password Reset** > **Properties**

password_reset.sms.pause_window

Specifies the amount of time to pass before another SMS code can be sent to a user.

Note: This SMS code property can be overridden by adding a value for the *pause_window* parameter in an SMS code verification.

- Type: integer
- Default value: 2 (minutes)
- Location: **Password Reset** > **Properties**

password_reset.wf.refresh_rate

Specifies how often to check the status of the workflow. Represented in the password reset process progress bar.

- Type: integer
- Default value: 90000 (milliseconds)
- Location: **Password Reset** > **Properties**

password_reset.wf.timeout

Specifies the maximum wait time, in milliseconds, for the workflow to execute. The workflow is triggered during the password reset request when the user clicks **Submit**.

- Type: integer
- Default value: 500 (milliseconds)
- Location: **Password Reset** > **Properties**

promin.show_records.limit

Specifies the maximum number of records that can be returned for an arc or node for the **Show Records** link to display. If more records are returned than the set limit, the link does not display.

- Type: integer
- Default value: 100,000 (records)
- Location: Add the property to the System Property [sys_properties] table.

remember_me.max_duration_in_days

Sets a maximum cap for the *remember_me_cookie.duration_in_days* cookie to expire before forcing a user to reauthenticate into the instance.

- Type: integer
- Default value: 30 (days)

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Note: Maximum value 365 days.

- Location: System Property [sys_properties] table

remember_me_cookie.duration_in_days

Sets the default expiration for the "remember me" cookie. When a user logs in with "remember me" enabled, each login within the expiration limit resets the expiration period.

- Type: integer
- Default value: 15 (days)

Note: Maximum value 30 days.

- Location: System Property [sys_properties] table

sa_analytics.aggregation.include_service

Includes all CIs for alert aggregation. If **false**, includes only CIs not related to a business service.

- Type: true | false
- Default value: true
- Location: **Alert Aggregation and RCA** > **Properties**

sa_analytics.aggregation_enabled

Enables alert aggregation. Enables aggregation of correlated alerts for services and alert groups.

- Type: true | false
- Default value: true
- Location: **Alert Aggregation and RCA** > **Properties**

sa_analytics.alert.severity_threshold

Alert severity threshold, above which alerts are included in analysis. Only alerts with severity that is above the threshold are included in alert aggregations and root cause CI analysis.

- Type: choice list
- Default value: Info
- Other possible values:
  - Warning
  - Minor
  - Major
  - Critical
- Location: **Alert Aggregation and RCA** > **Properties**

sa_analytics.rca_enabled

Enables (**true**) or disables (**false**) root cause analysis for business services. Enables RCA for alerts associated with business services, to identify root-cause CIs.

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- Type: true | false
- Default value: false
- Location: **Alert Aggregation and RCA** > **Properties**

sa_analytics.rca.input_purge_days

Purge staging tables (in days). Number of days that RCA input is kept before it is purged.

- Type: integer
- Default value: 90
- Range of possible values: 30-180
- Location: **Alert Aggregation and RCA** > **Properties**

sa_analytics.rca.learner_group_interval_secs

Time interval (in seconds) criteria for grouping alerts. Interval that alerts must be created in, to be included in a group.

- Type: integer
- Default value: 300
- Range of possible values: 60-900
- Location: **Alert Aggregation and RCA** > **Properties**

sa_analytics.rca.learner_query_interval_secs

Length of time period (in seconds) from which to include alerts for analysis. Period of past time from which to include alerts in alert aggregation analysis.

- Type: integer
- Default value: 86400
- Range of possible values: 43200-86400
- Location: **Alert Aggregation and RCA** > **Properties**

sa_analytics.rca.output_purge_days

Number of days that RCA output is kept before it is purged.

- Type: integer
- Default value: 3
- Range of possible values: 3-5
- Location: System Property [sys_properties] table

sa_analytics.rca.query_probability_threshold

Confidence score % threshold, above which RCA correlated alert groups appear in the Event Management dashboard and alerts console. Confidence score that must be met by RCA correlated alert groups before the groups are displayed on the Event Management dashboard and alerts console.

- Type: integer
- Default value: 0
- Range of possible values: 0-100
- Location: **Alert Aggregation and RCA** > **Properties**

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sam.install_deletion_deadline

Defines the number of days after which a software install is deleted if not discovered with the configuration item. Use a value that is greater than the number of days between consecutive Discovery runs.

- Type: integer
- Default value: 7
- Location: System Property [sys_properties] table

security.list.internal.domains

Other domains (excluding the ones in the comma-separated list in this property) are classified as external email domains. The counts of incoming emails from these external domains display in the External Incoming Emails metric in the Instance Security Center.

- Type: choice string
- Default value: None
- Other possible values: Comma-separated list of all internal email domains in the organization.
- Location: System Property [sys_properties] table

sn_acc_vis_content.set_assigned_to

Determines if Assigned To attribute is overridden by ACC-V or not.

- Type: Boolean
- Default value: false

sn_acc_vis_content.assigned_to_user_order

Defines the source of Assigned To user and its priority for ACC-V. The order of the username sources defined is used to define the priority based on which the Assigned To user is set for a computer CI. For example, computer_system_username, logged_in_users. These two different sources decide which user name derived from which source takes preference in deciding the attribute Assigned To for a computer CI.

computer_system_username: The source is derived from the native command for Windows machine wmic computersystem get user username.

Logged_in_users: Source is OsQuery which gets logged in users from the OsQuery table.

- Type: choice string
- Default value: computer_system_username, logged_in_users

sn_acc_vis_content.persist_os_user_type

Persists the type of users that you are interested in for ACC-V.

- Type: Comma separated parameter
- Default value: local,system

sn_acc_vis.column_name_for_user_mapping

The name of the column in the Agent Client Collector Discovery result containing user identity information, such as a username or an email address. This property

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maps a discovered device to a user record (sys_user), which is then used to set the **Assigned to** field in the Computer CI (cmdb_ci_computer) table. If the field is empty, the discovered device is mapped based only on the username and not the domain.

- Type: String
- Default value: <empty>

sn_agent.disco_minimum_threshold_for_rediscovery_minutes

The minimum number of minutes since the last Enhanced Discovery on a given IP before a rediscovery can be triggered. This helps to prevent too frequent Enhanced Discovery in cases where a network intermittently has a break or a laptop is rebooted repeatedly.

- Type: Integer
- Default value: 60

sn_agent.disco_disable_ci_clobber_of_agentless_disco

If true, checks whether CI already exists discovered with matching criteria (discovery_source=ServiceNow) and instead of re-discovering, links the agent record to existing CI.

- Type: Boolean
- Default value: true

sn_agent.disco_ci_clobber_of_agentless_disco_threshold_days

The maximum number of days since an existing CI has been discovered using Agent-less Discovery where the existing CI links instead of re-discovering it using the Agent.#This takes effect when disco_disable_ci_clobber_of_agentless_disco is true and it has been an extended period of time (over 14 days, by default) since a non-ACC discovery_source (like ServiceNow) has discovered the CI. Once this threshold is exceeded, Enhanced Discovery is allowed to execute and clobber an existing CI regardless of whether a CI has been previously discovered by a non-ACC discovery_source. This enables the most recent discovered data to be present in the CMDB.

- Type: Integer
- Default value: 14

sn_agent.host_data_collection.disable_when_container

If true, when host data collection occurs and it is found that the Agent Client Collector is running in a container, the incoming data will not be processed and the host data collection status will be set to disabled.

- Type: Boolean
- Default value: true

sn_acc_vis_content.persist_sam_usage_metrics

Controls how SAM usage metrics are stored based on reclamation rules. If **true**, store usage according to defined reclamation rules and store usage for all licensable software for which no reclamation rule is defined. If **false**, store SAM usage only according to defined reclamation rules.

- Type: Boolean
- Default value: true

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sn_analytics_list.pagination_max_value

Maximum number of records per page in a List visualization in Platform Analytics experience.

Danger: Raising this property above 100 might lead to memory issues.

- Type: integer
- Default value: 100
- Location: System Property [sys_properties] table

sn_app_insights.minutes_between_triggers

How many minutes to wait before sending out a notification for an identical metric trigger.

- Type: Integer
- Default value: 30

sn_app_insights.p1_predict_factor.semaphores

The normalizing factor for data for the semaphores metric in the p1 prediction model.

- Type: Integer
- Default value: 21

sn_app_insights.p1_predict_factor.sys_load

The normalizing factor for data for the sys_load metric in the p1 prediction model.

- Type: Integer
- Default value: 923

sn_app_insights.p1_predict_max_cooldown

The number of consecutive "no p1 predicted" minutes required to exit the p1 alert state.

- Type: String
- Default value: 5

sn_app_insights.p1_predict_threshold

The minimum confidence required for the p1 predict model to predict a p1 alert state.

- Type: Integer
- Default value: 90

sn_bm_client.dashboard_display_unit

Time unit to use for KPI values on the Benchmarks dashboard. Options are **Hours** or **Days**.

- Type: choice list
- Default value: Days
- Location: System Property [sys_properties] table

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sn_chg_soc.change_soc_initial_limit

Defines the number of change_request records to display on load of the Change Schedule.

- Type: Integer
- Default value: 40
- Location: System Property [sys_properties] table

sn_chg_soc.change_soc_scroll_load_limit

Defines the number of change_request records to display as the Change Schedule is scrolled.

- Type: Integer
- Default value: 20
- Location: System Property [sys_properties] table

sn_chg_soc.change_soc_total_limit

Defines the total number of change_request records that can be displayed on a Change Schedule.

- Type: Integer
- Default value: 1000
- Location: System Property [sys_properties] table

sn_chg_soc.landing_page.pinned_notification

Shows a message for pin or unpin a change schedule.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

sn_chg_soc.schedule_window_days

Specifies the number of days to be factored before and after the respective start/end of a change_request record when displaying blackout and maintenance window spans on the Change Schedule page.

- Type: Integer
- Default value: 30
- Location: System Property [sys_properties] table

sn_disco_cd.scheduled_job_time_out_in_mins

This property sets the value for the maximum run time of the scheduled job for Cloud Resources in minutes.

- Type: integer
- Default value: 120

sn_disco_certmgmt.cert_task_default_approval_group

This property is used to set default Approval Group name for Certificate Inventory and Management for manual approval processes for requesting new, renewing, or revoking certificates for automated workflows only. You can add more than one

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approval group, separated by commas. The task chooses the current domain group first and then the global domain group. If no group is found, the task will fail.

- Type: string
- Default value: none

sn_disco_certmgmt.default_cert_order_validity_period

This property is used to set the validity period of the certificate order being placed in Certificate Inventory and Management.

- Type: integer
- Default value: 1000 days

sn_disco_certmgmt.default_cert_task_priority

This property is used to configure New and Renew task priorities in Certificate Inventory and Management. Accepts values 1, 2, 3, 4, 5. If any invalid value (<1 || >5 || other strings) is provided, the value reverts to P3.

- Type: integer
- Default value: 3 (if property doesn't exist)

sn_disco_certmgmt.default_revoke_cert_task_priority

This property is used to configure Revoke task priorities in Certificate Inventory and Management. Accepts values 1, 2, 3, 4, 5. If any invalid value (<1 || >5 || other strings) is provided, the value reverts to P1.

- Type: integer
- Default value: 1 (if property doesn't exist)

sn_global_searchui.hide_results_count

Hides (**true**) or displays (**false**) the number of matching records for search groups and tables on the Global search page.

To modify this property, select **Enhanced Global Search UI** from the application picker before opening the System Properties table.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

sn_nowassist_va.com.glide.cs.gen_ai.enable_mid_topic_ai_search_conversational_catalogs

In Mid Topic Discovery AI Search results, change the value to true to show catalog results. By default, these Mid Topic AI Search results only show knowledge base results.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

sn_nowassist_va.nass_animated_avatar_enabled

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An animated sparkle icon appears while the LLM response streams to the end user. The animated sparkle icon changes to the static branded Virtual Agent icon after the response has fully loaded. If this system property is set to `false`, the animated ellipsis icon appears after the loading messages.

- Type: true | false
- Default value: true
- Location: System Property [sys_properties] table

sn_query_gen.default_source_type

The data source type that AI Data Explorer uses in responses—table or indicator—when there are no query keywords or explicit context to determine this. Does not apply in agentic mode.

- Type: Choice (table | indicator)
- Default value: table
- Location: System Property [sys_properties] table
- Learn more: Indicator vs Table data source selection

sn_query_gen.hidden_insights.groupby.min_fields

The target number of group-by fields for extended analysis in AI Data Explorer. These group-by fields are taken from the default list view of the relevant table. When this list view contains fewer eligible fields than the property value, the system looks for more eligible fields on the table to try to reach this count.

- Type: Integer
- Default value: 5
- Location: System Property [sys_properties] table
- Learn more: Extended analysis

sn_query_gen.segments.disable.filter

When set to true, excludes all segments from sys_filter from AI Data Explorer search results. During the next Sync Segments Job, all segments of that type are deactivated in the Segment table.

- Type: Boolean (true/false)
- Default value: false
- Location: System Property [sys_properties] table
- Learn more: Segments in the Query Generation semantic layer

sn_query_gen.segments.disable.manual_segment

When set to true, excludes all segments from sn_query_gen_segment_table_config (manual segments) from AI Data Explorer search results. During the next Sync Segments Job, all segments of that type are deactivated in the Segment table.

Important: The ability to disable manual segments is intended for testing and troubleshooting purposes only.

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- Type: Boolean (true/false)
- Default value: false
- Location: System Property [sys_properties] table
- Learn more: Segments in the Query Generation semantic layer

sn_query_gen.segments.disable.report_sources

When set to true, excludes all segments from sys_report_source from AI Data Explorer search results. During the next Sync Segments Job, all segments of that type are deactivated in the Segment table.

- Type: Boolean (true/false)
- Default value: false
- Location: System Property [sys_properties] table
- Learn more: Segments in the Query Generation semantic layer

sn_query_gen.segments.disable.sys_app_module

When set to true, excludes all segments from sys_app_module from AI Data Explorer search results. During the next Sync Segments Job, all segments of that type are deactivated in the Segment table.

- Type: Boolean (true/false)
- Default value: false
- Location: System Property [sys_properties] table
- Learn more: Segments in the Query Generation semantic layer

sn_query_gen.segments.disable.pa_cubes

When set to true, excludes all segments from indicator sources (pa_cubes) from AI Data Explorer search results. During the next Sync Segments Job, all segments of that type are deactivated in the Segment table.

- Type: Boolean (true/false)
- Default value: false
- Location: System Property [sys_properties] table
- Learn more: Segments in the Query Generation semantic layer

sn_query_gen.segments.disable.report

When set to true, excludes all segments from sys_report from AI Data Explorer search results. During the next Sync Segments Job, all segments of that type are deactivated in the Segment table.

- Type: Boolean (true/false)
- Default value: false
- Location: System Property [sys_properties] table
- Learn more: Segments in the Query Generation semantic layer

sn_query_gen.segments.indicator.inactivity_threshold_multiplier

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Applies a multiplier to how long ago an indicator value can have changed for that indicator to be "recently changed." The [Query Generation] Sync Segments job deactivates segments based on indicators that have not recently changed. The value that is multiplied differs by indicator frequency (see Segments in the Query Generation semantic layer).

- Type: Integer
- Default value: 1
- Location: System Property [sys_properties] table

sn_query_gen.segments.reports.last_viewed_threshold_days

Defines how many days ago a report can have run for that report to be considered "recently run." The [Query Generation] Sync Segments job deactivates segments based on reports that have not run recently. It also deactivates report sources whose reports have not run recently.

- Type: Integer
- Default value: 180
- Location: System Property [sys_properties] table

sn_vad_genai.com.glide.small_talk.closure.prompt_enabled

Includes a confirmation message to end the conversation whenever closure small talk is recognized.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

subscription.custom_table.enforce_entitlement

You can enable guardrails around custom tables when using certain applications, such as Mobile Studio, in a production or non-production environment.

When set to **true**, the property limits the list of custom tables available in applications such as Mobile Studio to those you are entitled to use, based on the active subscriptions present on your instance. If you want to remove these guardrails, setting the property to **false** enables you to access to all custom tables, regardless of your active subscription entitlements.

- Type: Boolean
- Default value:
- Location: System Property [sys_properties] table

Note: Setting this property to **false** enables you to use applications with custom tables that may not be entitled. See the service description for your active subscriptions to determine which custom tables (if any) you are entitled to use with selected applications.

sys_par_insights_enabled

Enables the Proactive Analytics feature.

- Type: true/false (Boolean)
- Default value: true

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- Location: To change the value, create this property in the System Properties table.
- More information: Add a system property

tablet.footer.text

Text that appears on the footer of the tablet UI.

- Type: string
- Default value: Copyright ServiceNow 2012
- Location: **System Properties** > **Tablet UI Properties**

tablet.header.text

Text that appears on the right-hand side of the tablet UI header.

- Type: string
- Default value: ServiceNow
- Location: **System Properties** > **Tablet UI Properties**

Add a system property

Add or create a property to control system behavior.

https://player.vimeo.com/video/1163458459?h=2fcc45d396&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: admin

For more information on creating system properties for your own applications, take the training on the ServiceNow® Developer Site.

About this task

Some properties in the system aren't visible in an instance by default and must be added to the System Property [sys_properties] table. If a feature requires the addition of the property, you can add a system property.

Important: System properties store configuration information that rarely or never changes. Each time you change or add a system property, the system flushes the cache to keep all nodes in the cluster in sync. This cache flush has a very high performance cost for one to 10 minutes, which can potentially cause an outage if done excessively. To prevent such outages, don't use a system property to store configuration information that changes more than once or twice a month. Instead, use a custom table to store regularly changing configuration information.

Procedure

1. In the navigation filter, enter `sys_properties.list`.
   The entire list of properties in the System Properties [sys_properties] table appears.
2. Verify that the property doesn't exist by searching for the property name.
3. Select **New**.
4. Complete the System Property form using the database name of the property.

   Make sure to specify the correct data **Type** and add the new value that you want the property to use.

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Properties that you add already contain default values. You add properties to change this value.

Field	Description
Name	Name of the property you're creating.
Description	Type a brief, descriptive phrase describing the function of the property.
Choices	Comma-separated values for a choice list. If you need a different choice list label and value, use an equal sign (=) to separate the label from the value. For example, `Blue=0000FF, Red=FF0000, Green=00FF00` displays **Blue**, **Red**, and **Green** in the list, and saves the corresponding hex value in the property value field.
Type	Select the appropriate data type from the list (for example, **integer**, **string**, or **true|false)**.
Value	Set the desired value for the property. All property values are stored as strings. When retrieving properties via the *`gs.getProperty()`* method, treat the results as strings. For example, a true|false property returns 'true' or 'false' (strings), not the Boolean equivalent.
Ignore cache	The system stores system property values in server-side caches to avoid querying the database for configuration settings. When you change a system property value, the system always flushes the cache for the sys_properties table. Use this field to determine whether to flush this property's value from all other server-side caches. The default cleared check box means that the system will flush all server-side caches and retrieve the current property value from the database. Leave the check box cleared when you want to ensure all caches have the current property value. Select the check box to ignore flushing some server-side caches, thus flushing only the cache for the sys_properties table and preserving the prior property value in all other caches. This option avoids the performance cost of flushing all caches and retrieving new property values. Typically, you should only select the check box and enable ignoring the cache when

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Field	Description
	you have a system property that changes more frequently than once a month, and the property value is only stored in the sys_properties table.
Private	Set this property to true to exclude this property from being imported via update sets. Keeping system properties private prevents settings in one instance from overwriting values in another instance. For example, you may not want a system property in a development instance to use the same value as a production instance.
Read roles	Define the roles that have read access to this property.
Write roles	Defines the roles that have write access to this property.

5. Select **Submit**.
   Depending on the property name, an administrator might be able to change its value only through a new module. It may also appear in one of the Properties pages in System Properties.

   Note: If the **Ignore cache** check box is selected, the system flushes the server cache when the parameter is changed.

Create a system properties module

You can add a module in the application navigator to access the list of system properties. This module makes it easy to add properties to the System Properties table.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Application Menus**.
2. Search for the application you want to add the properties table to, for example **System Properties**.
   Select an application that is restricted to the admin role so that non-admin users cannot access it.
3. From the Modules related list, click **New**.
4. Complete the form fields.

Field	Description
Title	Module name. For example, **All Properties**.
Application Menu	Specifies the name of the application menu the module appears under. This field should automatically be populated with the name of the application you accessed the Modules related list from.

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Field	Description
Link type	Specifies the type of link this modules opens. For a list of system properties, select **List of Records**.
Table	Specifies the table used by the module. Select **System Properties [sys_properties]**.

5. Click **Submit**.
6. Verify that the module was created. For example, navigate to **System Properties** > **All Properties**.

What to do next

If you want to include additional parameters for the list of system properties module, see Create a module.

Query join and complexity size limits

The platform uses a relational database to store data. Retrieving data can involve multiple joins to create a single result set. While these joins are usually simple, in certain cases the system may issue very large joins to bring together large numbers (>20) of tables.

Database engines normally handle multiple joins quite well. The relational model assumes joins are cheap and efficient, and this is usually true. Rarely, however, exceedingly large joins may cause a database performance issue.

To mitigate this potential complexity, use the following property to limit join complexity and size.

Navigate to **System Properties > System** and find the property with this description:

Max number of database joins per query. Smaller values cause the system to issue a larger number of less complex queries. Larger values reduce the number of queries at the cost of additional complexity per query. In the absence of known database issues stemming from large join counts, this property should remain unchanged.

This property specifies the maximum number of joins the system prefers to do. In certain edge cases, more complex queries might need to be issued, but generally no more than this number of joins will be issued. e.g., a value of 10 will result in no more than 10 tables being joined together in any given query.

The system must compensate for the fewer joins by issuing more queries to retrieve necessary data, so tuning this number down will result in more queries being sent to the database. In most cases, tuning this parameter is counterproductive.

Note: In the absence of known database issues stemming from large join counts, this parameter should remain unchanged.

Web proxy

Several properties support Web proxy configuration.

Note: Set these properties in the System Properties `[sys_properties]` table.

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Proxy setup properties

Property	Description	Examples
glide.http.proxy_host	Specify the proxy server hostname or IP address. • Type: string • Default value: none	proxy.company.com, 192.168.34.54
glide.http.proxy_port	Specify the port number for the proxy server. • Type: string • Default value: none	8080, 9100
glide.http.proxy_username	Specify the username used to authenticate the proxy server. • Type: string • Default value: none	proxyuser
glide.http.proxy_password	Specify the password used to authenticate the proxy server. • Type: string • Default value: none	password
glide.email.override.url	Set the URL to use in emailed links in place of the instance URL. The URL should end with `nav_to.do`. • Type: string • Default value: instance URL	https://servicenow.customerdomain.com/production/nav_to.do

NTLM authentication

NTLM is the most complex of the authentication protocols supported by a basic web server.

NTLM is the most complex of the authentication protocols supported by a basic web server such as HttpClient. It is a proprietary protocol designed by Microsoft with no publicly available specification. Early versions of NTLM were less secure than Digest authentication due to faults in the design. However, these were fixed in a service pack for Windows NT 4 and the protocol is now considered more secure than Digest authentication.

NTLM authentication requires that an instance of NTCredentials be available for the domain name of the server or the default credentials. Since NTLM does not use the notion of realms, HttpClient uses the domain name of the server as the name of the realm. Also, the username provided to the NTCredentials should not be prefixed with the domain:

- Correct: adrian
- Incorrect: DOMAIN\adrian

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There are some significant differences in the way NTLM works compared with basic and digest authentication. These differences are generally handled by HttpClient. However, having an understanding of these differences can help you avoid problems when using NTLM authentication.

- NTLM authentication works almost exactly the same as any other form of authentication in terms of the HttpClient API. The only difference is that you need to supply NTCredentials instead of UsernamePasswordCredentials (NTCredentials actually extends UsernamePasswordCredentials so you can use NTCredentials right throughout your application, if needed).
- The realm for NTLM authentication is the domain name of the computer being connected. This can be troublesome because servers often have multiple domain names. Only the domain name that HttpClient connects to, as specified by the HostConfiguration, is used to look up the credentials. While initially testing NTLM authentication, it is best to pass the realm in as null, which is used as the default.
- NTLM authenticates a connection and not a request. So you need to authenticate every time a new connection is made and keeping the connection open during authentication is vital. For this reason, NTLM cannot be used to authenticate with both a proxy server and the web server, nor can NTLM be used with HTTP 1.0 connections or web servers that do not support HTTP keep-alives.

Note: Set these properties from the System Properties `[sys_properties]` table.

NTLM authentication

Property	Description	Examples
glide.http.proxy_ntusername	Specify the username used to authenticate the proxy server with NTLM authentication. • Type: string • Default value: none	username
glide.http.proxy_ntpassword	Specify the password used to authenticate the proxy server with NTLM authentication. • Type: string • Default value: none	password
glide.http.proxy_nthost	Specify the hostname used to authenticate the proxy server with NTLM authentication. • Type: string • Default value: none	nthost
glide.http.proxy_ntdomain	Specify the domain used to authenticate the proxy server with NTLM authentication. • Type: string • Default value: none	DOMAIN

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Proxy servers for SOAP clients

Administrators can specify separate proxy settings for SOAP clients, such as the MID Server or ODBC Driver.

To specify a proxy server for a MID Server, see MID Server configuration

To specify a proxy server for the ODBC driver, see Configure ODBC to use proxy servers

Bypass the proxy server

Administrators can configure the instance to bypass the proxy server for specific URLs or URL patterns.

Typically, internal addresses do not need a proxy server for SOAP communications.

Bypass the proxy server

Property	Description	Examples
glide.http.proxy_bypass_list	Specify the semicolon-separated list of addresses that bypass the proxy server. Use an asterisk as a wildcard character to specify all or part of an address. • Type: string • Default value: none • Location: System Properties `[sys_properties]` table	127.0.0.1;*.internal.com;localhost

Admin Center

Admin Center provides a central hub for platform owners and admins to access platform capabilities, discover new applications, and get intelligent, actionable insights.

Use the Admin Center application to discover the capability of the available applications and how they can be implemented to work towards achieving your business goal.

Get started

Explore	Administer	Discover
Learn about Admin Center	Learn how to administer the Admin Home page features	Discover Adoption Blueprints, recommended adoption journeys organized by business outcome

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Configure	Reference	
 Learn more about how to configure applications with Configuration Hub	 Learn about miscellaneous information about the app	

Troubleshoot and get help

- Ask or answer questions about Admin Center (LES) in the ServiceNow Community
- Search the Known Error Portal for known error articles

Exploring Admin Center

Admin Center gives a centralized control of the instance to the admins with easy access to the platform capabilities, applications, and configurable admin dashboards.

Admin Center overview

Admin Center is a comprehensive platform management solution, offering access to platform capabilities, application discovery, and intelligent insights to drive informed decision-making.

Admin Center users

Admin Center has the following users.

Users	Description
System administrator [admin]	Admin role is required for the access to all applications and features in the instance.

Admin Center benefits

Benefit	Feature	Users
Explore all the key applications via the **Admin**menu	Admin Center summary	System administrator
Manage and track all your administrative work within a single page	Admin Home	System administrator
Access all the applications and features available to you to achieve business goals via Adoption Blueprints	Adoption blueprints	System administrator
Zoom-in into relevant applications and information on a single-page experience via Configuration Hub	Configuration Hub	System administrator

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What to explore next

To learn more about using Admin Center, see:

- Administering Admin Home
- Discovering adoption blueprints
- Configuration Hub
- Admin Center reference

Admin Center summary

If you are new to Admin Center, read this summary to learn what the product can do.

The first stop experience within Admin Center is the Admin Home page. It helps you manage and track all your administrative work within a single page experience. You can prioritize your work based on the instance data. See Admin Home for more information about Admin Home features.

Admin Center offers easy access to a number of key applications administrators need. You can access these applications directly from the **Admin** menu on the Admin Home page.

- Adoption Blueprints: Adoption Blueprints lists the available applications and features that are recommended to achieve business goals. You can target the strategic business improvements with a set of apps and features. See Adoption blueprints for more information.

  Note: Adoption Blueprints platform feature is available by default with instance upgrade to Tokyo and above.

- AI Admin Hub: The AI Admin Hub console provides you with quick and effortless access to the important information that you need to set up, configure, and monitor Now Assist features and skills. See Overview tab in AI Admin Hub for more information.
- Application Manager: As an admin, you have the ability to install, update, and manage licensed applications and plugins on your instance using the Application Manager application. See Application Manager for more information.

  Note: Application Manager store application is available by default with the instance upgrade of Vancouver and above.

- Security Center: Use the Security Center application to help your organization maintain the security of your ServiceNow deployments. See Security Center for more information.

  Note: Security Center is available by default from the Vancouver release and above with the instance upgrade. For the previous releases, you can install it from the ServiceNow store.

- Subscription Management: Proactively manage your subscriptions and monitor subscription usage on your instances using the Subscription Management application. See Subscription Management for more information.

  Note: The legacy version Subscription Management is available by default with the Vancouver release. You can install the new version of Subscription Management on your Vancouver instance from the ServiceNow® Store. You can also have both the legacy and new version on your Vancouver instance.

- Configuration Hub: Access and zoom in all the relevant details related to the selected application(s) using the Configuration Hub application. You can also track and view delta

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changes, over-allocated licenses, and customizations on a single screen. See Configuration Hub for more details.

Note: Configuration Hub store application is available by default with instance upgrade of Vancouver patch 2 and above.

- Upgrade Management: Leverage ServiceNow Upgrade Management for a comprehensive and efficient upgrade experience. Streamline your upgrade process by accessing all necessary tools and insights in one place. See Upgrade Console for more information.

You can also access the Admin Experience Product Hub on the ServiceNow Community for additional resources about Admin Center and the applications.

Administering Admin Home

Take control of your daily administrative tasks with our intuitive dashboard. Quickly access and manage essential tasks and tools to boost productivity.

Admin Home

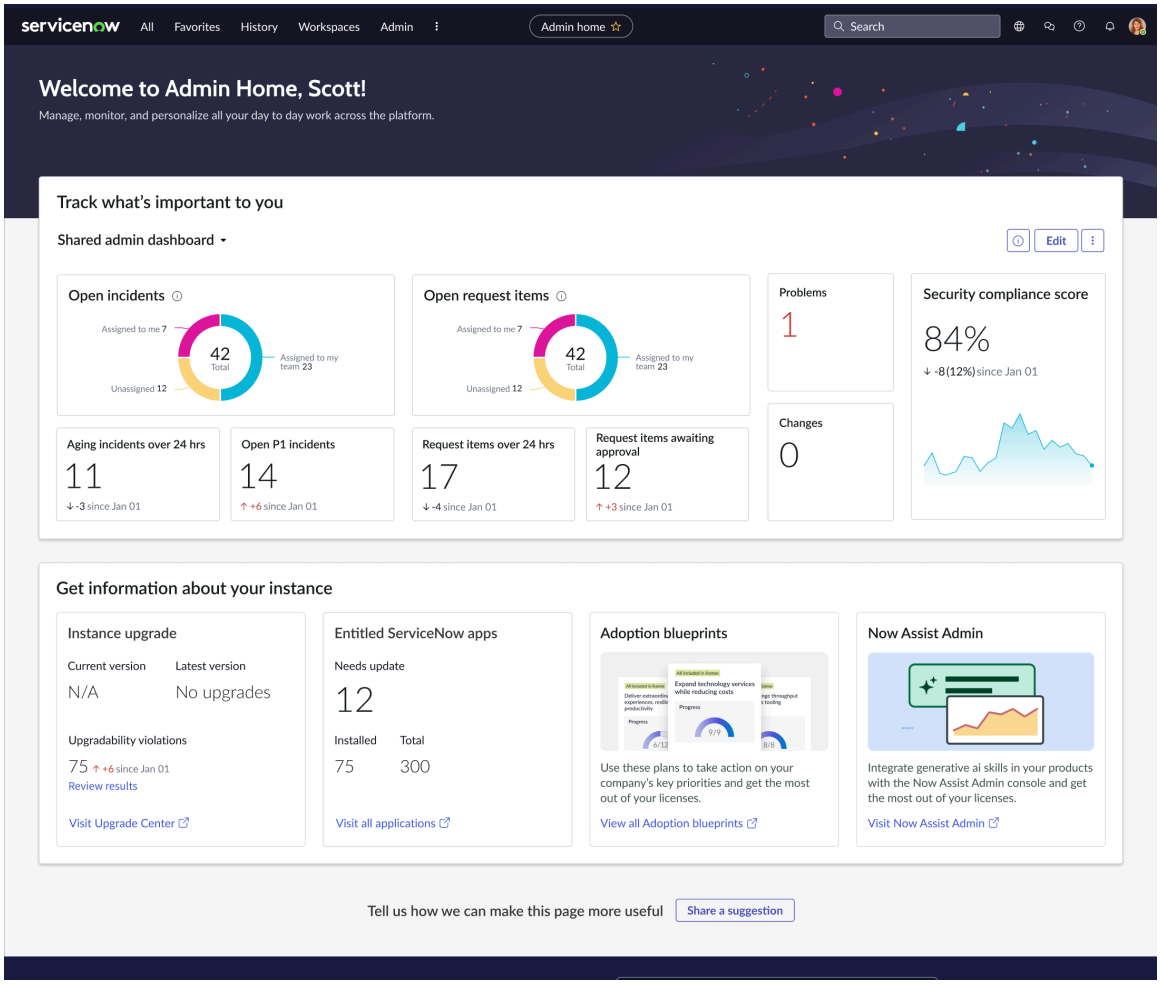
Manage and track your daily administrative work and tools on your instance by quickly accessing the cards on the dashboard. It helps you stay updated on any high priority incidents or problems on the instance that might need immediate attention.

https://www.youtube.com/watch?v=CcawQzC4uuk

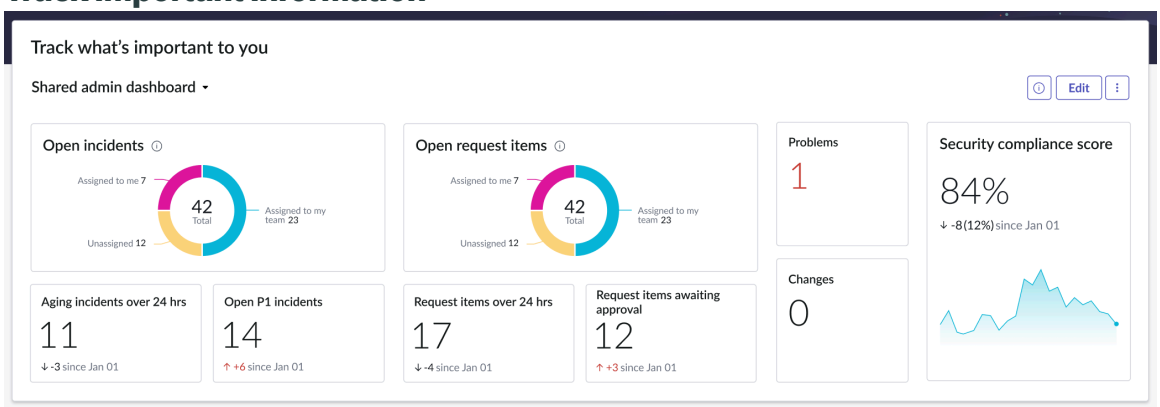
Use the advanced Admin Home page to accomplish the following:

- Get notified of the critical and high priority incidents
- Stay updated about the problems and changes on the instance
- Create and switch to your personalized dashboard based on what is most important to you
- Stay updated on the current version, scheduled upgrade, and licensed applications status on your instance
- Get a comprehensive, single-page view of the delta changes on the instance

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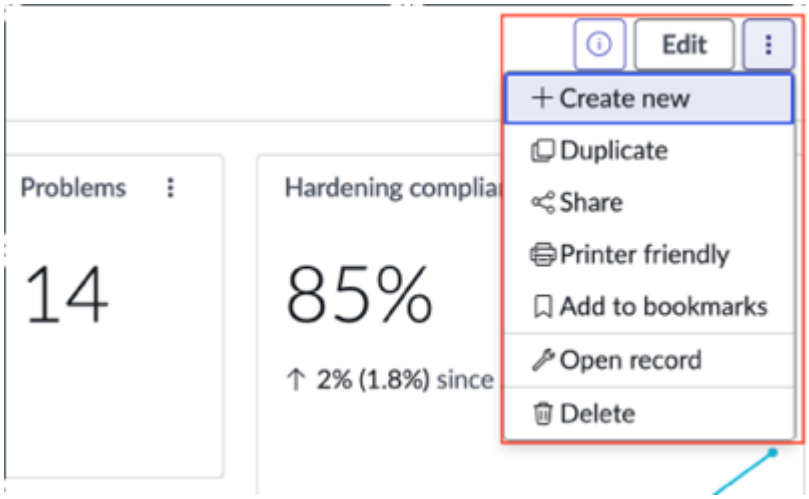
Track important information



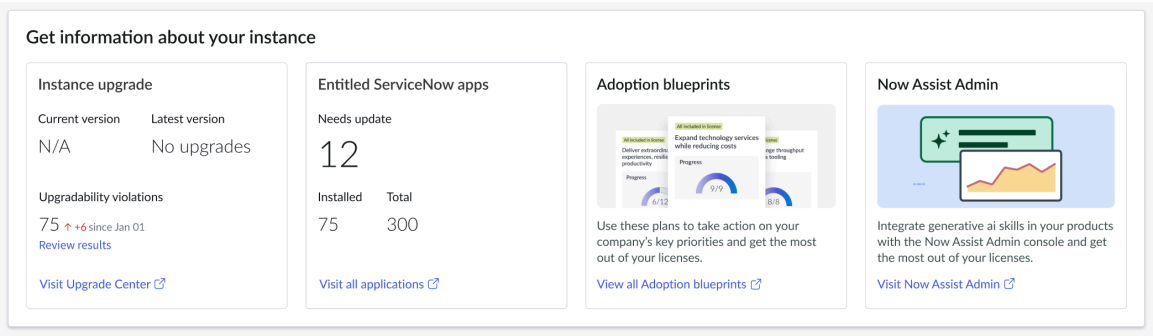
The **Track what's important to you** section of the Admin Home page provides insights into key information, such as open incidents, open requests, etc. This information is available on a default shared dashboard. You can click on each card to view more information.

Note: You can't add or remove any cards from the Shared admin dashboard. Instead, to modify the cards, you must first create a new dashboard by selecting **Create new** dashboard. Then, modify the new dashboard as needed and share it with other administrators using the **Share** option.

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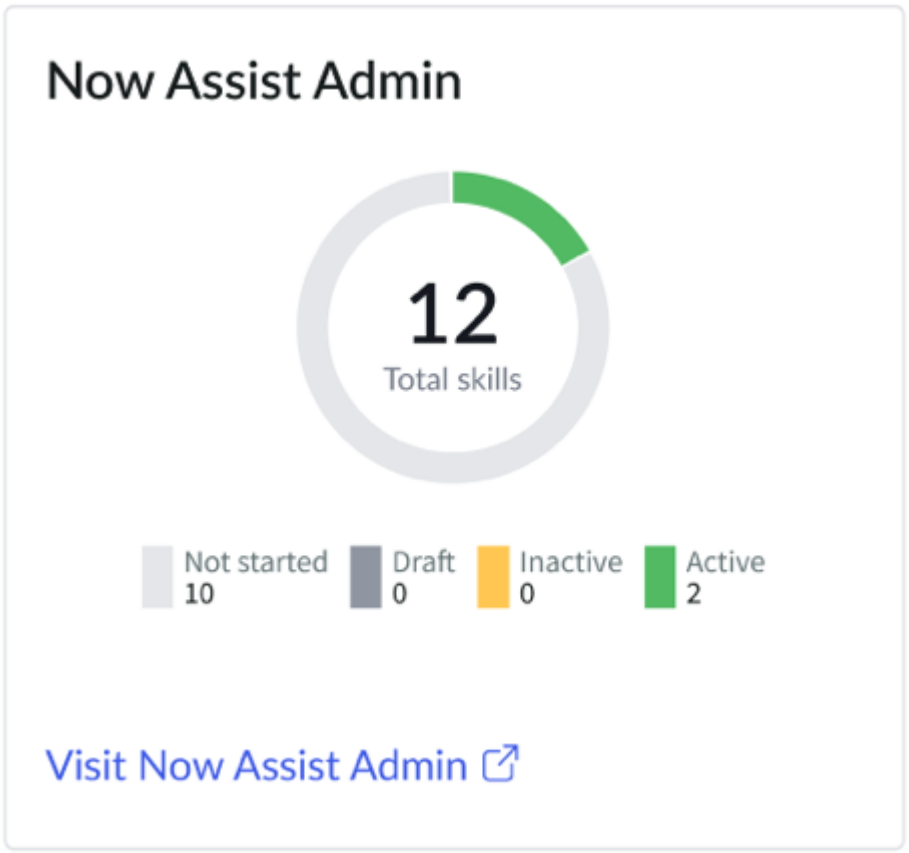
Get information about your instance



The **Get information about your instance** section of the Admin Home page shows information about your instance's current version, violations, and scheduled upgrade. It also shows the status of licensed applications as a list of installed applications on your instance and the applications that need to be updated, as well as a card with easy access to Adoption blueprints.

If your instance has one or more Now Assist plugins installed, a card displaying the status of your instance's Now Assist skills will be shown.

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Discovering adoption blueprints

Adoption blueprints provide a roadmap of applications and features, along with suggested solutions to help you reach your business objectives.

Explore the following to know more about adoption blueprints.

- Adoption blueprint overview: Get an overview of adoption blueprint and its suggested roadmap for you to achieve the business goal.
- Select your adoption blueprint: You have six different adoption blueprint to select from that closely relates to your organization business goals.
- Install applications for the selected adoption blueprint: Know all the applications, plugins, and features that need to be installed depending on your selected adoption blueprint.

Adoption blueprints

Adoption blueprints display the applications and features available to you and the recommended solutions to achieve business goals.

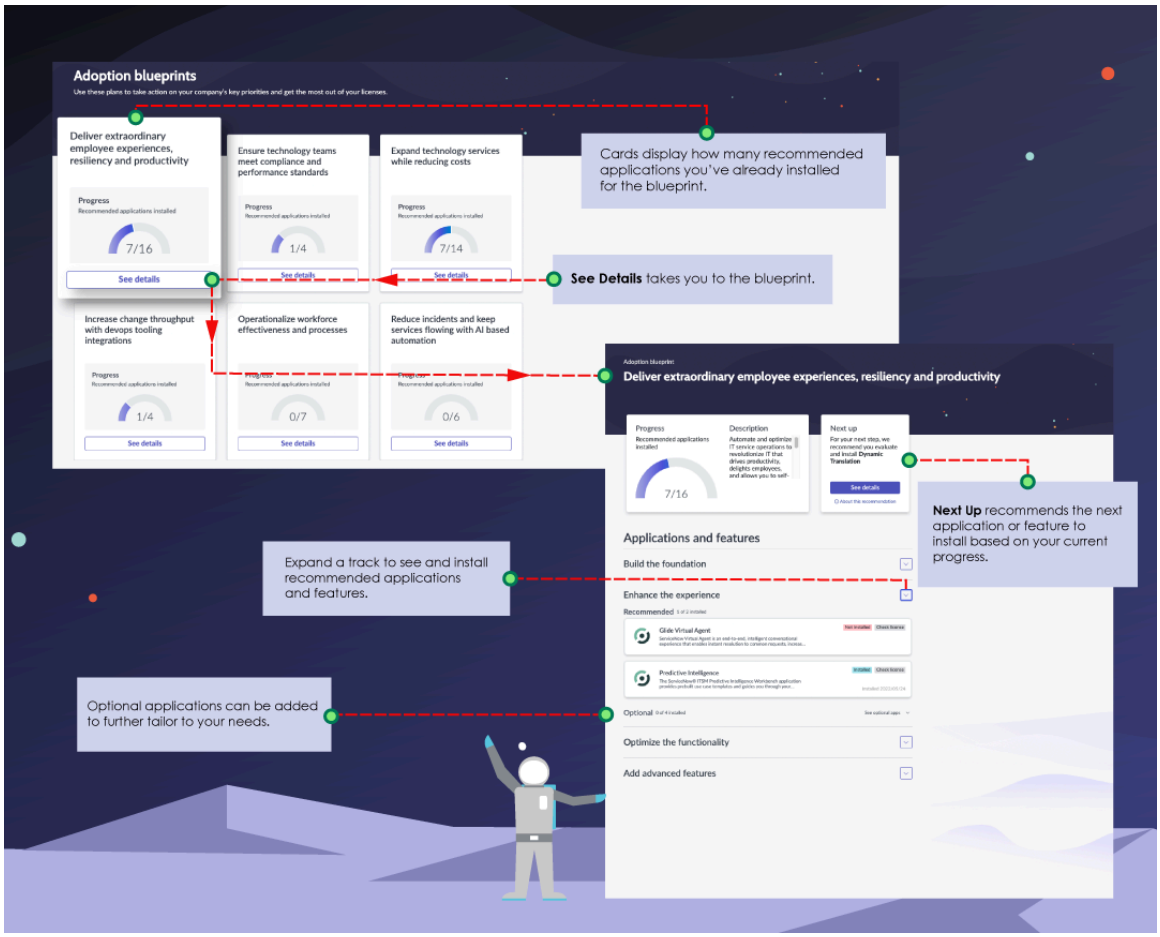
Adoption blueprints are the specific and measurable results that an organization needs to accomplish their growth. You can target the strategic business improvements with a set of apps and features.

Some of the goals based on which adoption blueprints are recommended:

- Optimizing operation to efficiently meet the goals of your organization
  - Reduced service operations cost for premium quality services
  - Focused on simplifying and automating transactions

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- Managing risk more efficiently by improving prioritization, efficiency, and operational reporting
- Delivering seamless employee experience to increase engagement and productivity with proper utilization of resources



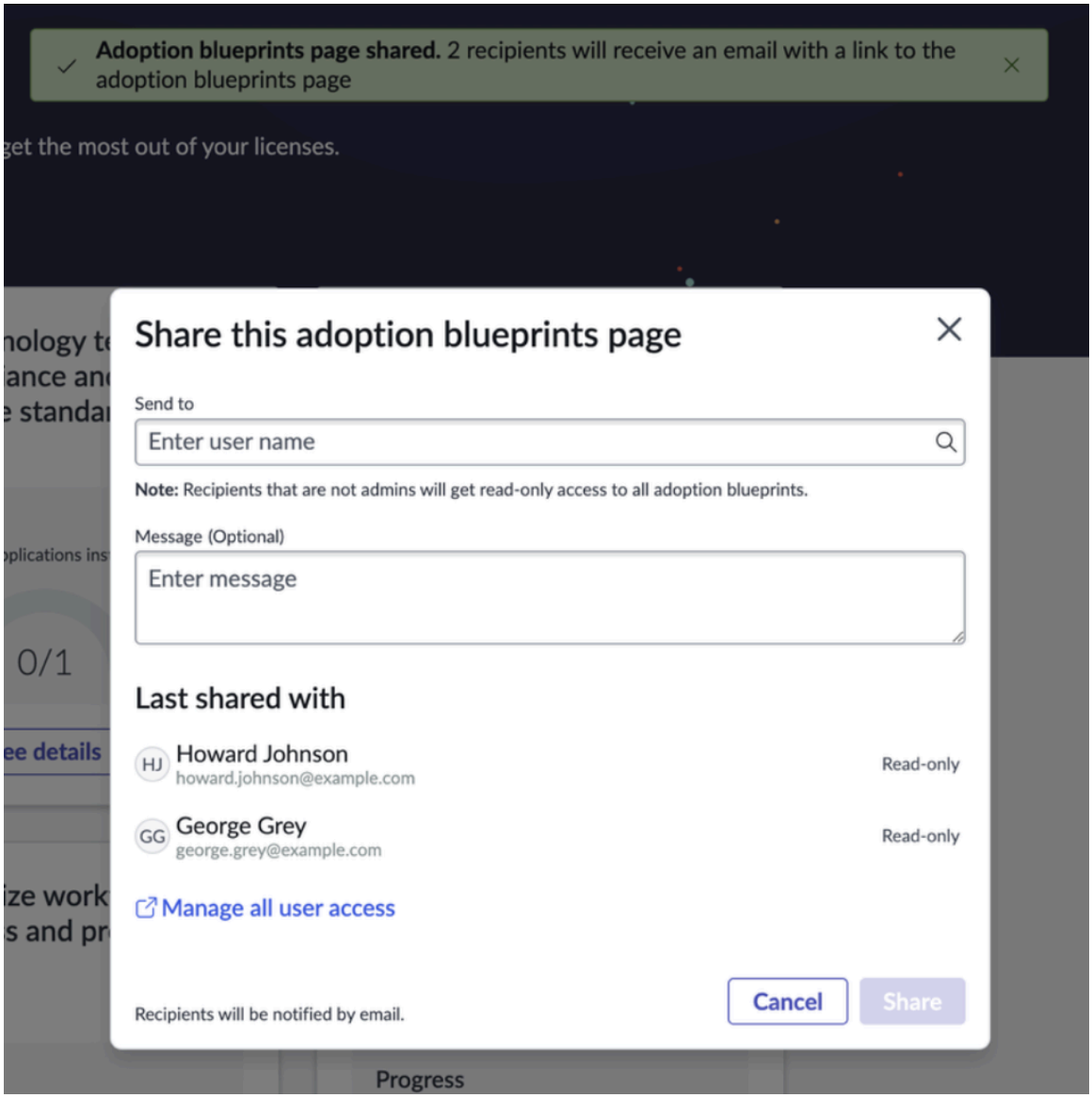
Each adoption blueprint displays the progress you have made in working towards your strategic goal. The number of applications that have been installed includes only the recommended applications.

See Select your adoption blueprint for more information.

Select **Share** if you want to share information about adoption blueprints, recommended applications and features. You can share the information with more than one recipient. The recipients are notified via email. You can also view the people with whom the details have been shared previously.

Note: If the information is shared with a non-admin user, the share functionality provides a read-only access to the non-admin users.

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When you select the adoption blueprint, the following tracks for the recommended applications and features within the selected adoption blueprint show up.

- Build a foundation
- Enhance the experience
- Optimize the functionality
- Add advanced features

The recommended applications and features have been arranged in the order of impact in the process of giving you a measurable result. They can also be referred as crawl, walk, run, and fly phases respectively.

Note: The applications and features mentioned in different tracks are only recommended to be installed. Some of the recommended applications and features in each track may already be installed in your instance and not require any additional action.

In each of the tracks, the applications are mentioned in the following order:

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1. Recommended applications which are not yet installed
2. Recommended applications which are already installed but need to be updated
3. Recommended applications which are already installed in your instance.

Note: The recommended applications don't need to be installed at all or in the order listed.

Select your adoption blueprint

Select an adoption blueprint that matches one of the strategic goals of your organizations. It also gives you a list of recommended applications that can be installed in the right combination to realize your business goal.

Before you begin

Role required: admin

Procedure

1. Access Adoption blueprint in one of the following ways.

Option	Steps
Using left navigation	**a.** Navigate to **All** > **Admin Center** > **Adoption Blueprints**. **b.** Select one of the Adoption Blueprints that can be implemented to work towards your organizational business goal.
Using Admin tab option	**a.** Navigate to **Admin** > **Adoption Blueprints**. **b.** Select one of the Adoption Blueprints that are recommended as solutions towards a business goal.

2. Select an adoption blueprint from the Adoption blueprint page.
3. Select **See Details** to view the details of the selected adoption blueprint.
   The adoption blueprint details page shows the progress of the installation of the recommended applications.
4. Scroll down to see all the tracks for the selected adoption blueprint.
   See Adoption blueprints for more information.
5. **Optional:** Expand the Optional list to view the optional list of applications and features that may be beneficial for you to install.
   The total number of recommended applications and features mentioned in the progress section doesn't include the optional applications.

   Note: The installation of each of the recommended and optional applications and features is not mandatory to achieve the business goal.

6. Review the Next Up card to view the application recommended to install next.

   Note: You can skip this step if you don't want to install the application mentioned in the Next Up card. You are also required to consider the current needs of your organization along with the suggested applications.

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Expand technology services while reducing costs blueprint

Select this adoption blueprint to create actionable plans to achieve your organization's business goals for automating core service and operations processes.

Note: The applications recommended within a blueprint may include, but aren't limited to, the following applications. Factors like entitlements and other instance dependencies can cause the number of recommended applications to vary.

Track	Recommended applications	Description	Roles installed	Additional resources
Build the foundation	Configuration Management	CMDB is a centralized source that gives you full visibility into your IT environment. By storing information about your organization's infrastructure and how it's configured, this system enables you to monitor your network and ensure stability and best performance.	cmdb_import_api_admin, cmdb_inst_admin, cmdb_ms_admin, cmdb_ms_editor, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, ecmdb_admin, sn_cmdb_admin, sn_cmdb_editor, tracked_file_reader	• CMDB and Discovery deployment playbooks • CMDB 101 - What is a configuration management database and why do you need one? (ServiceNow Community) • CMDB Resources Page (KB0546686)
Enhance the experience	Service Level Management	Service Level Management (SLM) helps to gather service requirements and monitors and reports information with regard to agreed service levels (SLAs).	Roles installed with Service Level Management	• Service Level Management (SLA) Resources (KB0623502) • How SLAs Really Work (KB0529411)
Enhance the experience	CSDM and the CMDB Data Foundations Dashboards	CSDM and CMDB Data Foundations Dashboards provide insights into the key foundational metrics of your CMDB and Common Service Data Model (CSDM). It provides	Uses bases system roles. See Base system roles.	Data Foundations Dashboards for CSDM and CMDB (video)

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Track	Recommended applications	Description	Roles installed	Additional resources
		recommendations to ensure that the CMDB and CSDM are properly configured for optimal usage and to mitigate any potential risks.		
Enhance the experience	Discovery	Discovery finds applications and devices on your network, and then updates the CMDB 360 with the information it finds, contributing toward self-resolution of incidents.	discovery_admin	• Discovery Welcome Guide (Community) • Discovery Best Practices (ServiceNow Community) (ServiceNow Community) • Discovery and MID Server Resources (KB0540193)
Optimize the functionality	Service Mapping	Service Mapping discovers all application services in your organization and builds a comprehensive map of all devices, applications, and configuration profiles used in these application services.	Roles installed with Service Mapping	• What is service mapping? • Service Mapping Overview (video)
Optimize the functionality	Change Management	Change Management provides a systematic approach to control the life cycle of all changes, facilitating beneficial changes to be made with	Uses bases system roles. See Base system roles.	• Automate change and incident management Playbook • Change Management (ServiceNow Community)

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Track	Recommended applications	Description	Roles installed	Additional resources
		minimum disruption to IT services.		• Change Management Overview (video)
Optimize the functionality	Incident Management	Incident Management restores normal service operation while minimizing impact to business operations and maintaining quality.	Uses bases system roles. See Base system roles.	• Incident Management limitations and support • Automate change and incident management Playbook • Incident Management Overview (video)
Optimize the functionality	Knowledge Management	Knowledge Management (KM) enables the sharing of information in knowledge bases. These knowledge bases contain articles that provide users with information such as self-help, troubleshooting, and task resolution.	Roles installed with Knowledge Management	• Knowledge Management limitations and support • Knowledge Management Quick Start Guide (ServiceNow Community)
Optimize the functionality	Problem Management	Problem Management helps to identify the cause of an error in the IT infrastructure, reported as occurrences of related incidents.	Uses bases system roles. See Base system roles.	Problem Management and 10 steps to making it successful (ServiceNow Community)
Optimize the functionality	Service Catalog	Service Catalog provides self-service opportunities for customers to request catalog	Roles installed with Service Catalog	Service Catalog design playbook

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Track	Recommended applications	Description	Roles installed	Additional resources
		items such as service and product offerings.		
Optimize the functionality	Service Operations Workspace for ITSM	Service Operations Workspace is a configurable workspace that provides a unified experience for multiple IT Service Management and IT Operations Management workflows. Configure your agent experience using the easy-to-navigate interface of Service Operations Workspace for ITSM.	Roles installed with Service Operations Workspace for ITSM	Configuration activities for Service Operations Workspace in ITSM and ITOM (ServiceNow Community)
Optimize the functionality	Certificate Inventory and Management	Certificate Inventory and Management discovers, takes inventory of, and proactively manages all your TLS certificates. IPv6 is supported for Certificate Inventory and Management.	Roles installed with Certificate Inventory and Management	What is certificate management?
Optimize the functionality	Firewall Audits and Reporting	Firewall Audits and Reporting discovers and takes inventory of your firewall security policies, devices, device groups, and manager information.	Roles installed with Firewall Audits and Reporting	What is a firewall audit?

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Track	Recommended applications	Description	Roles installed	Additional resources
Add advanced features	Digital Portfolio Management	Digital Portfolio Management (DPM) manages and maintains all your services, applications, and products from a single location.	Roles installed with Digital Portfolio Management	• Digital Portfolio Management Resources (KB1123710) • Digital Portfolio Management Overview (video)
Add advanced features	Health Log Analytics	Health Log Analytics helps prevent IT issues before your users are affected. It helps you identify the root cause of an issue by enabling you to triage-related logs and analyze the raw data.	Roles installed with Health Log Analytics	• Health Log Analytics (KB1064762) • ITOM Talks Session #3 - Health Log Analytics (video)

Deliver extraordinary employee experiences, resiliency and productivity blueprint

Select this adoption blueprint to enhance your employees' IT experience by automating and optimizing IT service operations that enable self-resolution of incidents, improved productivity, and recovering from complicated IT scenarios.

Note: The applications recommended within a blueprint may include, but aren't limited to, the following applications. Factors like entitlements and other instance dependencies can cause the number of recommended applications to vary.

Track	Recommended applications	Description	Roles installed	Additional resources
Build the foundation	Dynamic Translation	Use Dynamic Translation to enhance your experience of dynamically translating text entered in an application for a seamless localization experience.	Uses bases system roles. See Base system roles.	• Dynamic Translation limitations • Dynamic Translation overview
Build the foundation	ITSM Success Dashboard indicators	Use ITSM Success Dashboard to get an insight to the IT leadership team and	Roles installed with ITSM Success Dashboard indicators	Measuring success in your ITSM deployment and how Success Dashboards can

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Track	Recommended applications	Description	Roles installed	Additional resources
		process owners to measure the IT-related performance of their implementation.		help (ServiceNow Community)
Build the foundation	Employee Center	Use the Employee Center portal to experience a standard multi-department, dynamic portal for service delivery and employee engagement.	Roles installed with Employee Center	• Employee Center limitations and support • Employee Center (ServiceNow Community • Employee Center success story • Employee Center implementation success story
Build the foundation	Configure Walk-up Experience for Customer Service Management	Use the Walk-up Experience application to create and manage an on-site IT walk-up venue, where the requests and issues are fulfilled and solved by experienced IT technicians in person and in real time.	Roles installed with Walk-up Experience	Walk-up Experience limitations and support
Build the foundation	Service Operations Workspace for ITSM	Use the Service Operations Workspace interface to unify and configure your agent experience for multiple IT Service Management and IT Operations Management workflows.	Roles installed with Service Operations Workspace for ITSM	• Service Operations Workspace limitations and support • Service Operations Workspace overview

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Track	Recommended applications	Description	Roles installed	Additional resources
Build the foundation	Survey Management	Use the Assessments and Surveys application to create, send, and collect responses for surveys in order to improve the productivity and efficiency of your processes.	Roles installed with Survey Management	• Survey Management limitations and support • Survey Management overview
Build the foundation		Use the Benchmarks application to compare the performance of your organization with other recognized industry standards and implement recommendations for improved performance.	Roles installed with Benchmarks	Benchmarks limitations and support
Build the foundation	Incident Management	Use the Incident Management application to enrich IT experience by restoring normal service operation, while working toward minimizing business operations impact and maintaining quality.	incident_manager and Roles installed with Incident Management	• Incident Management limitations and support • Automate change and incident management Playbook • Incident Management Overview (video)
Build the foundation	Knowledge Management	Use the Knowledge Management application to share information in knowledge bases, contributing toward self-	Roles installed with Knowledge Management	• Knowledge Management (ServiceNow Community) • Knowledge Management limitations and support

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Track	Recommended applications	Description	Roles installed	Additional resources
		resolution of incidents.		
Build the foundation	Service Catalog	Use the Service Catalog application to self-create service catalogs contributing toward self-resolution of incidents. It will also help you to self-request a product or a service.	Roles installed with Service Catalog	• Service Catalog limitations and support • Service Catalog success story
Build the foundation	AI Search	Use the AI Search application for a modern consumer-grade search engine for Service Portal, Now Mobile, and Virtual Agent. Intelligent query features enable you to find the answers you need quickly.	Roles installed with AI Search	• AI Search (ServiceNow Community) • AI Search limitations and support
Build the foundation	Legacy: Performance Analytics ITSM Dashboards	Use the Performance Analytics ITSM Dashboards content pack to access the preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.	Roles installed with Performance Analytics ITSM Dashboard	Performance Analytics ITSM Dashboard (ServiceNow Community)

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Track	Recommended applications	Description	Roles installed	Additional resources
Build the foundation	Service Portal	Use Service Portal to build a mobile-friendly self-service portal experience for your employees or customers.	Roles installed with Service Portal	• Service Portal limitations and support • Service Portal (ServiceNow Community)
Enhance the experience	Virtual Agent	Unlock your enterprise productivity with ServiceNow® Virtual Agent. Provide your employees and customers with a friendly messaging interface, featuring prebuilt conversations powered by artificial intelligence.	Roles installed with Virtual Agent	• Virtual Agent limitations and support • Virtual Agent success story
Enhance the experience	Predictive Intelligence Workbench ITSM content	Use the Predictive Intelligence interface to train machine learning models and can improve performance, efficiency, and flexibility to your systems across multiple business units.	Roles installed with Predictive Intelligence Workbench ITSM content	• Predictive Intelligence limitations and support • Predictive Intelligence success story
Enhance the experience		Use the **Issue auto-resolution** tab to understand how well your Virtual Agent (VA) chatbot anticipates user needs. It displays information about the number of user issues intercepted by the auto-resolution	chat_analytics_admin and chat_analytics_viewer	Issue auto-resolution (ServiceNow Community)

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Track	Recommended applications	Description	Roles installed	Additional resources
		service and resolved by VA. It contributes toward auto-resolution of IT issues, enhancing employee and customer experience.		
Enhance the experience	ITSM Virtual Agent Conversations	Users can reset any Citrix desktop or application session using Virtual Agent conversation flows. Users can also provision a Citrix desktop or application.	Uses bases system roles. See Base system roles.	ITSM Virtual Agent Conversations support
Optimize the functionality	(Legacy) Implement NLU in Virtual Agent	Create and maintain NLU model groups and intents that map to your conversation topics in Virtual Agent. You can create and edit model groups in NLU Workbench or from topics in Virtual Agent Designer.	virtual_agent_admin	NLU support
Add advanced features	Discovery	Discovery finds applications and devices on your network, and then updates the CMDB 360 with the information it finds, contributing toward self-resolution of incidents.	discovery_admin	Discovery limitations and support

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Track	Recommended applications	Description	Roles installed	Additional resources
Add advanced features	Automation Discovery	Automation Discovery helps you identify automation opportunities for your workflows. Use the discovery reports to implement or improve automation solutions like Virtual Agent (VA), and Agent assist. It helps you toward improved productivity and efficiency.	Roles installed with Automation Discovery and nlu_admin	• Automation Discovery limitations and support • Automation Discovery overview
Add advanced features	(Legacy) Intent Discovery	Use the Intent Discovery application to help identify opportunities for incident deflection. For example, you can use it to identify which Virtual Agent conversations to activate next.	nlu_admin	Intent Discovery overview

Related topics

Customer Service Portal user roles

Modernize your change management process blueprint

Select this adoption blueprint to get a walk through on how you can adopt the required capabilities to allow your change process to dynamically scale without compromising stability and governance.

Note: The applications recommended within a blueprint may include, but aren't limited to, the following applications. Factors like entitlements and other instance dependencies can cause the number of recommended applications to vary.

Track	Recommended applications	Description	Roles installed	Additional resources
Build the foundation	Change Management	Simplify, automate, and accelerate complex change	Components installed with ITSM Roles	Configuring Change Management

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Track	Recommended applications	Description	Roles installed	Additional resources
		processes using built-in AI, with full risk and impact info. Minimize failure and lower costs.	- Change Management	
Enhance the experience	Change success score	Use change success scores for insight into change team and model historical performance (like a FICO score) and as an input into approval policies to enable more data-driven change automation	Components installed with ITSM Roles - Change Management	Components installed with Change Management - Change Success Score
Optimize the functionality	Digital Product Release	Plan and deliver new versions of products across product teams while "shifting left" and automating the validation of release readiness.	Components installed with Digital Product Release	• Ask or answer questions in the Digital Product Release community forum • Search the Known Error Portal for known error articles • Contact Customer Service and Support
Optimize the functionality	DevOps Change Velocity	Use DevOps Change Velocity to connect data from your DevOps tool chain with the ServiceNow platform to deliver changes faster without sacrificing compliance.	Components installed with DevOps Change Velocity	• DevOps Change Velocity support • DevOps Change Velocity overview (video)

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Track	Recommended applications	Description	Roles installed	Additional resources
Add advanced features	Train the Risk Intelligence solution	Leverage ML for data-driven evaluation of historical change data to predict change risk.	Components installed with ITSM Roles - Change Management	Request Change Management - Risk Assessment

Reduce incidents and keep services flowing with AI based automation blueprint

Select this adoption blueprint to leverage AI-based automation to keep the business running by reducing and prioritizing incidents and issues.

Note: The applications recommended within a blueprint may include, but aren't limited to, the following applications. Factors like entitlements and other instance dependencies can cause the number of recommended applications to vary.

Track	Recommended applications	Description	Roles installed	Additional resources
Build a foundation	Event Management	Use the Event Management application as a single management console to identify health issues across the datacenter.	Roles installed with Event Management	Event Management overview (video)
Optimize the functionality	Health Log Analytics	Health Log Analytics helps prevent IT issues before your users are affected. It helps you identify the root cause of an issue by enabling you to triage-related logs and analyze the raw data.	Roles installed with Health Log Analytics	• Health Log Analytics (KB1064762) • ITOM Talks Session #3 - Health Log Analytics (video)
Add advanced features	Managing major incidents	Define an incident as a major incident to demand a response beyond the routine incident management process.	Roles installed with Major Incident Management	Major Incident Management overview (video)

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Track	Recommended applications	Description	Roles installed	Additional resources
Optimize the functionality	Service Mapping	Service Mapping discovers all application services in your organization and builds a comprehensive map of all devices, applications, and configuration profiles used in these application services.	Roles installed with Service Mapping	• What is service mapping? • Service Mapping Overview (video)
Build a foundation	Service Operations Workspace for ITSM	Use the Service Operations Workspace interface to unify and configure your agent experience for multiple IT Service Management and IT Operations Management workflows.	Roles installed with Service Operations Workspace for ITSM	• Service Operations Workspace limitations and support • Service Operations Workspace overview
Enhance the experience		Use Site Reliability Operations as an integral part of DevOps for reliable digital services to deliver modern customer experiences.	Roles installed with Site Reliability Operations	• Site Reliability Operations support • Site Reliability Operations overview (video)

Ensure technology teams meet compliance and performance standards blueprint

Select this adoption blueprint to ensure that your technology teams meet all of the required compliance standards for vendors, security, and performance.

Note: The applications recommended within a blueprint may include, but aren't limited to, the following applications. Factors like entitlements and other instance dependencies can cause the number of recommended applications to vary.

Track	Recommended applications	Description	Roles installed	Additional resources
Enhance the experience	Certificate Inventory and Management	Certificate Inventory and Management	Roles installed with Certificate	What is certificate management?

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Track	Recommended applications	Description	Roles installed	Additional resources
		discovers, takes inventory of, and proactively manages all your TLS certificates. IPv6 is supported for Certificate Inventory and Management.	Inventory and Management	
Add advanced features	Cloud Provisioning and Governance	Use the Cloud Provisioning and Governance application to provide a single interface to access cloud resources, publish cloud offerings to a catalog, and manage the usage of those resources.	Uses bases system roles. See Base system roles.	Cloud Provisioning and Governance overview (ServiceNow community)
Enhance the experience	Firewall Audits and Reporting	Firewall Audits and Reporting discovers and takes inventory of your firewall security policies, devices, device groups, and manager information.	Roles installed with Firewall Audits and Reporting	What is a firewall audit?
Build a foundation	Service Level Management	Service Level Management (SLM) helps to gather service requirements and monitors and reports information with regard to agreed service levels (SLAs).	Roles installed with Service Level Management	• Service Level Management (SLA) Resources (KB0623502) • How SLAs Really Work (KB0529411)
Optimize the functionality		Use the Vendor Management Workspace to monitor your company's vendors and manage all	pa_data_collector	Vendor Management Workspace overview (video)

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Track	Recommended applications	Description	Roles installed	Additional resources
		vendor-related information.		

Operationalize workforce effectiveness and processes blueprint

Select this adoption blueprint to increase the effectiveness and efficiency of your workforce processes.

Note: The applications recommended within a blueprint may include, but aren't limited to, the following applications. Factors like entitlements and other instance dependencies can cause the number of recommended applications to vary.

Track	Recommended applications	Description	Roles installed	Additional resources
Enhance the experience	Advanced Work Assignment	Use Advanced Work Assignment to automatically assign work items to your qualified agents, based on their availability, capacity, and optionally, skills.	Roles installed with Advanced Work Assignment	Advanced Work Assignment (AWA) overview (video)
Enhance the experience	Agent Forecast	Set the minimum or maximum number of agents required per hour so that you always have the desired staffing coverage.	sn_agent_forecast_admin	Agent Forecast overview (video)
Optimize the functionality		Use Coaching to monitor the performance of your team and coach your employees to improve their skill set.	Roles installed with Coaching	Coaching support
Build a foundation	Continual Improvement Management	Use Continual Improvement Management to request improvement opportunities, and implement phases and tasks to meet performance goals, track	Roles installed with Continual Improvement Management (CIM)	Continual Improvement Management (CIM) support

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Track	Recommended applications	Description	Roles installed	Additional resources
		progress, and measure success.		
Add advanced features	Process Mining content pack	Use ITSM Process Mining to quickly analyze and optimize your business processes.	sm_cim_requestor or admin	• Process Mining success story • ITSM Process Mining Content Pack overview (video)
Build a foundation	Skill Determination	Define conditions for incidents or interactions and add skills required for those conditions using skill determination rules.	skill_admin or admin	Skill Determination overview (video)
Enhance the experience	Skills Management	Use Skills Management to associate skills with individual users or groups and assign them to tasks or projects. You can also assess the skills needed for your organization, identify gaps, and implement effective plans for hiring or training of your teams.	Roles installed with Skills Management	Skills Management (ServiceNow Community)
Add advanced features	Getting started with Workforce Optimization for ITSM	Use Workforce Optimization for ITSM to manage and maintain the productivity of your workforce from a single location.	Roles installed with Workforce Optimization for ITSM	Workforce Optimization for ITSM overview (video)

Install applications for an adoption blueprint

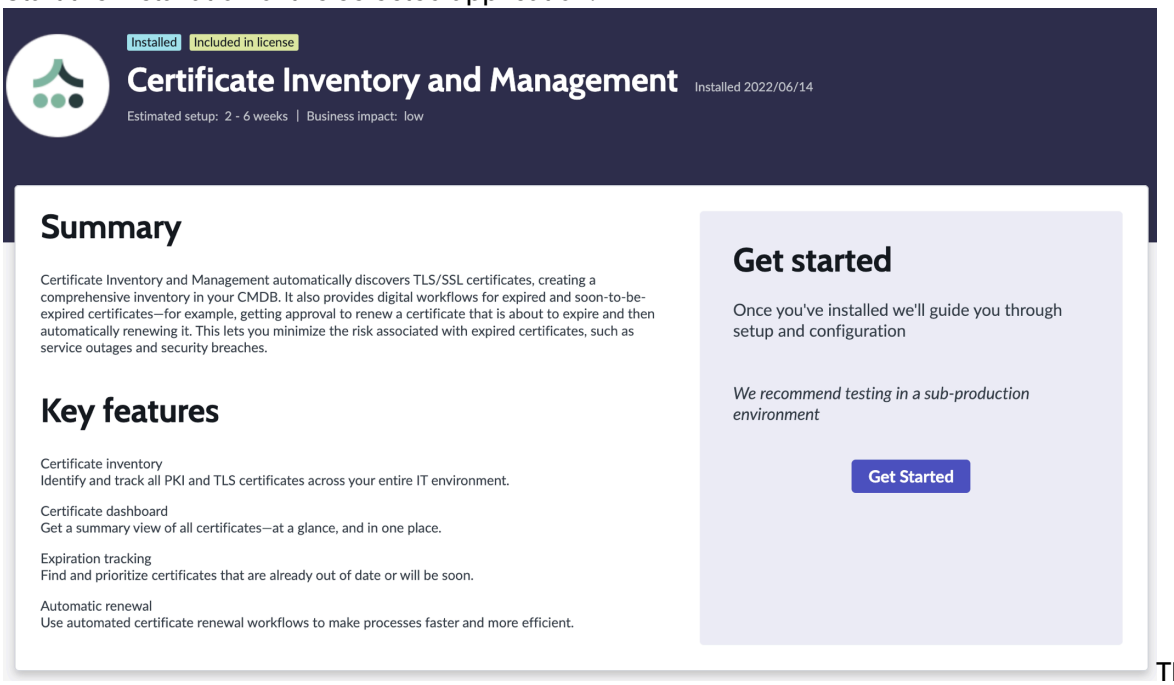
Install applications from the selected adoption blueprint to work towards achieving a certain business goal of your organization.

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Before you begin
Role required: admin

Procedure

1. Select the application you want to install from the Adoption Blueprints details page.
   An application details page with the key features about the selected application appears.
2. Start the installation of the selected application.

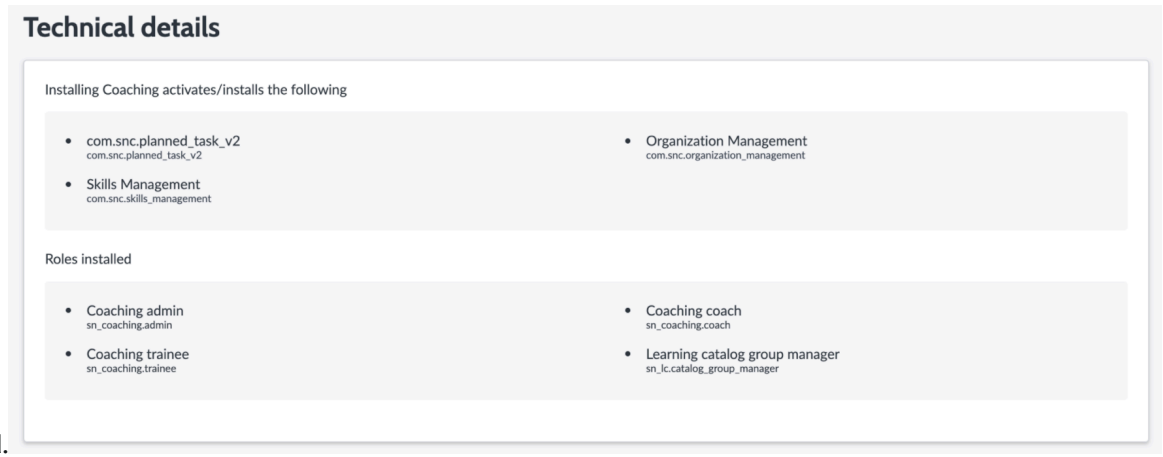


The button to start the installation or activation may vary depending on the selected application.

- **Activate**: If you have selected a plugin
- **Install**: If you have selected an application
- **Update**: If the installed application needs to be updated
- **Get started**: If the application or the plugin is already installed

Note: You can view the configuration page of the application by clicking **Get Started**.

Note: Some applications and plugins show dependency applications and roles that need to be installed.



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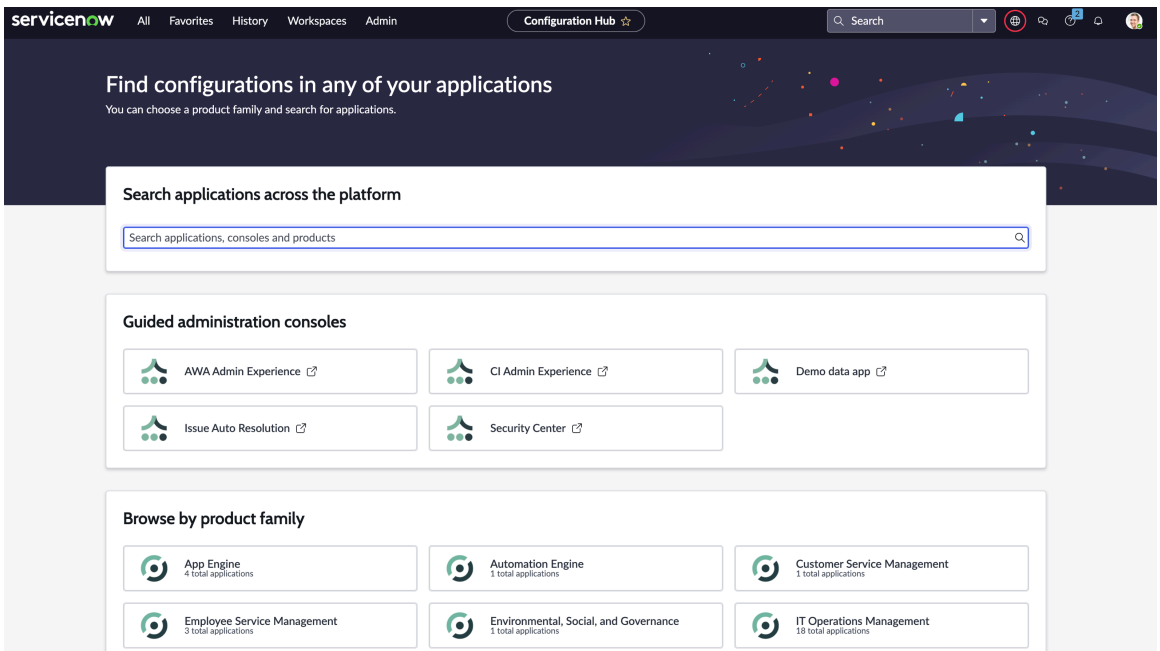
Configuration Hub

Experience the ability to zoom into an application or a group of applications and view all the relevant tables and records on a single page using the Configuration Hub. As an admin you can access all relevant details related to the selected application(s).

You can achieve the following by using Configuration Hub.

- One-stop experience to access all relevant information
- Enhanced ability to save your preferences for all tables and records
- Ability to track and view delta changes, over-allocated licenses, and customizations on a single screen
- Enhanced use of multiple filters simultaneously to drill down to a particular application
- Ability to open and edit a record within Configuration Hub. You don't need to navigate to the record using the conventional ways.

Note: Configuration Hub store application is available by default with any instance upgrade of Vancouver patch 2 and above. You can navigate to Configuration Hub from the **Admin** menu.



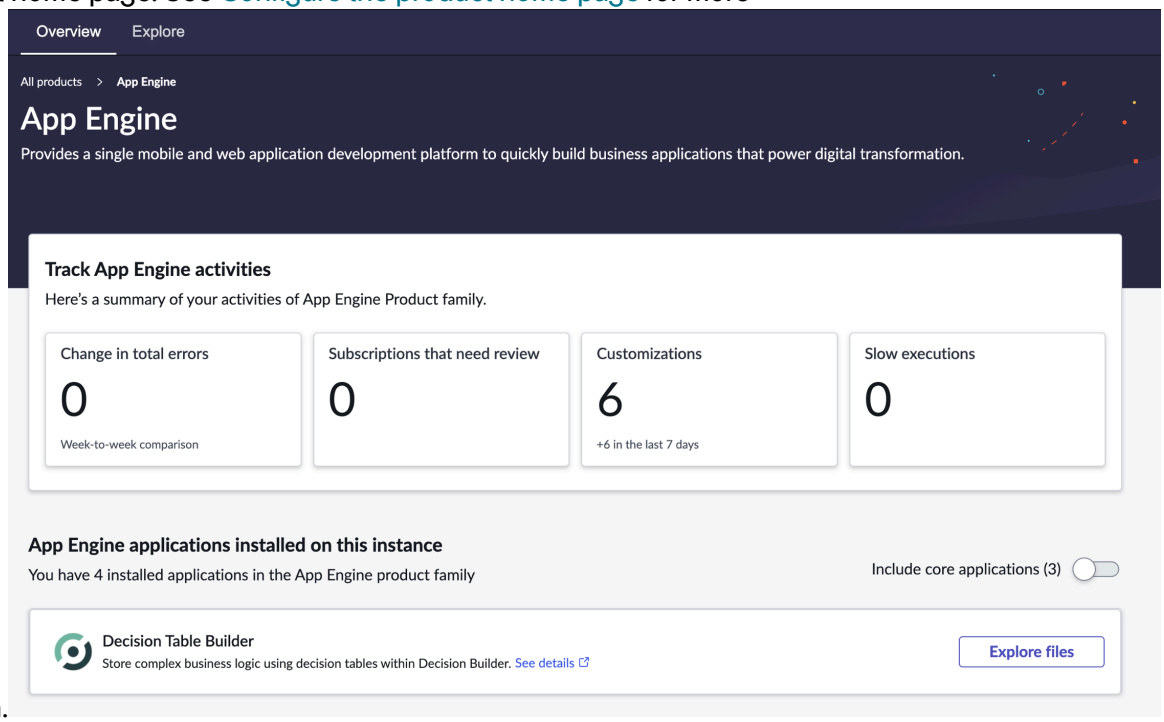
You can search through all the application, console or product names that have been installed on the instance within a certain scope.

Note: The application name doesn’t populate in the search bar if it’s not yet installed on the instance. The number under the family name shows the number of applications in the selected family have been installed on the instance. If there is a product family that doesn’t have any app installed, it won’t show up on the list.

It can also help you search applications that have been grouped by SN store, taxonomy or product families. When you select a product family, it takes to

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the product home page. See Configure the product home page for more information.



Configure the product home page

Track delta changes, over-allocated subscriptions, customizations, and slow execution on the product home page by selecting a product family

Before you begin

Role required: admin

Procedure

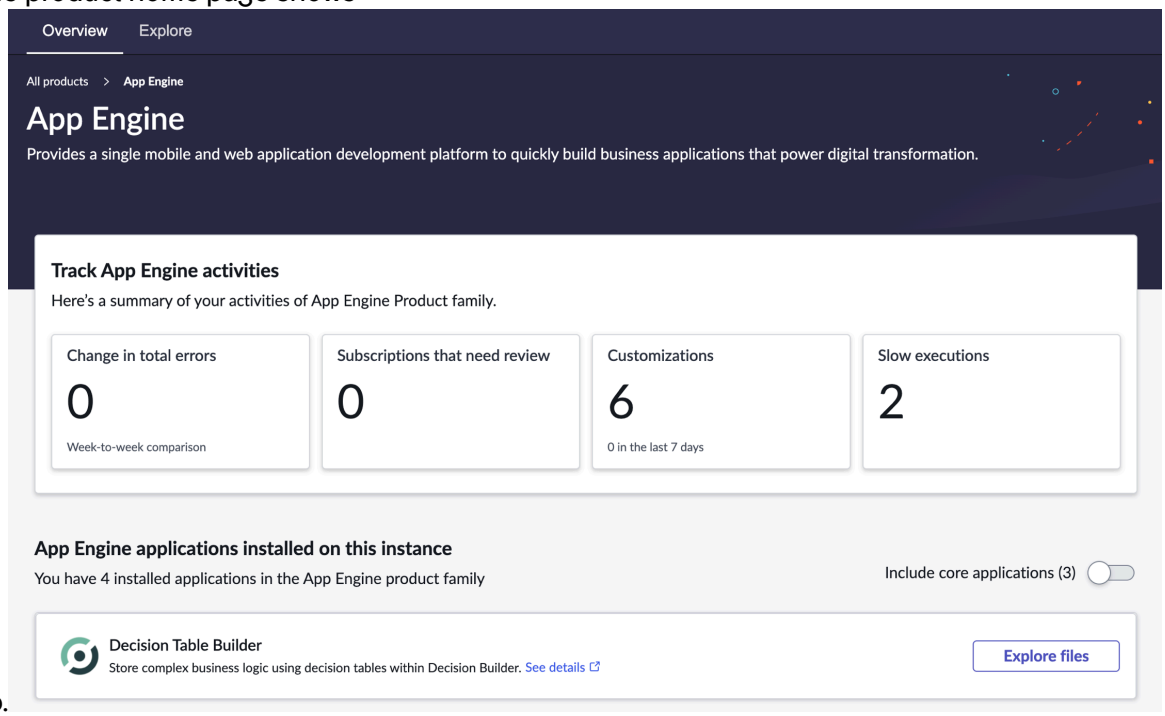
1. Access Configuration Hub in one of the following ways.

Option	Steps
Using left navigation	Navigate to **All** > **Admin Center** > **Configuration Hub**.
Using Admin tab option	Navigate to **Admin** > **Configuration Hub**.

2. Select one of the product families as per your requirement.

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The product home page shows



up.

3. Track the following activities in the Overview tab.
   - Change in total errors: Weekly delta change in errors
   - Subscriptions that need review: Number of licenses that have been over-allocated
   - Customizations: Total modified files related to the installed applications within the selected product family.

     Note: The number mentioned under the total customizations is the number of files that have been modified recently within last 7 days.

   - Slow execution: The number of slow transactions, events and scripts on the instance.

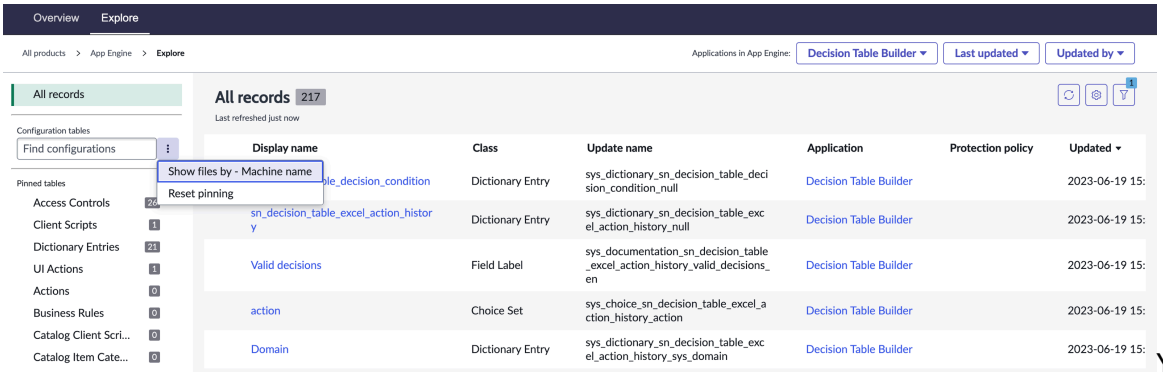
   By default, the core applications are hidden. Core applications are installed by default as you upgrade your instance. You can't uninstall the core applications. But you can use the toggle to show all the applications including the core apps.

   Note: It is recommended not to modify the core applications and its functionality so that during an upgrade you don't have too many skipped files.

   Select **See details** to read more about the store applications that have been installed. Select **Explore files** to list the records in the selected application of the product.
4. Drill down to a particular application by selecting the **Explore** tab.

   Note: The first time the **Explore** option is loaded, it takes in all the applications displayed in the **Overview** section.

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You can do the following in the Explore tab:

- Search for table names, sys_id, or relevant records in the Configuration tables search bar.

  Note: You can also display the files as per machine names.

- Select a particular table from the left navigation bar and all the records in that table show up.

  Note: The number mentioned next to the table name is the number of records in that table. The records also satisfy the Applications in filter. You can also save your table preference by pinning the required tables.

- You can make edits in the records directly within Configuration Hub. You don't have to open the records in a conventional way to make edits in them.

Admin Center reference

Find all the miscellaneous information about Admin Center and its applications in the reference section.

Admin Center roles

Admin Center is installed with these roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

System Administrator [admin]

The admin role allows you to access admin home features, adoption blueprints and configuration hub. You can create your own personalized admin home page on your instance with the information that is most important to you.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Elevated

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Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevate to a privileged role.

No.

Special considerations

None.

Administering applications

You can install, update, and remove applications without leaving your instance.

Get started

ServiceNow Store



The ServiceNow Store allows you to extend the capabilities of the ServiceNow AI Platform with hundreds of certified, ready-to-use apps, integrations, and products.

Application Manager



Application Manager simplifies the process of managing your licensed applications by consolidating them in one convenient location.

ServiceNow Store

Expand the capabilities of the ServiceNow AI Platform® with hundreds of certified, ready-to-use apps, integrations, and products that are available on the ServiceNow® Store.

The ServiceNow Store enables departments across the enterprise to do more with the ServiceNow AI Platform using solutions that complement and extend ServiceNow AI Platform instances. Available offerings include native ServiceNow solutions, which are updated outside of major platform releases, and solutions created by the growing ServiceNow partner ecosystem.

Get started

Explore



Learn about the ServiceNow Store and how apps, products, and integrations can help your organization enhance the ServiceNow AI Platform experience.

Configure



Configure notification preferences for each application you procure from the ServiceNow Store.

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Get apps



Procure apps for production and non-production instances of the ServiceNow AI Platform, or request trials for non-production instances.

Leave feedback



Review the apps your organization uses so providers know what's working well and what future updates you want to see.

Get apps for an on-premise instance



Download encrypted apps to install on on-premise (self-hosted) instances.

Use a regulated environment



If your instance is in a regulated environment, you might need to get apps and products from an isolated federal or regional version of the ServiceNow Store.

Reference



Get information about guest review form fields and types of ServiceNow Store listings.

Troubleshoot and get help

- Ask questions and explore other resources for the ServiceNow Store in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring the ServiceNow Store

Learn about the ServiceNow Store procurement workflow and how apps, products, and integrations can help your organization enhance the ServiceNow AI Platform experience.

ServiceNow Store overview

The ServiceNow Store offers ready-to-use applications, integrations, and products to help you accelerate your digital transformation. These solutions are prebuilt, pretested, and designed

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to work with the ServiceNow AI Platform, so you can deploy fully functional software without building or testing new code.

Each solution is developed and tested by ServiceNow or certified partners. Before being listed in the ServiceNow Store, every solution goes through a rigorous certification process to ensure it meets standards for stability, performance, and data security.

ServiceNow Store listings also undergo a content and marketing review to make sure they accurately describe the solution and include information needed to make informed decisions.

ServiceNow Store users

The following table provides examples of the different types of ServiceNow Store users and how they use the ServiceNow Store:

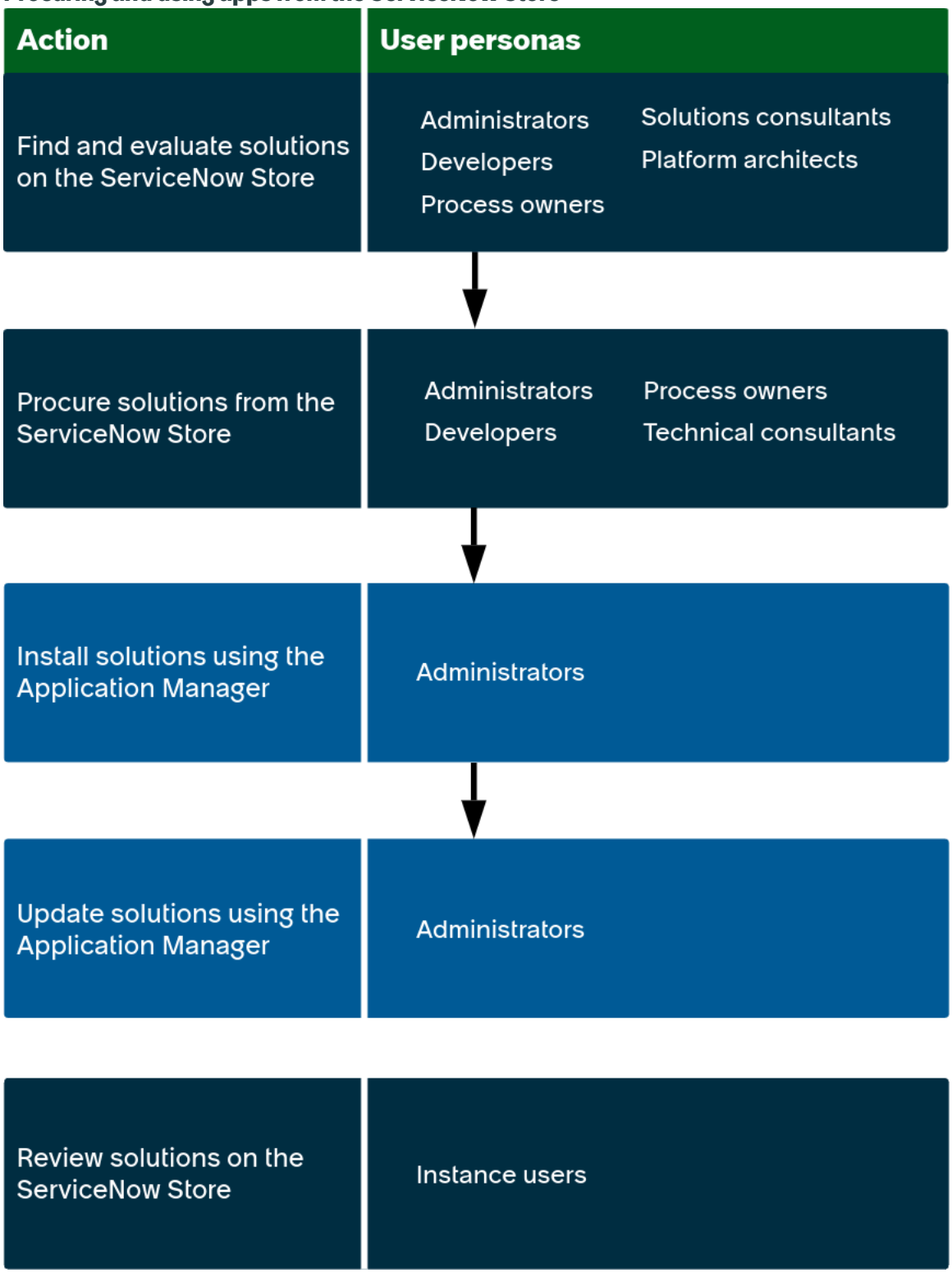
User	Description
Administrators and developers	Find, evaluate, and share solutions. They might also procure solutions based on their organizational roles and responsibilities.
Process owners, business owners, and similar roles	Find and evaluate solutions for departmental needs. They might also procure apps, or approve the procurement of paid apps, depending on their specific responsibilities.
Platform architects	Assess whether solutions align with internal guidelines, evaluate requirements and dependencies, and understand potential impacts on instance stability and performance.
Solution consultants	Stay updated on available solutions. They help find and evaluate options that meet organizational or departmental needs.
Technical consultants	Understand apps at a technical level, prepare detailed demonstrations of which solutions might fulfill organizational needs, and might procure trials from the ServiceNow Store to use in demonstrations.
Instance users	Leave feedback on apps, products, and integrations in the form of reviews on the ServiceNow Store. Instance users include anyone who uses their organization's ServiceNow AI Platform instance.

ServiceNow Store workflow

The following shows the overall workflow of finding, procuring, and installing solutions from the ServiceNow Store.

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Procuring and using apps from the ServiceNow Store



1. Find and evaluate solutions on the ServiceNow Store to determine which apps might improve your organization's ServiceNow AI Platform experience. Finding and evaluating solutions might be done by administrators, developers, process owners, solutions consultants, or platform architects.
2. Procure apps or trials from the ServiceNow Store to extend production or non-production instance capabilities. Procurement might be done by administrators, process owners, developers, or technical consultants.

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3. Install procured solutions using the Application Manager. Installation must be performed by an administrator. For more information about using the Application Manager, see Application Manager.
4. Update installed solutions using the Application Manager to take advantage of the latest improvements. Upgrades must be performed by an administrator. For more information about using the Application Manager, see Application Manager.
5. Leave a review on the ServiceNow Store listing details of any app or product that you have used. Anyone who has experience using a solution can leave a review at any time.

What to explore next

To learn more about using the ServiceNow Store, see:

- Tracking your ServiceNow Store activity
- Plugins, apps, integrations, and products
- Getting apps and trials from the ServiceNow Store
- Reviewing apps
- Getting apps as an on-premise customer
- Using the ServiceNow Store in a regulated environment
- ServiceNow Store reference

Tracking your ServiceNow Store activity

The My Store Activity page lets you view important information related to apps and products that you have purchased, trialed, or requested.

My Store Activity page

You can access the My Store Activity page from your user profile menu after logging in to the ServiceNow Store. From the My Store Activity page, you can select the **In Process**, **Store Applications**, or **ServiceNow Products** tabs to view the following information:

My Store Activity page tabs

Tab	Available information
In Process	• Pending purchases • Requests that are still being processed • Requests that have been rejected
Store Applications	Searchable lists that provide details about the following: • Apps your organization has procured • Payments (available to enterprise customers only) • Demo requests (available to enterprise customers only)

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My Store Activity page tabs (continued)

Tab	Available information
	From **Payments**, you can export all invoices by selecting **Export as CSV**. You can also view an individual invoice by selecting the transaction ID. From **Demo Requests**, you can view information about any trials you have requested, including the amount of time remaining for each trial.
ServiceNow Products	A searchable list that provides details of all products that your organization has procured.

For more information about apps and products, see Plugins, apps, integrations, and products.

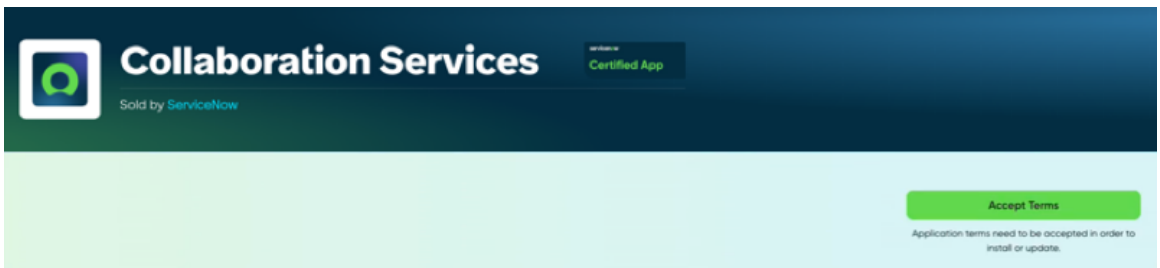
ServiceNow Store application listing details

The listing details page for a ServiceNow Store application shows information about the app and its features, as well as technical information about the versions available.

You can view an app's listing details by selecting an app in the ServiceNow Store. Listing details include a header with procurement options, app details, and version details.

Header

The listing details header shows procurement options, as well as basic information like the application name and the provider. For partner applications, you can select the provider name to view the seller profile.



There are a number of possible procurement options and additional statuses that can be found in the listing details header. Options include but not limited to requesting a 30-day trial, requesting purchase, and signing custom terms and conditions.

Procurement options might be updated or replaced with status messages depending on what actions you take. For example, once you request a trial, the button with that option is replaced with a status message letting you know the trial has been requested. After the trial has been approved, the message is replaced with an option to start the 30-day trial.

Application status messages in the ServiceNow Store are based on the procurement status of an application. After an application is fully procured, a message that it's available for installation is displayed. Installation can be managed through the Application Manager. For more information, see Application Manager.

App details

The app details section includes the following information:

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Summary

An overview of key information about the application, including the following:

- Rating
- Pricing
- Custom table count (the number of unallocated custom tables this application requires)
- Latest version
- Compatibility

Description

An overview of what the application can help you accomplish on your ServiceNow AI Platform instance.

Key features

A list of features and capabilities the application can add to your ServiceNow AI Platform instance.

Ratings and reviews

A summary of ratings on a five-star scale, where five stars is the best, and a list of user reviews. For more information about leaving reviews, see Reviewing apps.

Links and documents

Additional information made available by the provider. Links and documents might include product documentation, release notes, installation guides, case studies, and more.

Licensing requirements

A description of custom table requirements, AI usage, and subscription considerations for applications on the ServiceNow Store.

Terms and conditions

Downloadable ServiceNow Store terms of use and any terms and any other conditions applicable for the application.

Contacts

For partner applications, this shows contact information for the application provider. For applications built by ServiceNow, contact your account administrator or a sales agent.

Version details

The version details section includes the following information:

Version summary

Displays release date, custom table count, and platform release compatibility for the selected version. Select available platform release versions and application versions using the drop-down menus at the beginning of the version summary.

Dependencies

Lists of application dependencies and plugin dependencies that are required for the application to function correctly. For more information about dependencies, see Evaluating version requirements and dependencies.

Release notes

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Information about what's been added, removed, or fixed in the selected application version.

Resource permissions

Information about how the application accesses cross scope and cross origin resources, and how its system usage is controlled, if provided by the developer.

Requirements

Hardware and software requirements for the application.

Plugins, apps, integrations, and products

Learn the difference between plugins, apps, integrations, and products, and understand the role each plays in the ServiceNow AI Platform.

Plugins

A plugin is a set of customizations that extends the functionality of the ServiceNow AI Platform and any apps already installed on your instance. Some plugins are pre-activated in your instance, while others might need to be activated manually by you or by ServiceNow personnel.

New plugins are made available during instance upgrades in accordance with your organization's ServiceNow licensing agreement. Plugins can't be purchased through the ServiceNow Store.

For more information about plugins, see ServiceNow plugins.

Applications/apps

An application is a standalone piece of code that implements a collection of features on the ServiceNow AI Platform. You can try, buy, or get apps according to your ServiceNow licensing agreement through the ServiceNow Store.

After getting an app from the ServiceNow Store, install it using the Application Manager. For more information, see Application Manager.

You can also create your own apps. For more information about creating apps for your ServiceNow AI Platform instance, see Building applications.

Integrations

An integration is a type of app that connects your instance to various systems outside the ServiceNow ecosystem, helping to streamline the flow of data within your organization. Integrations can be procured from the ServiceNow Store, either on their own or as part of a product.

Products

Products are collections of apps that work together to add additional features and capabilities to your ServiceNow AI Platform instance.

For more information about procuring products, see Getting products.

Configuring ServiceNow Store

Configure your ServiceNow Store user account.

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Configuration overview

The ServiceNow Store is a marketplace of applications, integrations, and products that work with the ServiceNow AI Platform. You can log in to the ServiceNow Store using your Now Support account credentials by default.

To configure application-specific notification settings, see Configure ServiceNow Store application notification preferences.

Configure ServiceNow Store application notification preferences

You can set notification preferences for each application you have procured and each trial you have requested. By default, notifications are sent to the email address associated with your Now Support account.

Before you begin

Role required: none

Procedure

1. Log in to the ServiceNow Store using your Now Support account credentials.
2. Select your name to open the user options.
3. Select **My store activity**.
4. Select the **Select Action** drop-down menu next to the application whose notification setting you want to change.
5. Select **Manage Notifications**.
6. Select the edit icon to change which email address receives application notifications.

Block application entitlements from the ServiceNow Store

As a service provider, block one or more instances from receiving application entitlements through the ServiceNow Store. An application can be installed in any entitled instance.

Before you begin

- Your company must be a service provider.
- The application must already be licensed to your company, or be available to install without a license.
- You must be logged into the ServiceNow Store with your Now Support account credentials.

Role required: none

About this task

Entitled instances can install applications. By default, all instances you manage are entitled to your licensed applications and free applications. Service providers can block application entitlement for any instance they manage.

If your organization isn't a service provider, all eligible instances within the organization are entitled and can install licensed and free applications.

Procedure

1. Log in to the ServiceNow Store using your Now Support credentials.
2. Find and select the application in the ServiceNow Store to navigate to the listing details.
3. Select **Manage entitlements**.

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4. Move instances from the **Available to install** column to the **Install blocked** column to prevent them from installing the application.
5. Select **Save changes**.

Result
Blocked instances can't install the application.

Getting apps and trials from the ServiceNow Store

Learn more about the different procurement flows for apps from the ServiceNow Store.

Overview of getting apps and trials

Applications must be procured from the ServiceNow Store if any of the following scenarios apply:

- The application has custom terms and conditions that must be agreed to.
- The application requires a paid license or subscription.
- The application requires the provider's approval to install.

Application state indicators can help you determine whether an application must be procured from the ServiceNow Store before it can be installed. Any applicable application state indicators are shown as part of application details page in the Application Manager. For more information about application state indicators, see Application state indicators in Application Manager.

Procure apps for any production or non-production instance in one of the following ways:

- Get a free application

  Get an app that's available at no additional cost from the ServiceNow Store when the app has custom terms and conditions or requires provider approval.

- Buy a ServiceNow application

  Log in to the ServiceNow Store and purchase an application that lists ServiceNow as the provider.

- Buy a partner application

  Log in to the ServiceNow Store and purchase an application that lists a non-ServiceNow provider.

- Get a product

  Procure products from the ServiceNow Store based on the terms of your license. A product is a collection of functionalities, typically including multiple applications, that aims to fulfill a category of business need.

Many apps provide a 30-day trial at no additional cost. The trial enables you to install the app on your non-production instances to determine whether you want to continue with procurement for production instances.

If a trial is available for an app, the listing has a **Request 30-day trial** option in the app listing and the app details page in the Application Manager shows the "Trial Available" state indicator.. For more information about starting an app trial, see Start an application trial from the ServiceNow Store.

Once an app has been procured, it’s available to install from the Application Manager.

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Additional information

- Contact a seller

  Contact an app's provider through the ServiceNow Store to ask questions about the app and its procurement.

- Evaluating version requirements and dependencies

  Learn how version compatibility and technical dependencies can affect your ability to install and use apps.

- Terms and conditions in the ServiceNow Store

  Learn about when terms and conditions must be signed in the ServiceNow Store. Unsigned terms and conditions block procurement and installations.

- Application Manager

  Use the Application Manager to install, update, repair, or uninstall an app after it's been procured.

Start an application trial from the ServiceNow Store

Request a 30-day trial of an app to test its functionality in a non-production instance.

Before you begin

You must be logged in to the ServiceNow Store with your Now Support account credentials.

Role required: none

About this task

You can request a 30-day trial of any app that includes a **Request 30-day trial** option in its listing details. The trial enables you to install the app on your non-production instance for evaluation.

If you decide to install the app on a production instance after evaluation, return to the ServiceNow Store and purchase the app or request the necessary license. For more information, see Buy a ServiceNow application or Buy a partner application.

Procedure

1. **Optional:** On the ServiceNow Store listing details for the app or integration, select **Request 30-day trial**.

   (Optional) Trial approvals are granted at the app provider's discretion, and trial requests expire after six months. If your trial request isn't approved, you can make a new request after the first request expires.

   To contact a seller about a trial request, see Contact a seller.

2. If no approval is required or if you already received approval, navigate to the ServiceNow Store app listing details and select **Start 30-day Trial**.
3. **Optional:** If you're a service provider managing trials for other organizations, select **Manage entitlements** to choose which non-production instances can install the application during the trial period.

   a. Select **Save**

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Result
The app is entitled and available for installation on the non-production instances you have selected within 24 hours. If the application isn't available from the Application Manager within 24 hours, contact Now Support for assistance.

Confirmation emails for the application and any dependencies that were procured are sent to the email address associated with your ServiceNow Store account. For information about configuring which email address receives notifications for this application, see Configure ServiceNow Store application notification preferences.

What to do next
Use the Application Manager to install the app on non-production instances for evaluation. For more information about the Application Manager, see Application Manager.

You can track the trial expiration date through the **Store Applications** section of the My Store Activity page. For more information, see Tracking your ServiceNow Store activity.

Get a free application

Get an app that's available at no additional cost from the ServiceNow Store when the app has custom terms and conditions or requires provider approval.

Before you begin
You must be logged in to the ServiceNow Store with your Now Support account credentials.

Role required: none

About this task
Applications that are available at no additional cost must be procured from the ServiceNow Store before installation in the following scenarios:

- If the application has the "Approval Required" state indicator in the Application Manager, it must be requested through the ServiceNow Store.
- If the application has the "App Terms Not Accepted" state indicator in the Application Manager, it has custom terms and conditions that must be accepted from the ServiceNow Store.
- If a new application version has the "App Terms Not Accepted" indicator in the Application Manager, that version has custom terms and conditions that must be accepted from the ServiceNow Store before the application can be updated.

For more information about application state indicators, see Application state indicators in Application Manager.

Procedure
1. Log in to the ServiceNow Store using your Now Support account credentials.
   For more information about accessing isolated federal or regional version of the ServiceNow Store, see Access the ServiceNow Store for a regulated environment.
2. Find and select the application in the ServiceNow Store to navigate to the listing details.
3. **Optional:** Select **Request app** to request procurement approval if required by the provider.
   You receive an email informing you whether the request is approved.
4. **Optional:** Accept any unacknowledged custom terms and conditions from the ServiceNow Store.
   a. From the application listing details in the ServiceNow Store, select **Accept Terms**.
   b. Download and review the custom terms and conditions.

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c. Select the option to agree to the terms and conditions.

d. Select **Accept**.

Result

If you use the commercial ServiceNow Store, the application is available for installation from the Application Manager within 24 hours. If you use an isolated federal or regional instance of the ServiceNow Store, the application is available within two business days of final approval. For more information about using the Application Manager, see Application Manager.

Confirmation emails for the application and any dependencies that were procured are sent to the email address associated with your ServiceNow Store account.

Trouble?

If the application isn't available to install from the Application Manager within the expected amount of time, try the following actions.

- Verify that all necessary dependencies have been procured. For more information, see Evaluating version requirements and dependencies.
- Review application state indicators from application's details in the Application Manager. For more information about what each indicator means, see Application state indicators in Application Manager.
- If the previous options don't work, contact Now Support for assistance.

What to do next

Install the app on compatible production or non-production instances, based on whether you have a hosted or on-premise instance:

- If your instance is in a hosted environment, install the app using the Application Manager. For more information, see Install an application or plugin.
- If your instance is in an on-premise environment, download the encrypted app file from your federal or regional instance of the ServiceNow Store and upload the file to your instance. For more information, see Getting apps as an on-premise customer

Buy a ServiceNow application

Log in to the ServiceNow Store and purchase an application that lists ServiceNow as the provider.

Before you begin

You must be logged in to the ServiceNow Store with your Now Support account credentials.

Role required: none

Procedure

1. Log in to the ServiceNow Store using your Now Support credentials.
2. Find and select the application to view its listing details.
3. Initiate purchase based on the option displayed on the listing details page.
   - If the application requires additional approval, the listing details page displays a **Request purchase** option.
   - If the application doesn't require additional approval, the listing details page displays a **Request license** option.

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A sales agent or your account executive contacts you to process approved purchases. If the application uses the standard terms and conditions, it's available to install from the Application Manager within 24 hours of confirmation.

4. **Optional:** If the application displays the "App Terms Not Accepted" state indicator in the Application Manager, accept the custom terms and conditions from the ServiceNow Store. For more information about application state indicators, see Application state indicators in Application Manager.
   a. From the application listing details in the ServiceNow Store, select **Accept Terms**.
   b. Download and review the custom terms and conditions.
   c. Select the option to agree to the terms and conditions.
   d. Select **Accept**.

Result

The application is available for installation from the Application Manager within 24 hours of license confirmation. For more information about using the Application Manager, see Application Manager.

Confirmation emails for the application and any dependencies that were procured are sent to the email address associated with your ServiceNow Store account.

Trouble?

If the application isn't available to install from the Application Manager within the expected amount of time, try the following actions.

- Verify that all necessary dependencies have been procured. For more information, see Evaluating version requirements and dependencies.
- Review application state indicators from application's details in the Application Manager. For more information about what each indicator means, see Application state indicators in Application Manager.
- If the previous options don't work, contact Now Support for assistance.

Buy a partner application

Log in to the ServiceNow Store and purchase an application that lists a non-ServiceNow provider.

Before you begin

You must be logged in to the ServiceNow Store with your Now Support account credentials.

Role required: none

Procedure

1. Log in to the ServiceNow Store using your Now Support credentials.
2. Find and select the application in the ServiceNow Store to navigate to the listing details.
3. Initiate purchase based on the option displayed on the listing details page.
   If an application requires additional approval from the provider, the listing details page displays a **Request purchase** option. If the application doesn't require any additional approval, the listing details page displays **Contact seller** instead.

Option	Procedure
Request purchase	Select **Request purchase** to send a request to the provider. Approval is granted at the provider's discretion.

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Option	Procedure
Contact seller	**a.** Select **Contact seller**. **b.** In the **Reason for contacting** section of the pop-up window, select **Purchases**. **c.** In the **Message to the seller** field, enter your message. **d.** Select **Send** to submit the message to the application provider.

You receive an email informing you whether the provider approves the purchase.

4. When you receive an email confirmation that your purchase has been approved, follow any additional instructions in the email to complete the purchase.
5. **Optional:** If the application displays the "App Terms Not Accepted" state indicator in the Application Manager, accept the custom terms and conditions from the ServiceNow Store. For more information about application state indicators, see Application state indicators in Application Manager.
   a. From the application listing details in the ServiceNow Store, select **Accept Terms**.
   b. Download and review the custom terms and conditions.
   c. Select the option to agree to the terms and conditions.
   d. Select **Accept**.

Result

The application is available for installation from the Application Manager within 24 hours of license confirmation. For more information about using the Application Manager, see Application Manager.

Confirmation emails for the application and any dependencies that were procured are sent to the email address associated with your ServiceNow Store account.

Trouble?

If the application isn't available to install from the Application Manager within the expected amount of time, try the following actions.

- Verify that all necessary dependencies have been procured. For more information, see Evaluating version requirements and dependencies.
- Review application state indicators from application's details in the Application Manager. For more information about what each indicator means, see Application state indicators in Application Manager.
- If the previous options don't work, contact Now Support for assistance.

Getting products

Procure products from the ServiceNow Store based on the terms of your license. A product is a collection of functionalities, typically including multiple applications, that aims to fulfill a category of business need.

Overview of getting products

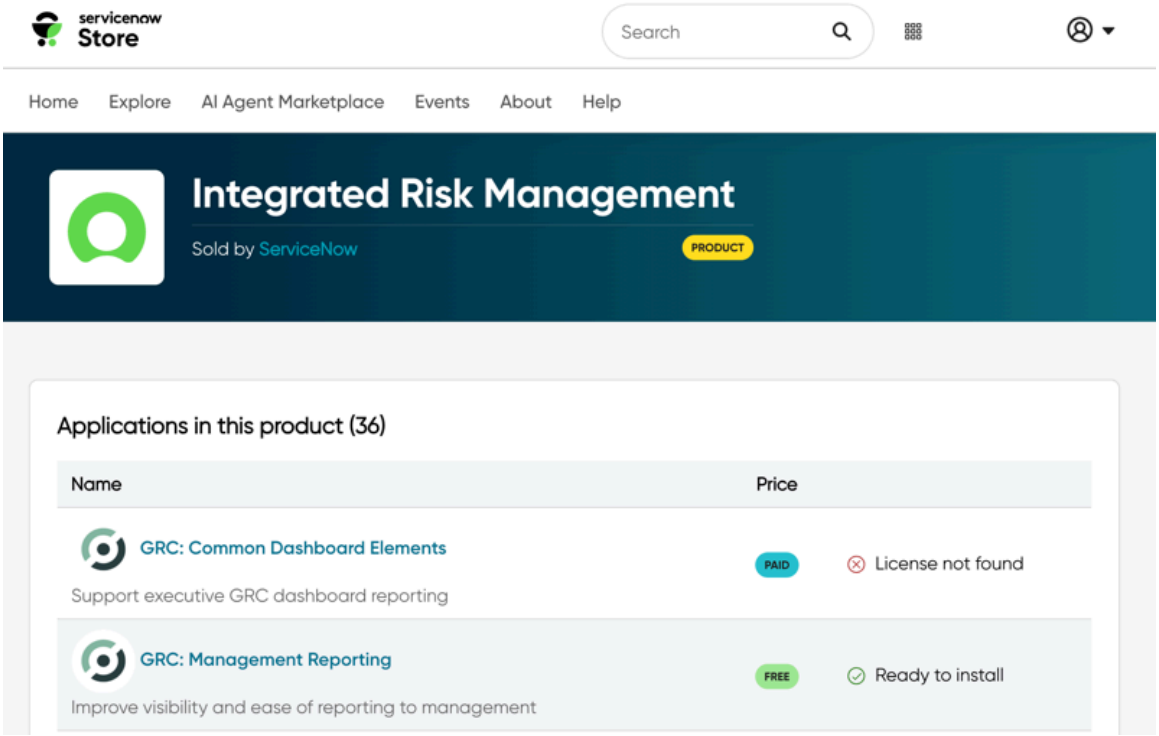
You can browse all products available from the ServiceNow Store by navigating to the **Explore** tab and selecting **ServiceNow Products**.

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Product details page

From the product details page, you can see all applications included in the product and whether each one is ready to install. Applications that aren't part of your license yet display "License not found."

Product details



Each unlicensed application in a product must be procured individually. Select each unlicensed application and request procurement from the application details page. For more information, see Buy a ServiceNow application.

Contact a seller

Contact the provider of an app through the ServiceNow Store to ask questions about the app and its procurement.

Before you begin
Role required: None

If an app is provided by a partner of ServiceNow, you can contact the provider through the ServiceNow Store with or without logging in.

If you have questions about an app offered by ServiceNow, contact your account executive or a ServiceNow sales representative.

Note: If your organization uses a federal or regulated instance of the ServiceNow Store, the **Contact Seller** button is unavailable. Instead, navigate to the **Contacts** section of the listing details using the side menu or select **View seller profile**, then use the contact information provided to contact the seller directly. For more information about getting applications in regulated environments, see Using the ServiceNow Store in a regulated environment.

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Procedure

1. From the summary section of the app listing details, select **Contact Seller**.
2. On the contact form, fill in the fields, which depend on whether you're logged in with your Now Support credentials.

Logged in status	Fields displayed
Logged in	Provide the reason for contacting the seller and your message.
Not logged in	On the guest contact form, fill in the fields. For a description of the field values, see Guest contact form fields.

3. Select **Send** to submit the form.

Result

If you contact the seller about a purchase, you might receive an email notification from the ServiceNow Store informing you that the seller has agreed to a custom order. In this case, you can procure the app from the ServiceNow Store according to the terms described in the email.

Otherwise, the seller responds to you directly using the contact information that's provided in the contact form or that's associated with your Now Support account.

Evaluating version requirements and dependencies

Reviewing technical requirements when deciding to implement a new app, product, or integration is necessary to confirm that the software can work correctly in your environment. Verify version compatibility with your ServiceNow AI Platform instance and check dependencies to make sure that an app will be ready to install after procurement.

Version support

The ServiceNow Store supports up to two platform releases before the current platform release. For example, if the current platform release is Yokohama, the ServiceNow Store maintains app versions that are compatible with Yokohama, Xanadu, and Washington DC.

However, it can't be guaranteed that new apps are compatible with any platform releases before the most current one. Available apps might, for example, be compatible with only Yokohama or with only Yokohama and Xanadu.

If you find that your ServiceNow AI Platform release version is no longer supported in the ServiceNow Store, upgrade your instance to take advantage of recent features and improvements. For more information, see Using ServiceNow AI Platform upgrade tools.

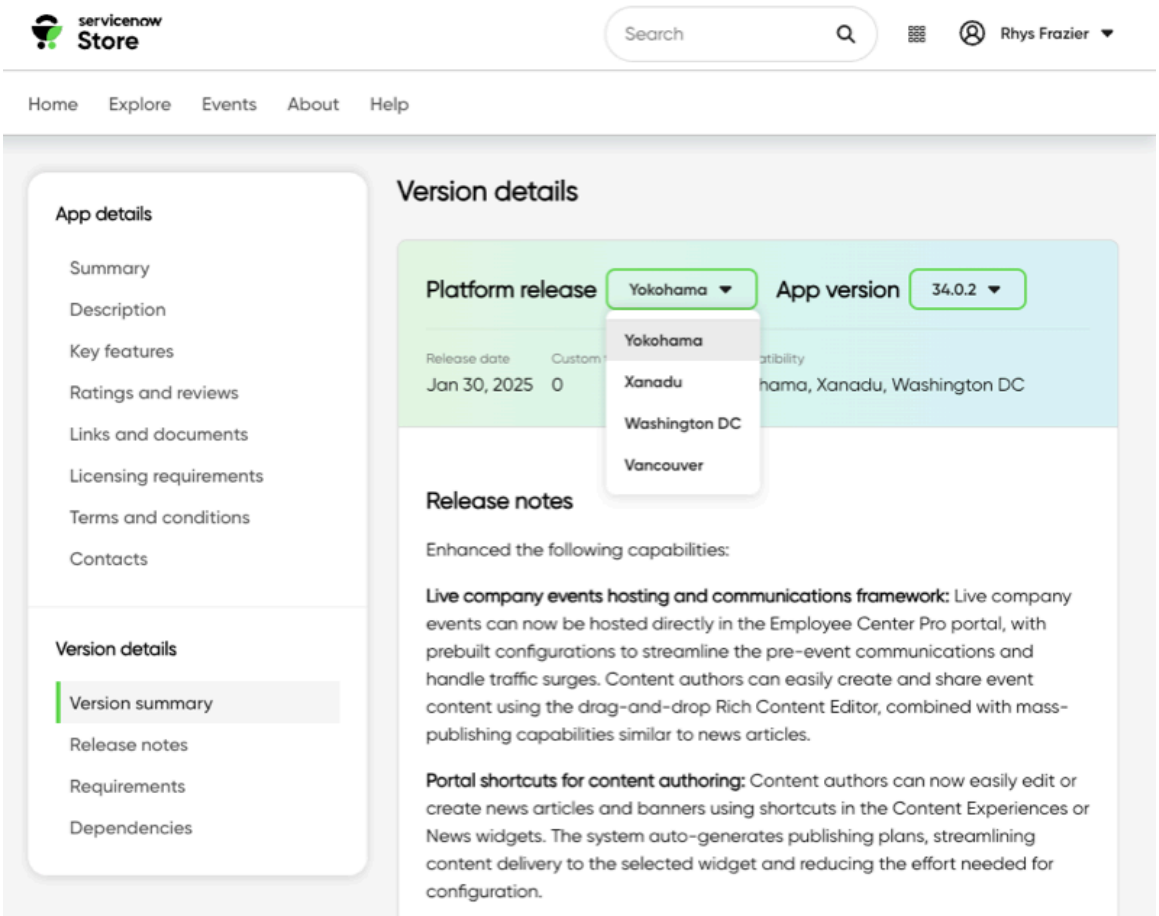
Checking version compatibility

The app you want to procure must be compatible with your instance's platform release version. If you can't procure an app, check whether it's compatible with your version.

Apps on the ServiceNow Store might be compatible with multiple ServiceNow AI Platform releases. Select **Version summary** from the navigation panel of the listing details or scroll to the version details section to determine platform release compatibility. You can select the platform release version that matches your instance by using the platform release drop-down menu.

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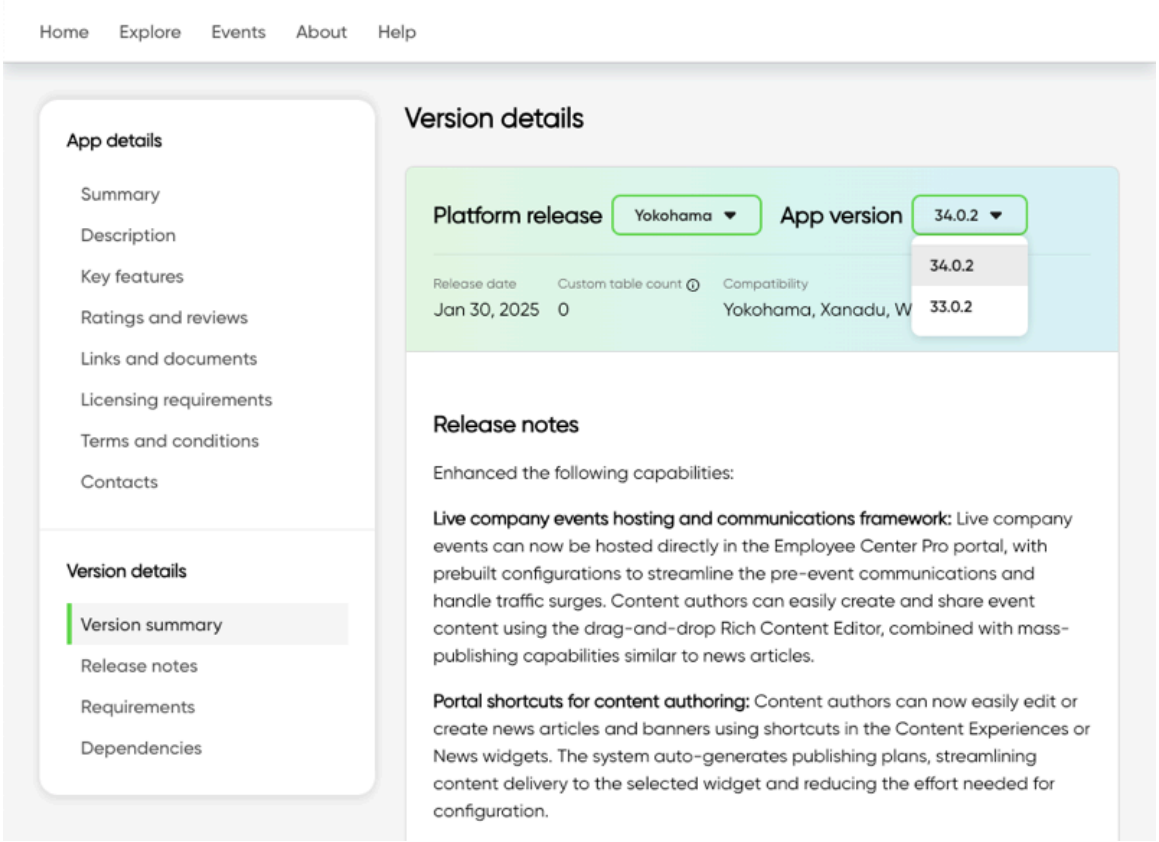
Platform release compatibility in an app listing details



Some apps and integrations are available in more than one version. Each of these versions might be compatible with a different major platform release. Use the app version drop-down menu to view release notes and decide which version is right for your instance.

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Accessing other app versions in app listing details



About dependencies

Dependencies are the additional apps, integrations, and plugins that an app might require to work correctly. Select **Dependencies** from the navigation panel of the listing details or scroll to the version details section to view an app's dependencies.

Any app on the ServiceNow Store might have application dependencies or system plugin dependencies.

Application dependencies

Include apps and integrations that are required for the app you want to procure. App dependencies that don't require an additional purchase are procured automatically. Paid app dependencies can be purchased through the ServiceNow Store

System plugin dependencies

Must be activated on your instance before an app can be installed and can’t be obtained from the ServiceNow Store. Instead, plugins must be obtained through your ServiceNow license and version upgrades. For more information about plugins, see ServiceNow plugins.

Each application dependency is listed with a symbol. The symbol indicates a category that describes how you can acquire the app dependency. App dependencies use the following categories.

Note: You must be logged in to the ServiceNow Store to see the app dependency categories.

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App dependency symbols

Symbol	Category	Description
	Application is available to install or update	This dependency is already entitled on your instance and is available to install through the Application Manager when you install the app that requires it. For more information about the Application Manager, see Application Manager.
	Unavailable to install application in production	This app isn't already entitled on your instance, and must be procured before it or the app that requires it can be installed. If this app requires purchase, procure it through its ServiceNow Store listing details, or contact you ServiceNow account manager to initiate procurement. If this app is available at no additional cost, it's automatically procured with the app that requires it in the following situations: • If the app doesn't have custom terms and conditions • If the app doesn't require approval from the provider

Unresolved dependencies in procured apps

If you procured an app but it still can't be installed through the Application Manager, you might have unresolved dependencies. You can verify whether there are unresolved dependencies by logging in to the ServiceNow Store and returning to the app listing details. If an application dependency must be procured manually, a red x icon () indicates that the app is unavailable to install in production.

The list of application dependencies contains links that direct you to the ServiceNow Store listing details for each app dependency. From the listing details, you can manually procure the required app.

Plugin dependencies can't be resolved from the ServiceNow Store. For more information about managing plugins, see ServiceNow plugins.

Terms and conditions in the ServiceNow Store

Learn about when terms and conditions must be accepted in the ServiceNow Store. Unaccepted terms and conditions block procurement and installations.

Applications in the ServiceNow Store might use standard or custom terms and conditions. You can review and download all terms and conditions that apply to an application from its listing details page.

Standard terms and conditions

Standard terms and conditions include the Store Standard Terms of Use and Vendor App Subscription Terms and Conditions. Standard terms and conditions must be accepted in the following scenarios:

- If you're a new ServiceNow Store customer
- If you're an existing ServiceNow Store customer and haven't yet accepted the standard terms and conditions

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When you log in to the ServiceNow Store, an alert message tells you if you must accept the standard terms and conditions. You can review, accept, and download the standard terms and conditions from the link in the alert message.

Standard terms and conditions must be accepted before you can procure or install applications, integrations, and products.

Custom terms and conditions

Application providers can also include custom terms and conditions that must be accepted before their applications can be procured. If an application has custom terms and conditions, you're prompted to accept them when you procure the application from the ServiceNow Store. If the application uses custom terms and conditions, procurement and installation are blocked until the custom terms and conditions are accepted.

Reviewing apps

Reviewing apps, products, and integrations on the ServiceNow Store lets providers know what's working well and what future updates customers want to see.

Overview of reviewing apps

You can leave a review on any ServiceNow Store solution that you have used. Either log in to the ServiceNow Store with your Now Support credentials to leave a review or submit a guest review.

You can view published reviews by selecting **Ratings and Reviews** from the app details navigation panel.

Reviews left on an application only show up in the environment where the review was made. For example, reviews made from the commercial ServiceNow Store are only visible on the commercial ServiceNow Store. Reviews made from a regulated regional or federal instance of the ServiceNow Store are only visible to users in the same instance of the ServiceNow Store.

Review an app

Use your Now Support credentials to log in to the ServiceNow Store and leave a review on any app or integration you have used.

Before you begin

- The app you’re reviewing must be installed on your instance.
- You must be logged in to the ServiceNow Store with your Now Support credentials.

Role required: None

About this task

You can review an app after your organization buys or trials it. App reviews provide valuable feedback about what you like and what possible updates you want to see in the future.

Reviews left on an application only show up in the environment where the review was made. For example, reviews made from the commercial ServiceNow Store are only visible on the commercial ServiceNow Store. Reviews made from a regulated regional or federal instance of the ServiceNow Store are only visible to users in the same instance of the ServiceNow Store.

Note: Your company is visible in any reviews that you leave while logged in to the ServiceNow Store unless your organization uses an isolated federal or regional instance. If your company uses an isolated federal or regional instance, "Verified ServiceNow Customer" is displayed instead.

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Procedure

1. Log in to the ServiceNow Store using your Now Support credentials.
2. Find and select the app that you want to review on the ServiceNow Store.
3. From the app details navigation panel, select **Ratings and Reviews**.
4. Select **Write a Review**.
5. Select a number of stars out of five.
6. Enter your comments in the review field.
7. Select **Post**.

Result

For commercial customers, your company, review, and rating are visible in a review posted to the app listing details. For customers using a federal or regulated ServiceNow Store instance, only the rating and review fields are made visible.

Submit a guest review

Submit a guest review to leave feedback on an app or integration if you aren't logged in.

Before you begin

Role required: None

About this task

Reviews left on an application only show up in the environment where the review was made. For example, reviews made from the commercial ServiceNow Store are only visible on the commercial ServiceNow Store. Reviews made from a regulated regional or federal instance of the ServiceNow Store are only visible to users in the same instance of the ServiceNow Store.

Procedure

1. In the ServiceNow Store, find and select the listing of the app you want to review.
2. From the navigation panel in the app listing details, select **Ratings and reviews**.
3. Select **Write a Review**.
4. On the guest review form, fill in the fields.
   For a description of the field values, see Guest review form fields.
5. Select **Submit**.

Result

For commercial customers, your company, review, and rating are visible in a review posted to the app listing details. For customers using a federal or regulated ServiceNow Store instance, only the rating and review fields are made visible.

Getting apps as an on-premise customer

If you have an on-premise (self-hosted) instance, you can procure apps from the ServiceNow Store. Download encrypted apps and products to install on your instance, or connect your instance to the ServiceNow Store to sync purchases with your instance directly.

Overview of using the ServiceNow Store for on-premise instances

If you have an on-premise instance, there are two ways that you can procure apps and products from the ServiceNow Store.

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- Use a computer with network access to download encrypted application files, and then transfer those files to your on-premise instance.
- Connect your on-premise instance to the ServiceNow Store to sync purchases with your instance and make them available for installation. Contact Customer Service and Support to connect your instance to the ServiceNow Store.

Procuring apps and products without connecting to the ServiceNow Store

Use the following steps to procure apps and products without connecting your instance to the ServiceNow Store.

1. Get an app or product as an on-premise customer

   Procure and download an encrypted app from the ServiceNow Store for use with your on-premise instance.

2. Upload an app to an on-premise instance

   Upload an application's encrypted file to your on-premise instance to make it available for installation.

3. Install the app or product using the Application Manager

   After uploading the encrypted app file, use the Application Manager to install the application to your on-premise instance.

For information about updating applications in unconnected on-premise instances, see the article Upgrade guidance for self-hosted customers [KB0598275] on the Now Support Knowledge Base.

Procuring apps and products by connecting to the ServiceNow Store

Contact Customer Service and Support to connect your instance to the ServiceNow Store.

After Customer Service and Support confirms that your instance is connected to the ServiceNow Store, follow the same steps used to procure and install applications in hosted instances. Refer to Getting apps and trials from the ServiceNow Store for more details.

Get an app or product as an on-premise customer

Procure and download encrypted apps, products, and dependencies from the ServiceNow Store for use with your on-premise (self-hosted) instance.

Before you begin

You must be logged in to the ServiceNow Store with your Now Support account credentials.

Role required: none

About this task

If your on-premise instance isn't connected to the internet or to the ServiceNow Store, you can download encrypted applications to use on your instance. Procure and download an application or product and its dependencies using a computer with internet access, then transfer the necessary files to your instance.

If your on-premise instance has been connected to the ServiceNow Store, refer to Getting apps and trials from the ServiceNow Store instead.

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Important: You must repeat this process for each instance you want to upload an app or product to.

Procedure

1. From a computer with internet access, log in to the ServiceNow Store and procure the app or product.
   - For more details about procuring apps and products from the commercial ServiceNow Store, see Getting apps and trials from the ServiceNow Store.
   - For more details about procuring apps in a regulated environment, see Using the ServiceNow Store in a regulated environment.
2. From the app listing details or product page on the ServiceNow Store, select **On-prem download**.
3. In the pop-up window, use the **Select on-prem instance** drop-down list to select an instance associated with your account.
4. Select an encryption certificate through the **Use existing**, **Generate new**, or **Upload new** options.
   - Select **Use existing** if you recently downloaded an application for the same instance you selected in step 3. If no certificate is automatically populated when you select **Use existing**, select **Generate new** or **Upload new** instead.
   - Select **Generate new** if you don't have an encryption certificate or if your encryption certificate has expired.
   - Select **Upload new** if you want to use the same encryption certificate you generated to install an application on a different instance.

Option	Procedure
Use existing	If a certificate is automatically populated, pro ceed to the next step. If no certificate is auto matically populated, select **Generate new** or **Upload new** instead.
Generate new	**a.** In the **Password** field, enter the password you want to use with the new certificate. **b.** Select **Generate**. A new encryption certificate is available for download.
Upload new	**a.** In the **Password** field, enter the password that was used to generate the certificate you want to use. **b.** In the **Upload file** field, add the encryption certificate. **c.** Select **Upload**.

For more information about generating encryption certificates and uploading them to your ServiceNow AI Platform instances, see How to generate and upload a certificate for on-prem store app | Troubleshooting common issues or errors [KB1080332].

5. Select a compatible application version to download from the **Version** drop-down list next to the application name.

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Only versions compatible with the instance selected in step 3 are displayed.

On-prem product downloads display multiple applications with **Version** drop-down lists. Applications that you don't specify a version for are excluded from download.

6. Select **Download Application** to download an encrypted `.store` file with the selected apps and their dependencies.

> **Note:** The `.store` file has an expiration date two weeks from the date of download. If more than two weeks pass before you upload it to your instance, you must download a new `.store` file.

What to do next

Transfer the `.store` file to your on-premise instance to upload the app. For more information, see Upload an app to an on-premise instance.

Upload an app to an on-premise instance

Upload an application's encrypted file to your on-premise instance to make it available for installation.

Before you begin

Role required: admin

- The same certificate used when downloading the app must be installed to the instance.
- For instances that aren't connected to the internet, the system property `sn_appclient.app.install.offline` must be set to `true`. If the value is set to `false`, contact Customer Service and Support and request it be changed to `true`.

Procedure

1. From your ServiceNow AI Platform instance, access the Application Manager by navigating to **Admin** > **Application Manager**
2. Select **Upload Offline Application**.
3. Upload the `.store` file you received when you downloaded the application from the ServiceNow Store.
4. Locate and select the app from the list on the **Available for you** page.

Trouble?
If you can't find the app, refresh the Application Manager and try again.

What to do next

Install the uploaded application through the Application Manager. For more information, see Install an application or plugin.

Using the ServiceNow Store in a regulated environment

Certain regulated environments require an isolated instance of the ServiceNow Store to meet data security requirements. If your instance is in a regulated environment, you might need to get apps and products from a federal or regional version of the ServiceNow Store.

Overview of using the ServiceNow Store in a regulated environment

Regulated instances of the ServiceNow AI Platform are hosted in datacenters that comply with the specific regional, organizational, or governmental needs of the customers that use

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them. With a regulated instance, an organization or government body can determine specific requirements, including data residency, privacy and security, and compliance requirements.

Some regulated environments require their own isolated instances of the ServiceNow Store to meet security requirements. Isolated instances of the ServiceNow Store are available in both federal and regional regulated instances.

Not all regulated environments require an isolated instance of the ServiceNow Store. If your environment doesn't have access to an isolated federal or regional ServiceNow Store, use the commercial ServiceNow Store instead. For more information about which environments have access to an isolated federal or regional ServiceNow Store, see Environments with federal or regional ServiceNow Store instances.

Important: Applications and products available in federal and regional instances of the ServiceNow Store aren't accredited. You must perform your own security review to confirm that an application or product meets the requirements for your regulated instance.

Procuring and installing apps in a regulated environment



1. Access the correct version of the ServiceNow Store for your environment.
   - If your regulated environment has an isolated federal or regional instance of the ServiceNow Store, see Access the ServiceNow Store for a regulated environment.
   - If your regulated environment doesn't require an isolated federal or regional instance, use the procurement process for the commercial ServiceNow Store instead. For information about procuring apps from the commercial ServiceNow Store, refer to Getting apps and trials from the ServiceNow Store.
2. Procure an application from an isolated federal or regional instance of the ServiceNow Store.
   - To request a 30-day trial, log in to your federal or regional instance of the ServiceNow Store and use the same process that users of the commercial ServiceNow Store do. For more information, see Start an application trial from the ServiceNow Store.
   - To get an application that's available at no additional cost, log in to your federal or regional instance of the ServiceNow Store and use the same process that users of the commercial ServiceNow Store do. For more information, see Get a free application.
   - To request a paid application, see Request a paid app for a regulated environment.
   - To complete procurement of an application for an on-premise instance, see Get an app or product as an on-premise customer.
3. Install an application in a regulated environment.

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- If you have a hosted instance in a regulated environment, see Install an application or plugin.
- If you self-host your instance, see Upload an app to an on-premise instance.

Additional info

- Environments with federal or regional ServiceNow Store instances

  Certain regulated environments contain an isolated instance of the ServiceNow Store to support data security requirements. Find out whether your environment has its own federal or regional instance of the ServiceNow Store.

- Listing types not available in regulated environments

  To preserve data privacy standards, certain types of app listings can't be offered in federal or regional instances of the ServiceNow Store.

- Terms and conditions in the ServiceNow Store

  Learn about when terms and conditions must be accepted in the ServiceNow Store. Unaccepted terms and conditions block procurement and installations.

Environments with federal or regional ServiceNow Store instances

Certain regulated environments contain an isolated instance of the ServiceNow Store to support data security requirements. Find out whether your environment has its own federal or regional instance of the ServiceNow Store.

Currently, regulated environments with access to isolated instances of the ServiceNow Store include the following:

- Government Security Cloud (GCC)
- National Security Cloud (NSC)
- ServiceNow Protected Platform: Australia (SPP-AU)
- ServiceNow Protected Platform: Singapore (SPP-SG)

If there isn't an isolated instance of the ServiceNow Store available for your environment, use the commercial ServiceNow Store.

Listing types not available in regulated environments

To preserve data privacy standards, certain types of app listings can't be offered in federal or regional instances of the ServiceNow Store.

The following listing types aren't available in isolated federal or regional instances of the ServiceNow Store:

OEM Solutions

Cloud-based services and solutions that are made available to customers both inside and outside the ServiceNow ecosystem.

Partner beta apps

Early-stage, experimental projects that partners are developing to introduce new functionalities to the ServiceNow AI Platform.

Innovation lab offerings

Early-stage, experimental projects that ServiceNow teams are developing to introduce new functionalities to the ServiceNow AI Platform.

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Access the ServiceNow Store for a regulated environment

Log in to the isolated instance of the ServiceNow Store contained in your regulated environment.

Before you begin
Role required: none

You must have access to Now Support in a regulated environment.

Procedure

1. Log in to Now Support for your regulated environment.
2. Access the ServiceNow Federal Store by scrolling to the end of the page and selecting the **Visit the ServiceNow Federal Store** button.

Result
You're logged in to the federal or regional instance of the ServiceNow Store that corresponds with your regulated environment.

Request a paid app for a regulated environment

Request to buy a paid app from a federal or regional ServiceNow Store instance to make that app available on your regulated instance.

Before you begin
Role required: none

Procedure

1. Access the federal or regional ServiceNow Store instance that corresponds to your regulated environment.
   For more information, see Access the ServiceNow Store for a regulated environment.
2. Find and select a paid app or integration.
3. Conduct a security review to verify that the app or integration meets the requirements for your regulated instance.
4. Request to purchase a license for the application or integration.
   - If the application is provided by ServiceNow, select **Request license**.
   - If the application is provided by a partner and requires approval, select **Request purchase**.

   If your request is approved, a sales representative or your account executive contacts you by email to process your purchase. Approval is granted at the provider's discretion.

   For questions about an application provided by ServiceNow, contact your account executive. For questions about an application provided by a partner, contact the partner directly.
5. Follow the emailed instructions to complete the purchase.

   Note: It can take up to two business days for the application to become available in the Application Manager after final license confirmation.

6. **Optional:** If the application displays the "App Terms Not Accepted" state indicator in the Application Manager, accept the custom terms and conditions from the ServiceNow Store. For more information about application state indicators, see Application state indicators in Application Manager.

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a. From the application listing details in the ServiceNow Store, select **Accept Terms**.

b. Download and review the custom terms and conditions.

c. Select the option to agree to the terms and conditions.

d. Select **Accept**.

Result

Confirmation emails for the application and any dependencies that were procured are sent to the email address associated with your ServiceNow Store account. For information about configuring which email address receives notifications for this application, see Configure ServiceNow Store application notification preferences.

The application is available to install within two business days. If the application still can't be installed after two business days, contact Now Support for assistance.

What to do next

Install the app on compatible production or non-production instances, based on whether you have a hosted or on-premise instance:

- If your instance is in a hosted environment, install the app using the Application Manager. For more information, see Install an application or plugin.
- If your instance is in an on-premise environment, download the encrypted app file from your federal or regional instance of the ServiceNow Store and upload the file to your instance. For more information, see Getting apps as an on-premise customer

ServiceNow Store reference

Reference topics provide more information about guest review form fields and types of ServiceNow Store listings.

Guest contact form fields

A description of the fields on the Guest contact form in the ServiceNow Store.

Guest contact form

Field	Description
Name	Full name.
Company	Name of your company or organization.
Business Email	Email address used within your organization.
Phone	Phone number where you can be reached.
Country	Country where you are located.
Message to Seller	Question or request.

Guest review form fields

A description of the fields on the Guest review form in the ServiceNow Store, as well as which fields are publicly visible after the review is published.

Guest review form

Field	Description	Visibility
Version	Version number of the app you're reviewing.	Not publicly visible.

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Guest review form (continued)

Field	Description	Visibility
First Name	First or given name.	Not publicly visible.
Last Name	Last or family name.	Not publicly visible.
Email	Your email address.	Not publicly visible.
Company	Name of your company or organization.	Publicly visible for commercial customers. Replaced with "Verified ServiceNow Customer" for customers using a regulated ServiceNow Store instance.
Review	Feedback about the app. Your feedback could include whether you recommend the app, how user-friendly it is, features you'd like to see added in the future, and so on.	Publicly visible.
Rating	Number of stars out of five, where a five-star rating is the highest and a one-star rating is the lowest.	Publicly visible.

ServiceNow Store glossary

Review important terms related to the ServiceNow Store to help determine which listings meet your organization's needs.

application

A standalone piece of code that implements a collection of features on the ServiceNow AI Platform. You can procure apps from the ServiceNow Store to install on an instance.

app

beta apps

Early-stage, experimental projects that ServiceNow partners are developing to introduce new functionalities to the ServiceNow AI Platform. Partners might invite you to try an app or integration that's in beta. Beta apps can only be installed in hosted non-production instances.

built on ServiceNow solutions

Apps and integrations that help you customize the ServiceNow AI Platform for specific and industry and market needs. Apps and integrations built on ServiceNow solutions have passed the ServiceNow Partner Solutions Center of Excellence process. This process verifies alignment with ServiceNow quality standards related to software development life cycle and business outcomes.

built with ServiceNow offerings

Services, dashboards, and implementation guides offered by ServiceNow partners and customized for your organization's needs. Offerings built with ServiceNow have passed the ServiceNow Partner Acceleration process to verify alignment with ServiceNow quality standards related to software development life cycle and business outcomes.

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custom tables

A non-exempt table created by a platform administrator and not included as part of the base ServiceNow AI Platform system. Custom table entitlements are included with certain licenses and subscriptions. For more information, see Custom tables.

generative AI

Applications and solutions that incorporate Now Assist, a generative AI experience purpose-built for the ServiceNow AI Platform.

innovation lab

Early-stage, experimental projects that ServiceNow teams are developing to introduce new functionalities to the ServiceNow AI Platform. Innovation labs are available on the ServiceNow Store.

integration

Connects your instance to other services, licenses, and apps outside the ServiceNow ecosystem to streamline the flow of data within your organization.

MSP ready

A ServiceNow Store listing filter for applications and integrations that have domain separation enabled. Managed Service Providers (MSPs) can procure and manage these applications on behalf of their customers.

plug and play

Applications and integrations that can be used without additional customization or setup after installation.

product

A collection of apps that coordinate to add features and capabilities to a ServiceNow AI Platform instance. Products can be obtained through the ServiceNow Store.

Application Manager

Application Manager provides admins the ability to install, update, and manage licensed applications and plugins for their instance.

Get started

Explore	Configure
	
Explore how Application Manager can help you manage your licensed applications in one convenient location.	Change default behaviors of the Application Manager if desired. The Application Manager is active by default.

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Install



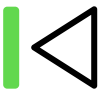
Use Application Manager to install applications, plugins, and products to your instance.

Update



Use Application Manager to update one or more applications or plugins in your instance.

Uninstall



Use Application Manager to uninstall applications that you don't need anymore.

Repair



Repair applications and plugins to revert accidental changes and repair file corruption that's occurred since installation.

Reference



Find information about Application Manager status indicators.

Troubleshoot and get help

- Review getting started information on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Application Manager

Application Manager provides admins the ability to install, update, and manage licensed applications and plugins for their instance.

Application Manager overview

ServiceNow AI Platform administrators can access the Application Manager by navigating to **Admin** > **Application Manager**.

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Application Manager users

Users

User	Description
Instance admin	Install, update, uninstall, and repair applications and plugins for their instances as needed.

Application Manager workflow

1. Install applications and plugins with the Application Manager. You can install applications and plugins that are included in your license, or install applications that have been procured from the ServiceNow Store.
2. Update applications and plugins as new versions become available to get the latest features.
3. If you no longer need an installed application, you can sometimes uninstall it using the Application Manager. Not all applications can be uninstalled.
4. If an application or plugin has been corrupted or accidentally changed, you can use the Application Manager to repair it.

Application Manager benefits

Application Manager benefits

Benefit	Feature	Users
Install any application or plugin included in your license, or any application obtained through the ServiceNow Store.	Install applications and plugins	Administrators
Update installed applications and plugins to get access to the latest features.	Update applications and plugins	Administrators
Repair applications and plugins to return them to their original state if accidental changes occur.	Repair applications and plugins	Administrators
View and filter all applications, products, and plugins . This includes applications, products, and plugins that haven't been licensed yet.	View applications, products, and plugins	Administrators
Review a list of all installed applications and plugins that can be updated to a newer version and complete the update process.	View applications and plugins with available updates	Administrators
View a list of all applications and plugins that have been installed on your ServiceNow AI Platform instance. Select an application or plugin from the list to display its description and technical details.	View all installed applications and plugins	Administrators
View the description and technical details ofan application or plugin. Technical details include dependencies and system requirements. Any options to update, uninstall, or repair the application or plugin are also included.	View technical details of applications and plugins	Administrators

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Application Manager benefits (continued)

Benefit	Feature	Users
Access an overview of recent and upcoming Application Manager activity, including installations, updates, scheduled jobs, and errors.	View the Activity log	Administrators

What to explore next

To learn more about configuring and using Application Manager, see:

- Configuring Application Manager
- Installing applications, plugins, and products
- Updating applications
- Uninstalling applications
- Repairing applications and plugins
- Application Manager reference

Application Manager activity log

The Activity log displays recent and upcoming Application Manager activity for quick reference.

The **Activity log** is available in the Application Manager home toolbar. You can use the **Filter** drop-down menu of the Activity log to view items based on the following criteria:

- Recently added
- In progress
- Scheduled
- Failed
- Completed

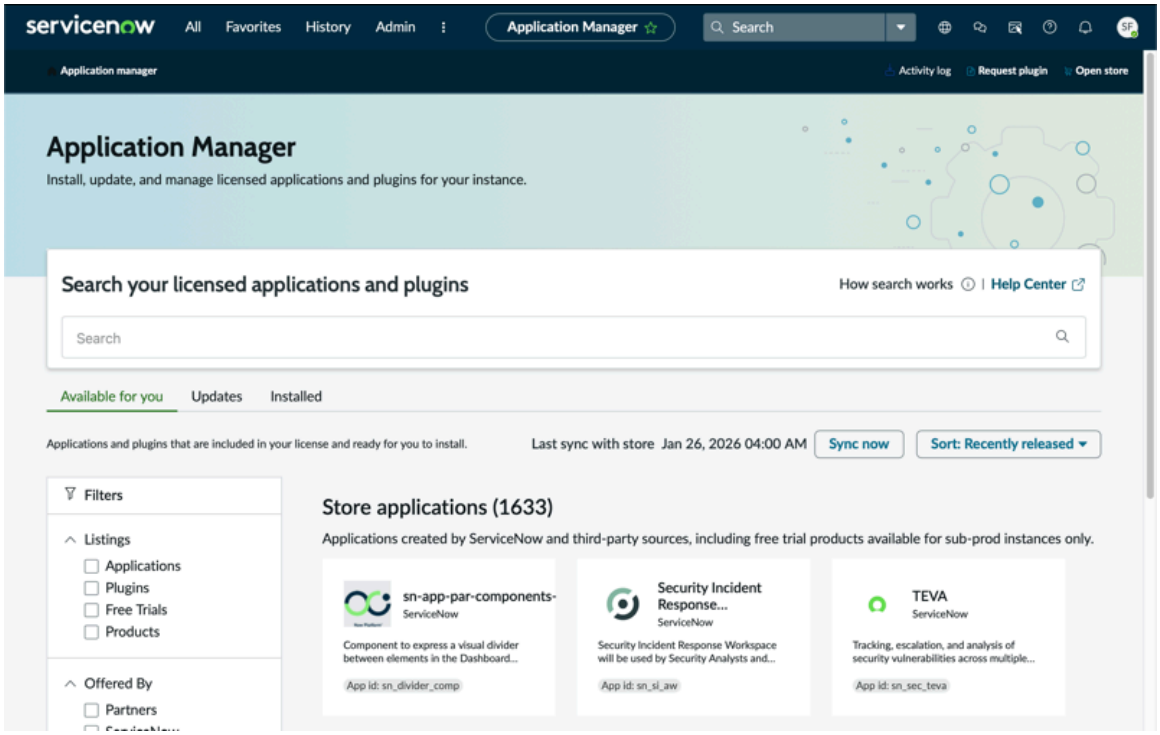
Application Manager available for you tab

The **Available for you** tab displays all applications, products, and plugins.

The applications and products in **Available for you** include the ones available for purchase from the ServiceNow Store and the ones that are already licensed. For more information about procuring applications and products from the ServiceNow Store, see Getting apps and trials from the ServiceNow Store.

The plugins in this section include those that are licensed and ready to install and those that need to be requested. For more information about requesting plugins, see Request a plugin.

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An automatic synchronization with the ServiceNow Store happens every 24 hours. If an app isn't displaying in the Application Manager, you can manually synchronize using the **Sync now** button.

Filtering applications

You can use the search bar and apply filtering options to find applications, products, or plugins that meet your organization's needs. You can also filter applications by the following attributes:

Free

Applications that are available at no additional cost.

Paid

Applications that require a paid license.

Licensed

Paid applications that you already have a license for. These applications can be installed.

Compatible

Application versions that are compatible with your instance of the ServiceNow AI Platform.

Upcoming Renewals

Applications with subscriptions that need to be renewed soon.

Trial Started

Applications that are currently in a trial period.

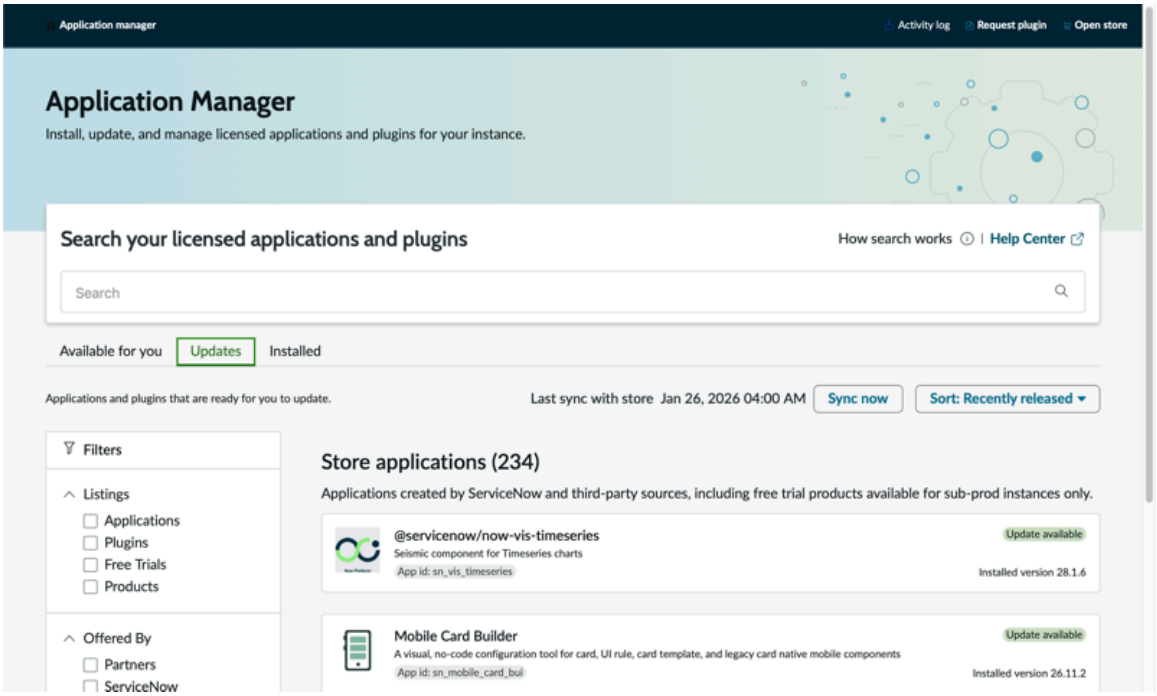
Application Manager Updates tab

You can check whether updates are available for installed applications and plugins at any time.

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Updates

The **Updates** tab displays applications and plugins that are ready for you to update. If there are updates available, they're displayed and a green **Update available** message is displayed on the tile. You can also apply filters to narrow your search or use the sorting option to display by alphabetical order or based on recently released.

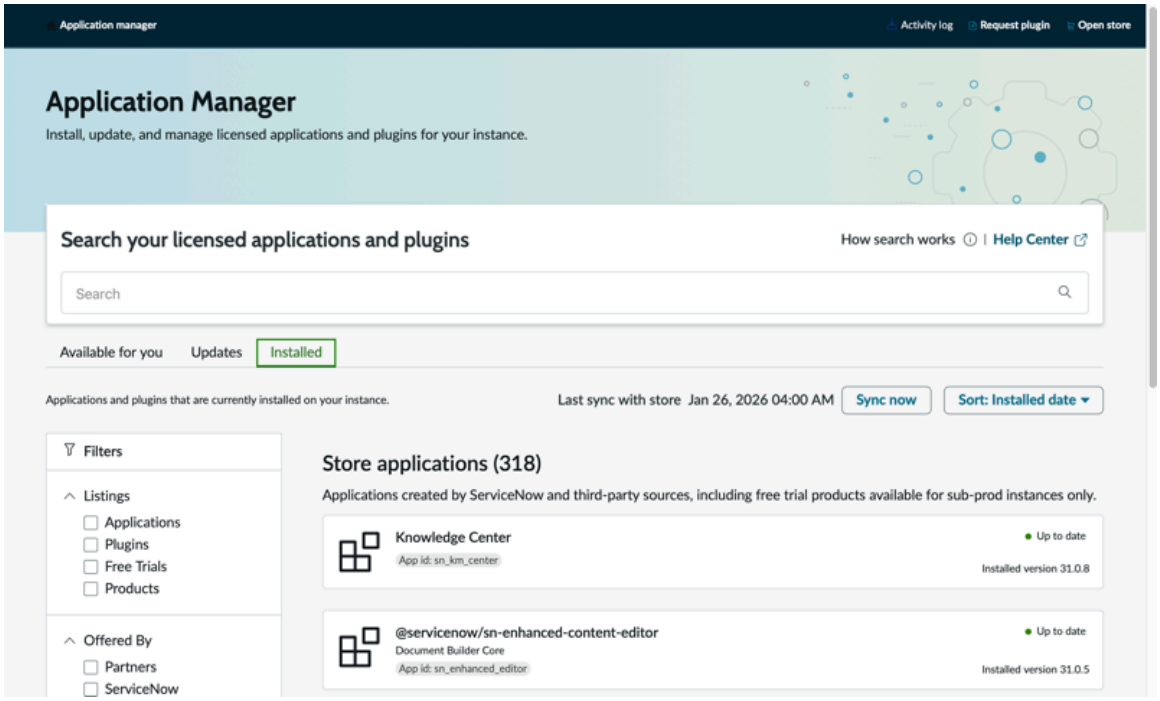


Application Manager installed tab

You can view all installed applications and plugins from one place in the Application Manager.

The **Installed** tab displays applications and plugins that are currently installed on your instance. Installed applications and plugins display their current version, as well as notifying you if the app is up to date or has an update available. You can also apply filters to narrow your search or use the sorting option to display by alphabetical order or based on recently released.

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Application Manager application details

The details page in the Application Manager displays key information about applications, plugins, or products that are installed or available to install.

When you select an application, plugin, or product the details page is displayed.

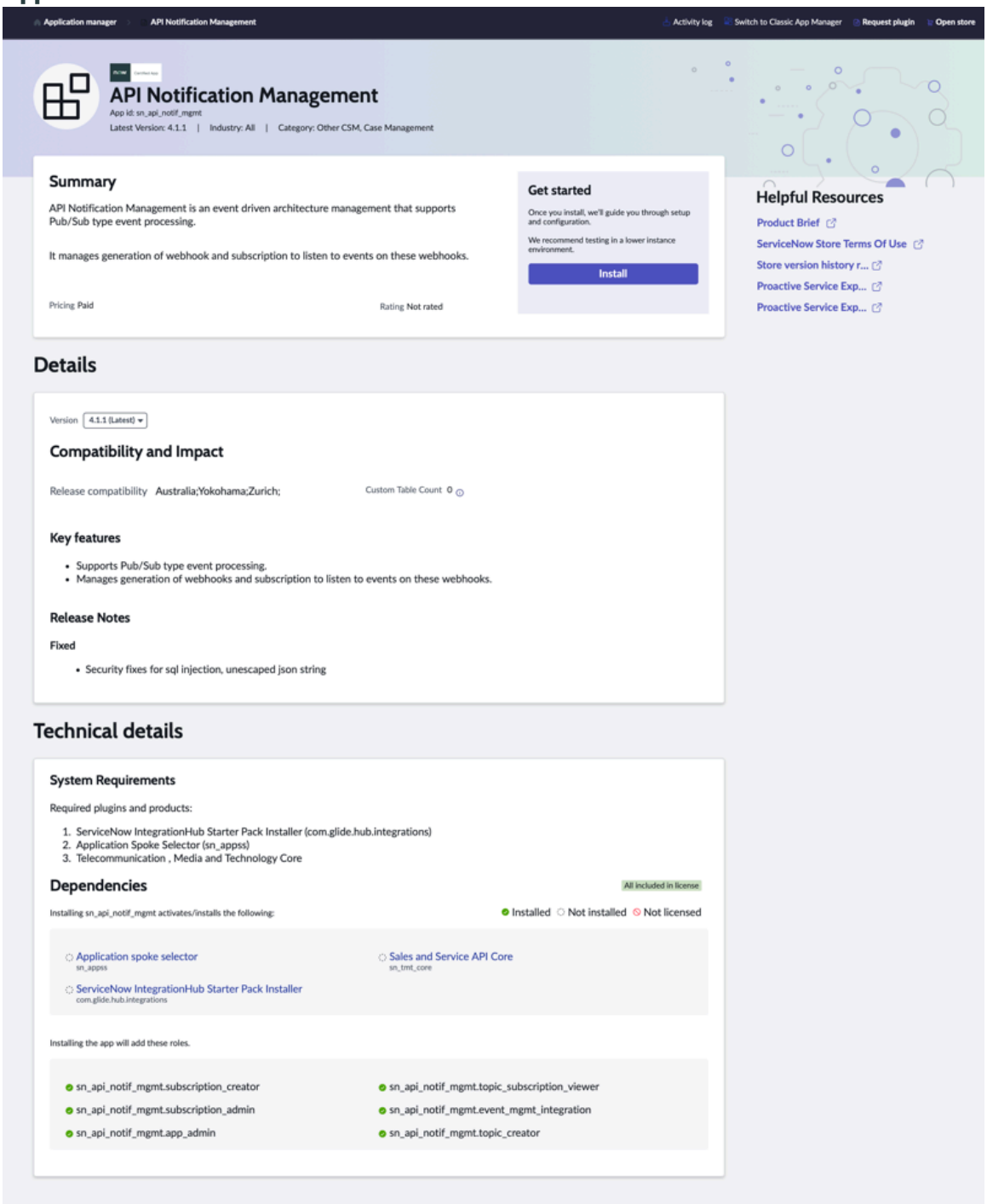
For an application, this page includes the following:

- Application state indicators, if applicable
- Application summary
- Version selector
- Compatibilities
- Key features
- Release notes
- Technical details such as system requirements and dependencies
- Resource usage permissions for the application, if provided by the developer

For a plugin or product, this page shows a summary of the plugin or product's function and its dependencies.

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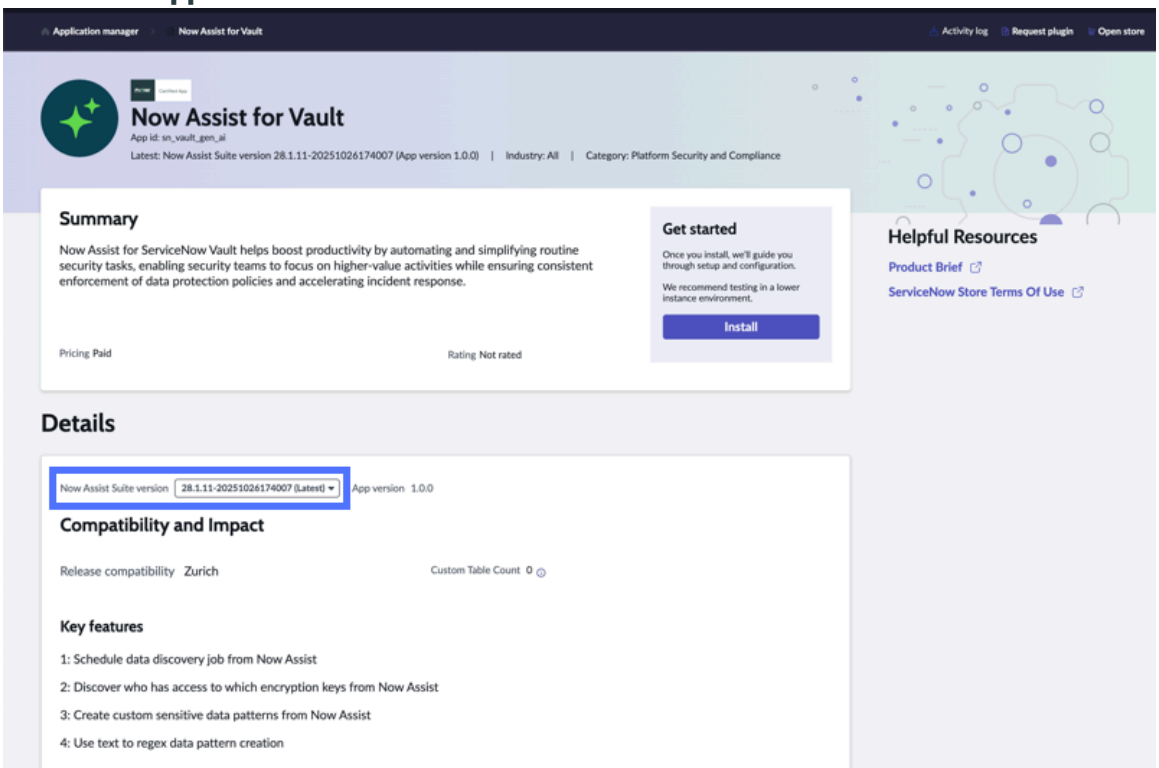
Application details



The application details page for Now Assist applications includes a Now Assist suite version selector instead of an application version selector. For more information about Now Assist suites, see Now Assist suite versions.

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Now Assist application details



Dependencies

Application details include information about required dependencies, including whether each dependency is installed, available to install, or not yet licensed.

Each application dependency in the technical details section is listed with a symbol. The symbol indicates a category that describes whether the dependency is already available, or must be procured. Dependencies use the following categories.

App dependency symbols

Symbol	Category	Description
✅	Installed	This dependency is already installed on your instance
◌	Not installed	This dependency isn't installed yet, but is available for installation. It's automatically installed when you install the application that requires it.
🚫	Not licensed	This dependency must be procured from the ServiceNow Store before it can be installed. Select the dependency and review any application state indicators for additional details. For more information about application state indicators, see Application state indicators in Application Manager. For more information about procuring applications, see Getting apps and trials from the ServiceNow Store.

Configuring Application Manager

Set up and configure Application Manager.

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Configuration overview

Application Manager is a ServiceNow AI Platform feature that is active by default. You don't need to activate a plugin.

By default, the Available for you page of the Application Manager automatically synchronizes with the ServiceNow Store every 24 hours. For information about deactivating auto sync with the ServiceNow Store, see Deactivating automatic synchronization with the ServiceNow Store.

Deactivating automatic synchronization with the ServiceNow Store

By default, the Application Manager in hosted ServiceNow AI Platform instances syncs automatically with available applications and updates from the ServiceNow Store. Automatic synchronization can be deactivated so you can receive updates only when you choose to.

Automatic syncing with the ServiceNow Store can be deactivated by taking the instance offline. If you take the instance offline, you can use the **Sync now** button in the Application Manager to sync the Available for you page with the ServiceNow Store.

To take the instance offline, contact Customer Service and Support and request that the `sn_appclient.app.install.offline` system property be set to `true`.

Installing applications, plugins, and products

Application Manager enables you to install any applications, plugins, or products that are included in your license or that have been procured from the ServiceNow Store.

Overview of using the Application Manager to install

You can view all applications, plugins, and products available for your instance by navigating to the Application Manager and selecting the **Available for you** tab. From there, you can install new applications, products, and plugins to your instance.

Note: Some applications and plugins can't be uninstalled after they've been installed.

Installation details

When you install or update applications or products, the Application Manager displays installation details for you to review. Use installation details to verify version and dependency details.

A pop-up window prompting you to review installation details is shown when you install or update an application, plugin, or product. Installation details include the following components:

Installation detail components

Component	Description
Version selector	Enables you to choose a licensed application or product version compatible with your instance. If the latest version isn't available, you might need to procure it from the ServiceNow Store to sign updated terms and conditions. If you have already procured the latest version and don't see it as an option in the version

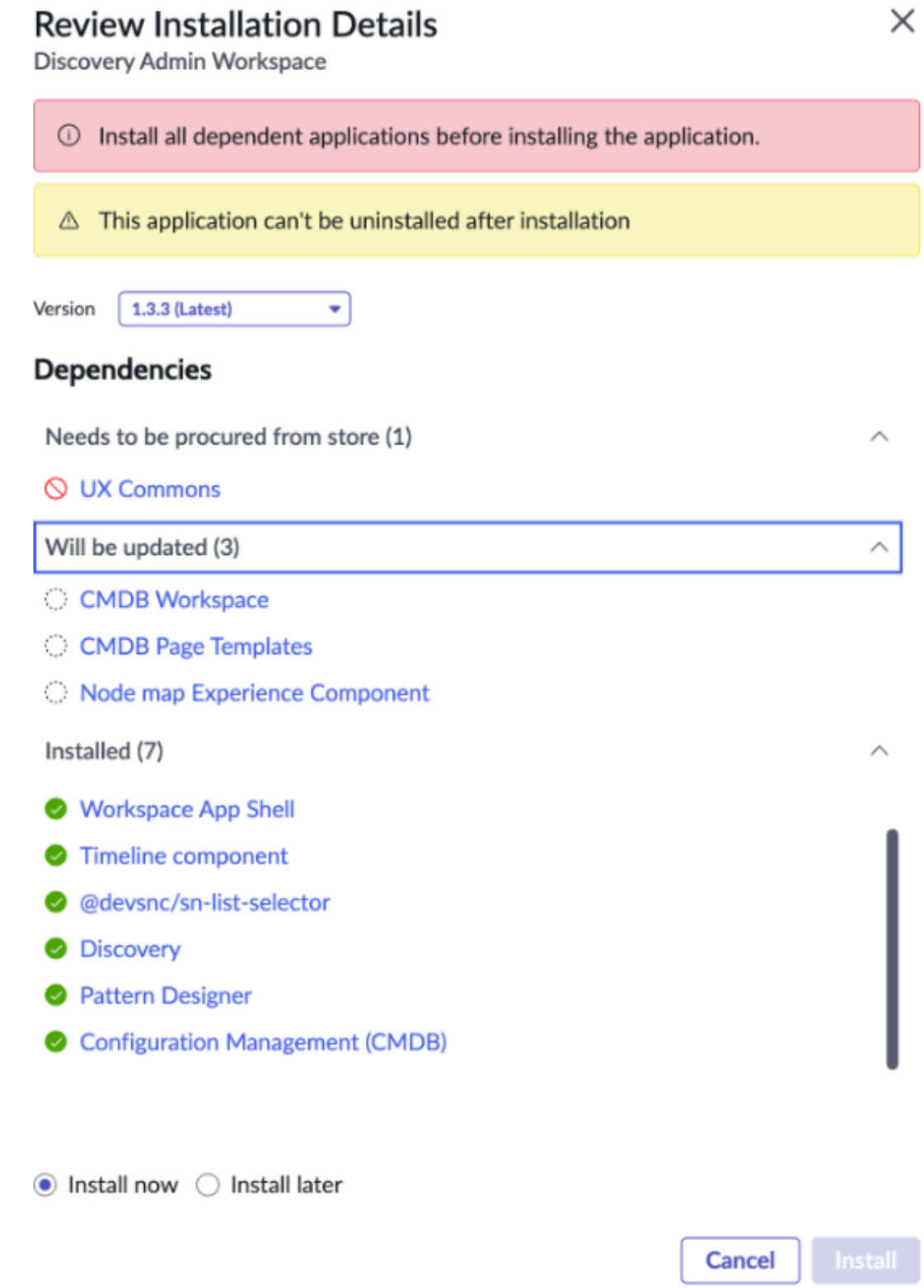
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Installation detail components (continued)

Component	Description
	selector, you might need to upgrade your instance to a compatible release version.
(Optional) Dependencies list	If the application or product has dependencies, the dependencies are listed in the following categories: • Needs to be procured from the store • Will be updated • Installed • Inactive plugins
Installation options	Enables you to choose to complete installation now or later. If you choose to install later, you can determine the date and time of installation.

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Example: installation details



Dependencies that need to be procured from the ServiceNow Store

When installing or updating an application or product, you might have dependencies that need to be procured from the ServiceNow Store.

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For more information about procuring applications and products from the ServiceNow Store, see Getting apps and trials from the ServiceNow Store.

Inactive plugins in dependencies

Some plugins must be activated before they can be installed. Any plugins that must be activated before they can be installed are categorized as inactive plugins in the dependency list. Inactive plugins might not block installation of the plugin, application, or product that requires them, but could result in reduced functionality.

For more information about how to activate plugins, see ServiceNow plugins.

Entitle an application

Entitle an application from your ServiceNow AI Platform instance if the application has been purchased but not yet linked to the instance.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Admin Center** > **Application Manager**.
2. From the filter options, select the **Instance not entitled** indicator.

   Note: The **Instance not entitled** filter is only displayed if your instance has an application that has been purchased and not entitled.

3. Select the menu icon on the application tile, and select **Entitle this instance**.
4. In the Application entitlement dialog box, select **OK**.

Result

The application is entitled and can be installed.

Install an application or plugin

Install an application or plugin to make its features available on your instance.

Before you begin

For domain-separated instances:

- applications must be installed and updated from the global domain.
- The `sys_user` table record for the user who completes the task must also be in the global domain.

Role required: admin, sn_appclient.app_client_user, or sn_appclient.app_client_company_installer

Note: Some applications and plugins can't be uninstalled after they've been installed.

About this task

This topic describes how to install an application or plugin. For information about updating applications or plugins, see Update an application or plugin.

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Procedure

1. Navigate to the **Available for you** tab of the Application Manager in one of the following ways.
   - Navigate to **Admin** > **Application Manager** > **Available for you**
   - Navigate to **All** > **Admin Center** > **Application Manager** > **Available for you**.
2. Find and select the application or plugin you want to install.
   You can search for an application or plugin by name, or use the sort and filter options available in the Application Manager.
3. Select **Install**.
4. Select the application version that you want to install from the **Version** drop-down menu.
5. If the application or plugin has dependencies, verify that all necessary dependencies can be updated or installed.
   If any dependencies are categorized as **Needs to be procured from store**, procure the necessary dependencies and sync the Application Manager with the ServiceNow Store before continuing. For more information about unavailable dependencies that block installation, see Evaluating version requirements and dependencies.
6. Install the application now or schedule installation for a later time.

Installation option	Procedure
Install now	**a.** Leave the default option to **Install now** selected. **b.** Select **Install**.
Install later	**a.** Select the option to **Install later**. **b.** Enter a start date and start time. **c.** Select **Schedule**.

Result

If you choose to install the application or plugin now, it and its dependencies begin to install immediately. Scheduled installations begin at the chosen date and time.

Install all applications in a product

Install all applications and plugins included in a product using Application Manager.

Before you begin

For domain-separated instances:

- applications must be installed and updated from the global domain.
- The `sys_user` table record for the user who completes the task must also be in the global domain.

Role required: admin, sn_appclient.app_client_user, or sn_appclient.app_client_company_installer

Note: Some applications and plugins can't be uninstalled after they've been installed.

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Procedure

1. Navigate to the **Available for you** tab of the Application Manager in one of the following ways.
   - Navigate to **Admin** > **Application Manager** > **Available for you**
   - Navigate to **All** > **Admin Center** > **Application Manager** > **Available for you**.
2. Find and select the product you want to install.
   You can search for a product by name, or use the sort and filter options available in the Application Manager.
3. Review the technical details of each included application to verify that you have access to all required dependencies.

   a. Select an application dependency and scroll to the technical details section of the application details page.
   From the technical details section, you can review the dependencies of the individual application. You can see which dependencies are installed, not installed, and not licensed.

   b. **Optional:** Procure any dependencies that aren't licensed from the ServiceNow Store.
   For more information, see Getting apps and trials from the ServiceNow Store.

   c. Go back to the product details page and repeat for each application dependency.

4. From the product details page, select **Install**.
5. Select the desired versions of each application to be included in the product.
6. **Optional:** Select **Load demo data** if you want demo data to be included in the installation.
7. Select **Proceed**.
8. Install the product now or schedule installation for a later time.

Installation option	Procedure
Install now	a. Leave the default option to **Install now** selected. b. Select **Install**.
Install later	a. Select the option to **Install later**. b. Enter a start date and start time. c. Select **Schedule**.

Result

If you choose to install the product now, it and its dependencies begin to install immediately. Scheduled installations begin at the chosen date and time.

Updating applications

Update your installed applications when new versions are available to get the latest features. You can update most applications to more recent versions directly from the Application Manager, without returning to the ServiceNow Store.

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Overview of using the Application Manager to update

You can view applications and plugins that can be updated by navigating to the Application Manager and selecting the **Updates** tab. From there, you can update most applications and plugins without returning to the ServiceNow Store.

There are some exceptions that might require you to procure the new application version or a dependency from the ServiceNow Store:

- A new dependency has been added to support new features of the application or product that requires it. The dependency must be procured for the first time.
- The dependency's provider requires that each new version of the dependency is requested and approved. The dependency is eligible for update after procuring the updated version from the ServiceNow Store.
- A new version of a previously installed dependency has updated terms and conditions that must be accepted. The dependency is eligible for update after procuring the updated version of the dependency from the ServiceNow Store.
- The provider of an application or product requires that each new version is procured from the ServiceNow Store. The application or product dependencies are available for update after procuring an updated version of the application or product from the ServiceNow Store.

For more information about procuring applications and products from the ServiceNow Store, see Getting apps and trials from the ServiceNow Store.

Notifications about available updates

By default, emailed notifications are sent when updates are available for ServiceNow Store applications and products. Default notifications are sent to the primary account administrator and to the individual who procured the application or product.

For more information about contact roles and notifications in the ServiceNow AI Platform, see Company key contacts and notification list overview on Now Support [KB0547262].

Update an application or plugin

Update an application or plugin to get the latest features that are compatible with your instance version.

Before you begin

For domain-separated instances:

- applications must be installed and updated from the global domain.
- The `sys_user` table record for the user who completes the task must also be in the global domain.

Role required: admin or sn_appclient.app_client_user

Procedure

1. Navigate to the **Updates** tab of Application Manager in one of the following ways.
   - Navigate to **Admin** > **Application Manager**.
   - Navigate to **All** > **Admin** > **Application Manager**.
2. Select the **Updates** tab.

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Trouble?
If nothing is displayed in the **Updates** tab, try selecting **Sync now** to sync your instance with the latest application versions available on the ServiceNow Store. If no applications are populated in your **Updates** tab after the sync, the latest application versions available for your instance are already installed.

3. Find and select the application or plugin that you want to update.
   You can search for an application or plugin by name, or use the sort and filter options available in the Application Manager.
4. From the Summary section of the details page, select **Proceed to update**.
5. Select a compatible application version or a compatible Now Assist Suite version from the version drop-down menu.
   For additional information about Now Assist Suites, see Now Assist suite versions.
6. **Optional:** If you have available application customizations, use the **Customized ver.** drop-down menu to select which customization to use.
   Your customizations might not be compatible with a new application version. Update the application in a non-production instance, then make any necessary changes to your customization and validate compatibility before making updates in production instances. For more information about managing customizations, see Manage customizations to applications.
7. If the application or plugin has dependencies, verify that all necessary dependencies can be updated or installed.
   If any dependencies are categorized as "Needs to be procured from store" or "Installation blocked," procure the necessary dependencies and sync the Application Manager with the ServiceNow Store before continuing. For more information about unavailable dependencies that block updates, see Updating applications.
8. Install the update now or schedule installation for a later time.

Installation option	Procedure
Install now	**a.** Leave the default option to **Install now** selected. **b.** Select **Install**.
Install later	**a.** Select the option to **Install later**. **b.** Enter a start date and start time. **c.** Select **Schedule**.

Result

If you choose to install the update now, the application or plugin and its dependencies begin updating immediately. Scheduled updates begin at the chosen date and time.

Auto-upgrade

The auto-upgrade mechanism automatically upgrades ServiceNow-managed applications and plugins across your instances on a regular schedule without requiring manual intervention. Auto-upgrade applies exclusively to ServiceNow-managed applications and plugins; customer-customized or third-party applications aren't included in automatic upgrades.

Auto-upgrade enables continuous delivery of ServiceNow-managed applications and plugins by automating the upgrade process, eliminating the need for your manual intervention. Instead of waiting for you to manually upgrade each application or plugin, the system automatically

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schedules and installs upgrades at optimal times, keeping your applications current with minimal effort.

Note: The auto-upgrade mechanism is disabled by default. You must enable the sn_app_auto_upgr.enabled system property to activate it.

Key benefits

The auto-upgrade feature provides the following benefits:

- Enables continuous delivery of ServiceNow-managed applications or plugins by removing the bottleneck of your initiated action.
- Distributes installation load across the platform infrastructure by randomizing upgrade schedules within a 24-hour window.
- Respects your high-usage periods by enforcing blackout windows during configured times.
- Orchestrates multiple application or plugin upgrades in batches, reducing the number of installation operations across instances.

How it works

The auto-upgrade mechanism operates through a combination of polling, scheduling, and batch orchestration to upgrade applications or plugins automatically:

- Automated polling: Your instances poll the API every 2 hours to check for pending SN-managed application or plugin upgrades. When new upgrades are available, the system automatically schedules installations within a 24-hour window of publication.
- Blackout window enforcement: Control automated polling with blackout windows and system properties. The system honors your configured high-usage periods (for example, Monday through Friday, 9 AM to 5 PM) during which no automated installations occur. Instance upgrade schedules are treated as implicit blackout periods to prevent conflicts. You can manage polling frequency and auto-upgrade controls using three system properties in System Properties:
  - sn_app_auto_upgr.enabled (master on/off switch)

    Note: Auto-upgrade is disabled by default. You must enable the sn_app_auto_upgr.enabled property to activate the mechanism.

  - sn_appclient.scheduled_jobs_config (polling frequency and operational settings)
  - sn_app_auto_upgr.platform_upgrade_lookahead_hours (platform upgrade detection window)
- Batch install orchestration: New application or plugin upgrade requests are added to existing active batch install plans if the target installation window is still open. If the window has closed, a new batch is created. The system handles multiple applications or plugins in a single batch and includes retry logic for failed installations.
- Environment targeting: Application business units specify whether a release targets non-production environments, production environments, or both. Custom target dates can be configured beyond the default 24-hour window.
- Read-only enforcement: All ServiceNow-managed application or plugin metadata is enforced as read-only at installation time, overriding any application-level settings to prevent your customizations.

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Auto upgrade failure resolutions

If an auto-upgrade installation fails, the system includes retry logic within the batch orchestration process. Depending on the failure, the system may automatically schedule a retry operation. If automatic retry does not resolve the issue, check the following areas:

- Verify that the instance is not in a blackout window or explicit instance upgrade schedule during the scheduled installation time.
- Check the status of auto-upgrade tasks in the activity log to understand the progress and outcome of installations. For more information about the activity log, see Application Manager activity log. Task status values indicate the stage of the upgrade operation:
  - Assigned: The batch install plan has been created and the task is queued for execution
  - In Progress: The batch install plan is currently executing the application or plugin upgrade
  - Success: The application or plugin upgrade completed successfully
  - Failed: The application or plugin upgrade failed; review the failure details and configure retry settings if needed
- Resolve withdrawn application errors. If an application or plugin version is withdrawn from the store before auto-upgrade installation, the system treats it as a failed installation and displays an error message indicating the application or the plugin is unavailable. Check the error details to determine next steps.

Uninstalling applications

Application Manager can be used to uninstall applications that are no longer in use on your instance.

Overview of using the Application Manager to uninstall

Some applications can be uninstalled from your instance to remove scripts, background jobs, and roles that are no longer needed. In some cases, it's possible to keep the associated fields and data after uninstalling the application that generated them.

Note: Some applications and plugins can't be uninstalled after they've been installed.

Uninstall an application

Uninstall an unused application to remove unnecessary or conflicting scripts, background jobs, and roles from your instance.

Before you begin

Role required: admin, sn_appclient.app_client_user, or sn_appclient.app_client_company_installer

About this task

Note: Some applications and plugins can't be uninstalled after they've been installed.

Procedure

1. Navigate to the **Installed** tab of Application Manager in one of the following ways.
   - Navigate to **Admin** > **Application Manager** > **Installed**.
   - Navigate to **All** > **Admin Center** > **Application Manager** > **Installed**.
2. Find and select the application or plugin you want to uninstall.
   You can search for an application or plugin by name, or use the sort and filter options available in the Application Manager.

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3. From the Quick Actions section of the details page, select **Uninstall**.
4. If you want to delete fields and metadata associated with the application from your instance, clear the check box labeled **Retain fields and data**.
   If the application can't be uninstalled, clearing the **Retain fields and data** check box might resolve the issue.
5. Select **OK**.

Repairing applications and plugins

Repairing an application or plugin returns it to its original state without needing to uninstall and reinstall it manually. Repairing applications or plugins can help resolve issues related to accidental modifications or corrupted files.

Overview of repairing applications and plugins

When you repair an application or plugin, all the files with sys_update_xml records are added to the remote update set. The remote update set is named with the format: "Repair/Upgrade app <app scope name> at <timestamp>".

Repairing applications with customizations

When you repair an application with a customization, the customization is also repaired unless it's linked to a source control repository.

It’s assumed the complete set of customizations for an application is within the application customization. When repairing, installing, or upgrading the underlying application or plugin that has an associated app customization, changes made outside of that application customization are overwritten.

For more information about customizations, see Customization vs. configuration with Creator Studio.

Repair an application or plugin

Repair an application procured through the ServiceNow Store or a plugin included in your instance. Repairing apps or plugins can resolve issues caused by unintentional modifications, corrupted files, or partial deletion.

Before you begin

Role required: admin

Procedure

1. Navigate to the **Installed** tab of Application Manager in one of the following ways.
   - Navigate to **Admin** > **Application Manager** > **Installed**.
   - Navigate to **All** > **Admin Center** > **Application Manager** > **Installed**.
2. Find and select the application or plugin you want to repair.
   You can search for an application or plugin by name, or use the sort and filter options available in the Application Manager.
3. From the Quick Actions section of the details page, select **Repair**.

Application Manager reference

Reference topics provide information to help understand Application Manager status indicators.

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Domain separation and Application Manager

Domain separation is unsupported for Application Manager. 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.

Overview of domain separation in Application Manager

Application Manager enables instance-level administrators to install and manage applications for their instances. Data within the Application Manager isn't filtered, displayed, or managed at the domain level.

Related topics

Domain separation for service providers

Application state indicators in Application Manager

Application detail page headers display indicators with additional information about the state of that application. Indicators tell you about any specific requirements, limitations, or blockers related to installing the application.

State indicators

Indicator	Meaning	Action needed
None	No application state indicators apply to this application.	No action needed. If all dependencies can be installed or updated, the application is available for installation. For more information about application dependencies, see Application Manager application details.
"Unavailable for Instance"	The app can't be installed on the type of instance you're currently in.	Install the app from a different kind of instance. For example, trials can only be installed in non-production instances. For more information about installation, see Installing applications, plugins, and products.
"Incompatible"	The application version isn't compatible with either the	Select a compatible application version from the version selector in

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State indicators (continued)

Indicator	Meaning	Action needed
	family or patch version of your instance.	the application details. If no compatible version is available, consider upgrading your ServiceNow AI Platform instance. For more information about upgrading your instance, see Prepare your upgrade.
"Demo Available"	The application can be installed on non-production instances for demonstration purposes.	Install the application in a non-production instance to demonstrate functionality. For more information about installing applications, see Installing applications, plugins, and products.
"App Terms Not Accepted"	This application has custom terms and conditions that haven't been accepted yet.	Accept the application's custom terms and conditions on the ServiceNow Store to enable installation. For more information, see Get a free application.
"Store Terms Not Accepted"	The standard terms and conditions for the ServiceNow Store must be accepted.	Go to the ServiceNow Store and accept the standard terms and conditions. For more information, see Terms and conditions in the ServiceNow Store.
"License Required for Subprod"	The application requires a license to install in non-production instances. You don't currently have the necessary license.	Purchase the necessary license. For more information, see Buy a ServiceNow application.
"License Expiring"	Your license for this application is expiring soon.	Contact your account executive or the application's provider and renew your license to continue using the application. For more information about contacting an application provider, see Contact a seller.
"Not Licensed"	You don't have a valid license for this application yet, or your license has expired.	Purchase the necessary license. For more information about purchasing applications, see Buy a ServiceNow application or Buy a partner application.
"Approval Required"	This application requires approval from the provider	Go to the ServiceNow Store and request the application.

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State indicators (continued)

Indicator	Meaning	Action needed
	before it can be procured or installed.	Paid applications and applications that are available at no additional cost can require approval. For more information about procuring applications from the ServiceNow Store, see Getting apps and trials from the ServiceNow Store.
"Approval Requested"	A request to purchase or install this application has been submitted.	Monitor the email address associated with your ServiceNow Store account for updates. Approval is granted at the application provider's discretion.
"Purchase in Progress"	Your purchase of this application is being processed.	Monitor the email address associated with your ServiceNow Store account for updates. For more information about purchasing applications, see Buy a ServiceNow application or Buy a partner application.
"Purchase Rejected"	The request to purchase the application wasn't approved by the provider.	Purchase approval is granted at the discretion of the application provider. If you have questions, you can contact the provider. For more information, see Contact a seller.
"Deactivation Requested"	The application provider has requested that you deactivate the application.	Uninstall or deactivate the application on your instance. For more information, see Uninstalling applications. If you have questions, you can contact the application provider. For more information, see Contact a seller.
"Trial Available"	A trial of this application is available to request from the ServiceNow Store.	Request a trial of the application from the ServiceNow Store. For more information, see Start an application trial from the ServiceNow Store.

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State indicators (continued)

Indicator	Meaning	Action needed
"Trial Approval Required"	Installing a trial of this application requires approval from the provider.	Request a 30-day trial of the application from the ServiceNow Store. For more information, see Start an application trial from the ServiceNow Store.
"Trial Approval Requested"	Your trial request for this application has been submitted to the application provider.	Monitor the email address associated with your ServiceNow Store account for updates. Trial approvals are granted at the application provider's discretion. For more information, see Start an application trial from the ServiceNow Store.
"Trial Active"	A 30-day trial of this application has been activated.	Install the application in a non-production instance for testing and evaluation. For more information, see Install an application or plugin. If you want to install the application in a production instance or continue using it after the trial period, purchase the application from the ServiceNow Store. For more information about purchasing applications, see Buy a ServiceNow application or Buy a partner application.
"Trial Rejected"	Your trial request for this application has been rejected.	Trial approval is granted at the discretion of the application provider. If you have questions, you can contact the provider. For more information, see Contact a seller.
"Trial Expired"	The application trial period has expired.	If you don't want to continue using the application after the trial period, uninstall or deactivate the application. For more information, see Uninstalling applications. If you want to continue using the application in a production instance, purchase the license from the ServiceNow Store.

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State indicators (continued)

Indicator	Meaning	Action needed
		For more information about purchasing applications, see Buy a ServiceNow application or Buy a partner application.
"Trial Deactivation Requested"	The provider of this application has requested that you deactivate the trial.	Uninstall or deactivate the application on your instance. For more information, see Uninstalling applications. If you have questions, you can contact the application provider. For more information, see Contact a seller.
"Service Provider Blocked"	Your service provider hasn't made this application available on the current instance.	If you want to install the application on the current instance, contact your service provider and request access.
"Beta App"	This application is part of the ServiceNow Store beta program. The provider has made it available to you for evaluation and feedback.	Refer to the information that was provided in the Beta Publish Program agreement.
"Innovation Lab"	This application is an innovation lab offering. Innovation lab applications are early-stage, experimental projects being developed to introduce new functionality to the ServiceNow AI Platform. Due to the experimental nature of innovation lab offerings, these applications are unsupported and have no warranty.	This state indicator is for informational purposes and requires no action. Refer to other application state indicators for installation availability, if present. If no other application state indicators and all dependencies can be installed or updated, the application is available for installation. For more information, see Application Manager application details.

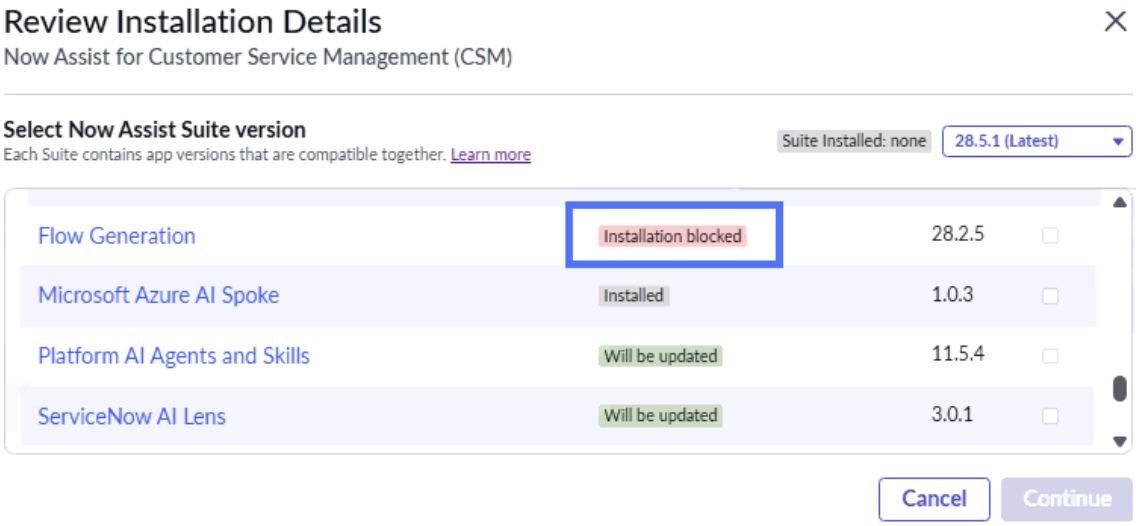
App installation blocked when installing or updating Now Assist Suite

Unlicensed applications can block the installation or update of Now Assist Suites.

Symptom

When attempting to update or install a Now Assist application, another application that is part of the same Now Assist Suite displays an "Installation blocked" indicator in the installation details. The update or installation can't be completed.

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Cause

The application version that displays "Installation blocked" isn't licensed.

Resolution: License the required application version

Procedure

If your organization uses the application, license the version required for the Now Assist Suite installation.
To license the necessary application version, contact your account executive or request the license through the ServiceNow Store. For more information about licensing applications through the ServiceNow Store, see Buy a ServiceNow application.

Resolution: Uninstall the application

Procedure

If your organization doesn't use the application that blocks installation, uninstall it through the Application Manager.
For more information about uninstalling applications, see Uninstall an application.

Multi-Instance Management

Multi-Instance Management offers tools and visibility to control how instances share information for enabled applications. This feature can be utilized for ServiceNow applications when they need to communicate data across multiple instances within a customer's account.

- Basic trust configuration for data sync applications: Certain ServiceNow applications have the ability to provide data visibility across instances within a customer's account.

  Note: This ability can be leveraged only if you have Security Center and Subscription Management installed on your instance. See Security Center and Subscription Management for more information.

- Cross-instance application trust configuration: Multi-Instance Management provides a mechanism to streamline the management of trust configurations across your entire multi-instance environment.

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Multi-Instance Setup simplifies setting up cross-instance communication with a single user interface where administrators can configure and monitor non-production instances connected to a controller. Every connection is requested, reviewed, and approved or rejected to help avoid silent failures or undocumented instance relationships. For more information, see Multi-Instance Setup.

Basic trust configuration for data sync applications

Certain ServiceNow applications have the ability to provide data visibility across instances within a customer's account.

Data visibility is protected by a trust configuration per instance, per application. You can configure the data sharing for production and non-production instances for the applicable applications by navigating to **All** > **Multi-Instance Management** > **Trust Configuration**.

Note:

By default, non-production instances allow application data sharing with production only. Production instances do not allow application data sharing with any other instance. However, these can be updated by the admin for each instance based on business needs.

If you demote a production instance to non-production, or promote a non-production instance to production, all previous customizations to data sharing settings are reset to the default configuration.

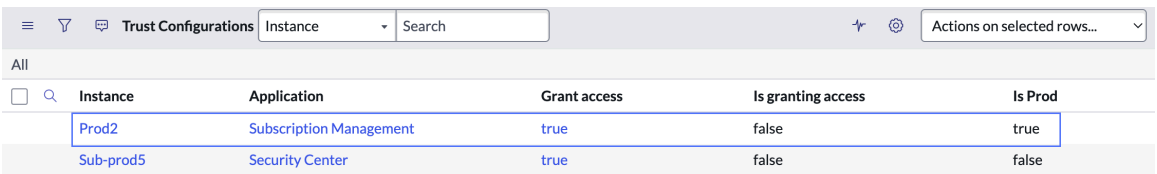
The **Grant access** column indicates the permission granted by the instance that you're currently logged in to for the instance named in the same row's instance column. The **Is granting access** column displays whether or not the instance mentioned in the Instance column has granted access to the instance you're currently logged in to; it can't be edited.

The following are some examples for data sharing restrictions between instances.

Example: Logged in to Prod1

In the following example, you're logged in to Prod1. Prod1 has granted access to the instance Prod2 for the application Subscription Management, as indicated by the `True` value in the **Grant access** column.

Prod2 hasn't granted access to Prod1, as indicated by the `False` value in the **Is granting access** column.



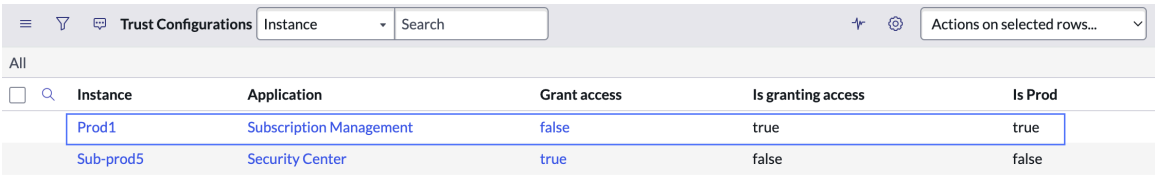
To revoke access for the Subscription Management app from Prod1 to Prod2, update the value in the **Grant access** column to `False` while logged in to Prod1.

Example: Logged in to Prod2

In the following example, you're logged in to Prod2. Prod1 has granted access to the instance Prod2 for the application Subscription Management, as indicated by the `True` value in the **Is granting access** column.

Prod2 hasn't granted access to Prod1, as indicated by the `False` value in the **Grant access** column.

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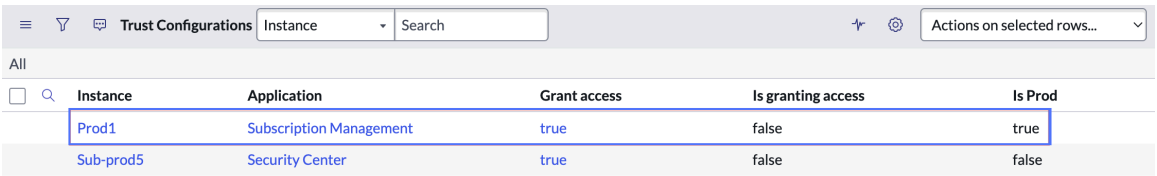


To grant access from Prod2 to Prod1 for the Subscription Management application, update the value in the **Grant access** column to `True` while logged in to Prod2.

Example: Logged in to Sub-prod2

In the following example, you're logged in to Sub-prod2. Prod1 hasn't granted access to the instance Sub-prod2 for the application Subscription Management, as indicated by the `False` value in the **Is granting access** column.

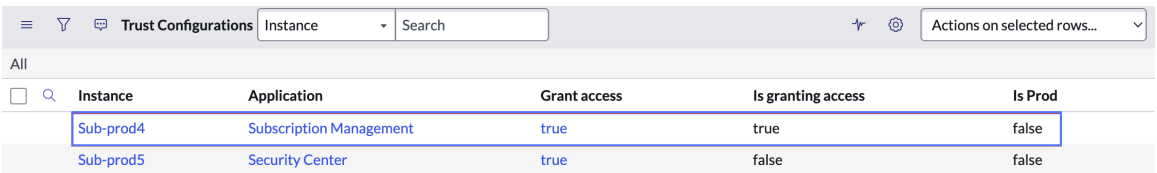
Sub-prod2 has granted access to Prod1, as indicated by the `True` value in the **Grant access** column.



To revoke access from Sub-prod2 to Prod1 for the Subscription Management application, update the value in the **Grant access** column to `True` while logged in to Sub-prod2.

Example: Logged in to Sub-prod3

In the following example, you're logged in to Sub-prod3. Sub-prod4 has granted access to the instance Sub-prod3 for the application Subscription Management, as indicated by the `True` value in the **Is granting access** column. Sub-prod3 has also granted access to Sub-prod4, as indicated by the `True` value in the **Grant access** column.



Cross-instance application trust configuration

Multi-Instance Management provides a mechanism to streamline the management of trust configurations across your entire multi-instance environment.

The multi-instance capability introduces new concepts, describing how communication is supported across instances for enabled applications and their capabilities. In order to do this securely, you need to define how these instances trust each other. This can be defined as a trust profile. The trust profile defines how a set of instances communicate for a given application. In order for this profile to be applied to each instance, that profile needs to be propagated out to the instances that will participate in a given application.

Multi-Instance Management offers a centralized mechanism for configuring and maintaining trust settings across your multi-instance deployment. This simplifies the process of propagating trust settings to all instances under your control by designating a production instance by designating a production instance to manage the trust configurations on all the instances it should manage remotely.

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Trust concepts

Trust profile

The Trust profile defines the ideal trust configuration of all the instances that participate in a specific application. The trust profile is specific to an enabled application. It defines how the instances leverage the application capabilities to communicate with each other. Once the application's trust profile with the trust configuration for each instance is defined, it can be shared with the managed instances. This will trigger the automatic population of trust tables within those instances. This automation depends on whether there is a Trust profile manager defined. If not, trust configuration needs to be manually created on each instance.

For example, if you're currently logged into sub-prod 2 and Prod 1 has management privileges over sub-prod 2, you can use the **Sync Trust Profile** button on Prod 1 to distribute trust profiles to all instances under Prod 1's management. The updated trust profile will then be reflected on Prod 2.

Capabilities and operations

Capabilities are application features that would be leveraged for cross instance communication. It is a group of granular operations that are available as a part of the application.

Enabled applications within an instance possesses a trust profile, which is established for every capability it exposes. To ensure seamless communication between instances for these capabilities, a trust configuration must be defined. This trust profile encompasses all the necessary trust configurations between instances for a specific application and its capabilities.

Trustor and Trustee

Trustor can be defined as the instance that is trusting the other instances with viewing its data and/or receiving messages from the trusted instance.

For example, you're logged into Prod 1. There are 2 other sub prods- sub-prod 1 and sub-prod 2. If Prod 1 trust sub-prod 1 and sub-prod 2, then Prod 1 is the Trustor and sub-prod 1 and sub-prod 2 are Trustees.

> **Note:** The trust concept works on the instance for a given application at the capability level. The table that lists the instances trusted by your instance has 3 columns: application, capability, and Trustee instance.

When instances are required to communicate, they consider the application trust configuration before communicating with each other.

For example, if an enabled application on Prod 1 needs to send a message to Sub-prod 1 and Sub-prod 2, these sub-prods must trust Prod 1 to receive the message and act on it. In this scenario, the sub-prods are the trustors, and Prod 1 is the trustee.

If Prod 1 doesn't trust sub-prod 1 and sub-prod 2, messages from the sub-prods to Prod 1 are not processed.

You can go to the trust table and create a new trust record.

Trust configuration management

Managing instances

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The table shows the instance that is designated as the manager instance for the instance you are logged into. If you are logged into the managing instance, the table will be blank.

For example, you're logged into Prod 1. The instances shown in the Managing Instances table are the instances that are being managed by Prod 1 for particular applications.

Managed instances

The table shows the instances that you are managing.

For example, you're logged into Prod 1. The instances shown in the Managed Instances table are the instances that Prod 1 is managing for the specified applications.

Managed instances must grant permission to managing instances in order to automatically distribute trust profiles.

Note: An instance can't be both a managing and a managed instance. An instance can manage several instances simultaneously. An application within an instance can be managed by only one instance at a time.

Configure Manager Instances

Implement the following steps to configure the Manager Instances in Multi-Instance Management.

Before you begin

Role required: admin or sn_mif.mif_admin.

Procedure

1. Log onto the instance that will be managed.
2. Go to **Multi-Instance Management** > **Manager Instances**.
   The Manager Instances list shows up.

   Note: sn_mif_managed_by_instance is the table for defining the manager instances.

   The manager instance table provides a list of multi-instance applications and the manager instances associated with each for trust configuration, for example, Impact Health.
3. Select **New** to designate a manager.
   The Manager Instances form shows up.
4. On the Manager Instances form, fill up the following.

Entry	Description
Manager Instance	Select a manager instance from the list of in stance names using the lookup option. **Note:** Only production instances should be designated as the primary managers for both production and sub-production instances. Sub-production in stances may manage other sub-produc tion instances under specific, defined conditions.

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Entry	Description
Application	Select the appropriate application from the application list using the lookup option.

5. Select **Submit**.

Configure Managed Instances

Implement the following steps to configure the Managed Instances in Multi-Instance Management.

Before you begin

Role required: admin or sn_mif.mif_admin.

Procedure

1. Go to **Multi-Instance Management** > **Managed Instances**.
2. Select **Add managed instances**.
   The Add managed instances modal shows up. The managed instances allow the managing instance to remotely distribute trust profile configurations. The modal shows a list of instances where the approval request is sent.

   Note: The instances that show up on the list are pulled from the instance table. The instances that belong to the same account and customer are only shown in the list for the request to be sent.

3. Select **Send Requests** to send the request to the selected instances to allow to be managed.
   A message informs you that managing instance requests were successfully sent and are pending approvals.
4. Refresh the managed instance and you will see the list of instances you have sent the request to with pending approval.
   The Managing instance needs to approve them.
5. Go to the Managed By Instances instance and refresh it.
   You will see the approvals requested.
6. Select the information icon next to the application name on the Managed By Instances instance.
   The Manager Instances record pops up.
7. Select **Open Record** in the pop up to open the record.
8. Select one of the following actions Manager Instances record.
   - Approve Manager Instance
   - Reject Manager Instance

   Note: If you are an Multi-Instance Management admin, you will also be notified by an email about the approval requests.

9. Once approved, review the Managed Instances instance and the status updates.

   Note: The status shows as Revoked in the Managed Instances instance if its been deleted from the Managed By Instances instance. If a request is approved by the system, the status shows as Auto-Approved.

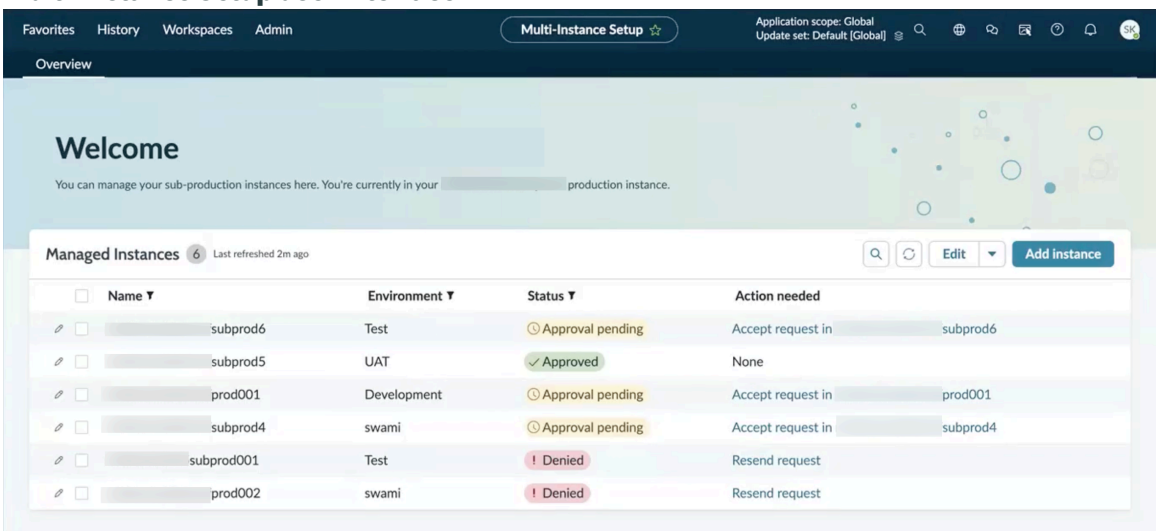
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Multi-Instance Setup

Multi-Instance Setup discovers non-production instances related to a production instance and connects instances to support cross-instance communication and data sharing with various ServiceNow applications.

Cross-instance communication is important for secure data exchange, synchronization, and collaboration between instances and is required to promote and govern applications across environments. Multi-Instance Setup simplifies setting up cross-instance communication with a single user interface where administrators can configure and monitor non-production instances connected to a controller. Every connection is requested, reviewed, and approved or rejected to help avoid silent failures or undocumented instance relationships.

Multi-Instance Setup user interface



Multi-Instance Setup and Multi-Instance Management

Multi-Instance Setup is built on Multi-Instance Management and simplifies the process of connecting instances but there are some distinctions between the two features:

- Multi-Instance Management is the ServiceNow AI Platform framework that establishes trust between individual instances at the level of a specific application or capability. Configuring Multi-Instance Management trust directly means working with manager and managed instance relationships one application at a time.
- Multi-Instance Setup manages the relationship between a controller and its non-production instances at the environment level, rather than configuring trust per application and capability. Multi-Instance Setup automatically maintains the underlying Multi-Instance Management trust relationships that individual applications rely on. Other ServiceNow applications that need cross-instance trust automatically manage their own per-capability trust profiles.

  Multi-Instance Setup also adds environment types on top of the Multi-Instance Management framework, which only distinguishes non-production instances from production instances.

Multi-Instance Setup workflow

From Multi-Instance Setup, administrators can configure cross-instance communication in a few steps:

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1. From the production instance, the instance admin sets the instance as the controller.
2. To add non-production instances to the controller, the admin chooses to run a scan that automatically discovers non-production instances or adds them manually and assigns each one an environment type.

   Multi-Instance Setup automatically sends an access request to each non-production instance's administrator.
3. From a non-production instance, the admin of that instance approves or denies the request to manage the instance from the controller.

   After the admin approves the request, cross-instance communication between the controller and that non-production instance is active.

For more information about using Multi-Instance Setup, see Connecting controller and managed instances.

Related topics

Developer Sandboxes

App Engine Management Center

Install Multi-Instance Setup and AMF Core

You can install the Multi-Instance Setup application and AMF Core plugin if you have the admin role.

Before you begin

Review the Multi-Instance Setup application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

On the production instance that you want to set as the controller, you must install the Multi-Instance Setup application (sn-app-amf) and the AMF Core plugin (com.glide.amf). To detect non-production instances to manage, you must install the AMF Core plugin (com.glide.amf) on any non-production instance that you want a controller to manage.

Roles and tables are installed with the AMF Core plugin (com.glide.amf). For more information, see Components installed with AMF Core.

Procedure

1. From a production instance, navigate to **All** > **Application Manager**.
2. Find the Multi-Instance Setup application (sn-app-amf) 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.

   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.

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4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.
6. Repeat the previous steps to install the AMF Core plugin (com.glide.amf) on the controller instance and each non-production instance that you want it to manage.

What to do next

Set the production instance as the controller so you can begin managing non-production instances. For more information, see Connecting controller and managed instances.

Components installed with AMF Core

The following components are installed with activation of the AMF Core plugin (com.glide.amf).

Roles installed

Role title [name]	Description	Contains roles
AMF Core administrator [sn_amf.amf_core_admin]	Defines and manages connections between controller and managed instances.	sn_mif.mif_admin
AMF Core viewer [sn_amf.amf_core_read]	Views connections between controller and managed instances.	sn_mif.mif_read

Tables installed

Table	Description
AMF Instance [sn_amf_instance]	Controller and managed instances and their instance type.
AMF Instance Type [sn_amf_instance_type]	Configured instance types: Development, Production, and Test by default.

Connecting controller and managed instances

Connecting a production instance to the non-production instances it manages involves three steps: setting the controller, adding the instances to manage, and approving requests to manage instances.

Before a production instance can manage non-production instances, you must set it as the controller. Then, you connect it to one or more non-production instances by adding them as managed instances. Adding a managed instance automatically sends an access request to that instance's administrator, and after the admin approves the request, the connection is active.

Set a production instance as a controller

Set a production instance as a controller that manages non-production instances.

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Before you begin
Install Multi-Instance Setup and AMF Core.

Role required: sn_amf.amf_core_admin or admin

About this task
The controller, or manager, is a production instance used to manage connected non-production instances. A production instance must be set as a controller before you can discover or add non-production instances.

Procedure
1. From a production instance, navigate to **All** > **Multi-Instance Setup** > **Multi-Instance Setup**.
2. From the pop-up window, select **Set as controller**.

What to do next
From the controller instance, you can discover or add any non-production instances that you want to manage.

Add managed instances to the controller

Add non-production instances to a controller and request approval for the controller to manage them.

Before you begin
A production instance must be set as a controller, or manager, that can manage non-production instances.

To detect non-production instances to manage, you must install the AMF Core plugin (com.glide.amf) on any non-production instance that you want a controller to manage. For more information, see Install Multi-Instance Setup and AMF Core.

Role required: sn_amf.amf_core_admin or admin

About this task
To add managed instances, you can run a scan to automatically discover related non-production instances or add them manually. Each instance has an assigned environment type, which identifies a managed instance's role in your application life cycle. Multi-Instance Setup uses three default environment types (Development, Test, and Production) but you can create custom environment types if needed.

The environment type can be used by other ServiceNow applications that use Multi-Instance Management for cross-instance communication, such as Developer Sandboxes. Otherwise, custom environment types are primarily a label for your own use.

Note: Multi-Instance Setup adds environment types on top of the Multi-Instance Management framework, which only distinguishes non-production instances from production instances.

Procedure
1. From the controller instance, navigate to **All** > **Multi-Instance Setup** > **Multi-Instance Setup**.
2. Select **Add instance**.
3. From the pop-up window, select one of the following options for adding instances.

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Option	Description
Run scan	Run a scan to automatically discover related non-production instances. The scan reads the instance's defined update set sources, such as a source connecting a test instance to a production instance, to iden tify instances and their environment types. **a.** Review the discovered instances and their environments. **b.** Select **Save and request access**. If no instances are discovered, select **Add an other instance** to add instances manually in stead.
Skip and set up manually	Manually add an instance if you already know the instance name and environment. **a.** From the Instance drop-down list, select an instance. **b.** From the Environment drop-down list, com plete one of the following steps: ▪ Select an existing environment type. ▪ Enter a name for the environment and se lect **Create environment**. **c.** To add more instances, select **Add another instance** and repeat the previous steps. **d.** Select **Save and request access**.

Result

Multi-Instance Setup automatically sends a request to each instance's admin to grant management control to the controller instance. In the Status column of the Managed Instances list, an instance appears with a status of Approval pending until the admin responds to the request. In the Action needed column, you can select a link to open the request in the non-production instance.

Trouble?

If you need to change an environment assignment after adding an instance, select **Edit** to change the environment for one or more instances.

What to do next

The admins for each non-production instance must review and approve requests to manage instances and make connections active.

Review a request to manage an instance

Review a request to allow a controller to manage an instance.

Before you begin

Role required: sn_amf.amf_core_admin or admin

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Procedure

1. Navigate to a request in one of the following ways depending on the instance type.

Option	Description
From the non-production instance	Navigate to **All** > **Multi-Instance Management** > **Instance Configuration** > **Manager Instances**.
From the controller instance	**a.** Navigate to **All** > **Multi-Instance Setup** > **Multi-Instance Setup**. **b.** From the Managed Instances list, identify an instance that has a status of Approval pending. **c.** From the Action needed column, select the link to open the pending request. **d.** Select **Go to requests**. On the non-production instance, the Manager Instances list that contains all requests from controllers opens.

2. From the Approval column of the Manager Instances list, select one of the following options:
   - **Approve** to grant the controller access to manage the instance.
   - **Reject** to deny the controller access to manage the instance.

Result

If a request is approved, the connection between the controller and managed instance is active. This connection supports cross-instance communication and data sharing with other ServiceNow applications, such as Developer Sandboxes, Automated Test Framework, and more.

Trouble?

To resend a request that was previously rejected, you must add the non-production instance to the controller as a managed instance again. For more information, see Add managed instances to the controller.

ServiceNow Otto for Setup

The ServiceNow Otto for Setup provides a unified, guided experience to set up, configure, and adopt ServiceNow products. It connects Admin Home, product hubs, and the Configuration Console into a single path from product activation to full configuration.

Administrators can manage entitlements, install required components, apply recommended configurations, complete guided setup steps, track progress, and package changes for promotion. The experience reduces manual effort and complexity by streamlining installation and configuration tasks. The Setup Hub is available with or without AI. All setup capabilities —including installation, default configurations, guided steps, and update set packaging are supported without AI, while AI-assisted features, such as agents and conversational experiences, are available when included in the subscription.

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Get started

Explore	Administer
Learn about ServiceNow Otto for Setup	Administering ServiceNow Otto for Setup
Configure	**Reference**
Configure ServiceNow Otto for Setup	Learn miscellaneous information about ServiceNow Otto for Setup

Troubleshoot and get help

- Ask or answer questions about ServiceNow Otto for Setup in the ServiceNow Community
- Search the Known Error Portal for known error articles

Explore ServiceNow Otto for Setup

ServiceNow Otto for Setup simplifies installing, configuring, and deploying ServiceNow products by automating setup, applying best practices, tracking progress, and packaging changes for production.

ServiceNow Otto for Setup overview

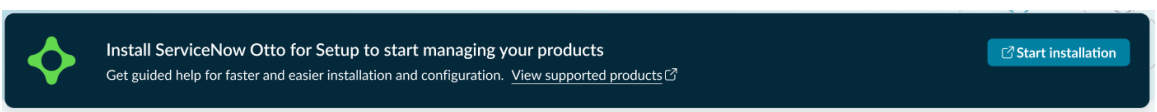
ServiceNow Otto for Setup offers a guided approach for installing, configuring, and deploying ServiceNow products. It streamlines the end-to-end setup by automating installation tasks, applying recommended configurations, monitoring setup progress, and preparing changes for production, making deployments more efficient and less manual.

This application is available to all users with Foundation SKUs for ITSM, CBS, ITOM, Employee Slate and ESM, and Pro+ SKUs for Simplified ITSM, ITOM and HRSD.

Note: ServiceNow Otto for Setup supports tiered SKUs (Advanced and Prime) for ITOM, Simplified IT Service Management, HAM and CBS, including entitlement-driven flows and experiences.

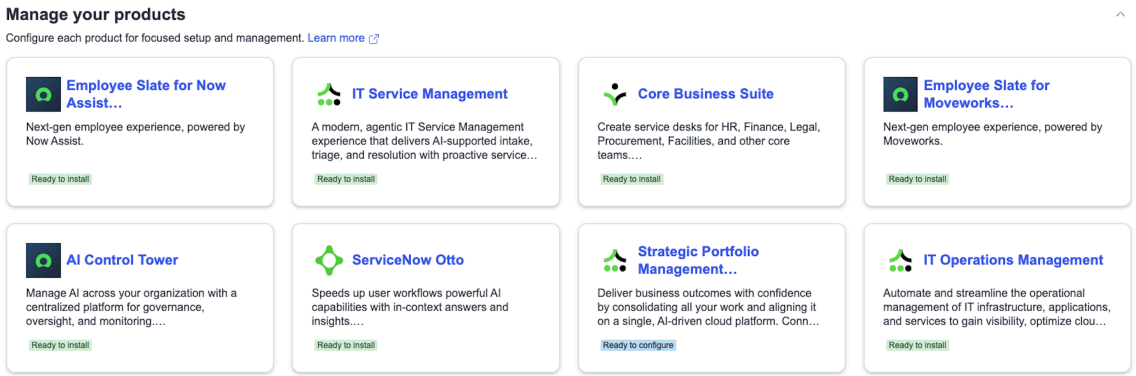
Installing ServiceNow Otto for Setup is the first step to experience automatic product installations and implementation of default configurations on your ServiceNow instance.

Note: You can install the ServiceNow Otto for Setup application either directly from the ServiceNow store or from the prompt on the Admin Home page.



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Zero touch install automatically installs ServiceNow Otto for Setup along with selected applications and plugins for net new ServiceNow customers in supported non-production instances, displays installation status, and enables users to begin configuration without manual setup. A contextual banner appears during initial onboarding to help you get started and you can dismiss it when you no longer need it.



Admin Home displays the installation status for each product to clearly indicate readiness and required action. Each product shows one of three states to help you understand the current state and determine the next step at a glance.

- Installation in progress: Indicates when the system is preparing the product in the background
- Ready to configure: Indicates when installation is complete and you can start the setup process
- Ready to install: when the product is not yet installed or installation did not complete successfully

The ServiceNow Otto for Setup capability helps you with the following:

- Automatic installation of the required products and implementation of default configurations.
- Visually clear and modular UI for focused task management.
- Provides an intuitive and critical tools interaction.
- Ensures maintaining control with minimal effort by significantly improving task completion speed through centralized access and reduced navigation steps.
- Supports customizations as per user entitlements.

ServiceNow Otto for Setup users

ServiceNow Otto for Setup has the following roles.

Users	Description
admin	The admin role helps you assign product family specific roles to users

See ServiceNow Otto for Setup personas and role assignments depending on the product family for more information.

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ServiceNow Otto for Setup benefits

Benefit	Feature	Users
Set up an application with ServiceNow Otto for Setup	Set up an application with ServiceNow Otto for Setup	admin
Set up ServiceNow Otto	Set up ServiceNow Otto with ServiceNow Otto for Setup	admin
Upload update set batch file	Manage update set for ServiceNow Otto for Setup	admin
Configure an application with ServiceNow Otto for Setup	Product modules configuration in ServiceNow Otto for Setup	admin
General guidelines for ServiceNow Otto for Setup	General guidelines	admin

What to explore next

To learn more about using ServiceNow Otto for Setup, see:

- Administer ServiceNow Otto for Setup
- Product modules configuration in ServiceNow Otto for Setup
- ServiceNow Otto for Setup references

Administer ServiceNow Otto for Setup

Explore this section to learn more about setting up an application and ServiceNow Otto admin with ServiceNow Otto for Setup.

- Set up an application: Set up an application with ServiceNow Otto for Setup
- Set up ServiceNow Otto: Set up ServiceNow Otto with ServiceNow Otto for Setup

To learn more about managing update set batch file, see Manage update set for ServiceNow Otto for Setup.

Set up an application with ServiceNow Otto for Setup

Implement the following steps to set up a specific application or plugin with ServiceNow Otto for Setup on your instance.

Before you begin

Before performing this task, you must install ServiceNow Otto for Setup application either from ServiceNow store or from the prompt on the Admin Home page.

This application is available to all users with Foundation SKUs for ITSM, CBS, ITOM, Employee Slate and ESM, and Pro+ SKUs for Simplified ITSM, ITOM and HRSD.

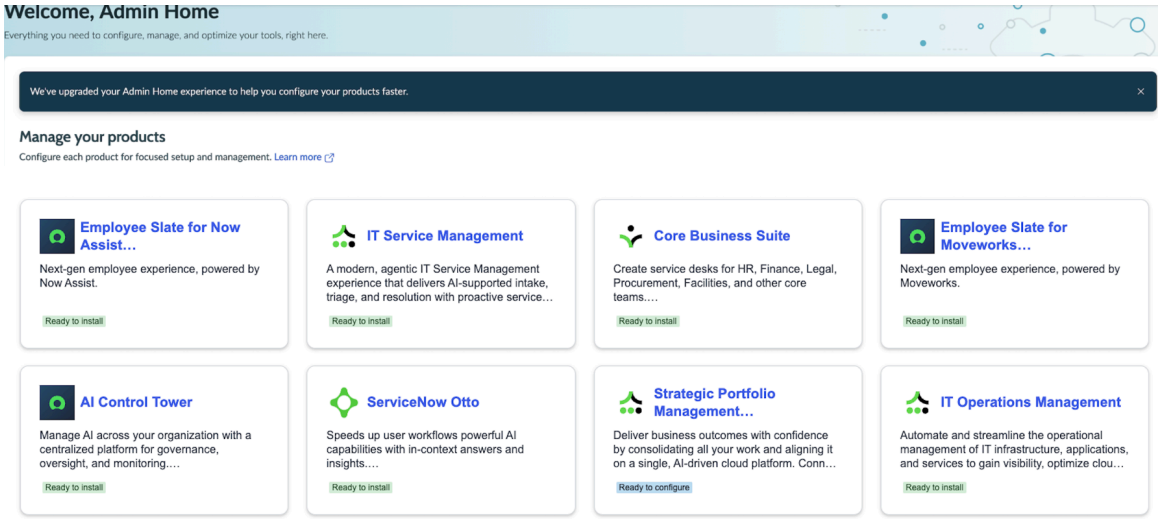
Note: ServiceNow Otto for Setup supports tiered SKUs (Advanced and Prime) for ITOM, Simplified IT Service Management, HAM and CBS, including entitlement-driven flows and experiences.

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Role required: admin

Procedure

1. Navigate to your Admin Home page on your instance.
   The system dynamically renders application and plugin cards based on your admin entitlement status.



   The image shows only a sample set of products. Available products may change as new products are added in future releases. The products displayed in Product Hub depend on the entitlements available for your instance.

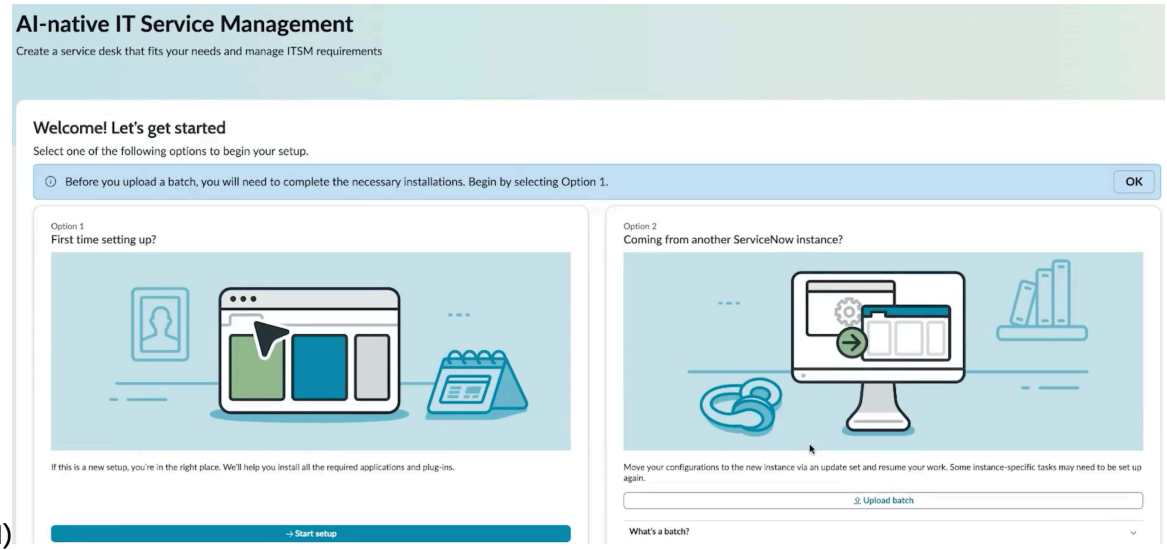
   Note: If you use an earlier version of Admin Center, see Install plugins for ServiceNow Otto for installation information about ServiceNow Otto. In the latest version of Admin Center, the ServiceNow Otto card appears in the Manage your products section.

   Note: The Manage your products section is collapsible by default. You can expand it to see all the product family cards.

2. Select a specific product family card in the Manage your products section to start the setup process.
   The Product Hub page for the selected product family shows up.
3. **Optional:** Select **Start setup** from Option 1.

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(Optional)



Note: This step is not applicable for all product families. The above UI is visible only for specific product families that are being set up for the first time.

The detailed Product Hub page for the selected product shows up. You can see the list of app bundles that needs to be installed.

(Optional) The Product Hub page displays a single product tier based on entitlements, using a descending order to show the highest tier when multiple tiers are available. For example, if both Foundation and Advanced tiers are installed for Simplified ITSM, only the Advanced tier is displayed. Under the Not installed section, only apps associated with the Advanced tier entitlement are shown. At the Product Hub level, the tiering approach can be configured as either Tiered or All Active Resources. For example, ITSM and CBS use the Tiered approach, while ITOM uses the default (All Active Resources) approach.

4. **Optional:** Select **Upload batch** from Option 2.
   This step is applicable only if you are setting up ITSM from another ServiceNow instance. See Manage update set for ServiceNow Otto for Setup for more information.
5. Select the install icon next to the app bundle mentioned under the Not installed tab to start the installation process of the specific app bundle.
   You can also see the information about the app bundles that have either been installed or have available updates under the Installed and Updates available tabs.
   Once the app bundle is installed, it moves under the Installed tab.

   Note: In case of Core Business Suite (CBS), it follows two steps installation process. The CBS app is installed first, followed by its corresponding apps mentioned under the Not installed tab. The green banner shows up only for CBS setup process.

6. **Optional:** Review the information in the Configuration insights section.
   Once an app is installed, corresponding information about the new configurations that have either been added or updated show up in the Configuration insights section.

   Note: This section is visible only for CBS setup process. This section shows up only when you have an application under the Installed tab for the CBS setup process.

   Select **More info** to show the total steps configured for each module.

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Note: The **More info** count reflects the combined total of manual and default configurations applied.

7. **Optional:** Select **Upload batch** to upload a batch file and set up the update set for ServiceNow Otto for Setup.

   Note: This step is applicable only if you need to setup the update set for either ITSM or CBS. See Manage update set for ServiceNow Otto for Setup for more information.

8. **Optional:** Expand What's included to view the applications included in the app bundle.

   (Optional) You can also explore the Helpful resources section in Product Hub page that include links to configuration guidance, product documentation, release notes, and the ServiceNow Community.

   Note: The What's included section stays collapsed by default.

9. Select **Configure** to move to the Configuration Console page.
   See Configure in ServiceNow Otto for Setup for more information.

Set up ServiceNow Otto with ServiceNow Otto for Setup

Implement the following steps to set up ServiceNow Otto with ServiceNow Otto for Setup on your instance.

Before you begin

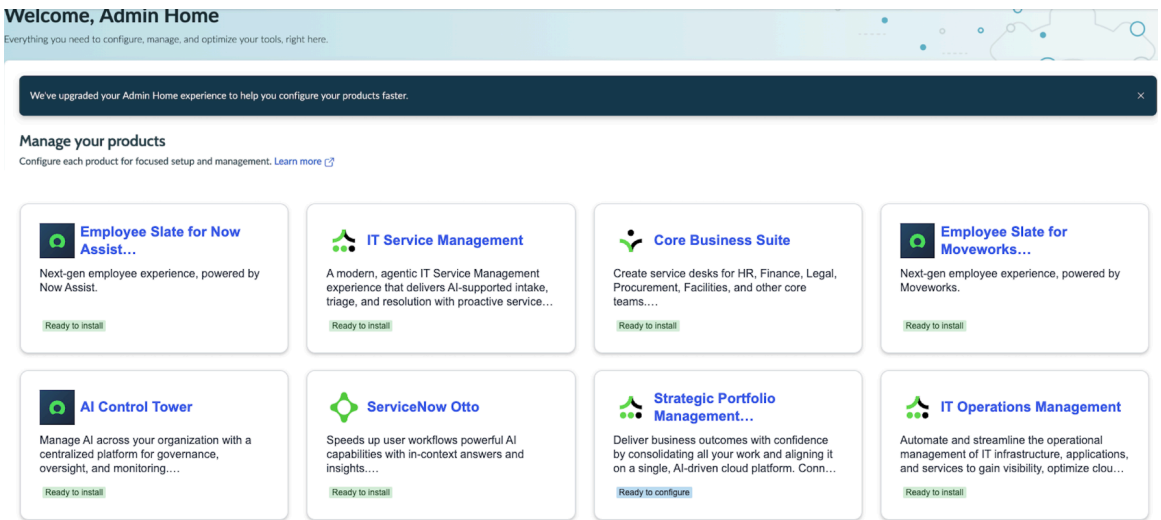
Before performing this task you must install ServiceNow Otto for Setup application from ServiceNow store or from the prompt on the Admin Home page.

This application is available to all users with Foundation SKUs for ITSM, CBS, ITOM, and ESM, and Pro+ SKUs for ITSM and HRSD.

Role required: admin

Procedure

1. Navigate to your Admin Home page on your instance.
   The system dynamically renders application and plugin cards based on your admin entitlement status.



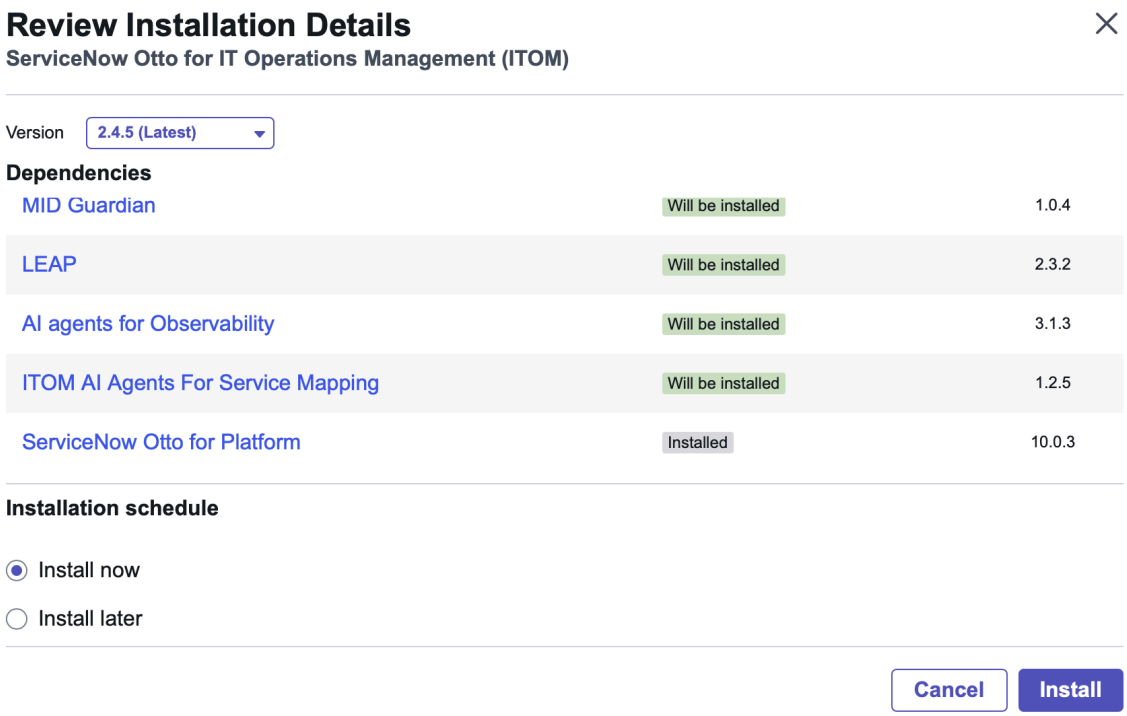
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The image shows only a sample set of products. Available products may change as new products are added in future releases. The products displayed in Product Hub depend on the entitlements available for your instance.

Note: If you use an earlier version of Admin Center, see Install plugins for ServiceNow Otto for installation information about ServiceNow Otto. In the latest version of Admin Center, the ServiceNow Otto card appears in the Manage your products section.

Note: The Manage your products section is collapsible by default. You can expand it to see all the product family cards.

2. Select the ServiceNow Otto card to start the setup process.
   The Product Hub page for ServiceNow Otto shows up.
3. Select the redirect icon next to the app bundle mentioned under the Not installed tab to start the installation process of the specific app bundle.
   The App manager page shows up.
4. Select **Install** in the Get started section.



The Review Installation Details modal shows up. It shows a list of corresponding applications that will be installed as part of the installation process.

5. Select **Continue** and then **Install** in the Review Installation Details modal.

   You also get the option of scheduling the installation process either for immediate execution or later processing.

   The Installation progress bar shows up. As soon as the installation starts, the selected app bundle card moves to queue on the Product Hub page.
6. Once you are done installing all the necessary applications and plugins, select **Go to ServiceNow Otto Admin** on the Product Hub page to boost your AI capabilities.
   See AI Admin Hub for more information on configuration of ServiceNow Otto Admin module.

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Manage update set for ServiceNow Otto for Setup

Upload a batch update set to promote validated configuration changes from a non-production instance to production in a single, controlled deployment, ensuring consistency and reducing manual errors.

Before you begin

Before performing this task you must install ServiceNow Otto for Setup application from ServiceNow store or from the prompt on the Admin Home page.

This application is available to all users with Foundation SKUs for ITSM, CBS, ITOM, and ESM, and Pro+ SKUs for ITSM and HRSD.

The following conditions should be met:

- Preset and manual configurations are completed and verified in the non-production instance.
- The batch update set is packaged in the non-production instance, and the XML file is downloaded. These update set files are then uploaded in the production instances. See Understand the Configuration page flow in ServiceNow Otto for Setup for more information.
- The production instance version is compatible with the source non-production instance.

The following task is performed on a production instance only after the above conditions are met:

https://player.vimeo.com/video/1174403543?h=c089e8f858&badge=0&autopause=0&player_id=0&app_id=58479

Role required: admin

Procedure

1. Navigate to your Admin Home page on your instance.
   The system dynamically renders application and plugin cards based on your admin entitlement status.
2. Select **View product overview** for AI-native IT Service Management product family card to start the setup process.
   The Product Hub page for AI-native IT Service Management shows up.
3. Select **Upload batch** under Option 2 - Coming from another ServiceNow instance? option.
   The Upload your batch update set as XML file modal shows up.
4. Select +Add file in the modal to upload the batch file and select **Continue**.
   The Update set ready modal shows up with "Upload successful with no conflicts detected" message.

   Note: This message is visible only if the batch file doesn't have any errors.

   When the batch file contains errors, the "Your update set has conflicts that need attention" message shows up.

5. Select **Preview** in the Update set ready modal.
   You can also select Open KB article if you want to view the KB article about uploading batch file.
   The Retrieved Update Set form shows up on a new tab.
6. **Optional:** Select **Commit Update Set Batch** in the form.

   Note: The **Commit Update Set Batch** option is visible only when there is no error in the batch file. You are required to resolve the errors in the batch file before selecting **Commit Update Set Batch**.

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The Commit Update Set Batch modal gets displayed showing the progress of the batch file being committed.

If the commit operation fails, an error message is shown stating the failure. Review the commit status and any error details presented and navigate back to the Product Hub page. The Product Hub page provides a See Logs link to the commit logs, with details of the specific reasons for any commit failures.

Note: Resolve all commit log errors before retrying to upload the update set xml file again. Ensure the non-production and production instances are running compatible versions.

7. **Optional:** Select Preview Problems for Batch related list to review the errors in the update set batch file.

   Note: This step is applicable only when there are errors in the update set batch file.

   The list of errors shows up under the Preview Problems for Batch related list.
8. **Optional:** Select any of the available actions to resolve the errors.

   Note: This step is applicable only if there are any errors in the update set batch file. You are then required to resolve the errors in the batch file and then proceed with the **Commit Update Set Batch** option. The **Commit Update Set Batch** option appears once the errors are resolved in the batch file.

9. Navigate back to the Product Hub page to see the progress.
   The extraction of these update sets are done on the Configuration Console page. See Understand the Configuration page flow in ServiceNow Otto for Setup for more information.
10. Once the update set commit completes, you can either select **Upload another update set** or **Configure** depending on the requirement.
    If you want to upload another batch file, select **Upload another update set**. You can also select **Configure** if you are done uploading the update set batch file and wants to proceed with the configuration process.

Result

These steps complete the successful uploading and committing of the update set batch file.

Mandatory and optional app selection modal

The app selection modal enables platform admins to view, select, and install product bundles with clear separation of mandatory and optional apps. The modal validates licensing, prevents modification of required apps, and integrates with App Manager APIs to verify transparent and guided installations.

When installing product bundles, platform admins need visibility into what will be installed and control over optional components. The app selection modal addresses this need by presenting a guided experience that separates mandatory apps from optional apps, validates licensing constraints, and enables informed selection decisions.

The modal integrates directly with App Manager APIs, ensuring that all app metadata, availability, and licensing rules remain current and authoritative. This approach eliminates manual app management and reduces the risk of invalid installations caused by missing required apps or licensing conflicts.

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Key benefits

The app selection modal provides the following benefits:

- Transparent installation visibility: Admins see exactly which apps are mandatory, which are optional, and why certain apps may be unavailable due to licensing constraints.
- Installation safety: Mandatory apps are pre-selected and locked, preventing accidental deselection of required components and eliminating installation failures caused by missing dependencies.
- User control over optional components: Admins can customize installations by selecting or deselecting optional apps that match their organizational needs, reducing bloat and unnecessary features.
- Clear licensing guidance: The modal displays messaging for unlicensed optional apps, enabling admins to make purchasing decisions or defer component installation until licenses are available.
- Dynamic item count: The modal displays a real-time count of selected items that updates as admins select or deselect optional apps, providing clear visibility into the total installation scope.
- Reduced installation errors: App Manager API integration ensures that app metadata, validation rules, and install requests align with current system state, preventing silent failures.

Use cases

The app selection modal is useful in the following scenarios:

- Standard product bundle installation: A platform admin installing a new product bundle wants to understand the base components (mandatory) before committing to optional add-ons. The modal provides clear visibility, enabling an informed decision about which optional apps to include in the initial installation.
- Licensing-constrained installations: An organization has licenses for some but not all components in a bundle. The admin uses the modal to identify which optional apps require additional purchasing, defer installation of those apps, and proceed with available components.
- Multi-team deployments: A large enterprise deploys the same product bundle across multiple business units with varying requirements. The modal allows each unit's administrator to customize the installation by selecting region-specific or team-specific optional apps without affecting the base functionality.
- Phased adoption: An organization plans to roll out additional functionality over time. The admin installs the mandatory core apps immediately and deselects optional apps, deferring their installation to a later phase when users are ready to adopt them.

As of Brazil release, the mandatory and optional app selection capability is available for Business Units (BUs) to configure.

Considerations

Consider the following when using the app selection modal:

- Mandatory apps are non-negotiable: Apps marked as mandatory by App Manager can't be deselected. These represent core dependencies required for the product to function correctly. If licensing or dependency issues prevent a mandatory app from being available, the entire installation is blocked with a clear error message.

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- Licensing rules are authoritative: App availability and licensing constraints are controlled by App Manager and can't be overridden within the modal. If an app is marked as unlicensed or unavailable, it can't be selected regardless of admin preference.
- Selection state is not saved between sessions: Optional app selections apply only to the current installation attempt. If an admin closes the modal without completing the install, their selections aren't retained for future sessions.
- App dependencies are opaque to the modal: The modal presents which apps are mandatory versus optional but does not display dependency graphs or explain why specific apps are required. Admins who need to understand app relationships should consult App Manager documentation or contact their implementation team.
- Item count updates dynamically: As admins select and deselect optional apps, the install button updates to show the current count of selected items. This count includes mandatory apps plus selected optional apps.
- Install button availability: The install button is disabled if zero apps are selected for installation (that is, if no mandatory apps are available and no optional apps are selected). This prevents silent failures caused by empty install requests.

Select apps during product installation

Use the app selection modal to review mandatory and optional apps, customize your installation by selecting optional components, and complete the product installation through product hub installation flow.

Before you begin

Before you begin:

- Your instance must have the Product Hub product available for installation.
- Your system must have active licensing for at least the mandatory apps in the bundle.

Role required: admin

About this task

When installing a new product bundle, the app selection modal displays which apps are required and which are optional. Use this procedure to customize your installation by selecting which optional apps to include.

Procedure

1. Navigate to the product bundle installation on the Product Hub page.

   Look for the Install option or product bundle installation entry point.

2. Select the product bundle you want to install.

   The system enforces the selection of mandatory apps defined for the product bundle. These apps can't be deselected during installation. After reviewing the selected apps, proceed to the next step.

3. Review the mandatory apps section in the app selection modal.

   Apps that are defined as mandatory and included in the user's entitlement are displayed with selected, disabled checkboxes and can't be deselected. Optional apps remain selectable and can be included or excluded during installation.

4. Review the optional apps section and decide which optional components to include.

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The system retrieves the apps that are entitled and available in the instance. Apps are then presented as either mandatory or optional based on the product bundle configuration. Mandatory apps can't be deselected, while optional apps can be selected or cleared during installation.

Select the checkboxes for optional apps you want to include in this installation.

5. Select or deselect optional apps and observe the item count update.

   As you select or deselect optional apps, the install button count updates in real-time. The count displays total selected items, including mandatory apps plus your selected optional apps. For example, if a bundle has 3 mandatory apps and 5 optional apps, and you select 2 optional apps, the install button shows "Install 5 selected items" (3 mandatory + 2 optional).

6. Verify the total count of apps being installed before proceeding.

   The install button displays text similar to "Install X selected items" where X represents the total. The button remains inactive if zero apps are available for installation (for example, if all mandatory apps are unavailable).

7. Select the install button to begin the installation.

   The system submits an install request containing all mandatory apps and only the optional apps you selected. App Manager validates the request and executes the installation.

   The installation begins and the system displays progress updates. On completion, a confirmation message appears listing all installed apps.

   Trouble?

   If the installation fails with an error message, verify the following:

   - You have the appropriate admin role or permissions.
   - Your instance has sufficient disk space for all selected apps.
   - No dependency conflicts exist between selected apps (consult with your implementation team if you're unsure).

   If issues persist, contact your ServiceNow implementation team or support.

Result

The selected product bundle and all mandatory plus chosen optional apps are installed on your instance. The apps are then available for use by users with the appropriate roles.

What to do next

After installation completes, consider the following next steps:

- Verify that the installed apps are accessible from the appropriate menu or navigation area.
- Assign roles to team members who need to use the new apps.
- For additional optional apps installed later, repeat this procedure to install additional components if needed.
- Refer to the concept topic for more information about how licensing and app availability work.

Individual plugin installation from Product Hub

Individual plugin installation enables you to discover, review, and install standalone plugins directly from Product Hub without requiring a bundled apps package. This capability supports

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flexible deployment scenarios, early adoption, and validation of plugins before committing to full product bundles.

Product Hub traditionally expose product bundles, providing guided installations of complete product packages with mandatory and optional apps. Individual plugin installation extends this capability by allowing admins to install specific standalone plugins without committing to an entire bundle. This approach enables business units (BUs) such as ITAM to adopt plugins incrementally, validate functionality before broader deployment, and maintain granular control over their instance's capabilities.

Individual plugins are surfaced alongside bundled products in Product Hub. Each plugin displays its name, description, current status, and required dependencies. The installation process leverages the same guided framework used for bundled installs, including entitlement validation, dependency checking, installation progress tracking, and dynamic item count display. Individual plugin installation workflows mirror the product bundle installation experience, ensuring consistency across product bundle installation scenarios.

Key benefits

Individual plugin installation provides the following benefits:

- Flexible deployment: Admins can activate only the capabilities they need, avoiding unnecessary components and reducing instance bloat from unwanted functionality.
- Early adoption: Business units can validate new plugins in controlled environments before deciding on broader deployment or full product adoption.
- Incremental rollout: Organizations can phase plugin adoption over time, aligning deployments with business priorities and readiness schedules rather than bundled all-or-nothing approaches.
- Faster time to value: Admins bypass the overhead of evaluating and installing entire product bundles when they only need specific capabilities.
- Simplified licensing: Plugin-level licensing constraints are evaluated independently, allowing admins to proceed with available plugins and defer others pending license acquisition.
- Clear dependency visibility: The install flow displays all required dependencies, helping admins understand what will be activated alongside their selected plugin.

Use cases

Individual plugin installation is useful in the following scenarios:

- Selective capability adoption: An organization needs a specific plugin's functionality but does not want the additional apps that would come with a full product bundle. Individual plugin installation lets them activate exactly what they need.
- Pilot deployments: A business unit tests a plugin in a sandbox or development instance before deciding whether to roll it out to production. If validation is successful, they proceed with installation in production; if not, they can defer or abandon the plugin without affecting other deployments.
- Phased rollout: A large enterprise rolls out multiple plugins over time according to organizational readiness. Using individual plugin installation, different teams can adopt plugins on their own schedule without waiting for bundled product releases.

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- Licensing optimization: An organization has licenses for some plugins but not others. They install available plugins immediately and defer others until additional licensing is procured, avoiding all-or-nothing delays.
- Feature experimentation: IT teams evaluate whether a plugin's capabilities align with business requirements before committing to broader rollout, minimizing waste and maximizing ROI on technology investments.

Considerations

Consider the following when using individual plugin installation:

- Dependencies are mandatory: When a plugin has required dependencies, all of them must be installed as part of the transaction. You can't selectively skip dependencies even if you don't intend to use them. Dependencies are identified during installation planning and validated before execution begins.
- Entitlements are authoritative: Plugin availability is controlled by active licensing and can't be overridden within Product Hub. If a plugin or dependency lacks appropriate licensing, installation is blocked until licensing is obtained.
- Plugins are registered by business units: Not all plugins are automatically eligible for individual installation through Product Hub. Plugins must be explicitly registered in the Product Hub registry by their owning business unit. Contact your implementation team if a plugin you need is not visible in the hub.
- Individual plugin installs don't include bundle customization: Individual plugin installation follows a streamlined path with pre-defined mandatory apps and dependencies. If you need fine-grained control over optional components, consider the bundled product installation flow instead.
- Installation status reflects App Manager state: The plugin's installation status in Product Hub is synchronized with App Manager. If a plugin is set to inactive or is uninstalled outside of Product Hub (for example, via direct App Manager operations), the status in Product Hub updates to reflect the current state.

Install an individual plugin from Product Hub

Use Product Hub to discover, review, and install an individual standalone plugin without requiring a full product bundle installation.

Before you begin

Before you begin:

- Your organization must have active licensing for the plugin you want to install.
- Your instance must have access to Product Hub and the plugin must be registered as available for individual installation.

Role required: admin

About this task

Use this procedure to install a standalone plugin through Product Hub when you want to activate specific functionality without installing an entire product bundle. Individual plugin installation validates your entitlements, checks dependencies, and guides you through the installation process.

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Procedure

1. Navigate to Product Hub.
   A list of available products, bundles, and individual plugins shows up.
2. Locate and select the individual plugin you want to install.

   Individual plugins are displayed alongside bundled products in the Product Hub. Look for the plugin by name, description, or category. Each plugin displays its current status (Not installed, Installed, Updates available).
3. Review the plugin details and dependencies in the expanded view.

   The plugin details pane displays the plugin's name, description, current status, and a "What's included" section listing all required dependencies (other plugins, apps, or platform prerequisites).
4. Verify that your organization has valid licensing for the selected plugin.

   The system automatically validates your entitlements. If the plugin or any of its required dependencies lack appropriate licensing, an error message appears with guidance on what licensing is needed.

   Note: You can't proceed with installation until licensing is valid.

   The system displays either a green status indicator (entitlements valid) or a red status indicator with actionable error messaging (licensing missing).

   Note: If you receive a licensing error, contact your ServiceNow account team to purchase the required licenses. Once licensing is activated, refresh the Product Hub and retry this procedure.
5. Select the install button to initiate the plugin installation.

   The system validates all dependencies, then submits the install request to App Manager.

   The installation begins immediately.
6. Verify the item count before selecting Install.

   The install button displays a count of total items to be installed, including the selected plugin and all its required dependencies. The item count updates dynamically as the selection is finalized. The button remains enabled once all licensing validations pass.
7. Monitor the installation progress in the Product Hub.

   The plugin status displays real-time installation progress, showing percentage complete and current phase.

   Note: Don't navigate away from this screen during installation. Installation typically completes within minutes depending on plugin size and instance performance.

   When installation completes successfully, the plugin status updates to "Installed" and a confirmation message is displayed. You may refresh the page or navigate away.

   If the installation fails, the system displays an error message explaining why (for example, missing dependencies, entitlement validation failure, or network error). Note the error details and complete the following:

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- Verify that all listed dependencies have valid entitlements.
- Confirm that your instance has sufficient disk space for the plugin and its dependencies.
- Check your network connectivity to App Manager services.
- Contact your ServiceNow implementation team if issues persist.

8. Verify that the plugin is active and accessible in your instance.

   After installation completes, the plugin is automatically activated. Depending on the plugin type, you may need to navigate to the corresponding module or menu to confirm the plugin is functioning. For example, a dashboard plugin might appear under a new dashboard category, or an app plugin might appear in the app launcher.

Result

The individual plugin and all its required dependencies are successfully installed and activated on your instance. The plugin is now available for use by users with the appropriate roles. You can track the plugin's status in Product Hub going forward, including any available updates.

What to do next

After the plugin installation completes, consider the following next steps:

- Assign appropriate roles to team members who need to use the newly installed plugin.
- Configure the plugin settings if required (consult the plugin's documentation for configuration guidance).
- Test the plugin functionality in your instance to confirm it meets your needs.
- Monitor Product Hub for any available plugin updates and plan upgrade windows as needed.
- Refer to the Individual plugin installation from Product Hub for more information about dependencies, entitlements, and considerations.

Jumbo apps and entitlement validation

Jumbo apps are large application bundles that support mandatory and optional app selection during installation. Entitlement validation confirms that admins have appropriate licensing for mandatory apps before installation proceeds, while optional apps display licensing status inline to inform installation decisions.

Jumbo apps are large product bundles that bundle multiple applications together. Unlike standard apps or smaller product packages, jumbo apps support granular control over which components are installed by offering mandatory and optional app selections. Product Hub workflow leverages entitlement validation to confirm licensing requirements are met before allowing installations to proceed.

Entitlement validation operates at two levels: mandatory app validation and optional app validation. This layered approach prevents invalid installations caused by missing licenses while giving you the flexibility to defer optional components when licenses aren't available.

Jumbo apps vs standard products

Jumbo apps follow a different installation workflow than standard products:

- Standard products: Use the app selection modal within Product Hub, where admins select mandatory and optional apps directly.
- Jumbo apps: Redirect admins to App Manager, where they configure version, choose optional features, and complete installation.

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Note: For jumbo apps, when an admin selects Install from Product Hub, they are navigated to App Manager to complete the installation experience.

Mandatory vs optional app designation

Business Units (BUs) register jumbo apps by populating specific fields on the Product Hub resource table:

- Mandatory apps: Identified through the product resource configuration. These apps are essential for core functionality and can't be deselected by admins.

  Note: Licensing for mandatory apps is a hard requirement — installations can't proceed without valid entitlements.

- Optional apps: Also defined in product resource configuration. These apps add supplementary capabilities and can be selected or deselected by admins during installation. Licensing for optional apps is informational — admins can defer installation if licenses are unavailable.
- Jumbo app identification: The system distinguishes jumbo apps from regular apps through a product type flag or resource classification. This classification enables the mandatory/optional app selection modal and triggers enhanced entitlement validation workflows.

Entitlement validation rules

Entitlement validation follows these rules:

- Mandatory apps require active licensing: Every mandatory app in a jumbo bundle must have a valid, active entitlement. Expired, inactive, or missing licenses block installation and prevent the modal from displaying.
- Entitlement checks validate against mandatory apps only before modal display: Pre-modal validation only checks mandatory apps. Optional app licensing is evaluated after the modal displays, allowing admins to see the full picture before deciding which components to install.
- Optional app licensing is non-blocking: If an optional app lacks valid entitlements, it displays as disabled within the modal with an inline message. Admins can proceed with installation of available apps.
- App Manager is the source of truth: All entitlement queries delegate to App Manager APIs. Product Hub doesn't cache or override App Manager licensing rules. If App Manager reports an app as unlicensed, it is treated as unlicensed regardless of other factors.
- Installation fails if App Manager validation fails: Even if pre-modal and modal-level validation passes, if App Manager rejects the install request during submission (for example, due to a changed licensing state or validation rule), the installation is blocked with an error message.

Entitlement validation rules reference

Technical reference documenting entitlement validation rules, error states, and validation logic for jumbo apps and App Manager integration in product bundle installation workflows.

Validation phases

Entitlement validation occurs in three distinct phases during the apps installation workflow:

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Validation phases

Phase	When it occurs	What is validated	Result if validation fails
App selection	After the admin starts the installation workflow	For jumbo apps, Product Hub redirects the admin to App Manager. App Manager determines which apps are mandatory or optional and displays the selection experience	The selection experience remains available and displays information about missing dependencies when applicable.
Install submission	After the admin submits the install request	App Manager performs the required installation checks before proceeding	Installation is blocked and App Manager displays an error or dependency message

Mandatory app validation rules

For jumbo apps, App Manager determines which apps are mandatory and which are optional.

- Are determined by App Manager
- Can't be deselected
- Remain visible in the selection experience even when required dependencies or entitlements are unavailable
- Can prevent installation from completing if App Manager detects missing dependencies or other validation issues

Optional app validation rules

For jumbo apps, App Manager determines which apps are optional.

- Can be selected or cleared during the installation process
- Are presented by App Manager based on the product configuration and instance state
- Don't affect the selection state of mandatory apps.

Error states and messaging

Error states

Error state	When it occurs	User action required
Missing dependency	A required dependency is unavailable during installation	Review the message provided by App Manager and resolve the dependency before retrying
Install validation failed	App Manager can't complete the install request	Review the error details and retry after addressing the reported issue

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App Manager integration

- Product Hub redirects jumbo app installations to App Manager
- App Manager determines which apps are mandatory and optional
- App Manager displays the app selection experience and any dependency-related messaging
- App Manager performs validation checks before installation
- If required dependencies are unavailable, App Manager can block the installation and provide guidance to the administrator.

Implementation notes

- Jumbo app identification: Product Hub identifies jumbo apps and redirects administrators to App Manager for installation. App Manager determines which apps are mandatory or optional based on its configuration and business logic.
- Jumbo app installation workflow: For jumbo app installations, Product Hub redirects administrators to App Manager. App Manager provides the installation experience, including app selection, dependency messaging, and installation validation.
- Fallback behavior: If App Manager can't provide the installation experience or validation results, the administrator receives an error message and installation can't continue until the issue is resolved.

Configure in ServiceNow Otto for Setup

Understand and learn how to configure the Platform module and other product modules in ServiceNow Otto for Setup by following the steps in each category.

Understand the Configuration page flow	Configure Platform module	Configure product modules
Understand the Configuration page flow to start the configuration process for other specific modules	Learn how to configure the Platform module with ServiceNow Otto for Setup	Learn how to configure other product modules with ServiceNow Otto for Setup

Understand the Configuration page flow in ServiceNow Otto for Setup

Implement the following steps to understand the configuration page flow to start the configuration process for either the Platform module or a specific product module on your instance.

Before you begin

Before performing this task you must install ServiceNow Otto for Setup application from ServiceNow store or from the prompt on the Admin Home page.

Role required: admin

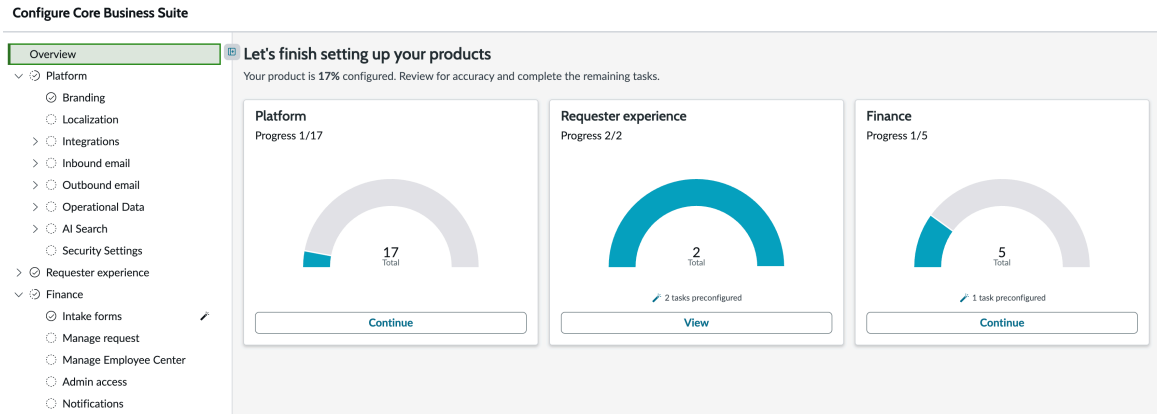
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Procedure

1. Once the setup of an application completes, select **Configure**.

   Note: The **Configure** option shows up only after the setup of an application completes.

   The Configuration Console page shows up.



2. Select Configuration Summary on the left panel of the Configuration Console page.
   You can see the modules and their specific configuration progress.

   Note: If the selected product module has enabled the update set functionality, a batch update set is created in the preferred scope that has been provided at the console level. This information shows up at the top menu bar on loading the Configuration Console page. Any update or metadata changes made on the console are captured in this update set unless you move to a different application or have switched to a different update set.

   The preferred scope can be updated depending on the next selected console item. For example, if you want to configure the Branding console item and it can be done in Global scope, you can override the preferred scope that was provided at the console level.

   The Platform module and the product specific module show up. The Platform module is a common module for all product modules. The product modules are based on the entitlement of the admin.

3. Select **Get Started** on the modules.
   You are redirected to the first configuration of the selected module. See Configure the Platform module in ServiceNow Otto for Setup for more information on Platform configuration steps.
4. **Optional:** Find a console item efficiently using the Search configurations search bar on the left navigation.
5. **Optional:** Expand the left panel configurations to view the pre-configured configurations.

   Note: The configurations that are pre-configured are marked with a checkmark and a magic wand. You can modify the default configurations that are preconfigured and marked with a Magic icon.

6. Select the Manage Task icon on a selected console item.
   You can then either create a new task or open a related task. If you select the Create a task option, the Product Console Task form. Fill up the fields on the form and select **Submit** to create a new task for the console item.

   You can also select the Open related tasks option to open the list of tasks that are being previously created and linked to the selected console item.

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7. Select a configuration that needs to be configured.
   Select each individual configurations that aren't pre-configured and complete the configurations. You need to expand each configuration to make its console items selectable.

   Note: Every application has different configurations that are either pre-configured or need to be configured.

8. Select **Package and download** to consider all the update made in configuring the selected console item.
   This step packages the current batch of configuration changes into an update set XML file. A new XML file is created every time you make any configuration changes.
9. Select **Configure with AI** to start AI-assisted configuration or receive guided assistance with ServiceNow Otto agent.

   Note: As a pre-req, install ServiceNow Otto for the **Configure with AI** button to show up on the Configuration Console page.

   You can now use the agent to ask questions in natural language and get guidance during the configuration process. The agent retrieves relevant information from ServiceNow documentation and presents a summarized response with links to related topics. For example, if you ask “What are roles?”, the agent searches the ServiceNow documentation site and returns a definition along with links to learn more. Select the **Choose something else** pill in the ServiceNow Otto agent chat view to review all available console items and start a different configuration path.

   The adoption of LitJS components in NAP enables the import and use of reusable components, promoting a scalable and consistent framework while improving development efficiency. You can also select the **ServiceNow Otto** icon on the menu bar to see the Open in expanded view pill that guides you through the configuration process using LitJS components.

   The ServiceNow Otto panel shows up and starts the agentic configuration process.

   Note: The **Configure with AI** button appears only for console items that are backed by AI capabilities.

10. **Optional:** Select **Download XML** to download the XML update set batch file.
    You can also select **Back to configuration summary** to go back to the Configuration Console page.
11. Review the labels and icons next to some selected console items.
    - The Label icon indicates that the particular console item is either mandatory or recommended.
    - The Update label indicates that the particular console item has been updated by the selected product family.
    - The New label indicates that the particular console item is new.
    - The Lock icon indicates that there is a pre-requisite that needs to be completed before unlocking the particular console item.

      Note: The Lock icon disappears as soon as the pre-requisite console item is marked as completed.

    - The Tick mark icon indicates that the console item has been configured either manually or using agents.
    - The Gear icon indicates that the default configuration of a console item.

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If a new update is available, the system displays a banner on the Configuration Console page.

Note: Select How this works link to find more information about the console items. The following modal shows up with these options on selecting the help link.

12. Select **Mark as configured** when you complete the configuration process of a configuration.
13. **Optional:** Scroll down to the Configuration activity section on the Configuration Console page to review the configured items and completed batch files by accessing **Configured items** and **Completed batches** tabs.

    (Optional) You can download a batch file from **Completed batches** tab view. Under the **Configured items** tab, you can see the console items that were marked as configured after the current active batch update set was created.
14. **Optional:** Select **Go to active batch** file to review all the update that were captured in the currently active batch file.
    Select the Child Update Sets related list to view the child update sets under the parent update set.

    Note: You can review the child update sets to know the exact update made in the active batch file.
15. Select **Go to Update Set** on the Configuration Console page.

    Note: This option shows up only when the entire configuration of the application completes.

    You can then export the update set and move it to either test instance or production instance.

What to do next

After the configuration completes, you can promote the changes to test or production instances by re-running the auto-installation, committing retrieved update sets, and validating ATF tests.

Configure the Platform module in ServiceNow Otto for Setup

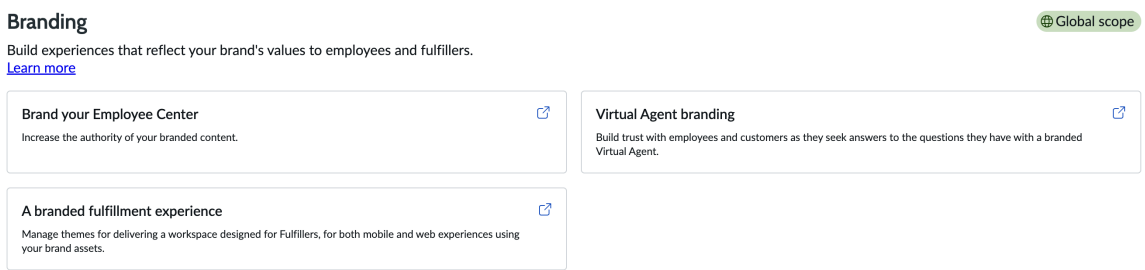
Complete the following steps to configure the Platform module.

Note: The Platform module is visible only if the selected product module configures the Platform changes for a particular install.

Note: You must be in Global scope to perform steps marked with the Global scope label.

Branding

Build the theme and experiences to reflect your brand's values.



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You can see the following information on the Branding page:

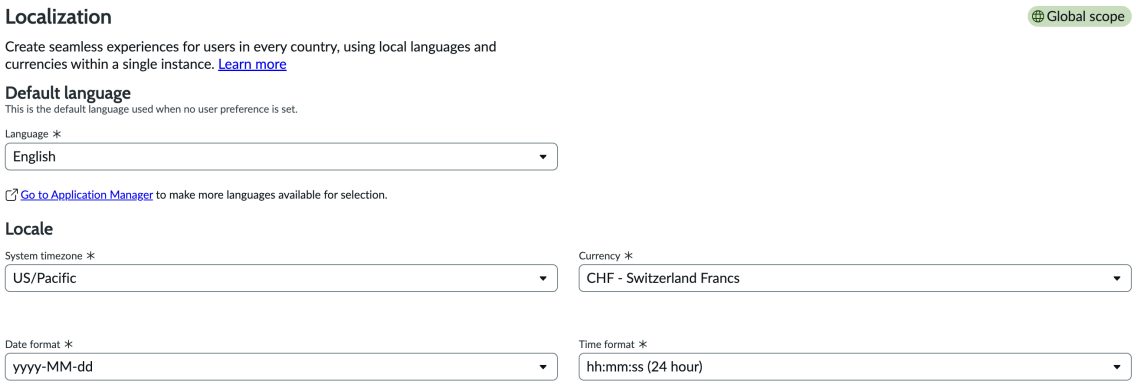
- Brand your Employee Center: Set your portal theme to reflect your brand. Use the branding editor for portal to provide the title, uploading the company logo, tag line, background, etc. See ABC for more information.
- Virtual Agent branding: Set your brand theme either through an AI agent or virtual agent. You can create a brand or a theme using the virtual agent conversation system. See ABC for more information.
- A branded fulfillment experience: Set the themes to deliver a workspace for both mobile and web experiences. See Theme builder for more information. See ABC for more information.

See Branding and theming for more information.

Localization

Enable users worldwide to interact in their preferred language and currency through one integrated system

Note: You are required to have Global scope to modify Localization settings.



Default language

You can set the language for the instance without impacting the system language. Select a language for the instance from the dropdown menu. English is the default language.

Note: The languages shown in the dropdown menu correspond to the languages configured in the instance.

Select the Go to Application Manager link to install more languages. Once a new language is installed, it shows up in the dropdown menu.

Note: Only one language can be selected at a time.

Locale

The locale options are for timezone, currencies, and date/time format.

Field	Description
System timezone	Timezone of the instance. US/Pacific is the default timezone.
Currency	Currency set for the instance. USD-United States Dollars is the default currency.

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Field	Description
Date format	Date format set for the instance. MM-dd-yyyy is the default date format.
Time format	Time format set for the instance. h.mm.ss (24 hr) is the default time format.

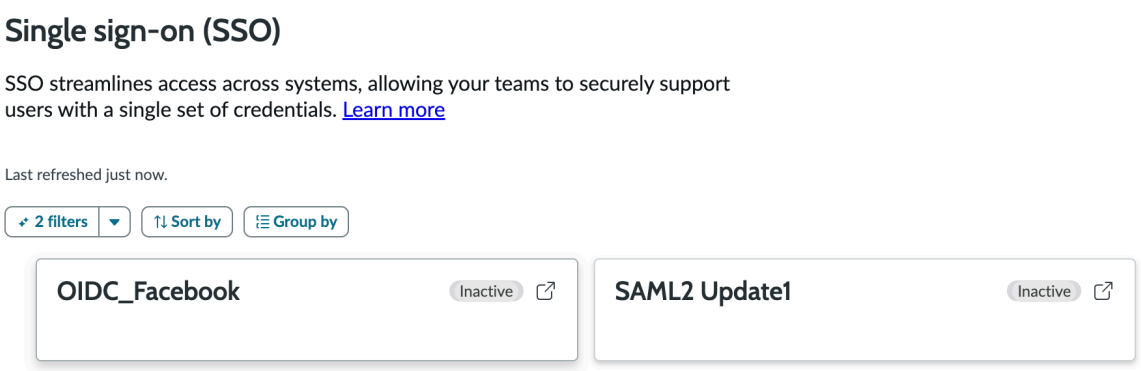
Note: Select **Save** to save the recent settings. You can also undo the most recent change by selecting **Undo**. By selecting **Undo**, the values are reverted back to the most recent saved values.

See Localization for more information.

Identity management integrations

Manage access and user profile by integrating with Identity providers and LDAP directories.

Single sign-on (SSO)



SSO simplifies secure multi-system access using one set of credentials.

Note: You are required to install Multiple Provider Single Sign-On Enhanced UI plugin before creating a new SSO provider. Select the Go to Application Manager link to install the plugin.

Once the plugin is installed, the existing SSO providers show up. Select the Identity Provider link to create a new SSO provider. You can create an identity provider of one of the following types:

- Digest
- SAML
- OpenID Connect

Note: Although the Digest type is an option, it is not supported. OIDC and SAML are the only two providers that are supported.

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Lightweight directory access protocol (LDAP)

Lightweight directory access protocol (LDAP)

Synchronize user and group data to streamline user management, authentication, and access control. Learn more



Add an LDAP server

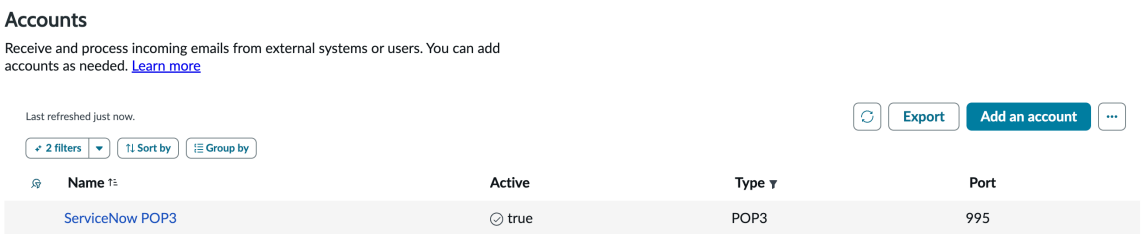
LDAP syncs user and group data to centralize authentication and access control.

On selecting LDAP on the left hand side panel, the gallery of the existing LDAP servers shows up. Select **Add an LDAP server** to create a new LDAP server.

Inbound email

Use the inbound email to receive and process incoming emails from external systems or users.

Accounts



Use Accounts to process inbound emails from external sources and users. On selecting Accounts under Inbound email, a list of existing accounts shows up. Select **Add an account** to create a new account.

Field	Description
Name	Name of the account
Type	States the type of account. It can either be POP3 or IMAP.
Authentication	States the authentication method of the account

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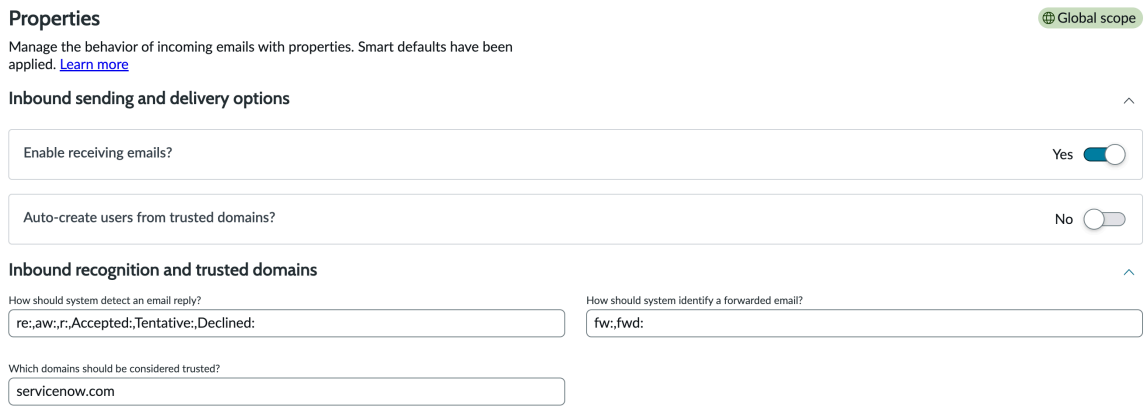
Field	Description
	Note: Authentication is a mandatory field
Server	Remote server to which this account connects. To activate a server for an on-premises installation, enter the full address (FQDN) of the node (for example, `node.customerdomain`). **Note:** Server is a mandatory field
Username	Username used to create the account **Note:** Username is a mandatory field
Password	Password used to set up the account **Note:** Password is a mandatory field
Connection Security	Type of secure connection. Choose a setting: • None: No secure protocol is used. • STARTTLS: Upgrades an insecure connection to a secure connection using the SSL/TLS encryption protocol, if your email server supports TLS. • SSL/TLS: Connect to an SSL/TLS encrypted port to secure the connection. Email is encrypted between the ServiceNow instance and your mail server. **Warning:** Selecting a less secure protocol like STARTTLS or None may expose your data. To better ensure the security of data in your email server, select SSL/TLS.
Port	Connection TCP port.
Active	Optional checkbox to create an active account
Enable Debug Logging	Option to create node logs for the raw data that is exchanged with the email server. You can review the node logs by navigating to **System Logs** > **Utilities** > **Node Log File Browser**.

Select **Export** to export the accounts on to an Excel, CSV, JSON or PDF. You can then select the delivery type either through download or email.

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Properties

Manage the behavior of incoming emails with Properties.



- Inbound sending and delivery options: You can enable receiving emails and can also enable auto-create users from trusted domains
- Inbound recognition and trusted domains: You can setup conditions for the following:
  - How to detect an email reply
  - How to identify a forwarded email
  - Which domains should be trusted

Note: Select **Save** to save the recent property settings. You can also undo the most recent change by selecting **Undo**. By selecting **Undo**, the values are reverted back to the most recent saved values.

Actions

Email actions determine how and when the system responds to service requests. On selecting Actions under Inbound email, a list of existing actions shows up. Select **Add an action** to create a new action.

Field	Description
Name	Name of the action
Target table	Select the table where the action adds or updates records.
Active	Optional checkbox to create an active action
Action type	Type of the action. Select the type of action the instance takes. Select **Record Action** to modify a record in the instance, or select **Reply Email** to have the instance send an email back to the source of the inbound email.
Stop processing	Optional checkbox to help prevent the system from running additional inbound email actions after this action runs.

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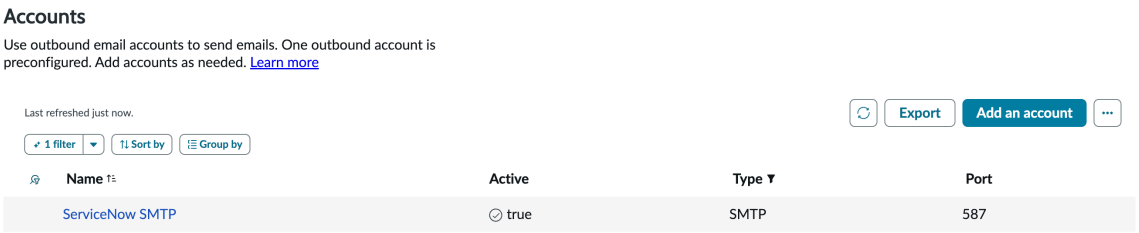
See Inbound email configuration for more information.

Outbound email

Use outbound email accounts to send emails.

Accounts

Use Accounts to process the outbound emails. On selecting Accounts under Outbound email, a list of existing accounts shows up. Select **Add an account** to create a new account.



Field	Description
Name	Name of the account
Type	States the type of account. It can either be POP3 or IMAP.
Authentication	States the authentication method of the account **Note:** Authentication is a mandatory field
Server	Remote server to which this account connects. To activate a server for an on-premises installation, enter the full address (FQDN) of the node (for example, `node.customerdomain`). **Note:** Server is a mandatory field
Username	Username used to create the account **Note:** Username is a mandatory field
Password	Password used to set up the account **Note:** Password is a mandatory field
Connection Security	Type of secure connection. Choose a setting: • None: No secure protocol is used. • STARTTLS: Upgrades an insecure connection to a secure connection using the SSL/TLS encryption protocol, if your email server supports TLS.

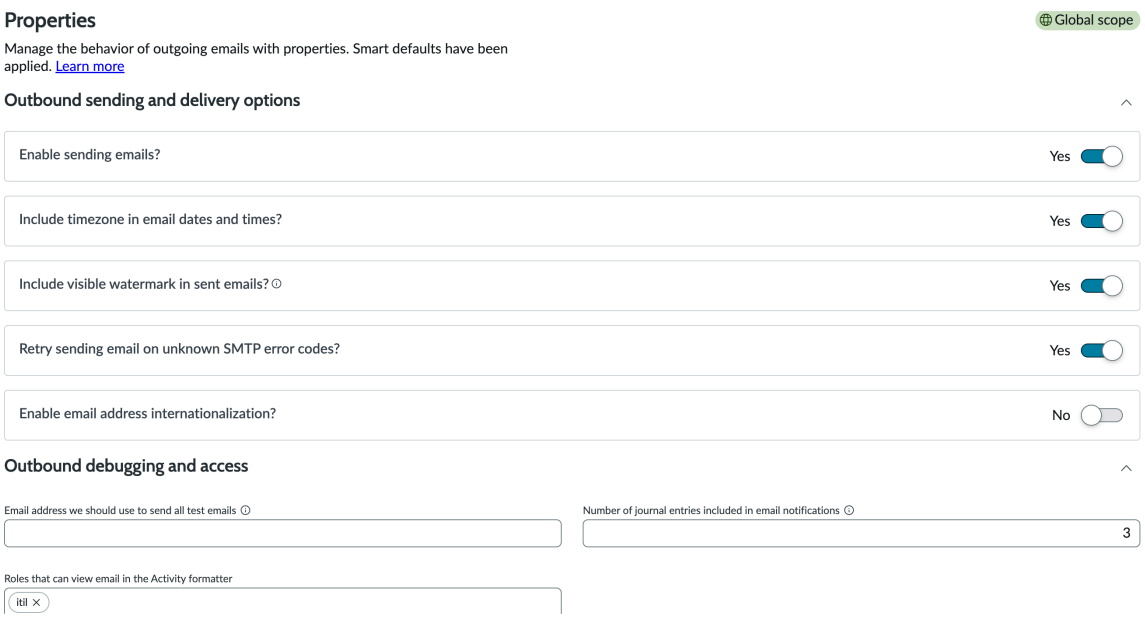
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Field	Description
	• SSL/TLS: Connect to an SSL/TLS encrypted port to secure the connection. Email is encrypted between the ServiceNow instance and your mail server. **⚠ Warning:** Selecting a less secure protocol like STARTTLS or None may expose your data. To better ensure the security of data in your email server, select SSL/TLS.
Port	Connection TCP port.
Active	Optional checkbox to create an active account
Enable Debug Logging	Option to create node logs for the raw data that is exchanged with the email server. You can review the node logs by navigating to **System Logs** > **Utilities** > **Node Log File Browser**.

Select **Export** to export the accounts on to an Excel, CSV, JSON or PDF. You can then select the delivery type either through download or email.

Properties

Manage the behavior of outgoing emails with Properties.



- Outbound sending and delivery options: You can either enable or disable the following options:
  - Enable sending emails
  - Include timezone in the email
  - Include visible watermark in the outbound emails

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- Retry sending email on unknown SMTP error codes
- Enable internationalization of email address

- Outbound debugging and access: You can configure the following:
  - Email address to be used to send all test emails
  - Number of journal entries to be included in email notifications
  - Roles that can view email in the Activity formatter

Note: Select **Save** to save the recent property settings. You can also undo the most recent change by selecting **Undo**. By selecting **Undo**, the values are reverted back to the most recent saved values.

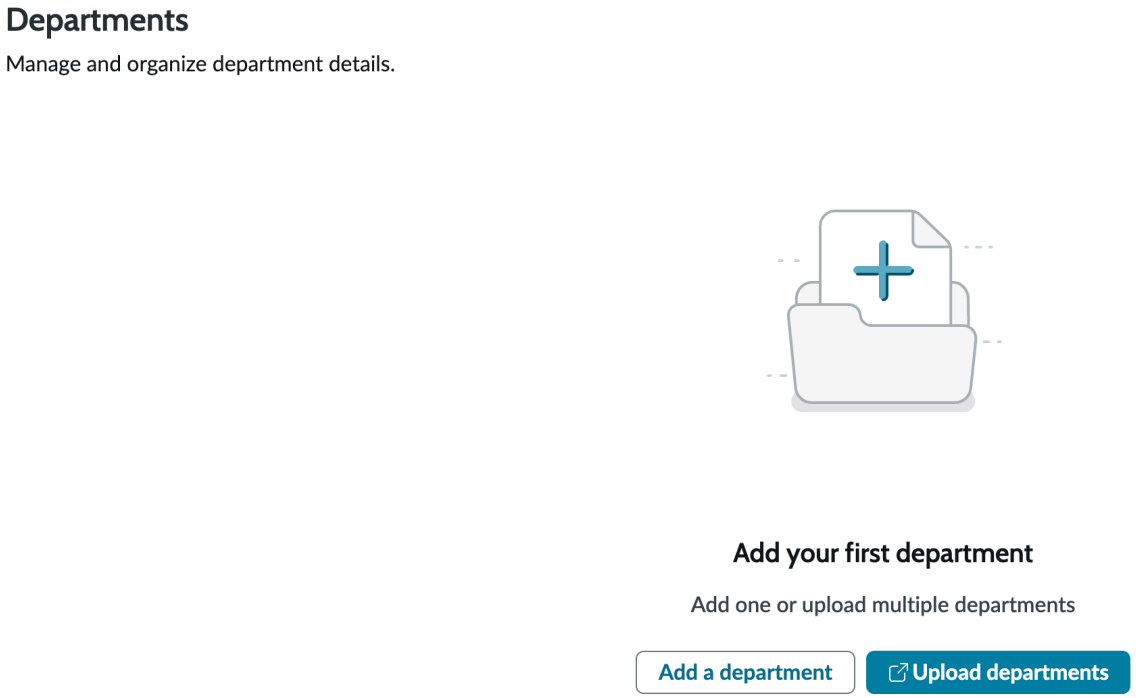
See Outbound email configuration for more information.

Operational data

Configure departments, locations, users, groups, and roles to establish the foundation for your ServiceNow implementation.

Departments

Manage and organize department details. On selecting Departments under Operational data, a list of existing departments shows up. You can modify an existing department by selecting it from the list. Select **Add a department** to individually add a new department.



Field	Description
Name	Name of the department
Department head	Name of the department head
ID	ID of the department
Primary contact	Primary contact of the department

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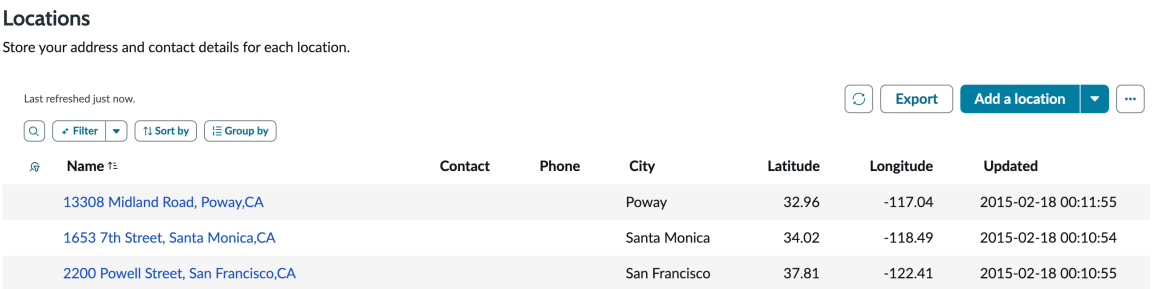
Field	Description
Description	Optional description of the department

You also have an option of **Bulk upload** to add more than one departments from an excel. If you select **Bulk upload** from the dropdown menu, you get the option of creating the Excel template and uploading the sheet where the department records are saved.

Select **Save** to save the recent department settings and redirect you to the list of existing departments. Select **Save & add more** to save the current department settings and reloads the Add a department form.

Locations

Store your address and contact details for all locations. On selecting Locations under Operational data, a list of existing locations shows up. You can modify an existing location by selecting it from the list. Select **Add a location** to individually add a new location.



Field	Description
Name	Name of the location
Contact	Contact information of the location
Street	Street name or number of the location
Phone	Contact number of the location
Fax phone	Fax contact number of the location
City	Name of the city of the location
State/Province	Name of the state or province of the location
Parent	Define parent location to manage multi-level location definition.
Zip/Postal Code	Zip or postal code of the location
Latitude	Exact latitude geo location
Longitude	Exact longitude geo location
Country	Name of the country of the location

Note: The fields that are marked with asterisks are mandatory.

You also have an option of **Bulk upload** to add more than one location from an excel sheet. If you select **Bulk upload** from the dropdown menu, you get the option of creating the Excel template and uploading the sheet where the location records are saved.

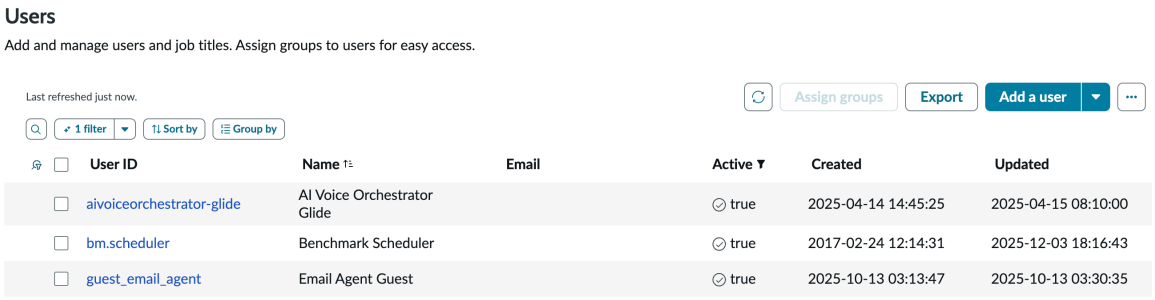
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Select **Save** to save the recent location details and redirect you to the list of existing locations. Select **Save & add more** to save the current location details and reloads the Add a location form.

Users

Add and manage users with job titles, then assign groups for simplified access control. On selecting Users under Operational data, a list of existing users shows up. You can modify an existing user by selecting it from the list. Select **Add a user** to individually add a new user.

If you select the checkmark next to an existing user, the **Assign roles** option is enabled. The Assign roles & users modal shows up on the right panel.

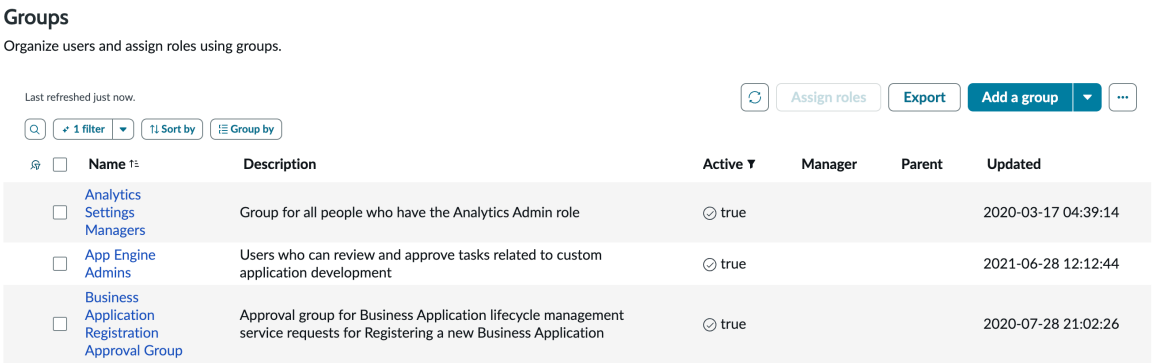


You also have an option of **Bulk upload** to add more than one user from an excel. If you select **Bulk upload** from the dropdown menu, you get the option of creating the Excel template and uploading the sheet where the user records are saved.

Select **Save** to save the recent user details and redirect you to the list of existing users. Select **Save & add more** to save the current user details and reloads the Add a user form.

Groups

Use Groups to organize users and assign roles. On selecting Groups under Operational data, a list of existing groups shows up. You can modify an existing group by selecting it from the list. Select **Add a group** to individually add a new group.



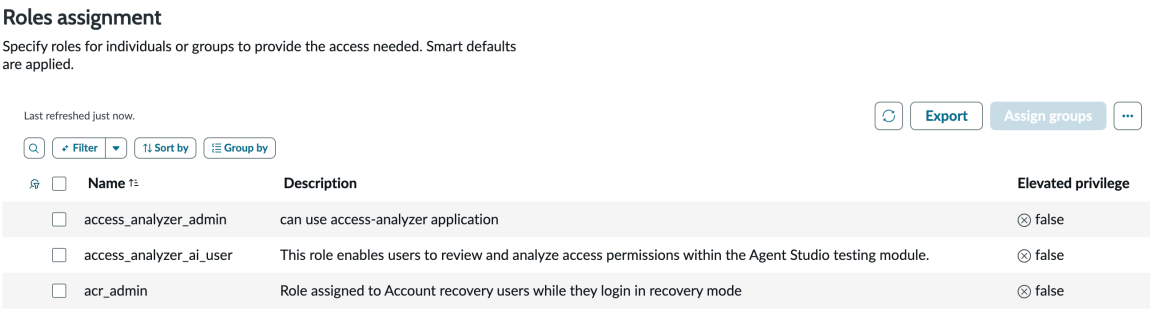
You also have an option of **Bulk upload** to add more than one group from an excel. If you select **Bulk upload** from the dropdown menu, you get the option of creating the Excel template and uploading the sheet where the group records are saved.

Select **Save** to save the recent user details and redirect you to the list of existing groups. Select **Save & add more** to save the current group details and reloads the Add a group form.

Roles assignment

Define roles for users and groups to control access permissions, leveraging smart defaults. On selecting Roles assignment under Operational data, a list of existing roles shows up.

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Note: You can't modify the details of any existing role nor can you create a new role.

Groups assignment

Organize users and assign roles using groups.

Field	Description
Name	Name of the group
Description	Detail description of the group
Active	State of the group if its active or not
Manager	Name of the assigned manager of the group
Parent	Name of the parent group
Updated	Date when the group information was last updated

Select **Add a group** if you want to add a group to configure. You can also export the list of groups into an excel sheet or an available file type by selecting **Export**.

Roles assignment

Specify roles for individuals or groups to provide the access needed.

Field	Description
Name	Name of the role
Description	Detail description of the role
Elevated privilege	States if the role has any elevated privilege or not

Select **Assign groups** if you want to assign a role to a group. You can also export the list of roles into an excel sheet or an available file type by selecting **Export**.

Note: You must select one or more roles to get it assigned to a group.

Assets

Configure the hardware and consumables to setup the assets for your ServiceNow implementation.

Hardware

Configure the assets with intuitive workflows.

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Field	Description
Display name	Name of the hardware
Asset tag	Tag ID of the hardware
Model category	Category name of the hardware
State	State of the hardware
Assigned to	Name of the assigned person
Cost	Cost of the hardware

Select **Add a hardware** if you want to add a hardware to configure. You can also export the list of hardware into an excel sheet or an available file type by selecting **Export**.

Consumables

Manage assets with intuitive work flows and life cycle visibility.

Field	Description
Display name	Name of the consumable
State	State of the consumable
Substate	Detailed state of the consumable
Stockroom	Name of the location where the consumable has been stocked
Quantity	Available quantity of the consumable in the stockroom
Model category	Category of the consumable

Select **Add a consumable** if you want to add a consumable to configure. You can also export the list of consumables into an excel sheet or an available file type by selecting **Export**.

Knowledge management

Configure a self-service platform for users to store, share and manage content.

Implement the following steps to complete the configuration:

1. Set up a knowledge base: Configure the knowledge base to define where articles are stored, how content is structured, and who can access it. Select **Set up** to start setting up the Knowledge base.
2. Review the flows: Define and configure workflows for article creation, review, approval, and publication, including approval stages and reviewer assignments. Select **Review** to start reviewing the flow.
3. Article templates: Predefined forms provide a consistent content structure by enabling authors to create articles using standard fields such as Problem and Solution. Select **Review** to start reviewing the article templates.
4. Add knowledge base articles: Create and manage knowledge articles to continuously enhance the self-service knowledge base. Select **Import articles** to start importing the knowledge base articles.

See Knowledge Management for more information.

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CMDB

Using the configuration items (CI), monitor the infrastructure and ensure continuous service operations.

Based on the CI type (for example, Service, Offering, Computer) selected in the **Configuration item type** field, a CI list of similar CI type is displayed. You can do the following for the similar CI type:

- Edit CIs from the displayed list
- Export the CI list
- Upload CIs
- Add a CI

Note: Use the *cmdb_lite_ci_config* system property to define the CI types that should be displayed in the **Configuration item type** field.

For information about CI, see Overview of CMDB and Create a CI class.

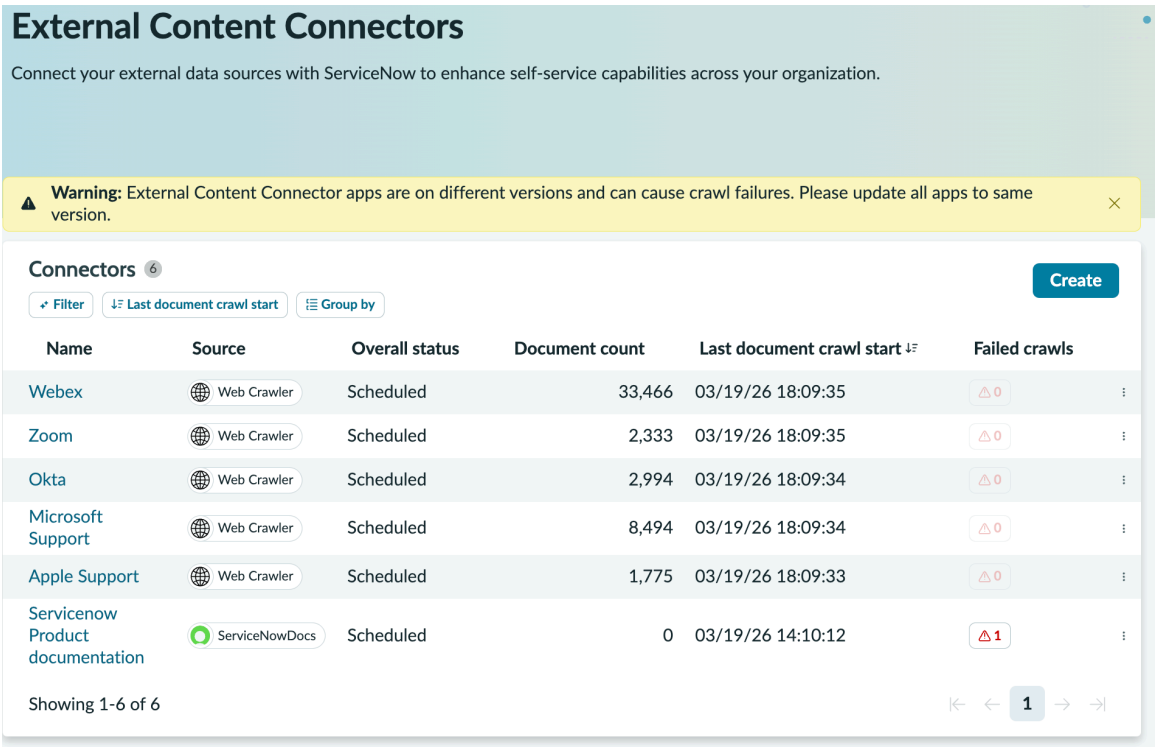
AI Search

Configure and maintain the AI-Search engine to experience a modern search experience.

External sources

Connect your external data sources with ServiceNow to enhance self-service capabilities across your organization.

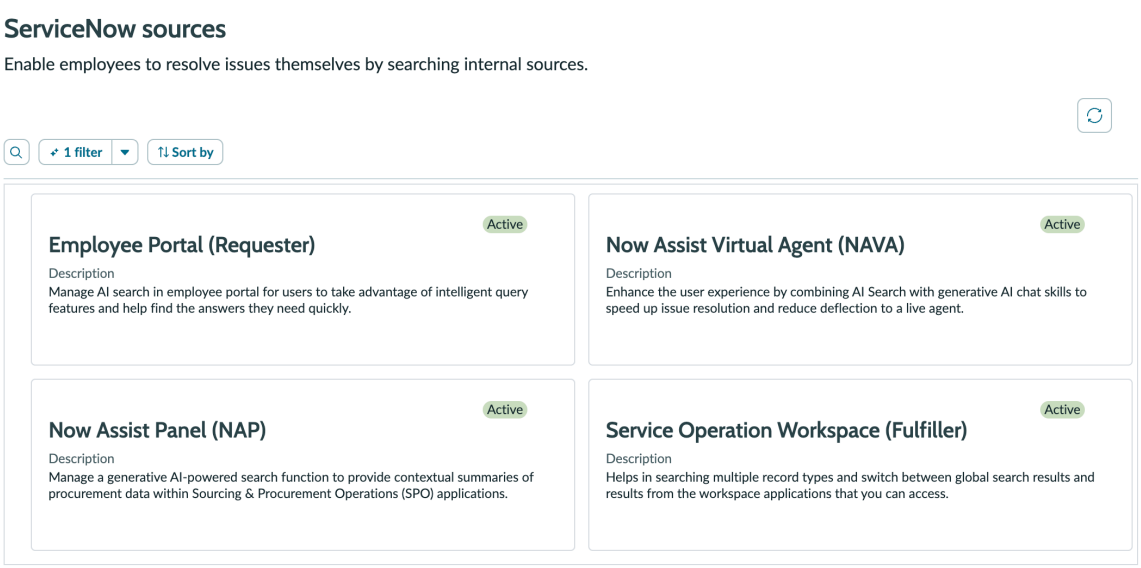
Warning: External Content Connector apps are on different versions and can cause crawl failures. Please update all apps to same version.



ServiceNow sources

Enable employees to resolve issues themselves by searching internal sources.

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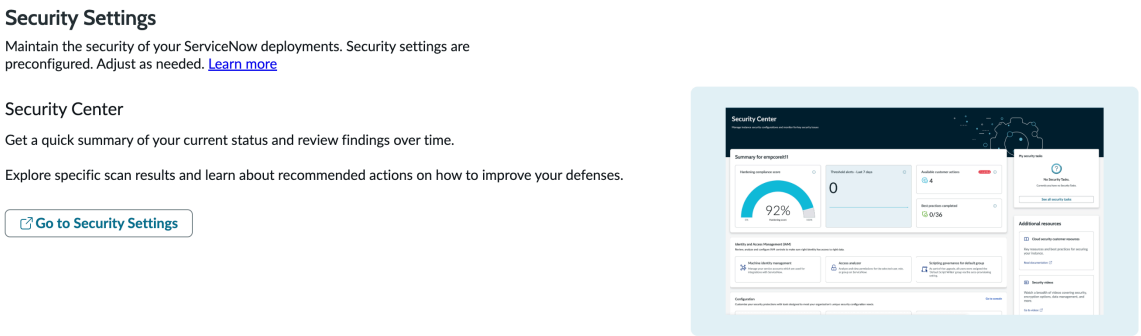


See AI Search for more information.

Security Settings

Configure the security settings to maintain the security of your ServiceNow deployments.

Select **Go to Security Settings** to configure the security settings in the Security Center hub.



Product modules configuration in ServiceNow Otto for Setup

Explore the following information to know more about the configurations of specific product modules.

- Simplified IT Service Management (ITSM): See Configuring Simplified IT Service Management for more information on configuration of ITSM product module.
- Sourcing and Procurement Operations (SPO): See Configuring Sourcing and Procurement Operations for more information on configuration of SPO product module.
- Core Business Suite Foundation (CBS): See Configure Core Business Suite for more information on configuration of CBS product module.
- IT Operations Management (ITOM): See Install ITOM using ServiceNow Otto for Setup for more information on configuration of ITOM product module.
- AI Admin Hub: See AI Admin Hub for more information on configuration of AI Admin Hub module.
- Employee Slate: See Configure branding and theme for more information on configuration of the Employee Slate product module.

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- Strategic Portfolio Management (SPM): See Modules in ServiceNow Otto for Setup (SPM) for more information on configuration of the Strategic Portfolio Management (SPM) product module.
- AI Control Tower (AICT): See Guided setup for more information on configuration of the AICT module.
- Hardware Asset Management (HAM): See Configuration Console for Hardware Asset Management for more information on configuration of the HAM module.
- Cloud Cost Management (CCM): See Configuring ServiceNow Otto for Cloud Cost Management (CCM) for more information on configuration of the CCM module.
- HR Service Delivery (HRSD): See AI-Native HR Service Delivery Implementation for more information on configuration of the HRSD module.
- Operational Technology: See Access ServiceNow Otto for Setup (OT) for more information on configuration of the Operational Technology module.
- Enterprise Asset Management (EAM): See Install Enterprise Asset Management from the Admin Home page for more information on configuration of the EAM module.
- Software Asset Management (SAM): See Configuration Console for Software Asset Management for more information on configuration of the SAM module.

ServiceNow Otto for Setup references

The reference topics provide additional information about ServiceNow Otto for Setup.

General guidelines

Practice the following general guidelines for an enhanced ServiceNow Otto for Setup experience.

Instance specific configurations

The following configurations are excluded from the update set and must be re-configured directly on the production instance:

- Single Sign-On (SSO)
- LDAP directory integration
- Notification templates and settings

Validation checks

If you encounter an error immediately after uploading the update set XML file, perform the following validation checks:

- Confirm that you are uploading the XML file downloaded from the non-production instance.
- Verify that the file has not been modified, renamed, or corrupted after download.
- If the issue persists, repackage the batch update set in the non-production instance, download the XML file again, and retry the upload.

Preview errors

Preview errors indicate conflicts or unresolved dependencies in the update set. Resolve each error on the Update Set Preview page before you can commit the update set. For each preview problem record, there is an Available Actions dropdown. The following resolution options are available:

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Available Actions	Description	When to use
Compare with local	Opens a side-by-side comparison view of the incoming update set version against the version currently on the production instance.	Use this action prior to selecting Accept or Skip in order to review the specific differences between the two versions and make an informed resolution decision.
Accept remote update	Overwrites the existing record on the production instance with the version contained in the update set.	Select this option when the incoming configuration from the update set is the correct and intended state of the record, and the local version on production should be replaced. **Note:** It is recommended to use the Compare with local action before selecting Accept remote update or Skip remote update for any conflict. Accepting a remote update will overwrite the existing production record and cannot be undone through the update set process.
Skip remote update	Discards the conflicting change from the update set and retains the existing record on the production instance.	Select this option when the local version on the production instance is the correct state, or when the incoming change is not applicable to the target environment.
Show local record	Shows the local version of the update set version available on the production instance.	Select this option to view the local version of the current update set version on the production instance.
Show local update	Shows the local update of the update set version available on the production instance.	Select this option to view the update made to the current update set version on the production instance.

AI agents in ServiceNow Otto for Setup

Refer to the following information about the Platform AI agents in ServiceNow Otto for Setup.

Note: The **Configure with ServiceNow Otto** button appears only for console items that are backed by AI capabilities.

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AI agents for configurations

AI Agent	Description
Admin configurations	
AI Search Configuration Agent	Configures AI search for ServiceNow internal tables by defining internal search sources, search profiles, and table mappings through conversation.
AI Search XCC Agent	Configures external content connectors for AI Search for public websites (for example, Zoom, Apple Support, and Okta) and SharePoint repositories. The agent guides with connector discovery that aligns with user requirements, authentication, content scope, crawl scheduling, search profile mapping, and error recovery.
Group and roles assignment agent	Provides user access through group-based associations. Creates a user group, manages users in a group, assigns roles to a group, and adds users to a role.
IA Operational Data Workflow Agent	Automates bulk data imports into ServiceNow for departments, users, locations, and groups. Supports both file-based and LDAP-based imports. Reduces the time and effort needed to migrate operational data during implementation.
SSO Configuration Agent	Automates Single Sign-On setup (OIDC and SAML) in ServiceNow using identity provider configuration data. Supports Q&A and troubleshooting throughout the setup process.

Scopes and roles for console items

Review the following information regarding the scopes and roles required for configuration for each console item in the Platform module.

Scopes for console items

Console item name	Scopes
Branding	Global
Localization	Global
Identity management integrations	Global
Inbound email	Global
Outbound email	Global
Operational data	Global
AI Search	Global
Security Settings	Global
Assets	Global

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Roles for console items configuration

Console item name	Roles
Branding	admin
Localization	admin
Identity management integrations	admin for SSO, user_admin and import_admin for LDAP
Inbound email	email_account_admin
Outbound email	email_account_admin
Operational data	admin, user_admin for Roles assignment
AI Search	admin
Security Settings	sn_vsc.security_center_viewer, sn_vsc.se
Assets	admin

ServiceNow Otto for Setup terminology

Before getting started with ServiceNow Otto for Setup, it's important to understand some key terms used in the application.

application scope

A unique namespace and a set of permissions to access application files and data. Admins can specify the data that is accessible to other applications from the application record or from each table record.

Automated Test Framework (ATF)

Enables you to create and run automated tests to confirm that your instance works after making a change. Examine failed test results to identify the changes that caused the failure and the changes that you should review.

clone

Copy data/metadata between instances to ensure parity.

configuration page

Central settings and the installation recap display modules and items.

Install (IL)

One-click install of required apps/plugins and standard presets in sub-prod and target environments.

Integration Hub

A framework used to interact with third-party platforms in ServiceNow.

MID Server

An on#premises service that enables secure connections to internal enterprise systems.

Product hub

Product-centric view of entitlements, outcomes, and content.

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update set

A collection of customizations made to a customer instance that can be transferred to another instance. When an instance is customized, the change is added automatically to the current update set. You can have only one current update set per user at a time.

Subscription Management

Subscription Management enables you to proactively manage your subscriptions and monitor subscription usage on your instances.

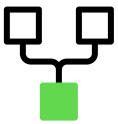
https://player.vimeo.com/video/1018055648?h=5c896ae137&badge=0&autopause=0&player_id=0&app_id=58479

Watch this short video to see an overview of Subscription Management.

Request apps on the 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.

Get started

Explore  Learn about Subscription Management benefits and features.	**Configure**  Configure Subscription Management settings.	**Manage per-user subscriptions**  Allocate per-user subscriptions using recommended groups.
Map custom tables and applications  Stay in compliance by mapping custom tables and applications to subscriptions.	**Monitor capacity subscriptions**  Learn how capacity subscriptions are calculated on your instance.	**Reference**  Get details about types of subscriptions, meters, and domain separation.

Exploring Subscription Management

Learn how Subscription Management helps you track and manage your product subscriptions and their applications.

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Subscription Management Overview

Subscription Management gives you an accurate, consolidated view of your entitlements where you can proactively manage your subscriptions.

- Gain visibility and control of your product subscriptions and their applications.
- Access a real-time view of your entitlement data.
- Maximize subscription usage and make informed decisions about purchases by viewing insights.
- Stay in compliance and avoid unexpected costs by tracking subscription usage and allocations over time.

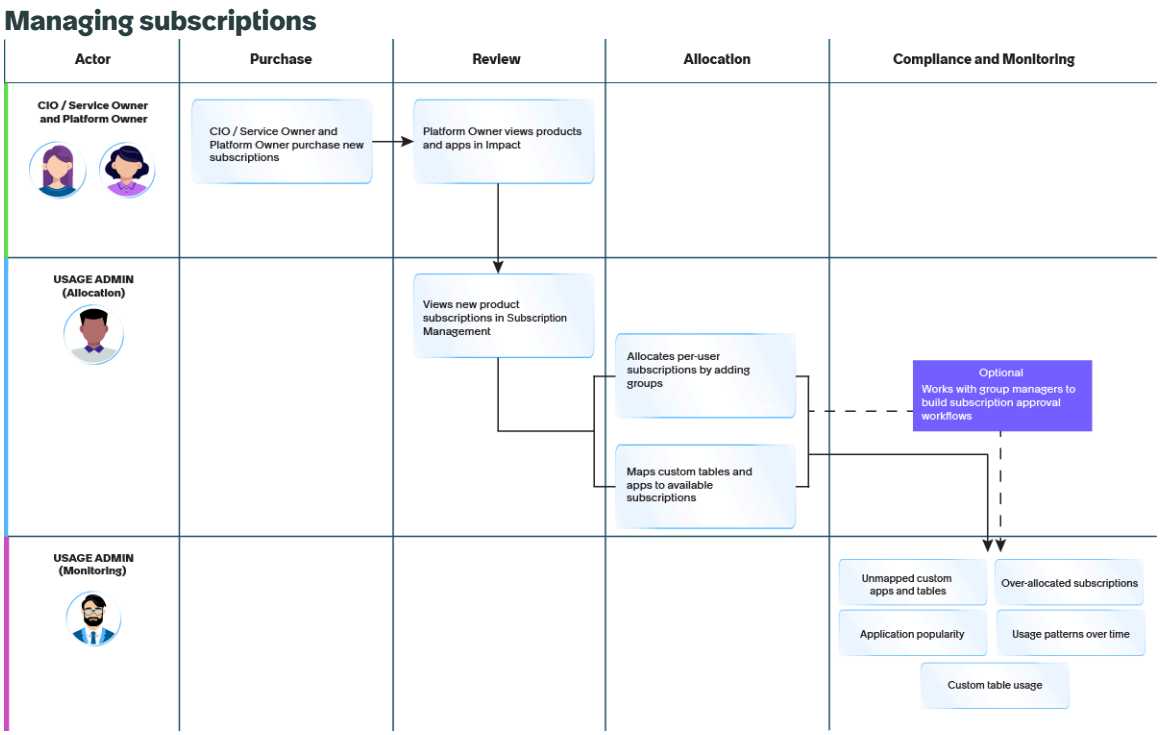
Subscription Management users

Users

User	Description
Usage admin	The usage admin allocates per-user subscriptions by adding groups to a product subscription. The usage admin maps custom tables and custom applications to subscriptions with available entitlements to maximize subscription usage and stay in compliance.

Subscription Management workflow

This infographic shows a sample end-to-end workflow of how different users in an organization work together to purchase, allocate, and manage subscriptions.



In this workflow:

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1. The chief information officer or service owner works with the ServiceNow platform owner to purchase new subscriptions.
2. After the purchase is complete, the platform owner views the products and applications in Impact.
3. The usage admin views the new product subscriptions in Subscription Management on the production instance. For more information, see Product subscriptions overview.
4. The usage admin performs the following tasks in Subscription Management:
   - Allocates per-user subscriptions by adding groups to a product subscription, which grants entitlement to all group members. For more information, see Managing per-user subscriptions in Subscription Management.
   - Maps custom tables and custom applications to subscriptions with available entitlements to maximize subscription usage and stay in compliance. For more information, see Managing custom tables and applications in Subscription Management.
5. If the organization requires security approvals before adding users to groups or financial approvals before subscriptions are assigned to users, the usage admin works with group managers to create subscription approval workflows that determine who gets a subscription when new users are added to groups.
6. The usage admin monitors subscription usage to stay in compliance and make informed decisions on future purchases, consistently monitoring the following data:
   - Over-allocated subscriptions
   - Unmapped custom applications and tables
   - Usage patterns over time
   - Application popularity
   - Custom table usage

Subscription Management benefits

Benefit	Feature	User
Fix over-allocated subscriptions	Insights	Usage admin
View unallocated subscriptions	Insights	Usage admin
Allocate available subscriptions using recommended groups	Allocate subscriptions	Usage admin
Map global custom tables to a product subscription	Issues	Usage admin
Map custom applications to a product subscription	Issues	Usage admin
View a summary of subscription allocations	Subscription details	Usage admin
View subscription allocation details over time	Subscription details	Usage admin
View custom table usage over time	Subscription details	Usage admin

What to explore next

To learn more about configuring and using Subscription Management, see:

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- Configuring Subscription Management
- Managing per-user subscriptions in Subscription Management
- Managing custom tables and applications in Subscription Management
- Monitoring capacity subscriptions
- Subscription Management reference
- Types of subscriptions in Subscription Management

Product subscriptions overview

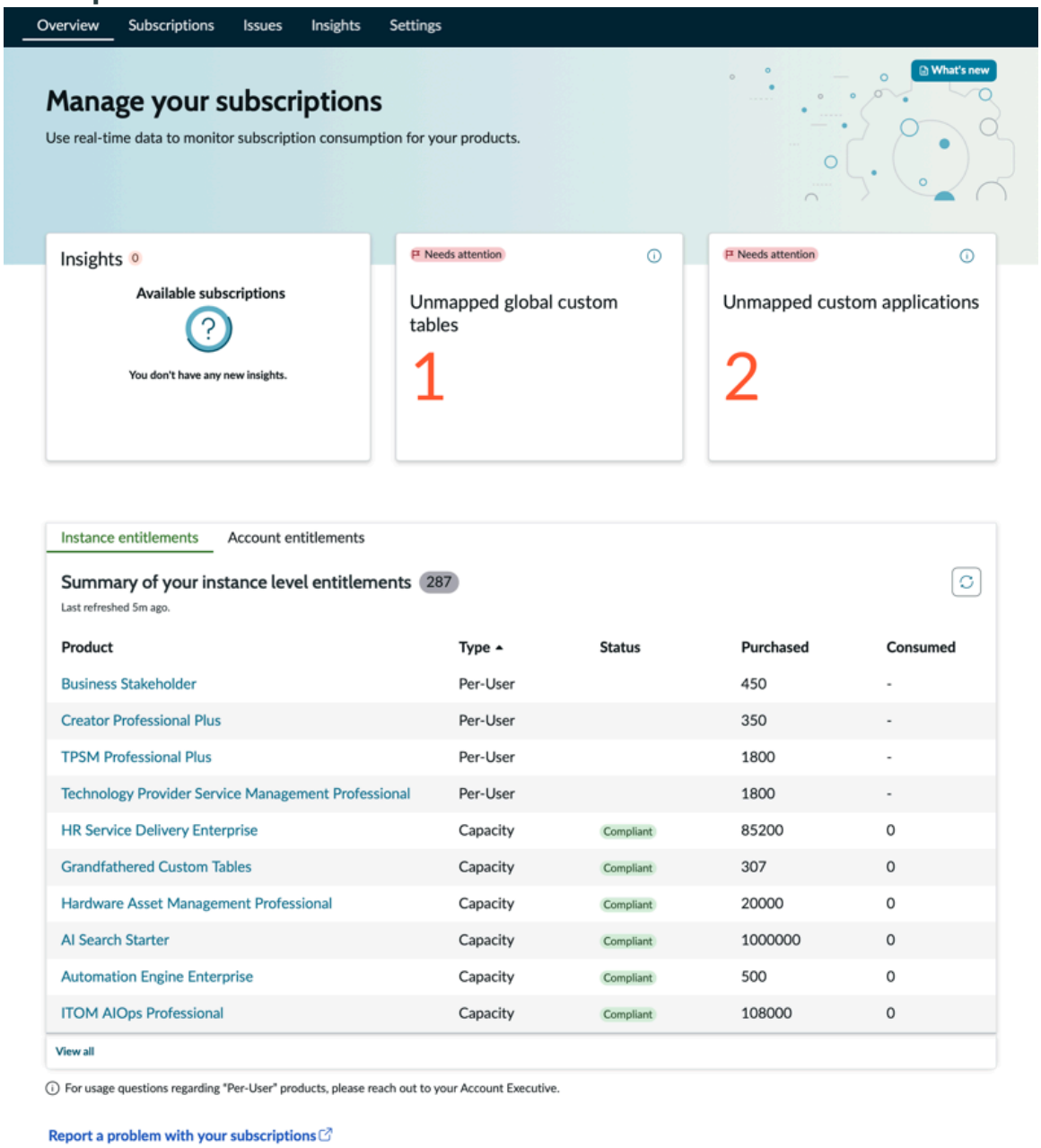
View a summary of your product subscriptions in Subscription Management.

Key benefits

- Determine whether you have any over-allocated subscriptions.
- Check for unallocated subscriptions that you can allocate to maximize usage and give users entitlement to ServiceNow products.
- Determine whether any custom tables in the global scope or any custom applications aren't mapped to subscriptions.
- Stay in compliance by monitoring the **Status** column in the list of product subscriptions.

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Subscriptions overview



Required ServiceNow AI Platform roles

The usage_admin, sn_sub_man.admin, or admin roles are required to view and edit Subscription Management.

Accessing product subscription overview information

View subscription overview information on the **Overview** tab in Subscription Management by navigating to **Admin** > **Subscription Management** or **All** > **Subscription Management** > **Subscription Management**.

Accessing user-based subscription information

Allocation details and status for user-based subscriptions are hidden from the Subscription Management overview to help prevent inaccuracy when allocations are incomplete. Contact your account executive for complete user-based subscription allocation details.

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Use cases

View a summary of your instance-level entitlements in the **Instance entitlements** tab.

- Identify when subscriptions are over-consumed and view insights into actions you can take to maximize subscription usage.
- Determine whether any custom tables and custom applications on your instance aren't mapped to a valid product subscription. You must map custom tables and custom applications that you create to a product subscription.
- View product subscription details by selecting the product name.
- Identify which type of subscriptions you have by viewing the values in the **Type** column. The subscription type determines the properties and attributes of the product subscriptions that your company receives and whether to allocate subscriptions manually.
  - Product subscription types include per-user, capacity, unrestricted user, unlimited, and display only.
  - Per-user subscriptions are automatically allocated by role for administrators that haven't manually allocated per-user subscriptions before. If an administrator has manually allocated per-user subscriptions in the past, they can continue to make manual allocations. Capacity, unrestricted user, and unlimited subscriptions are allocated on your instance automatically. Display-only subscriptions aren't measured on your instance.
  - Product subscriptions provide entitlements for different applications and can include different add-ons.

  For more information, see Types of subscriptions in Subscription Management.
- Determine whether your subscription allocations are in compliance by viewing the values in the **Status** column. Adjust allocations if subscriptions are over-allocated.

  Compliant

  The number of allocated subscription entitlements is lower than the number of purchased subscriptions.

  Near capacity

  The number of allocated subscription entitlements exceeds the threshold for your instance. You define the threshold on the **Settings** tab.

  Even

  The number of allocated subscription entitlements equals the number of purchased subscription entitlements.

  Over-c

  The number of allocated subscription entitlements exceeds the number of purchased subscription entitlements.

  Account-level only

  The subscription allocation status isn't calculated. Only applies to Creator Plus products.

  You can customize the near capacity threshold for your instance in the **Settings** tab. For more information, see Configure subscription allocation status in Subscription Management.
- View a summary of the Creator Plus subscriptions on the instance that you're currently accessing.

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- View the total number of Creator Plus subscriptions that your company has purchased in the **Purchased** column.
- Monitor the total number of Creator Plus allocations on your current instance in the **Allocated** column. Contact your account executive for up-to-date information about per-user subscription allocations.

View a summary of your account-level entitlements in the **Account entitlements** tab.

- View an account-level summary of Now Assist usage.
  - View the aggregated total of Now Assist usage entitlements from all the subscriptions that your account has purchased in the **Purchased** column.
  - View the total number of Now Assist usage entitlements consumed across all your instances in the **Allocated** column.
  - View additional details about Now Assist usage by selecting the product name.
- View an account-level summary of Now Assist creators.
  - View the total number of Creator Plus subscriptions that your account has purchased in the **Purchased** column.
  - Monitor unique Creator Plus allocations across all your instances by checking the **Allocated** column.

    Note: Users allocated to a Creator Plus subscription on multiple instances are automatically de-duplicated in the count on the **Account entitlements** tab. When a user is allocated to a Creator Plus subscription on more than one instance, that user counts toward the allocation total only once.

  - View additional details about Now Assist creators by selecting the product name.
- View an account-level summary of your cloud capacity.
  - View the total amount of cloud capacity that your account has purchased in the **Purchased** column.
  - View the total amount of cloud capacity consumed across all your instances in the **Allocated** column.
  - View additional details about cloud capacity by selecting the product name.

Reports

Title	Type	Source Table	Description
Insights	List	Subscription Insights definition [sn_sub_man_st_subscription_insights]	List of over-allocated subscriptions and available subscriptions
Unmapped global custom tables	Single Score	Custom Table Inventory [ua_custom_table_inventory]	Count of custom tables that aren't mapped to a subscription
Unmapped custom applications	Single Score	Custom Table Inventory [ua_custom_table_inventory]	Count of custom applications that aren't mapped to a subscription

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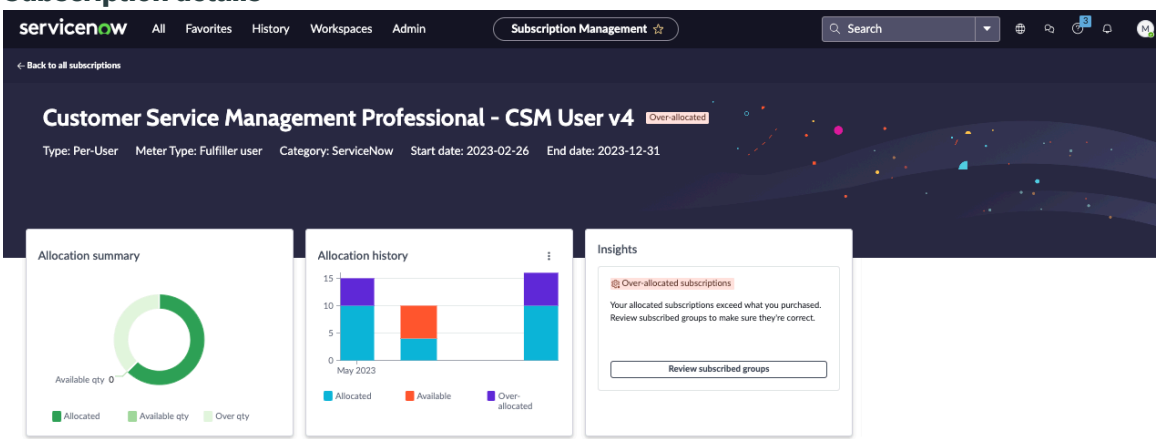
Viewing product subscription details in Subscription Management

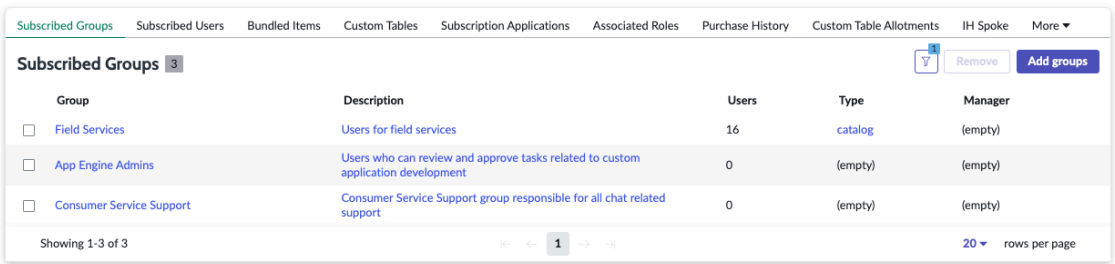
View a summary of your subscription allocations, allocation totals over time, and track your custom table entitlements in Subscription Management.

Key benefits

- See how a product subscription is measured by viewing the subscription's meter type.
- Match a product subscription in Subscription Management to your purchase order.
- View the groups and users that you have added to a subscription.
- View your entitlements for custom tables, portal visits, or transactions.
- View the custom tables and applications that you have mapped to a product subscription.

Subscription details





Required ServiceNow AI Platform roles

The usage_admin, sn_sub_man.admin, or admin role is required to view and edit Subscription Management.

Accessing subscription details

View subscription details on the details page by navigating to **Admin** > **Subscription Management** or **All** > **Subscription Management** > **Subscription Management**, and selecting a product or a subscription from the list.

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Use cases

- See how a subscription is measured and the type of entitlement it provides by checking the **Meter Type** field.
  - Entitlements for users with fulfiller-type access are tracked through a per-user subscription with a Fulfiller User meter type.
  - Entitlements for users who have fewer access rights than fulfiller users are tracked through a per-user subscription with a Business Stakeholder User meter type.
  - Entitlements for users with the now.assist.creator role are tracked through a per-user subscription with a Creator User meter type.
  - The creation and retention of platform objects such as custom tables is tracked through a capacity subscription with a Capacity meter type.

  For more information, see Types of subscriptions in Subscription Management.
- See how a capacity subscription total is calculated by selecting the Capacity Definition record and viewing the definition details. For more information, see Monitor capacity subscription calculations in Subscription Management.
- View the groups you have added to a subscription in the **Subscribed groups** tab. View the total number of users who belong to each group in the **Users** column.
- View the total number of active users in the **Active users** column. The count of active users excludes users who haven't logged in to the instance in the last 365 days, users assigned Web service access only, or users with an empty User ID.

  Only active users count toward the subscription allocation totals that appear throughout Subscription Management.
- View each active user who belongs to the subscribed groups in the **Subscribed users** tab. Only active users with allocated subscriptions appear in this list.
- Stay in compliance by monitoring your product subscription add-on usage on the **Bundled Items** tab. Product subscription add-ons can include bundled custom tables, portal visits, and transaction entitlements.
- Plan for future purchases and keep your subscriptions current by monitoring the start and end dates for each of your product subscriptions in the **Purchase History** tab.

  Note: Multiple entries for the same product might appear if modifications are made to a product.
- View the Workflow Data Fabric capabilities that are included with a product subscription and their relative token use rate on the **Token ratio** tab. For more information, see Monitoring Workflow Data Fabric capability usage with Subscription Management.
- View the applications that are included with a product subscription on the **Subscription applications** tab.
  - View application entitlement details, including the application's related plugins and associated roles by selecting an application.
  - Determine whether an application is available to install from the current product subscription by checking the **Installation status** column.
- Maximize subscription usage and grant entitlement to the right users by allocating per-user subscriptions. You allocate per-user subscriptions by adding one or more groups to a product subscription. Subscription Management helps you with the allocation process by

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recommending groups based on their assigned roles. For more information, see Allocate subscriptions in Subscription Management.

Note: To simplify the Subscription Management experience, the manual allocation workflow for user-based subscriptions is unavailable if you have never used it. Automatic allocation of user-based subscriptions is based on user and group roles. For more information, see Automatic subscription assignment.

Consolidated subscriptions

When you purchase multiple qualifying subscriptions for certain types of products, such as Integration Hub, those individual subscriptions combine into a single subscription pool. Any usage against that subscription deducts from the common pool.

- Capacity subscriptions with a common capacity definition are consolidated into one capacity subscription. For example, if you purchased two different Integration Hub subscriptions that are measured using the same capacity definition, they're consolidated into one Integration Hub Pool capacity subscription. Other types of capacity subscriptions with matching definitions are consolidated as well, but aren't labeled as a pool. For any consolidated capacity subscription, you can view the combined products in the **Subscription line items** tab on the details page.
- Capacity subscriptions can also consolidate entitlements for secondary line items such as custom tables, transactions, or portal visits from other product subscriptions. For example, if you have two Integration Hub transaction subscriptions combined in a pool, transaction entitlements that are included as a secondary line item from another capacity subscription are added to the pool if the capacity definition matches. In this scenario, three separate entries appear on the **Subscription line items** tab, one for each product that contributes to the pool.
- Custom table entitlements that come with per-user subscriptions can also be consolidated under one product subscription. When custom table entitlements are consolidated under one subscription, the total number of custom tables appears in the **Purchased** column on the **Bundled Items** tab. The **Bundled Items** tab only appears on one of the product subscriptions that contributed to the pool of custom tables.
- Unrestricted User subscriptions aren't consolidated into a single product subscription.

Reports

Title	Type	Source table	Description
Allocation summary	Donut	Subscription license detail definition [sn_sub_man_st_subscription_license_detail_metric] table	View a real-time summary of your subscription allocation. If an allocation is nearing capacity, consider reducing the number of allocated subscriptions or purchasing more subscriptions.
Account-level allocations	Donut	Account level entitlements [sn_sub_man_st_account_level_entitlement] table	View a summary of Creator Plus allocations across all of your instances. If the

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Title	Type	Source table	Description
			account-level allocation is nearing capacity, consider reducing the number of allocated subscriptions or purchasing more subscriptions.
Allocation history	Bar	Subscription license detail definition [sn_sub_man_st_subscription_license_detail_metric] table	View subscription allocation details over time. Prepare for future purchases or plan for changes according to the allocation trends.

Monitoring Workflow Data Fabric capability usage with Subscription Management

You can monitor Workflow Data Fabric capability usage and the relative token use rate of each capability with Subscription Management.

Overview of monitoring Workflow Data Fabric capability usage

Workflow Data Fabric subscriptions include tokens that can be used for Workflow Data Fabric capabilities. Using a capability expends a number of tokens determined by the terms of your Workflow Data Fabric license.

You can track token usage over time from the **Allocation summary** of a Workflow Data Fabric subscription details page.

Workflow Data Fabric token ratios

The **Token ratio** tab of the subscription details page shows the number of tokens expended each time a capability is used. Each row in the tab represents a capability. The **Column names** and **Column values** columns show how each capability is tracked.

The following table shows definitions of the entries in the **Column names** column.

Column names definitions

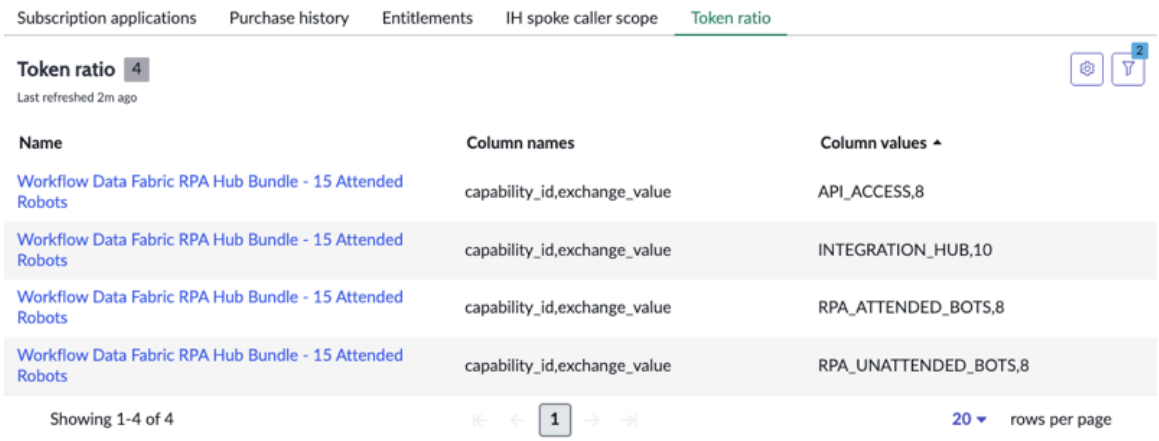
Column name entry	definition
capability_id	A unique identifier for each Workflow Data Fabric capability.
exchange_value	The number of tokens expended when the associated capability is used.

The **Column values** column has two comma-separated entries per row. The first entry corresponds to the capability_id, while the second entry corresponds to the exchange_value.

Example: Workflow Data Fabric token ratio tab

Match the entries under **Column names** to the entries under **Column values** to determine how many tokens are expended per Workflow Data Fabric capability.

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The first row under **Column values** displays "API_ACCESS, 8." Because the entries under **Column values** correspond to capability_id and exchange_value from **Column names**, the capability_id is "API_ACCESS" and the exchange_value is "8." In other words, a Workflow Data Fabric capability that requires API access expends eight tokens.

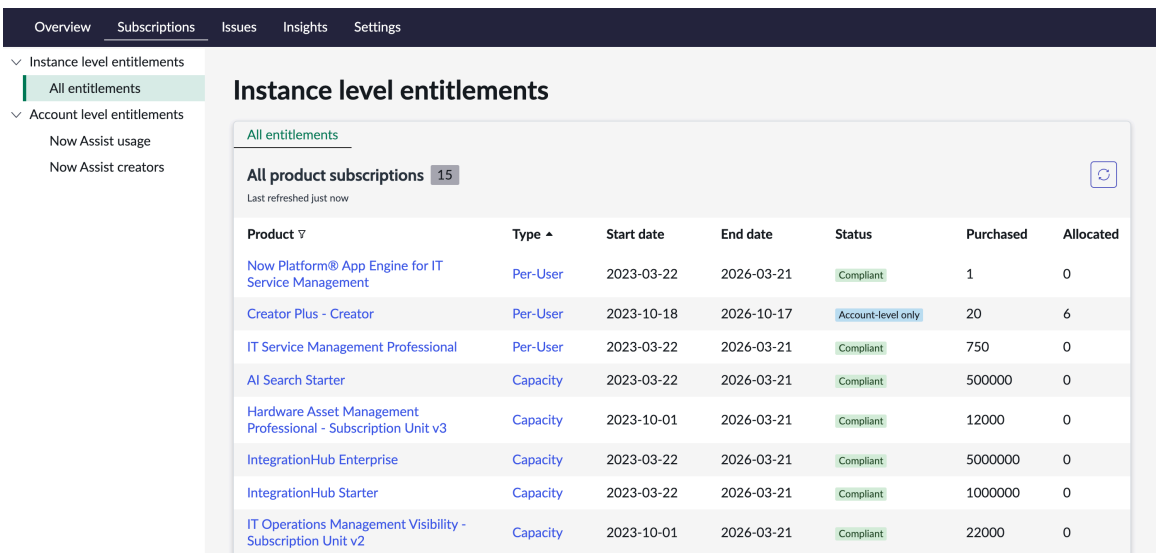
Viewing instance-level entitlements in Subscription Management

View a complete list of the product subscriptions purchased for your current instance.

Key benefits

- View details for product subscriptions, including purchase information and usage history by selecting the product name.
- Plan for future purchases and keep subscriptions current by monitoring the start and end dates for each of your product subscriptions.
- Stay in compliance by monitoring the subscription allocation values in the **Status** column.

Instance-level entitlements



Accessing your instance-level entitlements

Access your instance-level entitlements by navigating to **Admin** > **Subscription Management** > **Subscriptions** or **All** > **Subscription Management** > **All Subscriptions**.

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Subscription types

Identify which type of subscriptions you have and whether to allocate subscriptions manually by viewing the values in the **Type** column.

Per-User

Provides entitlements to users according to their assigned roles and associated access rights. You allocate per-user subscriptions manually by adding groups with metered roles or access rights to a product subscription. Subscription Management helps you with the allocation process by recommending groups based on their role assignments

Unrestricted User

Provides entitlements for an organization's number of active users regardless of their role assignments. An active user is any user whose record in the Users [sys_user] table has a value in the **User ID** field and has the **Active** field set to true.

Capacity

Automatically tracks measured units, and counts of transactions, records created, or resources managed such as devices, software, or nodes.

Unlimited

Provides entitlements for active users, with no limit to the number of users that can be allocated. An active user is any user whose record in the Users [sys_user] table has a value in **User ID** field and has the **Active** field set to true.

Display Only

Displays information. This type of subscription doesn't support allocation.

Subscription status

Determine whether your subscription allocations are in compliance by viewing the values in the **Status** column.

Compliant

The number of allocated subscription entitlements is lower than the number of purchased subscriptions.

Near capacity

The number of allocated subscription entitlements exceeds the threshold for your instance. You define the threshold on the **Settings** tab.

Even

The number of allocated subscription entitlements equals the number of purchased subscription entitlements.

Over-c

The number of allocated subscription entitlements exceeds the number of purchased subscription entitlements.

Account-level only

The subscription allocation status isn't calculated. Only applies to Creator Plus products.

Missing subscriptions

Purchased subscriptions might not appear on the **Subscriptions** tab for one or more of the following reasons:

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- Subscription data arrives on production instances only.
- Self-hosted instances don't receive subscription information. Contact your account manager for assistance.
- Subscription data might not yet have arrived. The data is downloaded daily.

Viewing account-level entitlements in Subscription Management

View an account-level summary of entitlements and consumption in Subscription Management.

Key benefits

- View and track Now Assist usage across all your instances.
- View and track Now Assist Creator consumption across all your instances.
- View and track cloud capacity entitlements across all your instances.

Accessing your account-level entitlements

Access your account-level entitlements by navigating to **Admin** > **Subscription Management** > **Subscriptions** or **All** > **Subscription Management** > **All Subscriptions** > **Account level entitlements**.

Viewing production and non-production instances

To view the entitlement data for all your instances, access your account-level entitlements on the **Subscriptions** tab in Subscription Management on a production instance. On a non-production instance, only entitlement data and usage for the instance that you're currently accessing is displayed.

Note: On a production instance, you can view entitlement data for all the instances owned by your account. However, if data sharing is restricted on an instance, that instance's entitlement data is hidden. You can disable the restriction by updating the trust configuration on that instance. See Share subscription data from another instance.

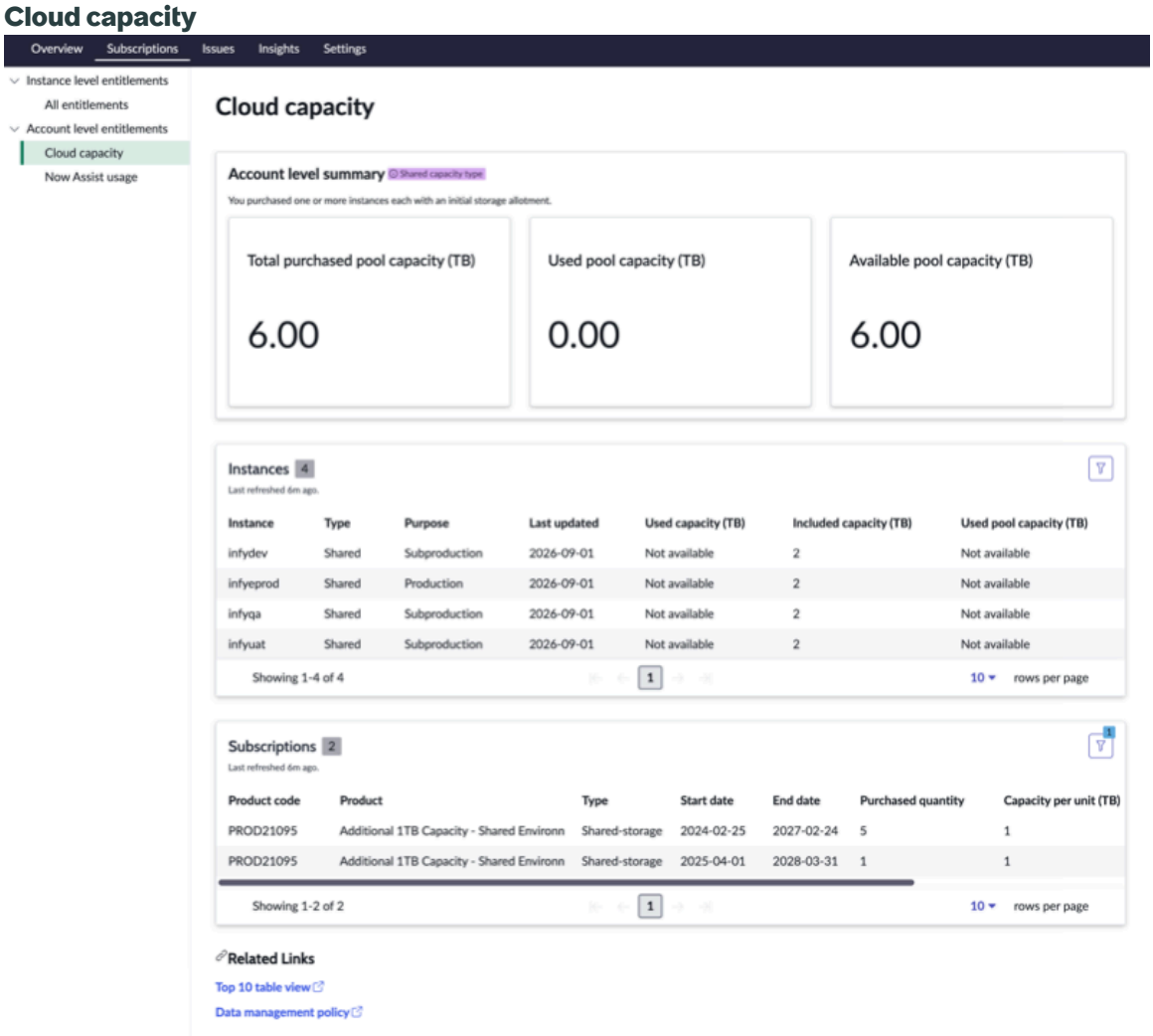
Monitoring cloud capacity in Subscription Management

View an account-level summary of your cloud capacity and track usage across all the instances associated with your account in Subscription Management.

Key benefits

- View the total amount of cloud capacity purchased for your account.
- View the total amount of cloud capacity consumed across all your instances.
- View the available cloud capacity for your account.
- Stay in compliance by monitoring excess cloud capacity consumption.

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Required ServiceNow AI Platform roles

The usage_admin, sn_sub_man.admin, or admin role is required to view and edit Subscription Management.

Accessing cloud capacity details

Access details about cloud capacity by navigating to **Admin** > **Subscription Management** > **Subscriptions** > **Cloud capacity**.

Use cases

- View the total amount of capacity purchased by your account by checking the **Total purchased pool capacity (TB)** card.
- View the total amount of capacity used by checking the **Used pool capacity (TB)** card.
- Monitor available capacity or overage by checking the value in the **Excess pool capacity (TB)** card.
- View cloud capacity usage for the instances associated with your account in the **Instances** list.
  - View the amount of capacity each instance has consumed in the **Used pool capacity (TB)** column. This applies to shared, dedicated, and hybrid capacity types.
  - View whether an instance's capacity is included with the instance or added separately in the **Hosting** column.

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In some scenarios, data isn't displayed in the **Instances** list.

- If data sharing is restricted on an instance, usage data for that instance is hidden. You can disable the restriction by updating the trust configuration on that instance. See Share subscription data from another instance.
- Capacity values are displayed only for instances on Xanadu or higher. If an instance appears in the list but isn't on at least Xanadu, the capacity value appears as Not available.

The sum of all the values in the **Used pool capacity (TB)** column equals the value in the Used pool capacity (TB) card. Only instances on at least Xanadu are included in the count.

- View details about your cloud capacity, including the purchased quantity, capacity per unit, and total pool capacity purchased in the **Subscriptions** list.
  - The total pool capacity purchased is calculated by multiplying the number of capacity environments you purchased by the capacity per unit.
  - The sum of all the values in **Total purchased primary pool capacity (TB)** column equals the value in the **Total purchased pool capacity (TB)** card.
  - The **Subscriptions** list includes both instance-level entitlements (capacity included with an instance) and account-level entitlements (additional capacity purchased separately). The **Total purchased pool capacity (TB)** card reflects the sum of both.
  - With shared capacity, additional capacity you might receive based on your purchase history appears in the **Subscriptions** list without an end date. The amount of additional capacity you receive can fluctuate depending on your future purchases and renewals of existing subscriptions.
- Identify which tables are driving storage growth on specific instances from the Data management Console. You can access the Data Management Console by selecting the **Data Management Console** link included in the Cloud Capacity report in Subscription Management, or by navigating to **All** > **System Data Management** > **Data Management Console**. For more information about the Data Management Console, see Data Management overview.

Monitoring Now Assist creators in Subscription Management

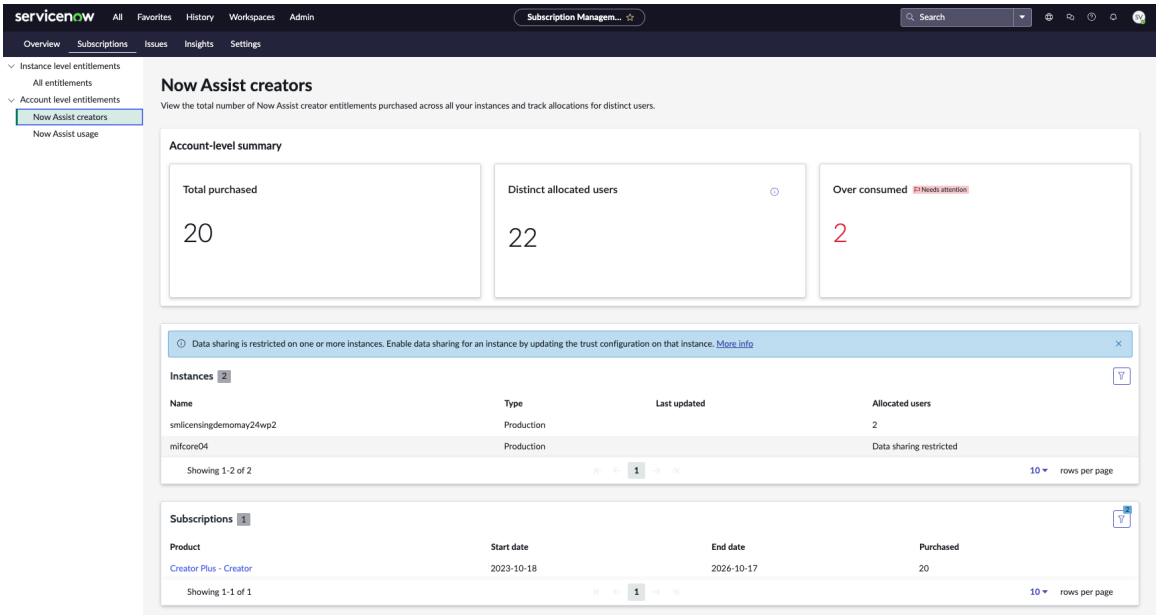
View a summary of your Creator Plus entitlements and track allocations for distinct users across all of your instances in Subscription Management.

Key benefits

- View the total number of Creator Plus entitlements that you purchased across all your instances.
- View the total number of Creator Plus entitlements allocated to unique users across all your instances.
- Track the availability of the remaining Creator Plus entitlements that you can allocate to users.

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Now Assist Creator Plus entitlements



Required ServiceNow AI Platform roles

The usage_admin, sn_sub_man.admin, or admin role is required to view and edit Subscription Management.

Accessing Creator Plus entitlements

Access details about Creator Plus entitlements by navigating to **Admin** > **Subscription Management** > **Subscriptions** > **Now Assist creators**.

Use cases

- Compare the total number of Creator Plus entitlements that your company has purchased to the total number of Creator Plus entitlements allocated across all your instances.
- Monitor the number of Creator Plus entitlements that are allocated to unique users across all your instances in the **Distinct allocated users** card.

  Note: Users allocated to a Creator Plus subscription on multiple instances are automatically de-duplicated in the total count. When a user is allocated to a Creator Plus subscription on more than one instance, that user counts toward the allocation total only once.

- View Creator Plus assignments by instance in the **Allocated users** column in the **Instances** list.

  In some scenarios, data isn't displayed in the **Instances** list.

  - Only instances on Washington DC Patch 2 and higher are listed in the **Instances** list.
  - If data sharing is restricted on an instance, usage data for that instance is hidden. You can disable the restriction by updating the trust configuration on that instance. See Share subscription data from another instance.
- View Creator Plus product subscription details by selecting a product in the **Subscriptions** list. On the details page, allocate available Creator Plus subscriptions by adding one or more groups with the Creator role.

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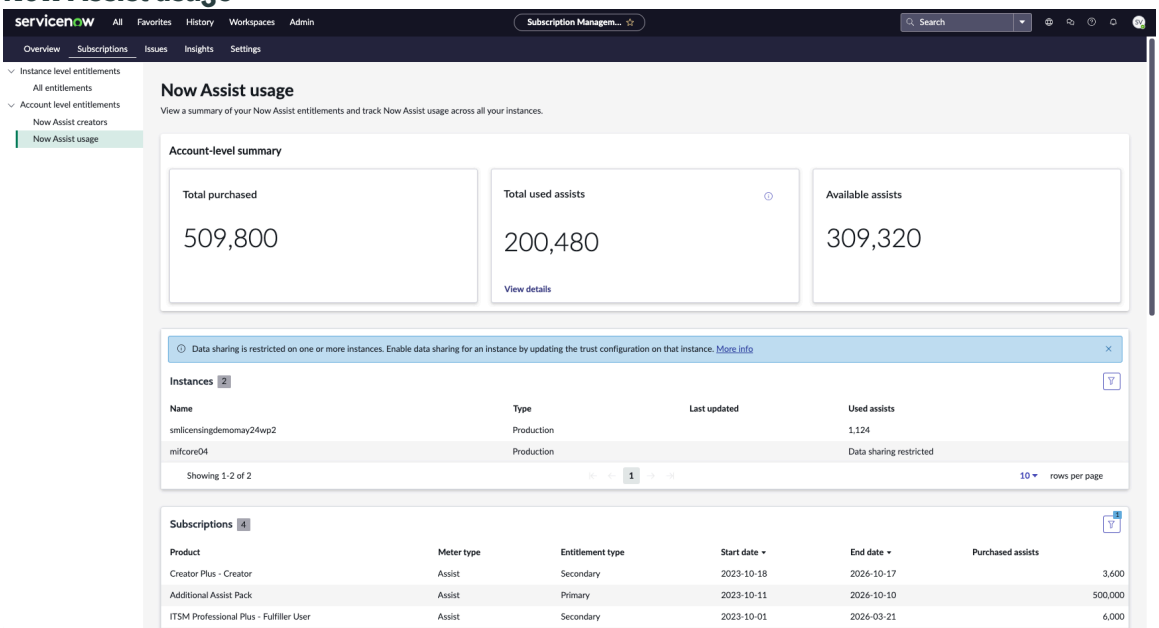
Monitoring Now Assist usage in Subscription Management

View a summary of your Now Assist entitlements and track Now Assist usage across all of your instances in Subscription Management.

Key benefits

- View an account-level summary of your Now Assist entitlements.
- Track Now Assist usage, including Moveworks Assists, across your production and non-production instances.
- Track Now Assist usage by domain in domain-separated instances.
- View a summary of Now Assist usage by skill.
- Plan for future purchases by analyzing Now Assist usage over time.

Now Assist usage



Required ServiceNow AI Platform roles

The usage_admin, sn_sub_man.admin, or admin role is required to view and edit Subscription Management.

Accessing Now Assist usage details

Access details about Now Assist usage by navigating to **Admin** > **Subscription Management** > **Subscriptions** > **Now Assist usage**.

Use cases

- Compare the total number of Now Assist entitlements that your company has purchased to the total number of Now Assist entitlements consumed across all your instances. Monitor the available number of Now Assist entitlements for your account.
- Visualize Now Assist consumption over time by selecting **View details** in the Total used assists card. Monitor compliance for your account for the current contract period or determine when Now Assist usage exceeded the total purchased count.

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Note: Assists used in demo instances are excluded from total used assists.

- View the number of assists consumed by each of your instances in the **Used assists** column in the **Instances** list.

  In some scenarios, data isn't displayed in the **Instances** list.

  - Only instances on Washington DC Patch 2 and higher are listed in the **Instances** list.
  - If data sharing is restricted on an instance, usage data for that instance is hidden. You can disable the restriction by updating the trust configuration on that instance. See Share subscription data from another instance.
- View details for each of your products that include assists in the **Subscriptions** list.
  - Determine whether assists are the primary or secondary line item in a purchase according to the value in the **Entitlement type** column.
  - Verify the start date and end date for each product.
  - View the total number of entitlements provided by each product in the **Purchased assists** column.
- View and filter the number of assists used by domain from the **Used assists** column of the **Domain** list. The **Domain** list is only available if domain separation is enabled and there are domain values other than global.
- Determine cumulative Now Assist usage by skill on your current instance. Data in the table is updated nightly. If your current instance doesn’t have any active subscriptions with assists, the list of skills is empty.
  - View Moveworks assists broken down by skill. Moveworks skill names are distinguished by the "MW" prefix.
  - View the number of times a skill has been used in the **Number of actions** column.
  - View the relative cost for each assist in the **Assist ratio** column.
  - Determine which skills are consuming the most Now Assist entitlements by checking the **Total assists** column. Total assists are calculated by multiplying values in the **Number of actions** column by values in the **Assist ratio** column.
  - Analyze Now Assist usage over time on your current instance by viewing the Utilization history chart. Monitor monthly or daily usage using the filter. Look for trends related to Now Assist skills. If usage continues to grow every month, consider purchasing more entitlements to stay in compliance.

Addressing issues in Subscription Management

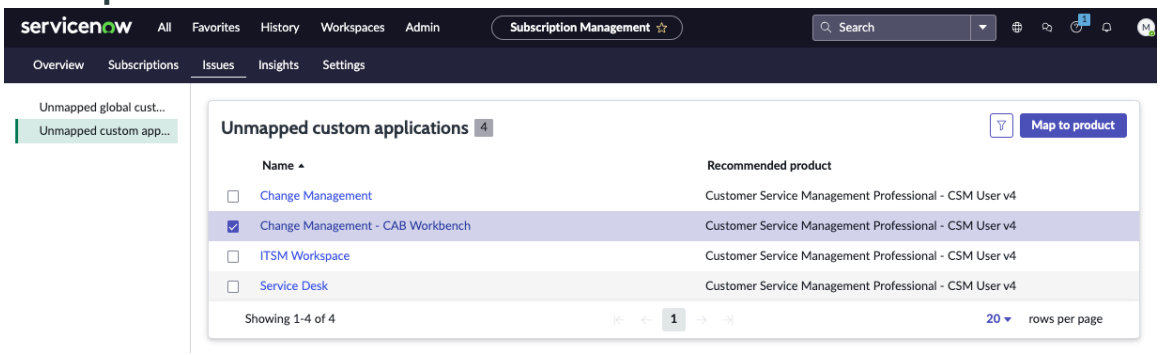
Stay in compliance by mapping custom tables and custom applications to subscriptions in Subscription Management.

Key benefits

- Identify custom tables and custom applications that aren't mapped to subscriptions.
- Maintain accurate entitlements by mapping custom tables and custom applications to a recommended product subscription or a product subscription of your choice.
- Plan for future subscription needs by assessing your custom table entitlements.

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Subscription issues



Accessing subscription issues

Access information on subscription issues on the **Issues** tab by navigating to **Admin** > **Subscription Management** > **Issues** or **All** > **Subscription Management** > **Issues**.

Unmapped global custom tables

Determine whether you have custom tables in the global scope that aren't mapped to a valid product subscription by accessing the **Unmapped global custom tables** tab. Keep custom table entitlements current by mapping the tables to a product subscription. For more information, see Map custom tables to a product subscription in Subscription Management.

Recommended subscriptions for unmapped custom tables appear on the **Issues** tab the day after the unmapped custom table is created.

Unmapped custom applications

Determine whether you have custom tables in a scoped application that aren't currently mapped to a valid product subscription by accessing the **Unmapped custom applications** tab. Ensure that entitlements for these tables are current by mapping the application to a product subscription.

You map tables in a scoped application at the application-level, which eases administration because you don't need to map tables individually after the application is mapped. For more information, see Map a custom application to a product subscription in Subscription Management.

Recommended subscriptions for unmapped custom applications appear on the **Issues** tab the day after the unmapped custom table is created.

Recommended subscriptions

When you map custom tables or custom applications to subscriptions, Subscription Management displays recommended subscriptions based on the following criteria:

The table belongs to an app scope or package

The custom table or tables in the application belong to an app scope or package associated with the recommended subscription.

The table extends another table

The custom table or tables in the application extend another table mapped to the recommended subscription.

The table has a relationship to another table

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The custom table or tables in the application are related to a different custom table or a ServiceNow default table associated with the recommended subscription.

The table doesn't meet any of the previous criteria

The custom table or tables in the application don't meet any of the previous criteria. If you have an App Engine subscription, Subscription Management recommends mapping the table or application to an App Engine subscription.

If the criteria for recommending a subscription aren't met and you don't have an App Engine subscription, Subscription Management can't display recommended subscriptions for unmapped applications and tables. Unmapped applications and tables without subscription recommendations are counted in the Subscription Management Overview reports, but aren't shown in subscription Issues. You can map any missing custom applications and tables to a subscription from the Custom Applications list or the Custom Table Inventory list. For more information, see Map a missing custom app to a product subscription in Subscription Management and Map a missing custom table to a product subscription in Subscription Management.

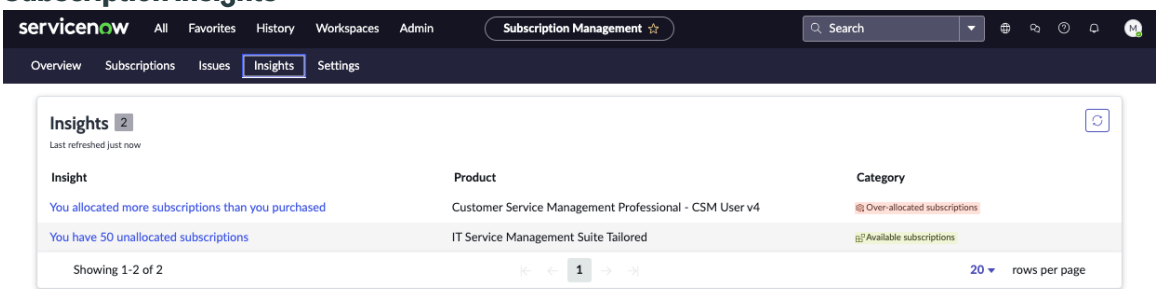
Discovering insights in Subscription Management

Identify when subscriptions are over-allocated and view actions you can take to maximize subscription usage in Subscription Management.

Key benefits

- View product subscriptions that are over-allocated and require adjustments or more entitlements.
- View product subscriptions with available subscriptions that you can allocate by adding groups.
- Maximize subscription usage by allocating your available subscriptions.

Subscription insights



Accessing subscription insights

Access subscription insight information on the **Insights** tab by navigating to **Admin** > **Subscription Management** > **Insights** or **All** > **Subscription Management** > **Insights**.

Over-allocated subscriptions

Identify over-allocated per-user subscriptions on your instance by accessing the **Insights** tab. Stay in compliance by performing one or more of the following actions:

- Remove a group from a subscription
- Remove a role from a group
- Remove users from a group
- Purchase more subscriptions

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For more information, see Remove a group from a product subscription in Subscription Management.

Available subscriptions

Identify available subscriptions on your instance by accessing the **Insights** tab. Maximize subscription usage and grant entitlements to the right users by allocating available subscriptions.

You allocate per-user subscriptions by adding one or more groups to a product subscription. Subscription Management helps you with the allocation process by recommending groups based on their assigned roles. For more information, see Allocate subscriptions in Subscription Management.

Configuring Subscription Management

Set up and configure Subscription Management.

Configuration overview

Subscription Management is free and active by default for all production instances and non-production instances. You don't have to activate a plugin.

1. Create a Subscription Management administrator

   Assign the usage_admin role to at least one user who will manage subscriptions for your organization.

2. Share subscription data from another instance

   View subscription data from other production instances in areas of Subscription Management that provide account-level summaries of subscription usage.

3. Configure subscription allocation status in Subscription Management

   Configure the consumption status threshold using a percentage value that represents what near capacity means for your instance.

Create a Subscription Management administrator

Create a Subscription Management administrator by assigning the usage_admin role to an administrator.

Before you begin

Role required: admin

About this task

Usage admins review and manage how purchased subscriptions are used on your production instance. They add groups to appropriate subscriptions, monitor usage of applications, and update subscriptions as needed.

Assign the usage_admin role to at least one person in your organization. Only admins, sn_sub_man.admins, and usage_admins can use Subscription Management.

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Select an existing user.
3. Update the user's role assignment by selecting **Edit** in the Roles related list.

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4. Add the usage_admin role.
5. Select **Update**.

Share subscription data from another instance

View subscription data from another instance by enabling data sharing on that instance.

Before you begin
Role required: usage_admin, sn_sub_man.admin, or admin

About this task
By default, data sharing is restricted between production instances, which means you can't see subscription data for other production instances in Subscription Management. To view subscription data from another production instance, modify the trust configuration settings on that instance.

For more information about modifying the trust configuration for an instance, see Basic trust configuration for data sync applications.

Note: Subscription data from a non-production instance is only viewable from a production instance.

In this scenario, the instance for viewing subscription data across all your instances is considered the primary production instance.

Procedure
1. Log in to the instance that has subscription data that you want to view on your primary production instance.
2. Navigate to **All** > **Multi-Instance Management** > **Trust Configuration**.
3. In the list of instances, find the primary production instance.
4. Share data from your current instance by changing the value in the **Grant access** column to true.

Result
Subscription data is shared with your primary production instance.

What to do next
Log in to your primary production instance to view the subscription data that is now shared with that instance. Repeat these steps for each additional production instance that has subscription data that you want to view from the primary production instance.

Configure subscription allocation status in Subscription Management

Identify when you're close to allocating all of your subscriptions by configuring an allocation status threshold if you prefer a threshold other than the default value of 90 percent in Subscription Management.

Before you begin
Role required: usage_admin, sn_sub_man.admin, or admin

Procedure
1. Navigate to the **Settings** tab in one of the following ways.
   - Navigate to **Admin** > **Subscription Management** > **Settings**.
   - Navigate to **All** > **Subscription Management** > **Settings**.

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2. In the **Allocation Status** tab, enter a percentage value that represents near capacity for your instance.
   If you want the **Status** column to display Near capacity before reaching the 90 percent threshold, enter a lower percentage value.
3. Select **Save**.

Result
When the number of allocated subscriptions exceeds the percentage you configured, the value Near capacity appears in the **Status** column throughout Subscription Management.

Manage subscriptions in an on-premise installation

Download licensing and usage definition data to view and manage subscriptions for your on-premise installation.

Before you begin
Role required: customer_admin or partner_admin

About this task
You can view and manage entitlements for an on-premise installation by uploading entitlement information. An automated workflow is available through the Now Support portal to request the necessary licensing and usage definition data.

Licensing and usage definition data can only be requested for production, sub-production, and demo instances. Development instances aren't supported.

Note: Account-level entitlements aren’t available in an on-premise installation. To calculate entitlements across all your instances, you must log in to each individual instance to gather entitlement data and then aggregate the totals.

Procedure
1. Log in to Now Support.
2. Navigate to **Automation Store** > **Service Catalog** > **Instance Management**.
3. Find and select **Request On-Prem Licensing Information**.
4. Select your company.
   If there are no child companies, the parent company is selected by default and the field is read-only.
5. Select an instance whose data you want to request.
   Only on-premise instances for the Yokohama family release and above can be selected.
6. Select **Submit**.

Result
You receive an email when the request has been processed.

What to do next
After the request has been processed, view on-premise licensing requests to download the data.

View on-premise licensing information requests

After a request for on-premise entitlement data is processed, you can find and download the data through Now Support.

Before you begin
Role required: customer_admin or partner_admin

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Procedure

1. Log in to Now Support.
2. Navigate to **Automation Store** > **Service Catalog** > **My Licensing Requests**.
3. From the completed licensing request, download the attached XML or JSON files.

What to do next

Import the entitlement data to your on-premise instance.

Import on-premise entitlement data

Import entitlement data for your on-premise instance to manage subscriptions for the instance.

Before you begin

Role required: admin sn_sub_man.admin, or usage_admin

Procedure

1. From the instance whose data you downloaded, navigate to **All** > **Subscription Management** > **Import Entitlement Data**.
2. Upload the zip file as an attachment.
   If your instance doesn't enable zip files to be uploaded, attach the contents of the zip file instead.
3. Select **Process**.

Result

A few minutes after the state changes to "Processed," the data in the Subscription Management dashboard can be refreshed. If there are scheduled jobs running or queued, it might take longer for the Subscription Management dashboard to refresh.

Managing per-user subscriptions in Subscription Management

Manage your per-user subscription allocations using Subscription Management.

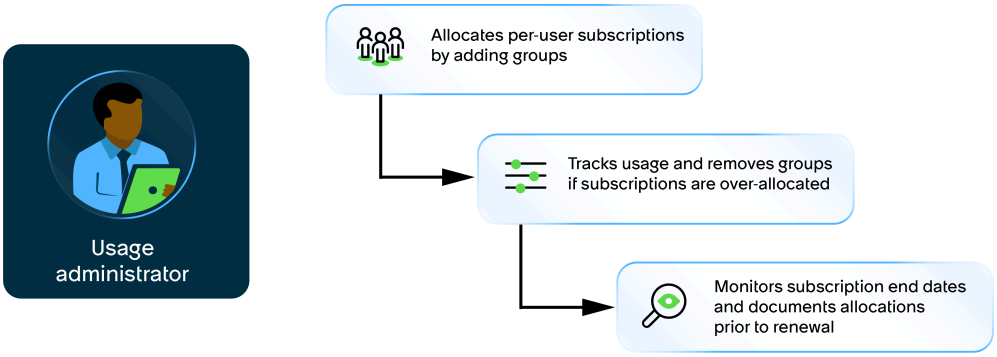
Overview of managing per-user subscriptions

To simplify the Subscription Management experience, the manual allocation workflow for user-based subscriptions is unavailable if you have never used it. Automatic allocation of user-based subscriptions is based on user and group roles. For more information, see Automatic subscription assignment.

If you have manually allocated user-based subscriptions before, you can still make manual allocations. To manually allocate user-based subscriptions, follow the process in this infographic.

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Managing per-user subscriptions



- Allocate subscriptions in Subscription Management

  Subscriptions are managed in Subscription Management using groups. Subscriptions are measured and audited in Subscription Management using roles. You allocate subscriptions by adding one or more groups with measured roles to a product subscription.

- Remove a group from a product subscription in Subscription Management

  You can potentially over-allocate subscriptions, meaning more users possess an entitlement than the number of purchased subscriptions. Subscription Management flags over-allocated subscriptions for you. To stay in compliance, remove users or groups from the subscription or purchase more subscriptions.

- Maintain per-user subscription allocations in Subscription Management at renewal

  When a per-user subscription renews, a new product SKU might be added to your account. Maintain your current allocations during the renewal process by documenting your allocations before the renewal date.

Recommended groups

Allocate per-user subscriptions by adding groups recommended by Subscription Management based on their roles. For example:

- If the Service Desk group has a fulfiller-type role in the ITSM application, you can add the Service Desk group to the ITSM product subscription to allocate the fulfiller subscriptions included with ITSM to all the users in the group.
- If you have available ITSM subscriptions, you can add groups that are recommended by Subscription Management based on the types of roles they have.

Groups that you add to a product subscription are considered subscribed groups. Consider assigning a group manager who is responsible for managing group membership and role assignments.

Measured roles

Roles that require a subscription are considered measured roles. Measured roles grant users access to an application and are categorized by the level of access they provide.

When possible, simplify role administration by assigning measured roles to groups instead of assigning roles directly to individual users.

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Automatic subscription assignment

If your organization has never manually allocated user-based subscriptions before, entitlements are automatically assigned based on user roles and ACL access. Reviewing how roles are evaluated for automatic subscription assignment can help you make decisions about which roles users should have.

If your organization has never manually allocated user-based subscriptions, Subscription Management evaluates user roles and assigns users the lowest-cost subscription that meets the access needs of their roles..

Custom and customized roles are classified for auto-assignment according to the Access Control Lists (ACLs) each role contains. Users with custom or customized roles are assigned subscription entitlements based on access granted to tables within a subscription product. For more information about subscription auto-assignment for custom and customized roles, see the article Understanding Custom Role Validation - Use Verification [KB1637906] on the Now Support Knowledge Base.

Allocate subscriptions in Subscription Management

Give users entitlement to ServiceNow products by allocating subscriptions in Subscription Management.

Before you begin

Role required: usage_admin, sn_sub_man.admin, or admin

About this task

To simplify the Subscription Management experience, the manual allocation workflow for user-based subscriptions is unavailable if you have never used it. Automatic allocation of user-based subscriptions is based on user and group roles. For more information, see Automatic subscription assignment.

If you have manually allocated user-based subscriptions before, you can still make manual allocations.

Procedure

1. Navigate to Subscription Management in one of the following ways.
   - Navigate to **Admin** > **Subscription Management**.
   - Navigate to **All** > **Subscription Management** > **Subscription Management**.
2. Select a product with subscriptions that you want to allocate.
3. Allocate subscriptions by adding recommended groups based on role type.

   a. On the details page, select **Add groups**.

   b. Select the check box next to one or more groups.
   The User group includes all user accounts in the `sys_user` table. The Active user group excludes users who haven't logged in to the instance in the last 365 days, users assigned Web service access only, or users with an empty User ID.

   c. Select **Add groups**.

Result

All group members are allocated subscriptions, giving each member entitlement to use the product. Subscribed users are updated during a daily scheduled job, so it might take up to a day for the changed to be reflected in Subscription Management.

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Trouble?
If you can't manually allocate user-based subscriptions despite having manually allocated them in the past, see Missing subscribed groups and users tabs in subscription management [KB2974856]

Remove a group from a product subscription in Subscription Management

Fix an over-allocated subscription and free up entitlements by removing a group from a product subscription in Subscription Management.

Before you begin
Role required: usage_admin, sn_sub_man.admin, or admin

About this task
To simplify the Subscription Management experience, user-based subscriptions are automatically allocated based on role if you haven't manually allocated user-based subscriptions before. To resolve over-consumed user-based subscriptions, reduce the number of users with roles that provide access to the over-consumed subscription. For more information, see Add a user to a group and Managing roles.

If you have manually allocated user-based subscriptions before, you can still make manual changes to the subscribed groups using the following process.

Procedure
1. Navigate to Subscription Management in one of the following ways.
   - Navigate to **Admin** > **Subscription Management**.
   - Navigate to **All** > **Subscription Management** > **Subscription Management**.
2. Identify an over-allocated subscription by checking either the **Status** column on the **Overview** tab or the list of over-allocated subscriptions on the **Insights** tab.
3. Select the over-allocated product subscription.
4. On the subscription details page, select the **Subscribed Groups** tab.
5. Select the check box next to one or more groups that you want to remove.
6. Select **Remove**.
7. In the dialog box, confirm that you want to remove entitlements for all users in the selected groups by selecting **Remove**.
   Subscribed users are updated during a daily scheduled job, so it might take up to a day for removal of groups to be reflected in Subscription Management.
8. **Optional:** Verify that the subscription is no longer over-allocated by checking the value in the **Status** column on the **Subscriptions** tab.

Trouble?
If you can't manually allocate user-based subscriptions despite having manually allocated them in the past, see Missing subscribed groups and users tabs in subscription management [KB2974856]

What to do next
The group is removed from the subscription. If the group still has a measured-role that requires a subscription, add the group to a different subscription or remove the measured-role from the group.

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Maintain per-user subscription allocations in Subscription Management at renewal

Ensure subscription allocations remain consistent throughout the renewal process.

Before you begin
Role required: usage_admin, sn_sub_man.admin, or admin

About this task
When a per-user subscription renews, a new product SKU might be added to your account. This SKU is treated as a new product subscription in Subscription Management. If you've manually allocated user-based subscriptions in the past, you must re-allocate renewed subscriptions by adding groups with measured roles to the subscription.

If you haven't manually allocated user-based subscriptions before, allocations are made automatically based on user and group roles. No action is necessary to maintain allocations after renewal.

Procedure

1. Before the renewal date, monitor the subscription end dates on the details page and document the current group allocations.
   See Viewing product subscription details in Subscription Management.
2. After the renewal date, add the documented groups to the renewed subscription in Subscription Management.
   See Allocate subscriptions in Subscription Management.

What to do next
Continue to monitor subscription renewal dates to ensure that your allocations are accurate throughout each renewal.

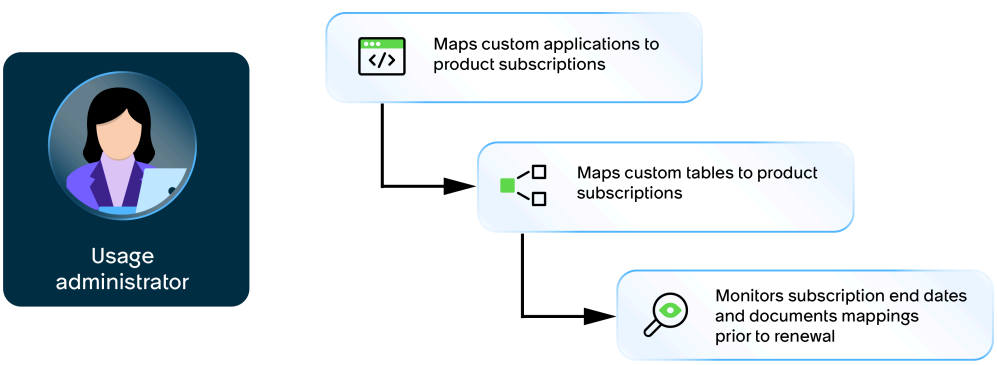
Managing custom tables and applications in Subscription Management

Keep your custom table entitlements updated by mapping all of your custom applications and tables to valid subscriptions in Subscription Management.

Overview of managing custom tables and applications

To successfully manage your custom tables and applications, follow the process in this infographic.

Managing custom tables and applications



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- Map a custom application to a product subscription in Subscription Management

  Map a custom application to a product subscription so that when developers add more tables to the application, they're automatically mapped to the subscription. Track your custom table usage to ensure that your organization doesn't run out of custom table entitlements.

- Map custom tables to a product subscription in Subscription Management

  Map custom applications and custom tables on your production instance to a valid subscription. On non-production instances, mapping is recommended but not required.

- Maintain custom table and application mappings at renewal in Subscription Management

  When a subscription renews, a new product SKU might be added to your account. Maintain your current custom table mappings during the renewal process by documenting your mappings before the renewal date.

Custom tables

A custom table is defined as a table that you create on the ServiceNow AI Platform that isn't provided by ServiceNow. Some tables are exempted from being classified as a custom table.

Note: For more information on custom tables on the ServiceNow AI Platform, see Table administration. For a detailed description of custom table use rights and exempt tables, see the Custom Table Guide on http://www.servicenow.com/upgrade-schedules.html

Subscriptions come with custom table entitlements that dictate the number of custom tables that you can map to a subscription. The number of custom table entitlements depends on the subscription.

Custom applications

A custom application is defined as an application that you create on the ServiceNow AI Platform that isn't provided by ServiceNow. If your organization purchased App Engine, you can use Subscription Management to manage your custom application subscriptions.

App Engine usage

App Engine subscriptions entitle you to develop applications and deploy custom tables in production instances. Based on your App Engine version, you monitor the subscription usage of your App Engine applications differently.

- You can view and manage App Engine V2 subscriptions in Subscription Management just like any other product subscription. You can map your applications and custom tables to an App Engine V2 subscription and allocate per-user subscriptions by adding groups with measured roles to an App Engine V2 subscription.

- You can't view App Engine V1 subscription details on the details page like other subscriptions. Users with the usage_admin, sn_sub_man.admin, or admin roles can view App Engine V1 subscription details and usage information by navigating to the **App Engine usage** module from the filter navigator. This module only appears if you have App Engine V1.

  For details on auditing App Engine V1 usage, see the article Auditing App Engine v1 [KB0999383] in the Now Support Knowledge Base.

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Map a custom application to a product subscription in Subscription Management

Maintain accurate entitlement for custom tables in a scoped application by mapping the application to a product subscription in Subscription Management. To stay in compliance, you must map custom tables to a product subscription.

Before you begin

Role required: usage_admin, sn_sub_man.admin, or admin

About this task

As your developers create and deploy new custom applications and tables on your instances, use Subscription Management to map them to subscriptions. After you map a custom application to a product subscription, additional tables that developers add to the application are automatically mapped to the subscription.

Procedure

1. Navigate to the **Issues** tab in Subscription Management in one of the following ways.
   - Navigate to **Admin** > **Subscription Management** > **Issues**.
   - Navigate to **All** > **Subscription Management** > **Issues**.
2. In the **Unmapped custom applications** tab, look for custom applications that aren't mapped to a subscription.
3. Update your entitlements by mapping one or more custom applications to a recommended product or a product of your choice.
   When possible, Subscription Management displays recommendations for product subscriptions with available custom table entitlements in the **Recommended Product** column. Subscription Management can't display product subscription recommendations for some unmapped custom applications, which therefore aren't shown in the **Unmapped custom applications** tab. For more information about mapping missing custom applications to product subscriptions, see Map a missing custom app to a product subscription in Subscription Management.

Option	Description
Map to a recommended product	**a.** Select the check box for one or more un mapped custom applications. **b.** Select **Map to product**. **c.** Select **Confirm**.
Map to a product of your choice	**a.** Select an unmapped custom application. **b.** In the **Subscription** lookup list on the Cus tom Application form, select a subscription. **Note:** The lookup list doesn't include expired, grandfathered, or Store ap plication subscriptions. If you have a Store application with custom tables that must be mapped to a subscrip tion, select a subscription with a cus tom table entitlement. **c.** Select **Update**.

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Result
One or more custom applications are mapped to a product subscription and your custom table entitlement count is updated. If you mapped a custom application to a subscription through the Custom Application form, Subscription Management is updated the next day.

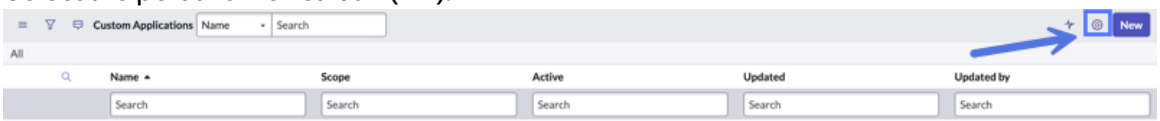
Map a missing custom app to a product subscription in Subscription Management

Map a custom application to a product subscription when that application isn't shown in the **Unmapped custom applications** tab of **Subscription Management**. To stay in compliance, you must map custom tables that belong to a custom application to a product subscription.

Before you begin
Role required: usage_admin, sn_sub_man.admin, or admin

About this task
Subscription Management can't display product subscription recommendations for some unmapped custom applications, and those applications aren't shown in the **Unmapped custom applications** tab. As a result, you might see fewer applications in the **Unmapped custom applications** tab than the number shown on the Unmapped Custom Applications report in the Subscription Management Overview page. You can map any missing custom applications to product subscriptions from the Custom Application list.

Procedure
1. Navigate to the **Issues** tab in Subscription Management in one of the following ways.
   - Navigate to **Admin** > **Subscription Management** > **Issues**.
   - Navigate to **All** > **Subscription Management** > **Issues**.
2. Select the **Unmapped custom applications** tab.
3. Select **Map missing applications from the custom application list**.
4. Select the personalize list icon ( ).



5. Adjust the columns shown on the Custom Application list by moving **Subscription(subscription_entitlement)** from the **Available** column to the **Selected** column.
6. Select **OK**.
   In the **Subscription** column, you can see which product subscriptions each of your custom applications are mapped to.
7. Select an unmapped custom application.
   You can identify unmapped custom applications using the **Subscription** column. The **Subscription** column for unmapped custom applications is empty.
8. On the header of the Custom Application form, select the form title.
9. Change the view by selecting **Subscription**.
10. In the **Subscription** lookup list on the Custom Application form, select a product subscription. The lookup list doesn't include expired, grandfathered, or Store application subscriptions. If you have a Store application with custom tables that must be mapped to a subscription, select a subscription with a custom table entitlement.
11. Select **Update**.

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Result
The custom application is mapped to a product subscription and your custom table entitlement count is updated. Updates made through the Custom Application form show in Subscription Management the next day.

Map custom tables to a product subscription in Subscription Management

Maintain accurate entitlement for custom tables in the global scope and stay in compliance by mapping the tables to a product subscription in Subscription Management. Mapping your custom tables keeps your custom table allotment updated and helps you avoid running out of custom table entitlements.

Before you begin
Role required: usage_admin, sn_sub_man.admin, or admin

Procedure
1. Navigate to the **Issues** tab in Subscription Management in one of the following ways.
   - Navigate to **Admin** > **Subscription Management** > **Issues**.
   - Navigate to **All** > **Subscription Management** > **Issues**.
2. In the **Unmapped global custom tables** tab, look for custom tables that aren't mapped to a subscription.
3. Update your entitlements by mapping one or more custom tables to a recommended product or a product of your choice.
   When possible, Subscription Management displays recommendations for product subscriptions with available custom table entitlements in the **Recommended Product** column. Subscription Management can't display product subscription recommendations for some unmapped custom tables, which therefore aren't shown in the **Unmapped custom applications** tab. For more information about mapping missing custom tables to product subscriptions, see Map a missing custom table to a product subscription in Subscription Management

Option	Description
Map to a recommended product	**a.** Select the check box next to one or more unmapped custom tables. **b.** Select **Map to product**. **c.** Select **Save**.
Map to a product of your choice	**a.** Select an unmapped custom table. **b.** In the **Subscription** lookup list on the Cus tom Table Inventory form, select the sub scription. **c.** Select **Update**. **d.** Repeat these steps for each remaining un mapped table.
Manually map to a product through the Cus tom Applications table	If subscription recommendations shown in the Subscription Management UI aren't cor rect for your environment, you can manually update custom table mappings.

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Option	Description
	a. From the platform's application navigator, select **All**. b. In the navigation filter, enter `sys_app.list`. c. Select the Update Personalized List icon  . d. Move **Subscription(subscription_entitlement)** from the **Available** column to the **Selected** column. e. Select **OK**. f. Find and select the record for the custom table you want to map. g. In the **Subscription** field, find and select the product subscription the table should be mapped to. h. Select **Save**.

Result

One or more custom tables are mapped to a product subscription and your custom table entitlement count is updated. If you mapped a custom table to a subscription through the Custom Table Inventory form, Subscription Management is updated the next day.

Map a missing custom table to a product subscription in Subscription Management

Map a custom table in the global scope to a product subscription when that table isn't shown in the **Unmapped global custom tables** tab of Subscription Management. To stay in compliance, all custom tables must be mapped to a product subscription.

Before you begin

Role required: usage_admin, sn_sub_man.admin, or admin

About this task

Subscription Management can't display product subscription recommendations for some unmapped global custom tables, and those tables aren't shown in the **Unmapped global custom tables** tab. As a result, you might see fewer tables in the **Unmapped global custom tables** tab than the number shown on the Unmapped Global Custom Tables report in the Subscription Management Overview page. You can map any missing custom tables to product subscriptions from the Custom Table Inventory list.

Procedure

1. Navigate to the **Issues** tab in Subscription Management in one of the following ways.
   - Navigate to **Admin** > **Subscription Management** > **Issues**.
   - Navigate to **All** > **Subscription Management** > **Issues**.
2. Select the **Unmapped global custom tables** tab.
3. Select **Map missing tables from custom table inventory list**.
4. If the Custom Table Inventory list is in the default view, select **Custom Table Inventory** > **View** > **Subscription Entitlement**.
   In the **Subscription** column, you can see which product subscriptions each of your custom tables are mapped to.

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5. Select an unmapped custom table.
   You can identify unmapped custom tables using the **Subscription** column. The **Subscription** column for unmapped custom tables is empty.
6. In the **Subscription** lookup list on the Custom Table Inventory form for the table, select a product subscription.
7. Select **Update**

Result
The custom table is mapped to a product subscription and your custom table entitlement count is updated. Updates made through the Custom Table Inventory form show in Subscription Management the next day.

Maintain custom table and application mappings at renewal in Subscription Management

Ensure custom table and application mappings remain consistent throughout the renewal process.

Before you begin
Role required: usage_admin, sn_sub_man.admin, or admin

About this task
When a subscription renews, a new product SKU might be added to your account. This SKU is treated as a new product subscription in Subscription Management, requiring you to re-map custom applications and custom tables to the subscription to stay in compliance.

Procedure

1. Before the renewal date, monitor the subscription end dates and document the current list of custom application and custom table mappings.
   See Viewing product subscription details in Subscription Management.
2. After the renewal date, map the documented tables and applications to the renewed subscription in Subscription Management.
   See Map a custom application to a product subscription in Subscription Management and Map custom tables to a product subscription in Subscription Management.

What to do next
Continue to monitor subscription renewal dates to ensure that your mappings are accurate throughout each renewal.

Grandfathered and exempted tables

Grandfathered and exempted custom tables are treated differently than other custom tables on your instance. Refer to your organization's ServiceNow® contract for additional information.

Grandfathered tables

Depending on your organization's legacy subscription entitlements and contractual migration, grandfathered tables might be allotted to your production instance. Grandfathered table entitlements enable preservation of your organization's previous custom table entitlements through license migration. This one-time process ensures that custom tables that currently exist in a production instance don't count against your new custom table entitlements.

Grandfathered custom tables can't be transferred, reused, or otherwise classified as another custom table type. If you delete a grandfathered custom table, you can't classify any other custom table as a grandfathered custom table to take its place. Once a custom table has been associated with a grandfathered table subscription, it remains in the Custom Table Inventory even if the table is deleted from the instance.

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To view your grandfathered tables, enter `ua_custom_table_inventory.list` in the filter navigator, and then add a filter with the condition **[Allotment type] [is] [Grandfather]**.

If you have a combination of custom and grandfathered tables in one application, the grandfathered tables must be mapped to a grandfathered table subscription. The remaining custom tables to one other subscription. Reach out to Customer Service and Support for help mapping a grandfathered table to a grandfather table subscription.

Example: Grandfathered tables on an instance

Scenario: Your organization purchases three new subscriptions with entitlements for a total of 55 App Engine Starter custom tables (formerly Bundled Custom Tables). To ensure your organization doesn't lose the previous custom table entitlements, a grandfather subscription with an entitlement for 25 grandfathered tables is allotted to your instance. This subscription requires support to identify and map the existing 25 tables. These subscriptions result in a total custom table entitlement of 80. Once a custom table has been assigned to the grandfather subscription there is no option to revert this.

Multiple subscriptions with grandfathered and custom table entitlements

Subscription	Number of custom table entitlements	Number of mappable tables
Grandfathered subscription	25	25
New Subscription 1	25	25
New Subscription 2	25	25
New Subscription 3	5	5

Exempted tables

Exempted tables are custom tables that don't count toward your subscription entitlements. These tables consist mostly of custom extensions of certain system-related tables, such as sys_portal_page and sys_user_preference, that you extend for operational improvements in your production instance.

To view a list of exempted tables, enter `ua_exempted_table_inventory.list` in the filter navigator.

The Custom Table Guide legal schedule provides the complete definition of which tables are considered exempt.

Note: Legal schedules are enforced based on when the contract is executed.

To find past versions of the Custom Table Guide, see the Legal Schedules Custom Table Guide.

Monitoring capacity subscriptions

Manage and track capacity subscriptions using Subscription Management.

Overview of monitoring capacity subscriptions

Capacity subscription usage is calculated using a table query or scripted definition. You can view a Capacity Definition record to view the details of the table query or scripted definition. You can also execute the definition on demand to view the latest counts.

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After determining how a capacity total for a subscription is calculated, you can maintain compliance by adjusting the number of assigned resources or increasing your capacity subscription. For example, you can determine which tables are queried for active users or how usage is defined for devices when the system allocates CIs to a capacity subscription.

Learn how capacity totals are calculated

Monitor capacity subscription calculations in Subscription Management

View how a capacity total is calculated to keep your subscription in compliance.

Before you begin

Role required: usage_admin, sn_sub_man.admin, or admin

Procedure

1. Navigate to Subscription Management in one of the following ways.
   - Navigate to **Admin** > **Subscription Management** > **Subscriptions**.
   - Navigate to **All** > **Subscription Management** > **All Subscriptions**.
2. In the list of all your product subscriptions, select a capacity subscription.
3. On the subscription details page, preview the Capacity Definition record by selecting the record ID next to the **Capacity Definition** field.
   If the Capacity Definition record ID is unavailable, contact your account executive for usage calculation details. For more information about how subscription usage is calculated for different products, see Values for Subscription-Based Products [KB0727967].
4. Depending on the definition type, review the following details to view how usage is calculated.

Type	Description
Table query	View the **Table Name**, **Query**, **Aggregation Type**, and **Aggregation Column**. View how the count is calculated by examining the SQL query.
Scripted definition	View how usage is calculated by examining the contents of the **Script** field.

5. **Optional:** Select **Open Record** to view the full Capacity Definition record details.
6. **Optional:** Select **Execute** to run the query or script immediately and view the latest results.

   Note: Executing a script or table query in a Capacity Definition record does not count toward the execution total that is monitored by the system.

   The total time required to execute and the latest count are displayed. The count from prior executions is displayed in the Previous Executions related list.
7. If the capacity subscription is out of compliance, adjust the number of allocated resources or increase the capacity subscription.

Subscription Management reference

Reference topics provide information about subscription types, meters, and domain separation support.

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Types of subscriptions in Subscription Management

Subscriptions to ServiceNow applications come in different types. The type of subscription determines the allocation ofusers, access to applications, and custom application and table entitlements.

Each type of product subscription is measured according to a meter. For details on the different types of meters and what they measure see Values for Subscription-Based Products [KB0727967].

Subscription type	Associated meter types	Usage allocation method	Description
Capacity	• Devices • Subscription Units • Transactions	No manual steps are required. Usage is automatically calculated and shown in your instance.	Automatically tracks measured units, and counts of transactions, records created, or resources managed such as devices, software, or nodes.
Display Only	None	Allocation isn't measured	Displays information. This type of subscription doesn't support allocation.
Per-User	• Rights-based user: measure of Fulfiller Users and Business Stakeholder Users • Application user: measure of users with any level of access to a product; includes Creator Users	Manually allocated	Provides entitlements to users according to their assigned roles and associated access rights. You allocate per-user subscriptions manually by adding groups with measured roles or access rights to a product subscription. Subscription Management helps you with the allocation process by recommending groups based on their role assignments.
Unlimited	Unlimited: No measurement limit	Automatically allocated by your instance	Provides entitlements to users, with no limit to the number of users that can be allocated.
Unrestricted User	Unrestricted user: Instance-wide measure of all active users	Automatically allocated by your instance	Provides entitlements for an organization's number of active users regardless of their role assignments. An active user is any user whose record in the Users [sys_user] table has a value

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Subscription type	Associated meter types	Usage allocation method	Description
			in the **User ID** field and has the **Active** field set to true.

Subscription form

The Subscription form contains important information about your subscription.

You can view the subscription form by entering `license_details.list` in the filter navigator to open the Subscriptions [license_details] table. Select a subscription name to open the Subscription form. Some fields don't appear for ServiceNow Store apps.

Subscription form

Field	Value
Name	Name of the subscription.
Category	Source of the purchased subscription: ServiceNow platform or ServiceNow Store.
Type	Type of subscription: • Per-User • Unrestricted User • Capacity • Unlimited • Display To learn more about subscription types, see Types of subscriptions in Subscription Management.
Start date/End date	Start and end of the subscription period as agreed in your service contract. This information appears in the General section of the service contract for the subscription.
Capacity Definition	The ID of the Capacity Definition. Learn how the total is calculated by selecting the Capacity Definition record ID on the product subscription details page. See Monitor capacity subscription calculations in Subscription Management.
Display only	Value of **true** indicates that user allocation or monitoring is not currently supported for the subscription.
Product Code	The product SKU shown on your subscription order form.

Related links

The related links on the subscription form may vary depending on the subscription.

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Link	Description
Manage Your Tables	See custom tables mapped to the subscription.
View Subscription History	View subscription status, dates, and trend information.
View User Subscription History	Lists user allocation history for the subscription. The list shows a user's current subscription status and how they were allocated.

User sets and groups in Subscription Management

Subscription Management uses groups (previously user sets) to provide entitlement to sets of users.

User set and groups overview

Prior to Quebec, Subscription Management used user sets to group users together. Usage_admins grouped users by conditions, such as what city or department they are in. User sets could then be assigned to subscriptions to give every user in the user set a license to the subscription.

In Quebec and later releases, all user sets are converted to groups. A group is a set of users who share a common purpose. Similar to user sets, groups can be added to subscriptions. Adding a group to a subscription gives every user in the group entitlement.

User set conversion

On upgrade to Quebec or later releases, all current user sets convert to groups. The new groups contain the same users and properties as your user sets. The conversion is a one-time occurrence, and users are not automatically added or removed from the new group after the conversion.

Group management

Admins and user_admins create groups and add users in the **User Administration** application.

To learn more about creating and editing groups, see Creating groups.

Components installed with Subscription Management

Several components are installed with activation of the Subscription Management plugin (com.glide.subscription_management), including user roles and tables.

Roles installed

Role title [name]	Description	Contains roles
Usage administrator [usage_admin]	Administers Subscription Management. Allocates subscriptions, maps custom tables and custom applications to subscriptions.	sn_sub_man.admin

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Tables installed

Table	Description
Subscription Insights definition [sn_sub_man_st_subscription_insights]	[Remote table] Records for available subscriptions and over-allocated subscriptions
Subscription license detail definition [sn_sub_man_st_subscription_license_detail_metric]	[Remote table] Subscription allocation metrics and history

Subscription Management roles

Subscription Management is installed with these roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

Usage administrator [usage_admin]

Administers Subscription Management. Allocates subscriptions, maps custom tables and custom applications to subscriptions.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevate to a privileged role.

No

Special considerations

None

Domain separation and Subscription Management

Domain separation is supported for Subscription 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*

The support level is Basic but has some exceptions or special conditions.

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- Business logic: Ensure that data goes into the proper domain for the application's service provider (SP) use cases.
- The user interface, cache keys, reporting, rollups, and aggregations all use the domain at production run time.
- The owner of the instance must be able to set up the application to function across multiple tenants.

Sample use case: When an SP uses chat to respond to a tenant-customer's message, the client must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview of domain separation in Subscription Management

Subscription Management enables you to manage your subscriptions and monitor subscription usage on your instances. Domain separation is enabled for user-based subscriptions and for monitoring Now Assist usage.

Note: This feature is only available in domain-separated instances. This feature isn't visible in instances without domain separation.

How domain separation works for user-based subscriptions in Subscription Management

In domain-separated instances, Subscription Management provides information about the domain of each user that has been allocated a user-based subscription.

Users in the SP domain can view the domains that each of their tenant users is a part of from the **Subscribed users** tab of subscription details. The **Domain** column shows the domain hierarchy of all child and grandchild domains and enables you to filter subscribed users by domain.

Users in tenant domains can only view subscription allocations from the global domain and domains that their organization manages. Users in tenant domains can't see user subscription allocations from parent or sibling domains.

Note: User records created before domain separation is activated are in the global scope until manually assigned a domain. Subscription allocations to global users are visible in all domains.

The Allocation Summary section in the subscription details displays information based on the total number of subscription allocations available across all domains. Administrators can use this information to help avoid over-allocating user subscriptions in tenant domains.

If you make allocation changes that aren't reflected in the Allocation Summary or Allocation History, clear the cache.

Monitoring Now Assist usage by domain

In domain-separated instances with Now Assist, Subscription Management provides information about assist usage by domain.

Users in the SP domain can view assist usage by domain by navigating to **Admin** > **Subscription Management** > **Subscriptions** > **Account level entitlements** > **NowAssist usage** and reviewing the current instance details.

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Users in tenant domains can only view their own Now Assist usage. Users in tenant domains can't see the number of assists used in parent or sibling domains.

Related topics

Domain separation for service providers

Now Support administration

The Now Support portal is where you can access self-help, get technical support, and manage your ServiceNow instances.

Who uses the Now Support portal

If you are responsible for managing, monitoring, or maintaining your company's ServiceNow instance(s), then you will likely use the Now Support portal. ServiceNow Customer Administrators are the gatekeepers and manage their companies' Now Support users. Administrators can then add or remove other users, such as developers, architects, and partners. What you can do within the portal will vary based on your role.

Note: For information about the types of notifications different Now Support users may receive, see KB0547262: Company Key Contacts and Notification List Overview on Now Support.

View Now Support users

As a Now Support admin, you can view active and inactive users and their roles.

Before you begin

Role required: admin

Procedure

1. Navigate to **Now Support**
2. Select the drop-down profile menu.
3. Select **Manage users and accounts**.
4. Select **View all Users** or search for a specific user.

Create a user in Now Support

You can create users in Now Support and assign them access roles.

Before you begin

Role required: admin

Procedure

1. Navigate to **Now Support**
2. Select the drop-down profile menu.
3. Select **Manage users and accounts**.
4. Select **View all Users**.
5. Select **Add new user**.
6. Fill in the required fields.

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7. Select the appropriate Now Support access roles.
8. Select **Submit**.

Manage user access in Now Support

You can manage users in Now Support and change their access roles.

Before you begin
Role required: admin

Procedure

1. Navigate to **Now Support**
2. Select the drop-down profile menu.
3. Select **Manage users and accounts**.
4. Select **View all Users** or search for a specific user.
   You can also select **Locked users** or **Inactive users** to find the user you are looking for.
5. After you select the user you want to change access for, select **Edit Role(s)** from the **Actions** pull-down field.
6. Add or remove Now Support access roles.
7. Select **Confirm**.

Configure ServiceNow AI Platform core features

The ServiceNow AI Platform provides for a multitude of customization options to your applications. Customize your UI, handle user and data administration, and localize your instance for time zones, currencies, and more.

User administration	ServiceNow AI Platform tables and data	Forms, fields, and lists
		
Set up users, groups, and roles.	Manage data with external sources, and configure data tables.	Control the action and appearance of forms, fields, and lists.

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Search administration  Enable users to find the information through Zing or AI search engines and specialized search experiences.	**Notifications**  Manage system email, notifications, and responses to inbound messages.	**ServiceNow AI Platform translation and localization**  Match languages and currency everywhere on the globe.
Time configuration  Create calendars, schedule events, and display time info to users around the world.	**Currency administration**  Manage the way financial data is displayed.	**Events**  Get in-depth analysis for all displays and user-based events in your application.

User administration

Create account access types and related roles to work within your instance. User records give you control over individual single account types and the records or actions that they can access. Group records expand control further, to assign access to teams or departments, as well as to subgroups or by skill associations. Customize instances even more with Roles, and assign access to various apps or modules. Troubleshoot and test it all with Tools that provide auditing, impersonation, and more.

See User administration.

ServiceNow AI Platform tables and data

Manage and use your business information effectively on the ServiceNow AI Platform. Take advantage of Data Management to store, transfer, import, and archive data. Work with multiple records at once using Table Administration, and connect with third-party or external instances to handle data with Financial Services Remote Tables.

See ServiceNow AI Platform tables and data.

ServiceNow AI Platform forms, fields, and lists

Take control of every aspect of data collection and usage in your instance. Forms on the ServiceNow AI Platform are fully customizable, with options for personalization, templates, attachments, UI, and more. Create and modify Fields, used in forms and displayed in lists or tables. Define user access to all your data with Lists, including custom controls and functions.

See ServiceNow AI Platform forms, fields, and lists.

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Search administration

Help your users find information with ease using ServiceNow search administration products. AI Search and the Zing search engine provide intelligent search results and proper indexing. Focus your data requests with Table searches, and go wider with Global searches, all with configurable search systems across the ServiceNow AI Platform. Improve search assistance with search suggestions, Contextual Search based on intent, and search data analysis.

See Search administration.

Time configuration

Keep your business on-time with the ServiceNow AI Platform. Handle schedule and event info collection with Date/Time fields, and manage personnel, users, and data across Time Zones. Business and fiscal calendars and event system schedulers are all available and tailored to best help you and your users. Time displays, counts, and time-based data analysis all help you manage your work and track historical info.

See Time configuration.

Currency administration

Monitor currency values with ServiceNow currency administration systems. Configure Standard Currency fields for financial and non-financial records and applications, or use expanded Foreign Exchange (FX) Currency fields for added configuration options.

See Currency administration.

Service Level Management

Ensure your services to your customers are properly managed and documented. The full series of ServiceNow modules for Service Level Management lets you define service contracts and service level agreements (SLA) as needed. Repair, monitor, and validate SLA records for time and duration accuracy, get analyses and reports on service, and separate record domains for information display and control.

See Service Level Management.

ServiceNow AI Platform translation and localization

Communicate effectively with users and customers around the world. The Localization Framework provides info to users in a variety of languages and currencies across a multitude of apps—all within the same instance. Dynamic Translation helps accommodate users even more fully, by actively translating text in forms and other applications.

See ServiceNow AI Platform translation and localization.

ServiceNow AI Platform integrations

Bring ServiceNow and external applications together with integrations on the ServiceNow AI Platform. Make onboarding and service configuration easy by adding to your instance. Integrate other instances, third-party apps, and data sources, and make helpful features such as Single Sign-on available throughout your enterprise.

See ServiceNow AI Platform integrations.

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Notifications

Use Notifications to automate status updates by email, system, or user (through individual providers). Set up Email administration and your instance email client to work with notifications, and proper sending and receiving of email. System notifications enable real-time updates through push notifications, SMS, chat messages, and more.

See Notifications.

State Management

Monitor workflow in your instance with State Management. Define state models and transitions to determine your business's service processes, as well as UI actions possible based on state.

See State Management.

User administration

Manage the individuals who can access your instance by defining them as users in the system. Create user groups and assign users to them. Use roles to specify what different users and user groups can see and do.

Get started

Explore  Learn about User administration.	Create users, companies, and departments  Create records for users or enable self-registration. Optionally create companies and departments to further categorize users.	Create groups  Create and manage groups that you can grant roles to and assign users to for efficiency.
Manage roles  Manage roles that govern what users and groups with that role can do.	Monitor user activity  Monitor user activity and troubleshoot issues by impersonating users and managing sessions.	Monitor instance usage  Track application usage on your instance.

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Troubleshoot and get help

- ServiceNow Community forums
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring user administration

User administration controls who can access features and data on your instance by managing users, groups, and roles.

Overview of user administration

Creating users, groups, and roles provide a flexible and scalable way to manage access to features on the ServiceNow AI Platform. By creating user accounts, assigning users to groups, and defining roles and permissions, administrators can verify that users have the appropriate level of access to applications and data. This enables organizations to control access to sensitive data, support organizational policies, and improve overall security. Additionally, users, groups, and roles can be easily managed and modified over time as organizational needs change.

Workflow

Subscriptions, users, groups, and roles work together to help you define who can access features on your instance.

1. Subscription Management

   Understand your subscriptions. Subscription management enables you to manage your subscriptions proactively and monitor subscription usage on your instances.

   Subscriptions may include per-user subscriptions. For more information, see Managing per-user subscriptions in Subscription Management.

2. Creating users, companies, and departments

   Create an account record for the individuals who have access to your instance. Each user account has a unique login ID, password, and set of permissions (roles) that define what they can do and access within the platform.

3. Creating groups

   Define groups that have similar roles or permissions. Groups enable you to apply permissions (roles) to multiple users at the same time. When a user is a member of a group, that user has the same permissions that have been defined for the group.

   You can view group members by navigating to **All** > **User Administration** > **Groups**. Select a group name and view the members in the Group Members related list.

4. Managing roles

   Roles describe the types of activities that a user can perform on the instance. Each role has a set of permissions that can govern what the users and groups can do, such as read, write, create, or delete records. Roles can be assigned to users and groups. Users can have multiple roles.

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For a complete list of the roles included with the ServiceNow AI Platform, see Base system roles.

Role records are stored in the Roles [sys_user_role] table.

5. Monitoring instance usage

   Users with the admin or usage_admin role can view the **Application usage overview** and ServiceNow Store **usage overview** dashboards to track instance usage.

6. Monitoring user activity

   Users with the admin role can impersonate users, manage user sessions, and use non-interactive sessions.

User preferences

Users can configure many UI features. Some examples include the number of rows per page in a list or whether the response time displays at the bottom of a list or form. Administrators can modify or delete these preferences as needed. For more information, see User preferences.

User groups

A group is a set of users who share a common purpose. Groups may perform tasks such as approving change requests, resolving incidents, receiving email notifications, or performing work order tasks. Any business rules, assignment rules, system roles, or attributes that refer to the group apply to all group members automatically. Users with the user_admin role can create and edit groups.

When possible, simplify user administration by assigning roles to groups. Create groups that contain all the roles necessary for specific personas, and then assign users to those groups.

Note:

You can view group members by navigating to **All** > **User Administration** > **Groups**. Select a group name and view the members in the **Group Members** related list.

Group records are stored in the Groups [sys_user_group] table.

User roles

Roles control access to features and capabilities in applications and modules. The admin role provides access to all features and capabilities.

After access has been granted to a role, all the groups or users assigned to the role are granted the access. Roles can contain other roles, and any access granted to a role is granted to any role that contains it.

For a complete list of the roles included with the ServiceNow platform, see Base system roles.

Note:

When possible, simplify user administration by assigning roles to groups. Create groups that contain all the roles necessary for specific personas, and then assign users to those groups.

Role records are stored in the Roles [sys_user_role] table.

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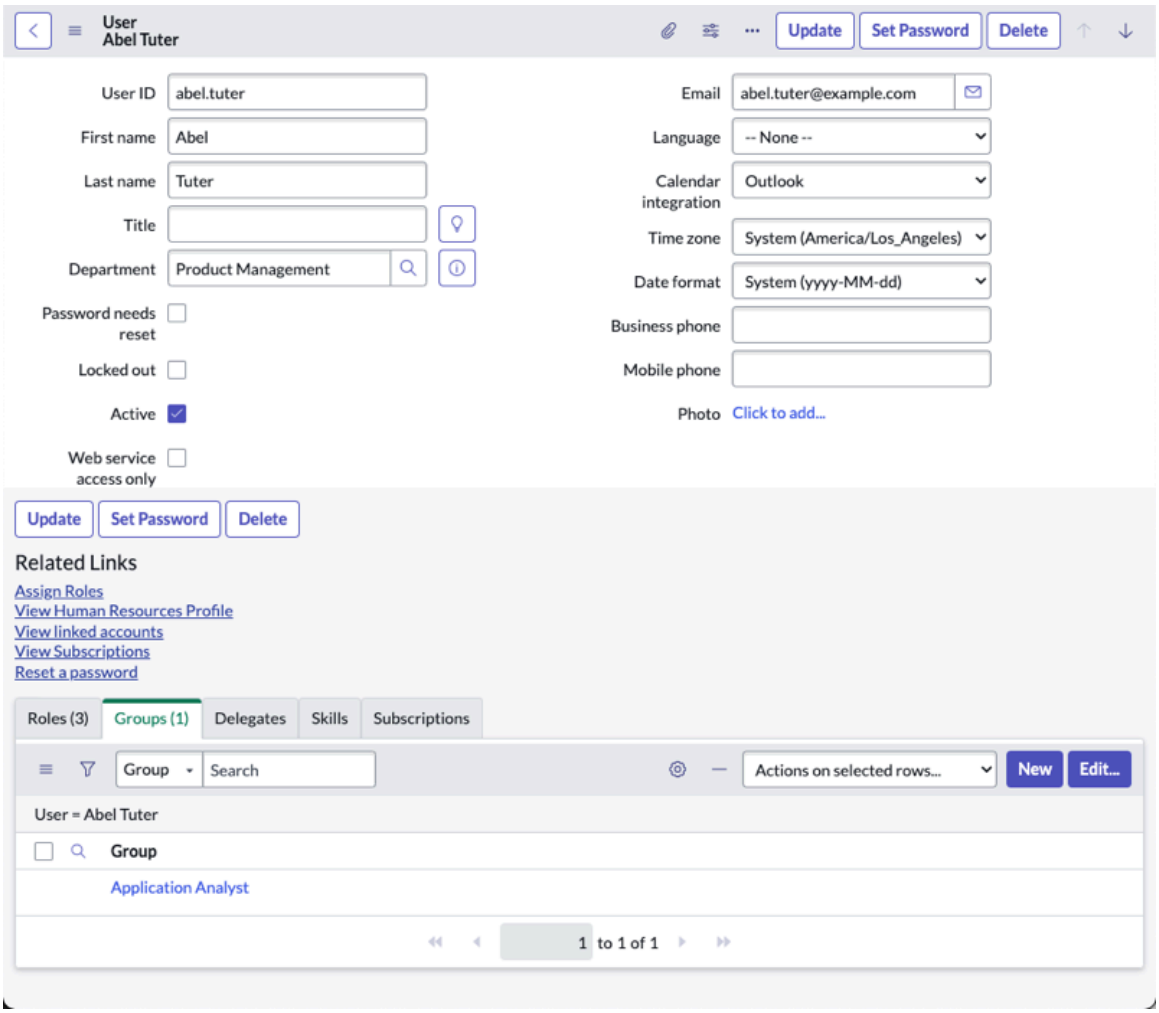
The User record

Learn about user records and their use within the ServiceNow AI Platform.

User account records

User records establish a relationship between an individual and your ServiceNow instance. User records consist of a user name, a password, and information relating to the individual, such as contact information, location, and job title.

User record



User records are stored in the Users [sys_user] table.

Note: ServiceNow occasionally adds service accounts to the sys_user table to facilitate some platform features and functionality. For more information, see KB1648003: (OOTB) Out of the box local user accounts in sys_user.

Related records

User records are associated with records on several other tables to control permissions, preferences, and other features.

Roles

Roles control access to features and capabilities in applications and modules. For more information on roles, see Managing roles.

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Note:

When possible, simplify user administration by assigning roles to groups. Create groups that contain all the roles necessary for specific personas, and then assign users to those groups.

Groups

A group is a set of users who share a common purpose. Users assigned to groups are automatically assigned to all roles associated with that group. For more details, see Creating groups and Managing roles.

Delegates

In addition to role and group assignments, users can be assigned as delegates, giving them permission to act with the same permissions as a delegator user. See Delegating roles for more information on delegation.

Skills

Use skill management to associate users with their areas of training and expertise. For more information on skill management, see Skill Management.

Subscriptions

Administrators use subscriptions to control which users have access to purchased subscriptions on their instances. Details on subscription management can be found at Subscription Management.

User preferences

User accounts are also connected with user preferences. Users can save personalized preferences to configure many UI features, as well as preferences regarding the notifications they receive. Details on administering user preferences are found at User preferences.

Date and time formatting

Note: From the Brazil release, Date format and Time format settings have been relocated from the user profile to the Language & Region section within the user's Preferences. The time zone setting continues to be available in the user profile from the Brazil release.

For releases before Brazil, you can set your preferred date and time formatting through the User record. If you don't specify a preference in these fields, the system applies default formatting.

Before the Brazil release, the Date format field appears in the User record by default and can be modified without specific permissions. However, the Time format field must be added to the User record by revealing additional form fields. For instructions on showing or hiding form fields, see Configuring the form layout. If you can't modify form fields, contact your organization's user administrator to update your time format preferences.

The Date and time format field in **User Menu** > **Preferences** > **Language & Region** extends the options you select in the Date format and Time format fields of your User record. For more information, see Configure Next Experience language and region preferences. Time zone settings automatically sync between the User record and your preferences.

System and guest users

Some automated processes use the system or guest user to apply and track changes to records. As a result, some records may show that they were last updated by system or guest.

For example, when a user logs in for the first time in a day, some fields on that user's record are updated by the system user. These fields can include **Last login** and **Last login time**. If a user has

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a failed login attempt or is locked out, some fields on that user's record are updated by the guest user, such as **Failed Login Attempts** or **Locked Out**.

If a record was last updated by the system or by guest users, you can identify the updated fields by enabling auditing for the table. View the audit history to see the changes. For more information, see Configuring auditing for a table and Knowing about History sets.

Creating users, companies, and departments

Create user records for the individuals who access your instance. Users can be assigned to groups with defined roles to determine what records and actions they can access.

Creating users

Users are typically added through Lightweight Directory Access Protocol (LDAP) directory integrations. Admins can also manually add users to the instance, enable self-registration for new users, and impersonate users to ensure that they have the proper access privileges.

For more information on LDAP integrations, see Lightweight Directory Access Protocol integration.

Create a user

You can add a user to your instance to enable them to log in and use designated application features.

Before you begin

Role required: user_admin

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Select **New**.
3. On the form, fill in the fields.

Field	Description
User ID	Create a unique identifier for this user's ServiceNow login user name. Typical examples of user IDs are `cwitherspoon` and `charlie.witherspoon`. You can't create a user whose User ID duplicates an existing user. If you do import duplicates from an update set, the more recently created name takes the duplicate User ID.
Given name	Enter the user's given (often their first) name.
Family name	Enter the user's family name (often their last name). **Note:** You can clear the **First Name** field, or the **Last Name** field in an existing user record, but you can't clear both at the same time.
Title	Enter a title or job description, or select one from the list.
Department	Select the user's department from the list.
Password	Assign a password to the user. To set up the user's password, fill in the fields on the form and **save** the record. Then, select **Set Password**. This password can be permanent or temporary.

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Field	Description
Password needs reset	Select this check box to require the user to change the password during the first login.
Locked out	Select this check box to lock the user out of the instance and terminate all their active sessions. The system helps prevent users with the admin role from locking themselves out.
Active	Select this check box to make this user active. Only the administrator sees an inactive user in: ○ Lists of users ○ The selection list on reference fields (magnifying glass icon) ○ The auto-complete list that appears when you type into a reference field
Web service access only	It designates a user as a non-interactive user. This field is available with Non-Interactive Sessions. **Note:** The Web service access only check box is automatically enabled when you select **Machine** in the Identity type field. The Web service access only check box is automatically disabled when you select **Human** or **AI**.
Internal Integration User	Select this check box to Mark service accounts as internal integration users.
Email	Enter the user's email address. To enter a non-standard email address that doesn't pass field validation, you must deactivate the validation script first: **a.** Navigate to **System Definition** > **Validation Scripts**. **b.** Select the **email** record. **c.** Clear the **Active** check box and save the change. **d.** Complete the user profile, including the email address, and update or submit the record. **e.** Reactivate the email validation script.
Identity type	Select the user identity type based on the user: ○ Human - Select this for a real person, such as an employee, customer, or admin. ○ Machine - Select this for a non-human system or device, such as a server, application, or service account that makes automated requests. ○ AI - Select this for an autonomous AI-driven system. AI users should be used when an AI agent or agentic workflow needs permissions greater than that of the invoking user. See Security for AI agents for more information on using AI type users.

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Field	Description
	Note: ○ The Web service access only check box is automatically enabled when you select **Machine** in the Identity type field. The Web service access only check box is automatically inactive when you select **Human** or **AI**. ○ Changing Identity type from **AI** to other types and vice versa is restricted.
Language	Select your preferred language from the list.
Calendar integration	Select **Outlook** to have this user receive meeting notifications via email directly to the calendar. Otherwise, select **None**.
Time zone	Select the user's time zone.
Date format	Select the user's preferred format for dates. The following date formats are supported: ○ 08/19/26 ○ 19/08/26 ○ 08-19-2026 ○ 08/19/2026 ○ 19-08-2026 ○ 19/08/2026 ○ 19.08.2026 ○ 2026/08/19 ○ 2026.08.19 ○ 2026-08-19 For more information, see GlideDateTime - Global.
Time format	Select the user's preferred format for time. The following time formats are supported: ○ 16:30:45 ○ 16.30.45 ○ 04:30:45 PM ○ 04.30.45 PM ○ 16:30 ○ 16.30 ○ 04:30 PM ○ 04.30 PM For more information, see GlideDateTime - Global.
Business phone	Enter the user's business phone number.

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Field	Description
Mobile phone	Enter the user's mobile phone number.
Photo	Attach a photo of the user, if appropriate.

The minimum fields required to create a user record are: **User ID** and either **First name** or **Last name**.

You can select the **Personalize Form** icon to remove fields.

4. **Optional:** Add **Roles**, **Groups**, **Delegates**, **Skills**, and **Subscriptions** to the user.
   For more information, see Managing roles, Creating groups, and Delegating roles.
5. Select **Submit**.
   The new user record appears in the list.

User self-registration

The User Registration Request [com.snc.user_registration] plugin provides the ability for unregistered users to request access to a ServiceNow instance. An administrator can activate the plugin.

A user can request an account by navigating to the instance. If the plugin is installed, a new section is added to the welcome screen to allow users to request a user account.

The user can complete and submit the self-registration form, and see a confirmation that it was submitted. The user receives an email when the account is registered.

Note:

- Starting with the Brazil release, User Registration Request plugin (`com.snc.user_registration`) is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. External User Self-Registration plugin (`com.snc.external_user_self_registration`) provides the latest experience for this functionality.
- If the email address entered in the self-registration form is already in the system, the request is not submitted.

Approve a self-registered user account

When a user submits a self-registration form, an admin can review and approve it.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Pending User Registrations** and open the request.
2. Use the **Create User** and **Reject** related links on the registration request form to approve or deny the request.
   - If **Create User** is selected, a new user is created using the email address as the **User ID**.
   - If **Reject** is selected, the request is marked **Rejected**.

   If the request was accepted, the user is sent an email notification with the login information. If it was denied, the user is sent an email with the rejection information.

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Enable automatic self-registered user account approval

Admins can enable users to self-register. Enable automatic approval of such accounts to streamline user registration.

Before you begin
Role required: admin

Procedure

1. Navigate to **System Properties** > **System**.
2. Select **Enable auto processing of user registration request**
3. Select **save**
   If enabled, registration requests do not require approval. Instead, the business rule *`Auto-Process User Registration`* creates the user record from the information provided.

What to do next
Request activation of the Explicit Roles (`com.glide.explicit_roles`) plugin. The Explicit Roles plugin creates two roles to differentiate between internal and external users.

Add a new company

You can add companies that represent vendors, manufacturers, or customers with whom you do business. These companies provide a way to categorize users, groups, and assets.

Before you begin
Role required: user_admin or admin

Procedure

1. Navigate to **All** > **User Administration** > **Companies**.
2. Click **New**.
3. Complete the form with the company details.

Company fields

Field	Description
Name	Name of the company.
Phone	Company phone number.
Fax phone	Company fax number.
Manufacturer	Whether the company is a manufacturer.
Vendor	Whether the company is a vendor.
Stock symbol	Three or four letter stock symbol for the company.
Stock price	Current price at which company stock is sold.
Street	Mailing street address of the company.
City	City in which the company is located.
State	State or province in which the company is located.
Zip/Postal code	Zip or postal code for the company.
Notes	Any information about the company that would be helpful for others to know.

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Field	Description
Fields that can be added by Personalize a form:	
Latitude	The latitude of the company, if applicable. This field is populated by a business rule called *get_lat_long*. Deactivate this business rule to prevent the system from overwriting any values populated in the field manually. Latitude is expressed as a floating point data type. Latitude from upgraded versions of ServiceNow expressed in any format other than floating point appears in a column called **Old Latitude**. The system attempts to convert all latitude values from previous versions to the floating point notation, where possible. **Note:** This field doesn't display by default. You can add it by personalizing the form.
Longitude	The longitude of the company, if applicable. This field is populated by a business rule called *get_lat_long*. Deactivate this business rule to prevent the system from overwriting any values populated in the field manually. Longitude is expressed as a floating point data type. Longitude from upgraded versions of ServiceNow expressed in any format other than floating point appears in a column called **Old Longitude**. The system attempts to convert all longitude values from previous versions to the floating point notation, where possible. **Note:** This field doesn't display by default. You can add it by personalizing the form.

Note: The IT Finance application adds a Finance view to the Company form. The Finance view adds a chart that shows expenses that were allocated to the company.

What to do next

Normalize company data to create consistency when referring to a company name, such as a vendor or manufacturer. For more information see, Normalization data services.

Normalization data services

The Normalization Data Services plugin helps maintain consistency for table fields that refer to a company name.

Tables related to configuration items and assets usually contain columns referring to a company name, such as a vendor or manufacturer. Often, these tables refer to the same company by several different names. This situation can happen for many reasons. For example, vendors sometimes use different company names depending on the device. This inconsistency creates problems, especially for reports that rely on these company names.

The Normalization Data Services plugin helps alleviate this problem.

When you enable and configure the Normalization Data Services plugin, the system downloads a list of standard company names that ServiceNow has compiled. It also downloads a list of common variants of that name. Anytime the plugin finds a company-name field with one of those variants, it substitutes the standard name in its place.

Note: The Normalization Data Services plugin refers to a standard name as a normalized name and to a variant name as a discovered name.

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While the Normalization Data Services plugin provides services similar to the field normalization feature, this plugin doesn't require you to manually set up the mappings from one name to another. If you like, you can add your own mappings to the set. However, you automatically start with extensive lists of common company names (normalized names) and their variants (discovered names).

The Normalization Data Services plugin stores data in two tables. The Normalized Company Names table contains the list of normalized company names. The Normalized Mappings table contains the mappings between each discovered name and its normalized name.

Important: If you edit a field whose value is a normalized name, you change the normalized name for ALL discovered names that map to it. These types of updates occur regardless of the table in which you edit the field.

The Normalization Data Services plugin adds a unique index or hash on the [core_company] table. You can store only one company record for a company name. The unique hash is the same for two companies with the same name. The uniqueness is required for many features to work correctly. For example, **Discovery**, which creates customer management database (CMDB) models and CIs. On a domain separated instance, the unique index is expanded to hash,sys_scope. This enables each domain to have its own version of a company with the same name.

Implementing normalization data services using guided setup

You can implement Normalization Data Services using a guided setup.

Normalization Data Services guided setup provides a sequence of tasks that help you configure the Normalization Data Services plugin on your instance. To open Normalization Data Services guided setup, navigate to **Normalization Data Services** > **Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Note: Because the Normalization Data Services feature requires an internet connection to download mapping information, this feature isn't supported for on-premise instances.

Activating the plugin

In the first task of the guided setup, you activate the Normalization Data Services plugin (com.glide.data_services_canonicalization.client). Activating the plugin installs all the necessary schema to support normalizing references to Company records in the configuration management database (CMDB) and Asset Management.

Downloading normalized data

In this task, you download the repository of all enterprise vendor names and the mappings to their normalized counterparts. After the download finishes, you can view the downloaded data in the Normalized Company Names [cds_client_name] table. You can verify mappings in the Normalized Mappings [cds_client_mapping] table. For example, you can verify that "Dell", "DELL", "Dell (UK)" are mapped to "Dell Inc.".

Updating reference qualifiers

This task modifies the reference qualifiers in reference fields linked to the Companies [core_company] table, helping to ensure that users can only select from a list of normalized company names. For example, when creating a Computer (cmdb_ci_computer) record, users can only select "Dell Inc." and not "Dell" or "Dell Incorporated".

Some reference qualifiers may not get updated. To normalize these reference qualifiers manually, see KB0784201.

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Activating normalization properties

In this task, select the properties you want to activate. See Normalization properties.

Enable the **Normalize existing canonical core_company records** property if the Companies [core_company] table has two or more records that were both set to Normalized ("canonical=true") before any mapping. This option ensures only one [core_company] record is set to Normalized. When you normalize the CMDB tables later in guided setup, the normalization job reassigns the proper normalized value.

For example, prior to mapping, both “DELL Inc” and “Dell Inc.” are set to Normalized ("canonical=true"). You define a new mapping for “DELL Inc” to “Dell Inc.”. If this property is true, guided setup denormalizes "DELL Inc", and updates the manufacturer field in the CMDB records to “Dell Inc." when the CMDB tables are normalized.

Normalizing data

To finish the guided setup, complete the remaining tasks by normalizing data in the following tables:

- Configuration Items (CMDB)
- Configuration Items (CMDB) Model
- Software Asset Management tables

Normalized company names table

The Normalization Data Services plugin stores the normalized company names in the Normalized Company Names table.

Normalized company names fields

Field	Description
Name	The normalized name for this company.
Table	The table in which this name is stored.
Description	[optional] A description with further information about this company or record.
Field	The field in which this name is stored.
Customer override	**True**, if the customer has an override in place for this name. Otherwise, **false**.

Normalized company names related lists

List	Description
Normalized mappings	A list of all the discovered names that map to this normalized name.

See KB0819618 for more information.

Normalized Mappings table

The Normalized Mappings table lists all the discovered names and the normalized name to which each maps.

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Normalized mappings fields

Field	Description
Discovered name	A variant of a normalized name in the database.
Normalized name	The normalized name to which the discovered name maps.
Table	The table in which this name is stored.
Field	The field in which this name is stored.

Normalized company names related lists

List	Description
Related mappings	A list of all the discovered names that map to the same normalized name as the selected record.

Actions

List	Description
Promote discovered name	Replaces the normalized name with the discovered name for the selected record and for all the records in its related mappings list.

Normalization properties

On the normalization properties form, you can see and change the configurable properties for the Normalization Data Services plugin.

Normalization Properties

Field	Description
Reference qualifiers on all tables that reference the company will be updated to use the Normalized field.	If **Yes**, any reference field for the company – for any table across the platform – uses the Normalized name. This service only works if you have run the Update Reference Qualifiers task in the Guided Setup.
Enable a business rule that automatically normalizes manufacturer names for configuration items.	If **Yes**, the system normalizes company names when you add or update configuration items by a mechanism other than Discovery (such as by manual import sets).
Enable Discovery to use the normalization service for the manufacturer name.	To have Discovery use the normalized company name for the manufacturer name, select **Yes**.
This property is to enable or disable the Normalization process.	To enable the Normalization Data Service process, select **Yes**. To disable, select **No**. For details, see Normalization data services.
Normalize existing canonical core_company records.	Select **Yes** to update an existing normalized (canonical=true) Companies record to not-normalized (canonical=false) if a mapping is present. For details, see KB0957144 .

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Changing normalized company names

You can change a normalized company name several different ways. In all cases, that change affects all normalized fields referring to that company.

You have several options for changing a normalized company name:

- Edit the Normalized Name field in the Normalized Mappings table. This method is preferred.
- Edit the Normalized Company name table.
- Edit the Company Name field on any table that refers to the Company [core_company] table.

Warning: If you edit a field whose value is a normalized name, you change the normalized name for ALL discovered names that map to it.

Change a normalized company name

You can change normalized company names by editing records in the Normalized Company Name table.

Before you begin

Role required: admin

About this task

You can add and edit records in the Normalized Company Names table.

Procedure

1. Navigate to **All** > **User Administration** > **Normalization Data Services** > **Normalized Mappings**.
2. Find the record with the name that you want to replace and edit the Normalized name field. The system changes the Normalized Company name for every discovered name that maps to that normalized name.

Enabling duplicate company names in extension tables

You can create records with duplicate company names in extension tables, such as Customer Account [customer_account] table, without causing normalization conflicts in Normalization Data Services.

If your ServiceNow instance has company records in the Company [core_company] table from IT Service Management (ITSM) or IT Operations Management (ITOM), and you are adopting Customer Service Management (CSM), you may encounter errors when creating Customer Account records for the same companies.

Normalization Data Services manages company name normalization across the Company [core_company] table and its extension tables, such as Customer Account [customer_account] table. By default, Normalization Data Services enforces unique company name across all company-related tables. This causes conflicts when a vendor in the Company table and a customer account share the same name.

The *glide.cmdb.canonical.use_base_core_company_only* property introduces support for creating duplicate company names in extension tables. When you enable this property, Normalization Data Services restricts unique company name validation to the base, Company [core_company] table only. Each duplicate record in an extension table still links to the correct normalized record in the base table.

Enable this property if you are upgrading from Zurich or an earlier release. You must use Customer Service Management with one or more of the following applications that extend the Company [core_company] table:

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- ITSM Software Asset Management
- Hardware Asset Management

Configure Normalization Data Services to create duplicate company name in extension table

Configure the Normalization Data Services feature to enable records with duplicate company names across core company's extension tables, such as Customer Account [customer_account] table.

Before you begin

Role required: admin

About this task

Note: This procedure applies only if you are upgrading from Zurich or an earlier release. If you are on the Australia release or later, this feature is enabled by default and no action is required.

Procedure

1. Navigate to **All** > **System Definitions** > **Script includes**.
2. Search for and open the **ClearNonCoreCompanyExtensionsFix** script.
3. Select **Run Script**.
   The script clears the hash values and sets the Normalized flag to false for all duplicate company name records in the Company [core_company] extension tables.
4. Verify that the script ran successfully.

   a. Navigate to **All** > **System Log** > **All**.

   b. Search for the following log entries in the Log [syslog_list.do] table.
      - [ClearNonCoreCompanyExtensionsFix] Cleared hash
      - [ClearNonCoreCompanyExtensionsFix] Set canonical=false

   The log entries confirm that the hash values are cleared and the normalized flag is set to false.
5. Add the *glide.cmdb.canonical.use_base_core_company_only* system property and set its value to **True**.
   For more information, see Add a system property.
6. Normalize data in the CMDB table.
   a. Navigate to **All** > **Normalization Data Services** > **Guided Setup**.
   b. In the Normalize Configuration Items (CMDB) Model step, select **Configure**.
   c. Select **Start Update**.
   d. Select **Close** after the update completes.
7. Verify if you can create records with duplicate company names in extension tables.

   a. Navigate to **All**, and then enter `customer_account.list` in the filter to go to the Customer Account table.

   b. Select **New**.

   c. On the form, fill in the fields.

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For a description of the field values, see Account form.

d. Select **Submit**.

8. **Optional:** If you're using Hardware Asset Management (HAM), run the following one-time script.

a. Navigate to **All** > **System Definitions** > **Script includes**.

b. Select **New**.

c. Enter a **Name** for the script include.

d. Enter the script include code in the **Script** field.

```
var worker = new CanonicalUpdaterWorker();
          var tables = {
          'sn_hamp_hw_manufacturer': ['company'],
          'cmdb_hardware_product_model':
 ['normalized_company'],
          'cmdb_consumable_product_model':
 ['normalized_company'],
    };
    for (var table in tables) {
         if (tables.hasOwnProperty(table)) {
         var fields = tables[table];
         for (var i = 0; i < fields.length; i++) {
             worker.addNormalization(table, fields[i]);
         }
       }
    }
    worker.setProgressName(gs.getMessage("Normalization Data
 Service"));
    worker.setBackground(true);
    worker.start();
```

e. Select **Submit**.

f. Select **Run Script**.

Add a department

Departments provide another way to categorize users, groups, and assets. You can add departments and assign them to users.

Before you begin

Role required: user_admin or admin

About this task

An administrator may need to configure the form to show all the fields listed in the steps. For more information see Personalize a form.

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Procedure

1. Navigate to **All** > **User Administration** > **Departments** > **Create a new record**.
2. Enter or modify the department name, ID, and description.
3. Select the company that the department is associated with.
4. **Optional:** Add a department head, primary contact, or both from your list of users.
5. Select **Submit**.

Creating groups

Admins can add users to one or more groups.

Create a user group

Create groups and assign roles to them. Users assigned to the group inherit the roles.

Before you begin

Role required: user_admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. On the form, fill in the fields.

   Some fields appear after personalizing the form. Personalize a form.

Field	Description
Name	Name of the group.
Manager	Group manager or lead.
Type	Category for this group. For example, a group designated as type **catalog** is a service catalog group and can also be accessed under the **Service Catalog** > **Catalog Policy** > **Fulfillment Groups** module. See Configure assignment group types for more information. You may need to Personalize a form to add the **Type** field. Activating the Work Management plugin adds the **Type** field automatically. **Note:** ITIL is added for groups with an empty group type. Also, the default reference qualifier for tasks enables these groups to assign tasks and other task types to the group.
Group email	Group email distribution list or the email address of the point of contact, such as the group manager.
Parent	Other group of which this group is a member. If a group has a parent, the child group inherits the roles of the parent group. The members of the child group aren't members of the parent group. For example, if an incident is assigned to the parent group and you select the **Assigned to** lookup icon, only the members in the parent group are available. The members of the child group aren't available.

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Field	Description
Active	Check box that indicates whether the group is active or inactive. Inactive groups still appear in any reference field that already references the group, but aren't visible by non-admin users in: ○ lists of groups ○ the reference lookup list for reference fields ○ the auto-complete list of groups displayed when you type into a reference field
Exclude manager	Check box that controls whether the group manager receives email notifications.
Include members	Check box that controls whether the group members receive individual emails when someone sends an email to the **Group Email** address. The only exception to this functionality is for approval notifications, whereby all members of a group receive an approval notification, regardless of the **Include members** selection. See Receive notifications for more information.
Description	Helpful information about the group.

4. **Optional:** Remove or hide a group.

   a. **Note:** Only users in the hidden group are able to see the hidden group when selecting a group in a reference field.

   Create a true/false field labeled `Hidden` on the Group form.
   For more information on creating fields, see Add and customize a field in a table
   The system creates a field called **u_hidden** on the **Users [sys_user_group]** table and enables use of the **Hidden** check box to designate a hidden group.

   b. Create a new before query business rule on the [sys_user_group] (Group) table with the following script:

```
if (!gs.hasRole("admin") && !gs.hasRole("groups_admin") &&
 gs.getSession().isInteractive()) {
  var qc = current.addQuery("u_hidden", "!=",
 "true"); //cannot see hidden groups...
  qc.addOrCondition("sys_id",
 "javascript:getMyGroups()"); //...unless in the hidden group
}
```

   Note: For more information, see Before Query business rules.

Result
The user group is created based on the configuration that you've provided.

Note:

When `glide.ui.schedule_job_for_group_parent_change` is set to true, removing a parent group results in the roles of the parent group being added to the child group asynchronously. If `glide.ui.schedule_job_for_group_parent_change` is set to false, the roles of the parent group are added to the child group synchronously when the parent group is removed.

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Add a user to a group

Add a user to a group so that the user inherits all the roles assigned to the group.

Before you begin
Role required: user_admin

About this task
If you're a non-admin user, you can't add a user to a group that contains the admin role. Likewise, if you don't have a security_admin role, you can't add a user to a group that contains the security_admin role.

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select a group **Name**.
3. In the **Group Members** related list, select **Edit**.
4. Select one or more names in the **Collection** list.
5. Select **Add** and **Save**.
6. **Optional:** Remove a user from a group when they change roles.
   a. Navigate to **All** > **User Administration** > **Groups**.
   b. Select a group **Name**.
   c. In the **Group Members** related list, select the check box next to each group member name you want to remove.
   d. From the **Actions on selected rows** menu, select **Delete**.

      Note: Before selecting **Delete**, first make sure you have properly selected the rows containing the users you want to remove from the group.

Configure assignment group types

Use the **Type** field to define categories of groups. Once defined, you can use these categories to filter assignment groups based on the group type using a reference qualifier.

For example, when selecting an assignment group from the Incident form, **Type** can be used to filter groups based on whether they're typically involved in the Incident management process. Groups such as Network or Help Desk are displayed as they're typically involved. Groups such as HR or New York are omitted.

The following items are provided in the base system.

- The types **catalog**, **itil**, and **survey**.
- The reference qualifier on [task.assignment_group] filters on **[Type] [equals] [itil]**.
- A reference qualifier named *`GetGroupFilter`* is available to filter for group types using Create a dynamic filter option.

Note: Dictionary overrides enable administrators to filter a group type on an extended table using a simple reference qualifier override.

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Add a group type

You can add additional group types to filter assignment groups for tasks.

Before you begin
Role required: admin

About this task
You may need to configure the form to display the **Type** field. For more information see: Personalize a form

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select a group record.
3. Select the lock icon beside **Type**.
4. Select the lookup icon beside the selection field.
   The Group Types dialog opens.
5. Complete the following steps.

   a. Select **New**.

   b. Enter the group type name and description.

      Example
      For example, to define a type for a group as **incident** and **problem**, enter: **incident,problem**.

      Example
      Select **Submit**.

   The Group form reopens with the new type listed.
6. **Optional:** Add additional group types if needed.
7. Select **Update**.

Assign a group type

You can assign group types to filter assignment groups for tasks.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups** and select the desired group.
2. Select the lock icon beside **Type**.
3. Select the lookup icon beside the selection field and select one or more group types.

   Note: Because the default behavior of `task.assignment_group` is to filter out groups with group types defined, adding a type to a group filters it out of the **Assignment Group** field on tasks. To change the behavior, set up the reference qualifier.

4. Select **Update**.

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Managing roles

Administrators can create and configure roles that grant specific permissions, which govern what users and groups with that role can do.

Base system roles

Administrators can assign one or more base system user roles to grant access to base system platform features and applications.

To learn more about managing per-user subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

Important: Avoid granting an admin role when more specialized roles are available.

Administrator [admin]

The administrator role. This role has access to all system features, functions, and data because administrators can override access control list (ACL) rules and pass all role checks. Avoid assigning this role to your users when more targeted roles are available.

Contains Roles

List of roles contained within the role.

- ais_admin
- announcement_admin
- catalog
- catalog_admin
- catalog_builder_editor
- catalog_lookup_admin
- catalog_template_editor
- chat_admin
- evam_admin
- image_admin
- import_admin
- import_scheduler
- import_set_loader
- import_transformer
- live_feed_admin
- ml_admin
- ml_labeler
- nlu_admin
- nlu_editor
- nlu_user
- pa_data_collector
- pa_viewer
- personalize_dictionary

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- platform_ml_create
- platform_ml_read
- platform_ml_write
- search_application_admin
- search_relevancy_model_admin
- sn_ace.ace_user
- sn_employee.admin
- sn_hr_sp.admin
- sn_hr_sp.esc_admin
- sn_nlu_workbench.nlu_feedback_admin
- sn_templated_snip.template_snippet_admin
- sn_templated_snip.template_snippet_reader
- sn_templated_snip.template_snippet_writer
- sp_admin
- taxonomy_admin
- user_criteria_admin

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

Grant this privilege carefully. If you have sensitive information, such as HR records, that you must protect, create a custom admin role for that area. Train any users authorized to see those records to act as the administrator. Also note the Special Administrative Roles.

Note: Users with roles related to the Key Management Framework can only be modified by admins with the kmf_admin role. For details on KMF roles, see Roles installed with Key Management Framework.

Agent administrator [agent_admin]

Agent administrators can download and administer the built-in system agent. They can manage MID Server-related scripts.

Contains Roles

List of roles contained within the role.

- agent_security_admin
- view_changer

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Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

AI search administrator [ais_admin]

AI search administrators can query, create, update, and delete indexing and search settings and log messages through the AI Search application.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Application client company installer [app_client_company_installer]

Users assigned the app_client_company_installer role can install applications containing the same company as the currently logged in instance. Assigning this role enables first-time installation of applications for the company associated with the current instance. Users with this role can't install an application for another company.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

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Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Application client user [app_client_user]

Application client users can install applications containing the same company as the currently logged in instance.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Approval administrator [approval_admin]

Approval administrators can view or modify approval requests not directly assigned to them. Use the approver_user role to enable approvers to view or modify only requests directly assigned to them.

Fulfillers may approve within the product to which they are subscribed (ITSM Fulfiller approving within ITSM). This approval may be in the platform or via email. No additional entitlement is required.

Fulfillers may not approve beyond the product to which they are subscribed (ITSM Fulfiller approving within Procurement, GRC, etc.). This approval would need an additional approval entitlement for the user.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

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Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Approver users [approver_user]

Approver users can modify requests for approval routed to them. They also have all the capabilities of requesters.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

There's a fee associated with this role. Don't assign it to users without confirming your organization has the appropriate entitlement.

Asset user [asset]

Asset users can manage hardware and software assets.

Contains Roles

List of roles contained within the role.

- inventory_user
- cmdb_query_builder
- canvas_user
- financial_mgmt_user
- cmdb_read
- contract_manager
- category_manager

Groups

List of groups this role is assigned to by default.

None

Elevated

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Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Assignment rule administrator [assignment_rule_admin]

Assignment rule administrators can manage assignment rules.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Business process administrator [business_process_admin]

Business process admins can create, read, update, and delete all records and their relationships in the business process.

In the context of Governance, Risk, and Compliance (GRC), users with the sn_grc.admin role who manage GRC applications and their setup automatically gain access to this role. This access enables the GRC administrators to administer a business process and its records similar to other GRC tables.

Contains Roles

List of roles contained within the role: business_process_manager.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

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This role is assigned to users who are administrators and have thorough information and training on business processes. None.

Business process manager [business_process_manager]

Business process managers can create, read, and update any business process and manage the relationship of business processes with other records. This role is assigned to business process managers who are usually specialists and manage multiple business processes in the organization. Assign this role to users who generally work with other employees and are experts around business processes.

In the context of GRC, users with the sn_grc.manager role automatically inherit this role that enables them to manage the business processes for the entire organization.

Contains Roles

List of roles contained within the role - business_process_user.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Business process user [business_process_user]

Business process users can update the business processes that a user owns and can also read any business process. This role must be assigned to the respective process owners. This role can also be provided to users who are required to view the business processes in the organization and understand them better.

In the context of GRC, users with the sn_risk.user role are automatically assigned this role. This role enables users to manage the business processes that they own as well as read all business processes.

Contains Roles

List of roles contained within the role- cmdb_read.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

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Catalog administrator [catalog_admin]

Catalog administrators can manage the Service Catalog application, including catalog categories and items.

Contains Roles

List of roles contained within the role.

- user_criteria_admin
- catalog_builder_editor
- catalog_template_editor
- catalog
- catalog_lookup_admin

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Catalog editor [catalog_editor]

Catalog editors can create, modify, and publish items within categories that they're assigned to.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

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Catalog item designer [catalog_item_designer]

Catalog item designers can view the status of their category requests. This role is granted automatically to users when they make a request for an item designer category.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Catalog manager [catalog_manager]

Catalog managers can view and assign catalog editors to their categories. They can also create, modify, and publish items within their categories.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Catalog user [catalog]

Catalog users have read and some write access to all Service Catalog Requests, Tasks, and Items.

Contains Roles

List of roles contained within the role.

None

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Groups

List of groups this role is assigned to by default.

- Catalog Request Approvers > $1000
- Catalog Request Approvers for Sales
- Field Services

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Category manager [category_manager]

Category managers can create, edit, and delete model categories.

Contains Roles

List of roles contained within the role - model_manager.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

CMDB administrator [sn_cmdb_admin]

The configuration management data base (CMDB) administrator is a key role required for interacting with the CMDB Workspace and the Service Graph Workspace. CMDB administrators can access all CMDB data, tools, and UIs within the CMDB Workspace and Service Graph Workspace. Users with this role can set policies that an editor can't, such as class manager and app service requirements.

As you drill down in the CMDB Workspace or the Service Graph Workspace, there are some dashboards and list views that require specific roles in addition to the CMDB Admin, CMDB Editor, or CMDB User roles.

Contains Roles

List of roles contained within the role.

- canvas_admin
- cmdb_ms_admin

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- data_manager_admin
- sn_cmdb_editor

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

CMDB de-duplication administrator [cmdb_dedup_admin]

CMDB de-duplication admins can review and remediate CMDB de-duplication tasks.

Contains Roles

List of roles contained within the role - cmdb_read.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

CMDB editor [sn_cmdb_editor]

A key role required for interacting with CMDB Workspace and the Service Graph Workspace. CMDB editors can create, edit, and delete CMDB records but can't change policies such as data manager, class manager within CMDB Workspace or Service Graph Workspace.

As you drill down in the CMDB Workspace or Service Graph Workspace, there are some dashboards and list views that require specific roles in addition to the key CMDB Admin, CMDB Editor, or CMDB User roles.

Contains Roles

List of roles contained within the role.

- cmdb_ms_editor
- sn_cmdb_user

Groups

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List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

CMDB multi-source administrator [cmdb_ms_admin]

The CMDB multi-source administrator can create and run a query and can modify CMDB 360 properties. Contains the cmdb_ms_write role.

Contains Roles

List of roles contained within the role - cmdb_ms_editor.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

CMDB multi-source editor [cmdb_ms_editor]

CMDB multi-source editors can create and query, read, and write CMDB records, but can't perform recomputing actions.

Contains Roles

List of roles contained within the role - cmdb_ms_user.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

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CMDB multi-source user [cmdb_ms_user]

CMDB multi-source users have read and execute access to the multi-source queries.

Contains Roles

List of roles contained within the role - cmdb_read.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

CMDB reader [cmdb_read]

CMDB reader users can read data from the CMDB hierarchy.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

CMDB user [sn_cmdb_user]

A key role required for interacting with CMDB Workspace and the Service Graph Workspace. CMDB users have read-only access to CMDB data and basic UI within CMDB Workspace and Service Graph Workspace.

As you drill down in the CMDB Workspace or in Service Graph Workspace, there are some dashboards and list views that require specific roles in addition to the key CMDB Admin, CMDB Editor, or CMDB User roles.

Contains Roles

List of roles contained within the role.

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- app_service_user
- canvas_user
- cmdb_ms_user
- cmdb_query_builder
- data_manager_user

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Contract manager [contract_manager]

Contract managers can create, edit, and delete contracts through the Contract Management application.

Contains Roles

List of roles contained within the role.

- canvas_user
- financial_mgmt_user

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

CreateNow unlimited [unlimited_createnow]

Role for CreateNow unlimited licensed users.

Contains Roles

List of roles contained within the role.

None

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Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Data classification administrator [data_classification_admin]

Data classification administrators manage all aspects of the Data Classification application, data classification code setup, and assignment.

Contains Roles

List of roles contained within the role - data_classification_auditor.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Data classification auditor [data_classification_auditor]

Data classification auditors audit Data Classification code assignments.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

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None

Enterprise CMDB administrator [ecmdb_admin]

Enterprise CMDB administrators can perform administrative tasks and access tables and records in Enterprise CMDB.

Contains Roles

List of roles contained within the role - cmdb_read.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Filter administrator [filter_admin]

Filter administrators can create, edit, and delete filter [sys_filter] records.

Contains Roles

List of roles contained within the role.

- filter_global
- filter_group

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Filter group user [filter_group]

Filter group users can create filters that belong to groups of which the user is a member.

Contains Roles

List of roles contained within the role.

None

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Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Gauge maker [gauge_maker]

Gauge makers can create gauges from reports. Starting with Helsinki, reports are no longer made into gauges.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Global filter user [filter_global]

Global filter users can create global filter [sys_filter] records.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

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Special considerations

None

Global template editor [template_editor_global]

Users with the template_editor_global role can create templates for global use.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Group template editor [template_editor_group]

Users with the template_editor_group role can create templates for groups. (Users must also be assigned the template_read_global role)

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Guided tour administrator [guided_tour_admin]

Guided tour administrators can create, modify, and delete guided tour [sys_embedded_tour_guide] records.

Contains Roles

List of roles contained within the role - sn_tourbuilder.tour_admin.

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Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Image administrator [image_admin]

Image administrators can create, modify, and delete image [db_image] records.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Impersonator [impersonator]

Impersonators can impersonate users.

⚠ **Warning:** This role doesn't enable the impersonation of admin users.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

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No

Special considerations

For details on impersonation, see Base system roles.

Import administrator [import_admin]

Import administrators can manage all aspects of import set [sys_import_set] records and imports.

Contains Roles

List of roles contained within the role.

- import_set_loader
- import_transformer
- import_scheduler

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Import scheduler [import_scheduler]

Import schedulers can schedule imports.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

⚠ **Warning:** Grant this role carefully. The import_scheduler can execute scripts with administrator level privileges.

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Import set loader [import_set_loader]

Import set loader users can load import set [sys_import_set] records.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Import transformer [import_transformer]

Import transformer users can manage import set transform map [sys_transform_map] records and run transforms.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Inventory administrator [inventory_admin]

Inventory administrators administer stockrooms, stock models, stock rules.

Contains Roles

List of roles contained within the role.

- inventory_user
- canvas_user

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Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Inventory user [inventory_user]

Inventory users have access to stock information.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

ITIL

Information Technology Infrastructure Library (ITIL) users can open, update, close incidents, problems, changes, and read some rules, definitions, and CIs related to CMDB features. This role is the base system technician role. Users with the ITIL role can have tasks assigned to them.

Contains Roles

List of roles contained within the role.

- agent_workspace_user
- app_service_user
- cmdb_query_builder
- cmdb_read
- dependency_views
- email_composer
- snc_platform_rest_api_access

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- sn_change_write
- sn_comm_management.comm_plan_viewer
- sn_gd_guidance.guidance_user
- sn_incident_write
- sn_nb_action.next_best_action_user
- sn_problem_write
- sn_request_write
- sn_sow.sow_list
- sn_sow.sow_user
- sn_sttrm_condition_read
- survey_reader
- template_editor
- tracked_file_reader
- view_changer
- viz_creator

Groups

List of groups this role is assigned to by default.

- Field Services
- Catalog Request Approvers > $1000
- Catalog Request Approvers for Sales

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

ITIL administrator [itil_admin]

ITIL administrators can delete incidents, problems, changes, and other related records. This role is intended for team leads.

Contains Roles

List of roles contained within the role.

- assessment_admin
- sn_bm_client.benchmark_data_viewer
- cmdb_read

Groups

List of groups this role is assigned to by default.

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None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

Avoid granting admin roles when more specialized roles are available.

Knowledge [knowledge]

Knowledge users can write, edit, and review knowledge management articles.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Knowledge administrator [knowledge_admin]

Knowledge administrators can manage knowledge bases.

Contains Roles

List of roles contained within the role - knowledge.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

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List updater [list_updater]

List updater users can select the **Update Entire List** and **Update Selected** menu options on a list.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Maintenance

This role is reserved for ServiceNow use.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

This role can't be assigned or impersonated, and is reserved for ServiceNow use.

MID server [mid_server]

MID server users can access to the tables that MID servers ordinarily use. This role should be granted to your MID servers.

Contains Roles

List of roles contained within the role - soap.

Groups

List of groups this role is assigned to by default.

None

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Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

This role should be assigned to user accounts created for MID servers to interact with your instance. For details, see Create the MID Server user and grant the role.

Model manager [model_manager]

Model managers can create, modify, and delete base model [cmdb_model] records.

Contains Roles

List of roles contained within the role - catalog_editor.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Personalize [personalize]

Users with the personalize role can personalize forms, lists, rules, controls, and scripts.

Contains Roles

List of roles contained within the role.

- personalize_control
- personalize_rules
- personalize_dictionary
- personalize_choices
- personalize_styles
- personalize_responses
- personalize_list
- personalize_form

Groups

List of groups this role is assigned to by default.

None

Elevated

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Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Personalize choices [personalize_choices]

Users assigned to the personalize_choices role can personalize the choices for a list field.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Personalize control [personalize_control]

Personalize control users can personalize controls on lists, such as filters, links, and buttons.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Personalize dictionary [personalize_dictionary]

Users with the personalize_dictionary role can personalize dictionary entries and labels.

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Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Personalize form [personalize_form]

Users with the personalize_form role can personalize forms.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Personalize list [personalize_list]

Users with the personalize_list role can personalize lists.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

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Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Personalize responses [personalize_responses]

Users with the personalize_form role can personalize predefined responses for suggestion fields, such as the additional comments field.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Personalize rules [personalize_rules]

Personalize rules users can personalize business rules and scripts. This role contains additional roles for granting selective, administrative access to rules and scripts.

Contains Roles

List of roles contained within the role.

- ui_action_admin
- business_rule_admin
- client_script_admin
- ui_policy_admin

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

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Special considerations

Avoid granting this role to users who don't need access to all the roles contained in this role.

Personalize styles [personalize_styles]

Users with the personalize_styles role can personalize field styles.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Personalize UI [personalize_ui]

Users with the personalize_ui role can personalize forms and lists.

Contains Roles

List of roles contained within the role.

- personalize_form
- personalize_list

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Platform Rest API access [snc_platform_rest_api_access]

Allows access to Platform Rest APIs. This role is contained with in the ITIL [itil] role.

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- Table API
- Import Set API
- Aggregate API
- Attachment API

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Public [public]

No login is required to access features or functions with the public role.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Release administrator [release_admin]

Release administrators can edit the release history for a release.

Contains Roles

List of roles contained within the role.

None

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Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Report administrator [report_admin]

Report administrators can manage, share, publish, and schedule all reports. Users assigned this role can access the **Reports** > **Administration** module and manage all report-related objects. The report_admin role inherits all other report roles.

Contains Roles

List of roles contained within the role.

- gauge_maker
- report_alias_admin
- report_global
- report_group
- report_publisher
- report_scheduler
- viz_admin

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Report alias administrator [report_alias_admin]

Report alias administrators can maintain field and value aliases.

Contains Roles

List of roles contained within the role.

None

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Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Report global [report_global]

Report global users can manage reports that are shared with everyone (listed in Global).

Contains Roles

List of roles contained within the role - report_user.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Report group [report_group]

Report group users can manage and share reports that are shared with them (listed in Group).

Contains Roles

List of roles contained within the role - report_user.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

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Report publisher [report_publisher]

Report publisher users can publish reports any that they can manage. Publishing a report creates a public link to that report. Users with this role must also have another role that grants permission to create, edit, and share reports.

Contains Roles

List of roles contained within the role - report_user.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Report scheduler [report_scheduler]

Report scheduler users can schedule emailing of all reports that they can see, including reports they can't manage. Users with this role must also have another role that grants permission to create, edit, and share reports.

Contains Roles

List of roles contained within the role - report_user.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Report user [report_user]

Report users can create and view reports that have been shared with them. Users with this role can't share, edit, or delete reports that have been shared with them.

Contains Roles

List of roles contained within the role - viz_creator.

Groups

List of groups this role is assigned to by default.

None

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Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Script fix administrator [script_fix_admin]

Script fix administrators can manage fix scripts.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Search application administrator [search_application_admin]

Search application administrators can insert, update, and delete search user experience-related configuration tables:

- sys_search_context_config
- sys_search_source
- m2m_search_context_config_search_source
- sys_search_facet
- sys_search_filter

Search application admin is granted the ais_admin role to enable AI search configuration.

Contains Roles

List of roles contained within the role.

- ais_admin
- personalize_dictionary

Groups

List of groups this role is assigned to by default.

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None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

SOAP [soap]

users with the soap role can query, create, update, and delete records on all tables, as well as execute scripts.

Contains Roles

List of roles contained within the role.

- soap_create
- soap_delete
- soap_ecc
- soap_query
- soap_script
- soap_update

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

SOAP create [soap_create]

Users with the soap_create role can create records in all tables and columns.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

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Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

SOAP delete [soap_delete]

Users with the soap_delete role can delete records in all tables and columns.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

SOAP ECC [soap_ecc]

Users with the soap_ecc role can query, create, and update on the external communication channel (ECC) Queue table only.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

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SOAP query [soap_query]

Users with the soap_query role can query records on all tables and columns.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

SOAP query update [soap_query_update]

Users with the soap_query_update role can query and update all tables and columns.

Contains Roles

List of roles contained within the role.

- soap_query
- soap_update

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

SOAP script [soap_script]

Users with the soap_script role can execute business rule endpoint functions via **script.do**.

Contains Roles

List of roles contained within the role.

None

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Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

SOAP update [soap_update]

Users with the soap_update role can update records on all tables and columns.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Survey administrator [survey_admin]

Survey administrators can see all surveys, definitions, questions, and instances created by them and others. Users with this role can use all modules in the **Survey** application menu.

Contains Roles

List of roles contained within the role.

- assessment_admin
- sn_bm_client.benchmark_data_viewer
- sn_publications_recipients_list_user

Groups

List of groups this role is assigned to by default.

None

Elevated

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Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Survey creator [survey_creator]

Survey creators can manage survey definitions, questions, and instances created by them.

Contains Roles

List of roles contained within the role.

- sn_bm_client.benchmark_data_viewer
- sn_publications_recipients_list_user

Groups

List of groups this role is assigned to by default - Survey Creators.

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Survey reader [survey_reader]

Survey readers can view surveys and related information, such as survey responses, survey groups, scorecards, and reports. Users with this role can't change or modify surveys or survey responses.

Contains Roles

List of roles contained within the role - sn_bm_client.benchmark_data_viewer.

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Task editor [task_editor]

Task editors can edit protected task fields.

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Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Template editor [template_editor]

Template editors can create templates for personal use, and modify or delete personal templates. This role is included in the itil role in the base system.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Template scheduler [template_scheduler]

Template schedulers can schedule template-based record creation.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

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Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Text search administrator [text_search_admin]

Text search administrators can customize Global Text Search groups and tables.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Timecard administrator [timecard_admin]

Timecard administrators can access all timecard records.

Contains Roles

List of roles contained within the role.

- timecard_approver
- timecard_user

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

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Timecard approver [timecard_approver]

Timecard approvers approve or reject time cards for users.

Contains Roles

List of roles contained within the role.

- pa_viewer
- timecard_user

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Timecard user [timecard_user]

Timecard users can create time cards themselves, and view their own time cards.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

User [user]

The user role has no functionality and doesn't grant access to any assets on your instance. Users with this role are counted as licensed fulfillers.

Contains Roles

List of roles contained within the role.

None

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Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

User administrator [user_admin]

User administrators can administer users, groups, locations, skills, and companies.

Contains Roles

List of roles contained within the role.

- fsm_skill_admin
- skill_admin
- territory_admin

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

View changer [view_changer]

View changers can switch active views.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

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Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Workflow administrator [workflow_admin]

Workflow administrators can create, edit, publish, or delete graphical workflows.

Contains Roles

List of roles contained within the role.

- activity_creator
- itom_admin
- workflow_creator
- workflow_publisher

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Workflow creator [workflow_creator]

Workflow creators can create graphical workflows.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

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None

Workflow publisher [workflow_publisher]

Workflow creators can publish graphical workflows.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Workflow report viewer [workflow_report_viewer]

Workflow report viewers can access the workflow scratchpad for reports.

Contains Roles

List of roles contained within the role.

None

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None

Zing text search administrator [ts_admin]

Users with the ts_admin role can administer the Zing text indexing and search engine.

Contains Roles

List of roles contained within the role.

None

Groups

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List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevated privilege roles.

No

Special considerations

None.

Special administrative roles

Certain roles grant specific administrative rights without the full privileges of the admin role. For example, an administrator can grant a user the right to change UI policy but not client scripts.

To learn more about managing per-user subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

These roles don't change the behavior of the admin role, which grants full administrative privileges.

Important: You can't rename roles of any kind in the ServiceNow AI Platform

Assignment rule administrator [assignment_rule_admin]

Create, modify, and delete assignment rules.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

Business rule administrator [business_rule_admin]

Create, modify, and delete Business rules./>.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

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None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

Client script administrator [client_script_admin]

Create, modify, and delete client scripts.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

Form administrator [form_admin]

Create, modify, and delete forms, and form sections and section elements.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

Report administrator [report_admin]

Manage, share, publish, and schedule all reports. Users assigned this role can access the **Reports** > **Administration** module and manage all report-related objects. The report_admin role inherits all other report roles.

Contains Roles

List of roles contained within the role.

- gauge_maker
- report_alias_admin

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- report_global
- report_group
- report_publisher
- report_scheduler
- viz_admin

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

Script include administrator [script_include_admin]

Create, modify, and delete Script Includes.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

UI action administrator [ui_action_admin]

Create, modify, and delete UI actions.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

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UI macro administrator [ui_macro_admin]

Create, modify, and delete UI macros.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

UI page administrator [ui_page_admin]

Create, modify, and delete UI pages.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

UI policy administrator [ui_policy_admin]

Create, modify, and delete using UI policies.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

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UI script administrator [ui_script_admin]

Create, modify, and delete UI scripts.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

Read-only role

The read-only role (*snc_read_only*) restricts a user or a group of users to read-only access on the tables to which the user already has access.

This role is designed to complement other roles a user possesses. Its purpose is to restrict actions like the insert, update, or delete operations on the tables accessible through their existing roles.

After you assign this role to a user, they can no longer create, update, or delete records on ANY tables.

Note: Assign this role only to users. Don't assign this role to other resources in the system, including applications, access control levels (ACLs), and so on.

The *snc_read_only* role can be assigned to any user to limit access to data without having to create ACLs for system tables, custom tables, and fields. This practice is useful for performing internal or external audits without enabling a user to have insert or update access to data.

Users with the *snc_read_only* role have the following restrictions regardless of other roles and privileges that they have.

- Can't insert, update, or delete records from the UI or when using the GlideRecord API.
- Can't activate or upgrade plugins.
- Can't directly run SQL.
- Can't upload XML files.
- Can only run background scripts when on an instance in the public sandbox environment.

Note: These role restrictions are in place even if impersonating another user with write access such as an admin.

Exempt tables from the read-only restriction

Three system properties control which tables users with the *snc_read_only* role can still create, update, or delete records on. These properties are not created on instances by default. To use them, manually add each property to the System Properties [sys_properties] table and set the value to a comma-separated list of table names. See Add a system property.

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snc_read_only exempt table system properties

Property	Description
glide.security.snc_read_only_role.tables.exempt_create	Comma-separated list of tables in which users with the *snc_read_only* role can create records.
glide.security.snc_read_only_role.tables.exempt_write	Comma-separated list of tables in which users with the *snc_read_only* role can update records.
glide.security.snc_read_only_role.tables.exempt_delete	Comma-separated list of tables in which users with the *snc_read_only* role can delete records.

Activate the read-only role

If it isn't already active, an administrator can activate the Read-Only User Role (com.snc.read_only.role) plugin.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Read-Only User Role (com.snc.read_only.role) plugin 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.

Read-only role properties

These system properties control the snc_read_only role. The following default values are used for the properties.

System properties for Read-only role

Name	Description
glide.security.snc_read_only_role.tables.exempt_create	Specifies which tables are exempt from the read-only role enforcement and enable the creation of new records. • Type: string • Default value: sys_user_session, sysevent, syslog, syslog_transaction, sys_user_preference, sys_ui_list,

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System properties for Read-only role (continued)

Name	Description
	sys_ui_list_element, sys_db_cache, user_multifactor_auth • Location: System Properties [sys_properties] table
glide.security.snc_read_only_role.tables.exempt_write	Specifies which tables are exempt from the read-only role enforcement and enable the updating of existing records. • Type: string • Default value: sys_user_session, sysevent, syslog, syslog_transaction, sys_user_preference, sys_ui_list, sys_ui_list_element, sys_db_cache, user_multifactor_auth • Location: System Properties [sys_properties] table
glide.security.snc_read_only_role.tables.exempt_delete	Specifies which tables are exempt from the read-only role enforcement and enable the deletion of existing records. • Type: string • Default value: sys_user_preference, sys_ui_list, sys_ui_list_element, sys_db_cache, user_multifactor_auth • Location: System Properties [sys_properties] table

After you configure these properties, assign the read-only role as needed. When you log in, you're restricted from creating, updating, or deleting records on ANY tables unless you modified these properties.

Note: Test the read-only role by assigning it to a user and then impersonating that user.

Application specific roles

Applications you install on your instance may include additional roles. Follow the links in this section to see roles installed along with applications.

Workflow	Product	Roles Documentation Links
Customer Service Management	Customer Access Management	Roles installed with customer access management
Customer Service Management	Customer Service Management	Roles installed with Customer Service Management

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Workflow	Product	Roles Documentation Links
Customer Service Management	Major Issue Management	Components installed with Major Issue Management
Customer Service Management	OpenFrame	Components installed with OpenFrame
Customer Service Management	Public Sector Digital Services	
Customer Service Management	Special Handling Notes	Components installed with Special Handling Notes
Customer Service Management	Targeted Communications	Components installed with Targeted Communications
Employee Service Management	Case and Knowledge Management	Components installed with Case and Knowledge Management
Employee Service Management	HR Service Delivery	Setting up your Alumni Center
Employee Service Management	HR Service Delivery	Reference for Document Templates
Employee Service Management	HR Service Delivery	v
Employee Service Management	Journey Designer	
Employee Service Management	Journey Designer	Components installed with Journey Accelerator
Employee Service Management	Manager Hub	Components installed with Manager Hub
Employee Service Management	Workplace Case Management	Components installed with Workplace Case Management
Employee Service Management	Workplace Service Delivery	Components installed with Workplace Calendar Synchronization

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Workflow	Product	Roles Documentation Links
Employee Service Management	Workplace Service Delivery	Components installed with Workplace Case Management
Employee Service Management	Workplace Service Delivery	Components installed with Workplace Core
Employee Service Management	Workplace Service Delivery	Components installed with Workplace Move Management
Employee Service Management	Workplace Service Delivery	Components installed with Workplace Reservations for Microsoft Outlook Add-in
Employee Service Management	Workplace Service Delivery	Components installed with Workplace Reservation Management
Employee Service Management	Workplace Service Delivery	Components installed with Workplace Space Management
Employee Service Management	Workplace Service Delivery	Components installed with Workplace Space Mapping
Employee Service Management	Workplace Service Delivery	Components installed with Workplace Visitor Management
Employee Service Management	Vendor Management Workspace	
Environmental, Social, and Governance Management	Environmental, Social, and Governance Management	Components installed with Operational Sustainability Management (formerly ESG Management)
Governance, Risk, and Compliance	Audit Management	Components installed with Audit Management
Governance, Risk, and Compliance	GRC: Metrics	Components installed with the GRC: Metrics application
Governance, Risk, and Compliance	Operational Resilience	
Governance, Risk, and Compliance	Privacy Management	Roles installed with Privacy Management

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Workflow	Product	Roles Documentation Links
Governance, Risk, and Compliance	Risk Management	Components installed with Risk Management
Healthcare and Life Sciences	Healthcare and Life Sciences Service Management Core	Components installed with Healthcare and Life Sciences Service Management Core
Healthcare and Life Sciences	Patient Support Services	Components installed with Patient Support Services
Healthcare and Life Sciences	Pre-Visit Management	Components installed with Pre-Visit Management
IT Asset Management	Model Management	Installed with Model Management
IT Asset Management	Product Catalog	Roles installed with Product Catalog
IT Operations Management	Automation Discovery	Components installed with Automation Discovery
IT Operations Management	Event Management	Components installed with Event Management
ServiceNow AI Platform capabilities	Advanced Work Assignment	Components installed with Advanced Work Assignment
ServiceNow AI Platform capabilities	AI Search	Components installed with AI Search
ServiceNow AI Platform capabilities	Application Portfolio Management	
ServiceNow AI Platform capabilities	Automation Center	Components installed with Automation Center
ServiceNow AI Platform capabilities	Client Software Distribution 2.0	Components installed with
ServiceNow AI Platform capabilities	Conversational Analytics	

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Workflow	Product	Roles Documentation Links
ServiceNow AI Platform capabilities	Document Intelligence	
ServiceNow AI Platform capabilities	Interaction Management	Components installed with Interaction Management
ServiceNow AI Platform capabilities	Live Feed	User roles installed with Live Feed
ServiceNow AI Platform capabilities	Notify	Roles installed with Notify
ServiceNow AI Platform capabilities	Orchestration (Legacy)	Installed with Orchestration ROI
ServiceNow AI Platform capabilities	Build Workflows	
ServiceNow AI Platform capabilities	Build Workflows	
ServiceNow AI Platform capabilities	Build Workflows	User access to Workflow Studio flows
ServiceNow AI Platform capabilities	Build Workflows	
ServiceNow AI Platform capabilities	Service Bridge	
ServiceNow AI Platform capabilities	Service Bridge	
ServiceNow AI Platform capabilities	State Model	Installed with State Model
Platform Analytics	Automation Discovery	Components installed with Automation Discovery
Platform Analytics	Performance Analytics	Performance Analytics roles
Platform Analytics	Process Mining	Components installed with Process Mining

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Workflow	Product	Roles Documentation Links
Platform Analytics	Reporting	Reporting roles
Platform Analytics	Usage Insights	Roles installed with Usage Insights
IT Service Management	Asset Management	
IT Service Management	Change Management	Components installed with ITSM Roles - Change Management
IT Service Management	Continual Improvement Management	Continual Improvement Management roles
IT Service Management	Contract Management	User roles installed with Contract Management
IT Service Management	Digital Portfolio Management	Roles for Digital Portfolio Management
IT Service Management	Employee Center	Employee Center roles
IT Service Management	Expense Line	Components installed with Expense Line
IT Service Management	Facilities Move Management	
IT Service Management	Facilities Service Management	
IT Service Management	Incident Management	Components installed with ITSM Roles — Incident Management
IT Service Management	ITSM Predictive Intelligence Workbench	
IT Service Management	Knowledge Management	Knowledge Management roles
IT Service Management	Performance Analytics	Performance Analytics roles

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Workflow	Product	Roles Documentation Links
IT Service Management	Planned Maintenance	Installed with SM Planned Maintenance
IT Service Management	Problem Management	Components installed with Problem Management
IT Service Management	Procurement	User roles installed with Procurement
IT Service Management	Request Management	Request ITSM Roles - Request Management
IT Service Management	Service Builder	Roles installed with Service Builder
IT Service Management	Service Operations Workspace	Components installed with Service Operations Workspace ITSM Applications
IT Service Management	Service Operations Workspace	Components installed with Agent Client Collector for Investigation
IT Service Management	Service Operations Workspace	Components installed with Microsoft Endpoint Configuration Manager for Investigation
IT Service Management	Service Operations Workspace	Components installed with Remedial Actions Framework
IT Service Management	Service Operations Workspace	Components installed with Metrics and CI Actions Framework
IT Service Management	Service Level Management	Installed with Service Level Management
IT Service Management	Service Management Core	Installed with Service Management Core
IT Service Management	Service Portfolio Management	
IT Service Management	Vendor Management Workspace	

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Workflow	Product	Roles Documentation Links
IT Service Management	Walk-up Experience	Components installed with Walk-up Experience
IT Service Management	Workforce Optimization	Components installed with Process Mining
Security Operations	Security Incident Response	Components installed with Security Incident Response
Security Operations	Threat Intelligence Sharing	
Security Operations	Vulnerability Response	Components installed with Vulnerability Response
Strategic Portfolio Management	Data Separation	
Strategic Portfolio Management	Enterprise Release Management	
Strategic Portfolio Management	Field Service Management	Components installed with Field Service Management
Strategic Portfolio Management	Field Service Management	Field Service with Service Locations Support components
Strategic Portfolio Management	Financial Management	
Strategic Portfolio Management	Investment Funding	Components installed with Investment Funding
Strategic Portfolio Management	Project Portfolio Management	Components installed with Project Portfolio Management (PPM) Standard
Strategic Portfolio Management	Scrum Programs	Components installed with Scrum Programs
Strategic Portfolio Management	Teamspaces	Installed with teamspaces

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System roles

Administrators can control access to features and capabilities on a ServiceNow instance by assigning roles to users.

Your ServiceNow AI Platform instance includes roles to grant access to the platform features and applications included in a base system instance. Applications you install on your instance may include additional roles to control access to those installed features. For more information about roles, see Exploring user administration.

Important: Base system and roles installed with applications can be deactivated by administrators, but can't modify or rename these roles.

Base system roles

Base system roles are present in all ServiceNow instances and don't require the installation of additional plugins.

Role	Description
admin	The system administrator role. This role has access to all system features, functions, and data because administrators can override access control list (ACL) rules and pass all role checks. Avoid assigning this role to your users when more targeted roles are available. **Warning:** Grant this privilege carefully. If you have sensitive information, such as HR records, that you need to protect, you must create a custom admin role for that area. You must also train any users authorized to see those records to act as the administrator. Also note the Special Administrative Roles.
agent_admin	Agent administrators can download and administer the system's built-in agent. They can manage MID Server-related scripts.
ais_admin	AI search administrators can query, create, update, and delete indexing and search settings and log messages through the AI Search application.
approval_admin	Approval administrators can view or modify approval requests not directly assigned to them. Use the approver_user role to enable approvers to only view or modify requests directly assigned to them. Use of this role requires a Fulfiller license. Use of the approver_user role requires an Approver license.
approver_user	Approver users can modify requests for approval routed to them. They also have all capabilities of requesters. **Note:** There's a fee associated with this role. Don't assign it to users without confirming your organization has the appropriate entitlement.
assignment_rule_admin	Assignment rule administrators can manage assignment rules.
asset	Asset users can manage hardware and software assets.
business_process_admin	Business process admins can create, read, update, and delete all records and their relationships in the business process.

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Role	Description
	In the context of Governance, Risk, and Compliance (GRC), users with the sn_grc.admin role who manage GRC applications and their setup automatically gain access to this role. This access enables the GRC administrators to administer a business process and its records similar to other GRC tables. **Important:** This role is assigned to users who are administrators and have thorough information and training on business processes.
business_process_manager	Business process managers can create, read, and update any business process and manage the relationship of business processes with other records. This role is assigned to business process managers who are usually specialists and manage multiple business processes in the organization. These users generally work with other employees and are experts around business processes. In the context of GRC, users with the sn_grc.manager role automatically inherit this role that enables them to manage the business processes for the entire organization.
business_process_user	Business process users can update the business processes that a user owns and can also read any business process. This role must be assigned to the respective process owners who manage the business process that they own. This role can also be provided to users who are required to view the business processes in the organization and understand them better. In the context of GRC, users with the sn_risk.user role are automatically assigned this role as this role enables them to manage the business processes they own as well as read all business processes.
catalog	Catalog users can access service catalog requests.
catalog_admin	Catalog administrators can manage the Service Catalog application, including catalog categories and items.
catalog_editor	Catalog editors can create, modify, and publish items within categories that they're assigned to.
catalog_item_designer	Catalog item designers can view the status of their category requests. This role is granted automatically to users when they make a request for an item designer category.
catalog_manager	Catalog managers can view and assign catalog editors to their categories. Can also create, modify, and publish items within their categories.
category_manager	Category managers can create, edit, and delete model categories.
cmdb_dedup_admin	CMDB de-duplication admins can review and remediate CMDB de-duplication tasks.

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Role	Description
cmdb_ms_user	CMDB multiscource readers can access and run a multi-source CMDB query, but can't create a query. This role contains Contains cmdb_read role.
cmdb_ms_editor	Can create and run a query, has full read and write access, but can't do Recompute. Contains cmdb_ms_read role.
cmdb_ms_admin	Can create and run a query, and can modify CMDB 360 properties. Contains cmdb_ms_write role.
cmdb_read	Can read any CMDB table. Contained in admin and itil.
communication_manager	Manages communication for major incidents and is responsible for communicating with all stakeholders.
contract_manager	Can create, edit, and delete contracts through the Contract Management application.
data_classification_admin	Administers all aspects of the Data Classification application, data classification code setup and assignment,
data_classification_auditor	Audits Data Classification code assignments.
ecmdb_admin	Can administer the CMDB.
filter_admin	Can manage filters.
filter_global	Can create global filters.
filter_group	Can create filters that belong to groups of which the user is a member.
gauge_maker	Can create gauges from reports. Starting with Helsinki, reports are no longer made into gauges.
guided_tour_admin	Can manage and administer Guided Tour functionality.
image_admin	Can manage image files on the Images [db_image] table.
impersonator	Can impersonate users. This role doesn't allow impersonation of admin users.
import_admin	Can manage all aspects of import sets and imports.
import_scheduler	Can schedule imports. **Warning:** Grant this role carefully. The import_scheduler role is equivalent to giving the user the admin role, because the import_scheduler has the ability to execute scripts with administrator level privileges.
import_set_loader	Can load import sets.
import_transformer	Can manage import set transform maps and run transforms.
incident_manager	Manages Incident properties and Major Incident trigger rules.
inventory_admin	Can create and delete stock information. Only users with the inventory_admin role can edit stock rules, stockrooms, and stockroom types.
inventory_user	Has access to stock information. Can create and manage transfer orders.
itil	Can perform standard actions for an ITIL helpdesk technician. Can open, update, close incidents, problems, changes, configuration

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Role	Description
	management items. By default, only users with the itil role can have tasks assigned to them.
itil_admin	Possesses more privileges than the itil role and is intended for team leads. This role has the ability to delete incidents, problems, changes, and other related entities when both the itil and itil_admin roles are assigned. In addition, the itil_admin role grants full control of the CMDB. The itil_admin role includes all of the permissions granted to the sn_cmdb_admin role, which provides full access to CMDB data, tools, and UIs.
knowledge	Can create, edit, and review knowledge base articles.
knowledge_admin	Can manage the knowledge base.
list_updater	Can use Update Entire List and Update Selected menu options on lists.
maint	Reserved for ServiceNow use.
mid_server	Role that any MID server user should be granted. This role gives the MID server access to the tables it ordinarily uses.
model_manager	Can create CMDB models. Model manager can control the base models and any model extensions that aren't software or consumables. Consumable models are controlled by the asset manager role (asset). Software models are control by the software asset manager role (SAM).
major_incident_manager	Initiates the major incident process by assessing and approving major incident candidates or creating a major incident. Maintains the ownership and accountability for the life cycle of the incident. Identifies the users and groups to be involved in the resolution activities and sets up communication channels.
nobody	The nobody role means that no user has access - not even admin or maint. Use the nobody role carefully. The nobody role takes precedence over the admin override option on ACLs, so even admins can't have access. See Create an ACL rule. Don't assign it to specific users. You can use this role in ACLs that control access to resources, such as UI pages, processors, script includes, and records. **Warning:** Applying the nobody role may be irreversible if applied to some important system functions.
personalize	Can configure forms, lists, rules, controls, scripts.
personalize_choices	Can configure choices and predefined responses for non-journal fields designated as choice or suggestion fields.
personalize_control	Can configure controls on lists, such as filters, links, and buttons.
personalize_dictionary	Can configure dictionary entries and labels.
personalize_form	Can configure forms.
personalize_list	Can configure lists and list calculations.

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Role	Description
personalize_responses	Can configure predefined responses for journal fields designated as suggestion fields.
personalize_rules	Can configure business rules and scripts. This role contains the following specialized roles for granting selective, administrative access to rules and scripts: • business_rule_admin • client_script_admin • ui_policy_admin • ui_action_admin
personalize_styles	Can configure field styles.
personalize_ui	Can configure forms and lists.
public	No login is required to access features or functions with the public role.
release_admin	Can edit Release history for a release.
report_admin	Can manage reports.
report_global	Can create global reports.
report_group	Can create reports and share reports with groups that the user is a member of. Users with this role can edit reports shared by other users in the group.
report_publisher	Can make reports available on a public page.
report_scheduler	Can schedule a report to be emailed.
script_fix_admin	Can create and manage fix scripts but can't run fix scripts.
search_application_admin	Can query, create, update, and delete records on search UX-related tables. Contains the ais_admin role.
sn_appclient.app_client_user_install_installer	Can install applications containing the same company as the currently logged in instance. User role that enables first-time installation of applications for the company associated with the current instance. A user with this role can't install an application for another company.
sn_appclient.app_client_user	Can install applications containing the same company as the currently logged in instance.
sn_cmdb_admin	Provides full access to CMDB data, tools, and UIs. A CMDB Admin, for example, sets policies in the CI Class Manager and application service requirements. CMDB Admin provides the highest level of access to the CMDB.
sn_cmdb_editor	Provides access to CMDB records. A CMDB Editor can't change policies such as in the CMDB Data Manager or in the CI Class Manager.
sn_cmdb_user	Provides read-only access to CMDB data and to basic UIs such as CMDB reports and dashboards.
soap	Can query, create, update, and delete records on all tables, as well as execute scripts.

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Role	Description
soap_create	Can create records on all tables and columns.
soap_delete	Can delete records on all tables and columns.
soap_ecc	Can query, create, and update on the ECC Queue table only.
soap_query	Can query records on all tables and columns.
soap_query_update	Can query and update records on all tables and columns.
soap_script	Can execute business rule endpoint function via script.do.
soap_update	Can update records on all tables and columns.
survey_admin	Can see all Surveys, their definitions, questions, instances created by them and others. Survey administrators can use all modules in the Survey application menu.
survey_reader	Users with survey reader role can view surveys and related information, such as survey responses, survey groups, scorecards, and reports. Survey_reader can't change or modify a survey or survey responses.
task_editor	Can edit protected task fields.
template_editor	Can create templates for personal use, and modify or delete personal templates. Included in the itil role in the base system.
template_editor_global	Can create templates for global use.
template_editor_group	Can create templates for groups.
template_scheduler	Can schedule template-based record creation.
text_search_admin	Can customize Global Text Search groups and tables.
timecard_admin	Can approve, modify, and delete the time cards of other users.
ts_admin	Can administer Zing text indexing and search engine.
unlimited_createnow	Role for CreateNow unlimited licensed users.
upgrade_app	Can upgrade installed applications containing the same company as the currently logged in instance. Can't perform first-time installations of applications published to the Application Client page.
user	Available for customer use, has no function in the base system.
user_admin	Can administer users, groups, locations, and companies.
view_changer	Can switch active views.
workflow_admin	Can create, edit, publish, or delete graphical workflows.
workflow_creator	Can create new graphical workflows.
workflow_publisher	Can publish graphical workflows.

Application-specific roles

Applications you install on your instance may include additional roles. Follow the links in this section to see roles documentation on roles installed along with applications.

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Product	Application
Platform Capabilities	Advanced Work Assignment

Create a role

Create a role to control access to features and capabilities in applications and modules. The new role doesn't have access to any application or module until you add other roles to it, or add it to the appropriate applications and modules.

Before you begin

Role required: admin

About this task

After access has been granted to a role, all groups or users assigned to the role are granted the access. Roles can contain other roles, and any access granted to a role is granted to any role that contains it.

For a complete list of the roles included with the base instance, see Base system roles

Warning: If your organization hasn't manually allocated user-based subscriptions before,subscription assignments are based on user roles and the kind of access each role permits. Creating, customizing, and assigning roles can have subscription usage impact. For more information about how roles are evaluated for subscription assignment, see Automatic subscription assignment.

Move this action to the background so you aren't waiting when adding a number of group members by adding the system property `glide.ui.schedule_slushbucket_save_for_group_roles`. Set the system property to **true**. The system user is used to create records or update existing ones since the action is running in the background.

Procedure

1. Navigate to **All** > **User Administration** > **Roles** and create a record.
2. Complete the form.

Field	Description
Name	Enter a name for the role. **Note:** You can't rename roles of any kind in the ServiceNow AI Platform. If you manually create a role, you can't rename it after you save it.
Requires Subscription	Indicates whether users with this role require a subscription to stay in compliance. **Yes** Measured-role that requires a subscription. You can allocate subscriptions to users with this role by adding one or more groups to a product subscription. To learn more, see Managing per-user subscriptions in Subscription Management. **No** Not a measured-role.

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Field	Description
	Unspecified Neither
Application	Select the application that contains this record.
Elevated privilege	A role that requires elevated privilege can't be assigned to a user at login by the system. Instead, a user must manually elevate privileges to receive the elevated role. Select this option to mark this role as required to elevate it to high security. See Elevated privilege roles for more information.
Description	Select the roles to delegate to the group member.

Grant a role access to applications and modules

Roles control access to features and capabilities in applications and modules. You add a role to an application or module to enable the role to grant access to the application or module for all users with the role.

Before you begin
Role required: admin

About this task
Warning: If your organization hasn't manually allocated user-based subscriptions before,subscription assignments are based on user roles and the kind of access each role permits. Creating, customizing, and assigning roles can have subscription usage impact. For more information about how roles are evaluated for subscription assignment, see Automatic subscription assignment.

Procedure
1. Navigate to **All** > **System Definition** > **Applications** or **System Definition** > **Modules**.
2. Select the appropriate application or module to open it in form view.
3. Select the lock to open the **Roles** field.
4. Add the desired roles to the application or module.
5. Select the lock to close the **Roles** field, and then save your changes.

Assign a role to a group

You can assign a role to a group to grant access to applications and modules to group members.

Before you begin
Role required: user_admin or admin

About this task
When you assign roles to groups rather than to individual users, members of the group inherit the role. When a user switches groups, the new group role is assigned automatically. For information about the Service Mapping roles, see Control user access to application services.

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select the group to assign a role.
3. In the **Roles** related list, select **Edit**.

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4. Add the desired roles to the group.
5. Select **Save**.

Assign a role to a user

A user inherits roles from all groups to which they belong. You can also assign roles directly to a user. Whenever a user is assigned a new role, it only takes effect after logging in with a new session.

Before you begin

Role required: user_admin or admin
When possible, simplify user administration by assigning roles to groups. Create groups that contain all the roles necessary for specific personas, and then assign users to those groups.

About this task

To grant the admin role to a user, you must also have the admin role. To grant the security_admin role to a user, you must also have the security_admin role. You must elevate to the security_admin role before granting the security_admin role to other users. See Elevate to a privileged role.

You can't delete roles that are assigned to the group from the user record. You must remove the user from the group record.

Warning: If your organization hasn't manually allocated user-based subscriptions before,subscription assignments are based on user roles and the kind of access each role permits. Creating, customizing, and assigning roles can have subscription usage impact. For more information about how roles are evaluated for subscription assignment, see Automatic subscription assignment.

Procedure

1. Navigate to **All** > **User Administration** > **Users** and then open a user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**.
   The **Collection** list displays only roles for applications and plugins that are installed on your instance. If a role does not appear, the corresponding application may not be installed.

   Note:

   The System administrator (admin) role provides access to all system features, functions, and data, regardless of security constraints. Avoid assigning this role to users when more targeted roles are available.

4. Select **Save**.

What to do next

Note: If the user is logged in when you update their roles and they're unable to access records enabled by the new role, they may need to log out and back in again.

Add a role to an existing role

When you add a new role to an existing role for a user, the user inherits the access that is granted by the new role.

Before you begin

Role required: admin

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About this task

Warning: If your organization hasn't manually allocated user-based subscriptions before,subscription assignments are based on user roles and the kind of access each role permits. Creating, customizing, and assigning roles can have subscription usage impact. For more information about how roles are evaluated for subscription assignment, see Automatic subscription assignment.

Procedure

1. Navigate to **All** > **User Administration** > **Roles** and open the existing role.
2. Click **Edit** in the Contains Roles related list.
3. Use the slushbucket to add one or more roles to the existing role.
4. Click **Save**.

The users with the existing role inherit the access that is granted by the new role.

Create a group role

Create a group role to control access to features and capabilities in applications for all members in a group.

Before you begin

Role required: admin.

About this task

Warning: If your organization hasn't manually allocated user-based subscriptions before,subscription assignments are based on user roles and the kind of access each role permits. Creating, customizing, and assigning roles can have subscription usage impact. For more information about how roles are evaluated for subscription assignment, see Automatic subscription assignment.

Procedure

1. Navigate to **All** > **User Administration** > **Group Roles**.
2. Select **New**.
3. Fill in the fields on the form and then select **Submit**.

Field	Description
Group	Select a group.
Role	Select the role to apply to the group.
Inherits	Select this option to have all members of the group inherit the role. This option is selected by default.

Note: To move this action to the background so you aren't waiting when adding a number of group members, add the system property *glide.ui.schedule_slushbucket_save_for_group_roles* and set it to true.

Audit user roles

Changes to user roles are tracked in the Audit Roles [sys_audit_role] table.

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Before you begin

Role required: admin

Note: If the Prevent duplicate entries with Contextual Security: Role Management V2 plugin is installed, you must Enable role auditing with Contextual Security: Role Management V2.

Procedure

Navigate to **All**, and then enter `sys_audit_role.list` in the filter.
The Audit Roles [sys_audit_role] table displays changes to user roles.

Field	Description
Changed by	The user who made the change.
Count after change	Direct role added as a result of the change (if any), plus the number of inherited roles added.
Granted by group	If the role was inherited, the group that the role was inherited from.
Operation	The type of change. Values include: • Added • Removed
Role	The affected role.
User	The affected user.

Delegating roles

Administrators can grant users the ability to assign roles within groups. However, these users can only assign roles that they already have.

Role delegators are users responsible for assigning roles to other users within a group. This role can be assigned manually by granting the role_delegator role to the user, or through the **Group Manager Change** business rule.

The **Group Manager Change** business rule, which is disabled by default, automatically grants the role_delegator role to a user who is designated manager of a group in the **Manager** field on the **Group** form. The role is removed when the user is no longer the manager of the group.

Activate the business rule to take advantage of it. For more information on **Business rules**, see Classic Business rules.

Reviewing Roles and Role Changes

To view roles and role changes:

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- Individual users: Navigate to **User administration** > **Users** select a user, and review the **Roles** related list.
- Role delegators: Review who can give roles in which groups by navigating to **User administration** > **Role delegators**.
- For all role changes: To see a history of role changes, navigate to **System security** > **Reports** > **Role audit**. See Audit user roles for more information.

Designate role delegators

Designate role delegators to assign roles to users who are in a particular group.

Before you begin
Role required: admin

About this task
Delegators can assign roles that they inherit from a group. They can also assign roles that an administrator assigned to them.

Procedure

1. Navigate to **All** > **User Administration** > **Designate Role Delegator**.
2. Select the group that includes the user who you want to be the role delegator.
3. Select the user.
4. Select **Submit**.
   A change request for the role delegator request is created and automatically approved.

Assign roles as a role delegator

If you're a role delegator, you can delegate roles that are assigned to you for groups that you manage.

Before you begin
Role required: role_delegator

Procedure

1. Navigate to **User Administration** > **Delegate Roles in Group**.
2. Fill out the form.

Field	Description
Group	Select the group in which to delegate a role or roles to a member. Any group can be selected, including groups that the role_delegator doesn't belong to or groups that the role_delegator doesn't manage.
User	Select the group member to delegate a role or roles.
Roles to delegate	Select the roles to delegate to the group member. The roles available for delegating are only the roles that the role_delegator has.

(Optional) To remove a delegated role from a user, open the delegation record and remove the unwanted role or roles.

Prevent a role from being delegated

You can prevent roles from being delegated to users.

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Before you begin
Role required: admin

About this task
By default, the following roles can't be delegated.

- admin
- public
- role_delegator

> **Note:** A user with the role_delegator role can't delegate this role to other group members.

Procedure
1. Navigate to **All** > **User Administration** > **Roles**.
2. Open the role.
3. Configure the form to add the **Grantable** or **Can delegate** fields.
4. Clear the check box for one or both of these fields.
5. Select **Update**.

Time-limited role

Time-limited roles give users the defined role during the defined time period.

Assigning the time-limited roles ensures users have elevated access only when needed, without requiring manual revocation. When you assign a time-limited role to a user, you specify a start and end date. The system automatically activates the role at the start date and removes it when the end date passes, eliminating the need for manual access cleanup.

Supported roles and limits

Time-limited roles enhance security by automatically reducing privileges when no longer needed, support compliance through time-bound access policies, and improve efficiency by eliminating manual tracking and revocation. The following table provides information about the available time-limited roles and limits:

Configuration information and limits of time-limited role

Supported Roles	Assignment Rules
• `admin` • `snc_read_only` • `impersonator` • `snc_required_script_writer_permission`	• Maximum of four concurrent time-limited roles per user can be assigned • Time-limited role can be maximum of 5 days per user. • Time-limited assignments can handle more than one role assignment to a user, even if the total duration across assignments is less than five days.

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Grant a time-limited user role

Learn how to assign a role to a user temporarily. Use this feature if you have a user who needs to perform a one-time action that is normally outside their roles.

Before you begin

Role required: user_admin

Note:

- Time-limited user roles can be assigned to a user for a maximum of 5 days.
- For a user, you can assign only `admin`, `snc_read_only`, `impersonator`, and (or) `snc_required_script_writer_permission` role as time-limited role.
- Time-limited user roles are not displayed to the assigned users under the **Roles** tab of the user (sys_user) record.
- When the time-limited role assigned users log in, they see a notification regarding the role assignment.
- Time-limited assignments can handle more than one role assignment to a user, even if the total duration across assignments is less than five days.

About this task

Warning: Usage of Time-limited User Roles may consume access and use rights procured by customer and could result in additional subscription fees.

Procedure

1. Navigate to **All** > > **User Administration** > **Time-limited user roles**.
2. Select **New**.
3. Fill in the fields on the form.

   All fields except Comments are mandatory.

Fields	Description
Active	Determines if the time limited role assignment is active.
Role	The role assigned to the user. Only admin, impersonate, and snc_readonly are allowed
User	The user to be assigned the time limited role
Start Time	The start time and date for the time limited role
End Time	The end time and date for the time limited role **Note:** **End Time** cannot be more than 5 days from the **Start Time**.

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Fields	Description
Comments (Optional)	Additional comments or information for the limited role assignment

4. Select **Submit**.

Result
The specified user now has the role. They must complete their restricted task between the start time and the end time.

Monitoring user activity

Learn about the tools available to administrators for monitoring users on their instance.

User administration tools

In addition to storing information on a user, user accounts are also associated to groups and roles. Your instance uses groups and roles to determine which records and features an individual may access.

Impersonation

Administrators can select user records for impersonation. Use this feature to experience the instance as another user, with that user's preferences and permissions. User impersonation can be a valuable tool for testing and troubleshooting. For more information on impersonation, see Impersonating users.

Investigating user account activity

At any time there is a need to review specific user behavior, below are the recommended steps on how to review the transaction logs and event logs:

- Locate the IP address of successful/failed login for a particular ServiceNow user for their instance
- Modify the time frame of the search
- Limiting the scope of the search by user name
- View successful/failed login attempts

For more information about investigating user activity, see the How to investigate user account activity [KB0564981] article in the Now Support Knowledge Base.

User sessions

With user session management, and administrator can view and terminate individual user sessions, lock out users from the instance, and make users inactive. For details on managing user sessions, see Managing user sessions.

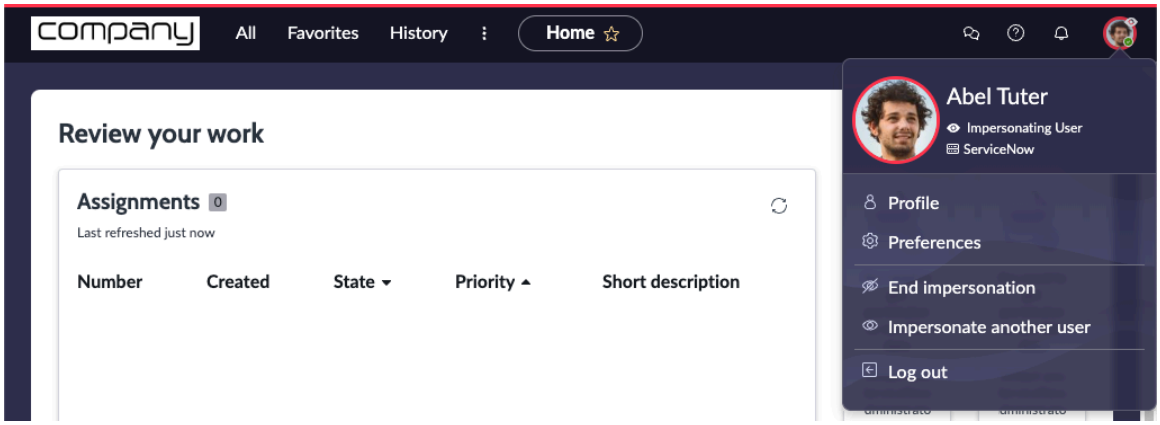
User records are also associated with transaction logs. Administrators can use these logs to track all browser activity for an instance.

Impersonating users

Administrators are able to impersonate other authenticated users, a feature primarily used for testing.

This function enables the administrator to access the system exactly as the impersonated user, including identical menus and modules. All actions performed by the administrator during impersonation are recorded as if they were executed by the impersonated user.

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Impersonation limitations

When you impersonate a user, all scope-protected roles and encryption module roles are supported if the **Impersonation** option is configured in the module access policy. See Create a module access policy for details.

Impersonating a user enables access to scope-protected and encryption roles, as defined in the access policy. However, if impersonating a user with an admin role, access to certain features and modules is limited unless the impersonator already possesses those roles.

Impersonating a user with an application-specific admin role, like Human Resources admin or Security Incident Response, limits access to certain features such as security incidents and profile information, unless these roles are already assigned to the impersonating admin. This restriction extends to certain modules and applications in the navigation bar, and admins can't change the password of users with application admin roles.

The following actions or conditions cause a user impersonation to end:

- The user impersonates a different user
- The user session ends, for example after a user logs out of their instance

> **Note:** When an administrator starts impersonating a user, the 'Impersonate Begin' event is logged in the system log. Similarly, the 'Impersonate End' event is recorded when impersonation concludes under one of the two conditions listed above.

Impersonation requirements

The user account to be impersonated must have a user ID. You can find this ID in the User [sys_user] record for the account. If this value is missing, the message `The user you selected could not be impersonated` appears.

You need several different accounts to test the system.

- An admin account to do work
- An information technology infrastructure library (ITIL), or similar, account to test as a technician
- An ESS account to test as an end user

More logins may be required to adequately test the system.

> **Note:** If you try to impersonate a user who is either locked out or inactive, the system will automatically log you out if you initiate an action or select a link. Remember that all changes made during impersonation only apply to that session. To help ensure accuracy, log out and then log back in after completing the impersonation.

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Mobile impersonation

Mobile impersonation is available on ServiceNow mobile apps. For information on mobile impersonations, see Mobile impersonation.

Manage the visibility of the impersonation feature

Before users can impersonate another user, an administrator must make the feature visible.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System properties** > **UI properties**.
2. Select a check box under **Enable impersonation button in the banner line** to display or conceal the button.
3. Select **save** at the top of the page.
   Admins can still impersonate users via the **impersonate_dialog** UI page.

Impersonate a user

You can select a user or enter a different user name to perform an impersonation.

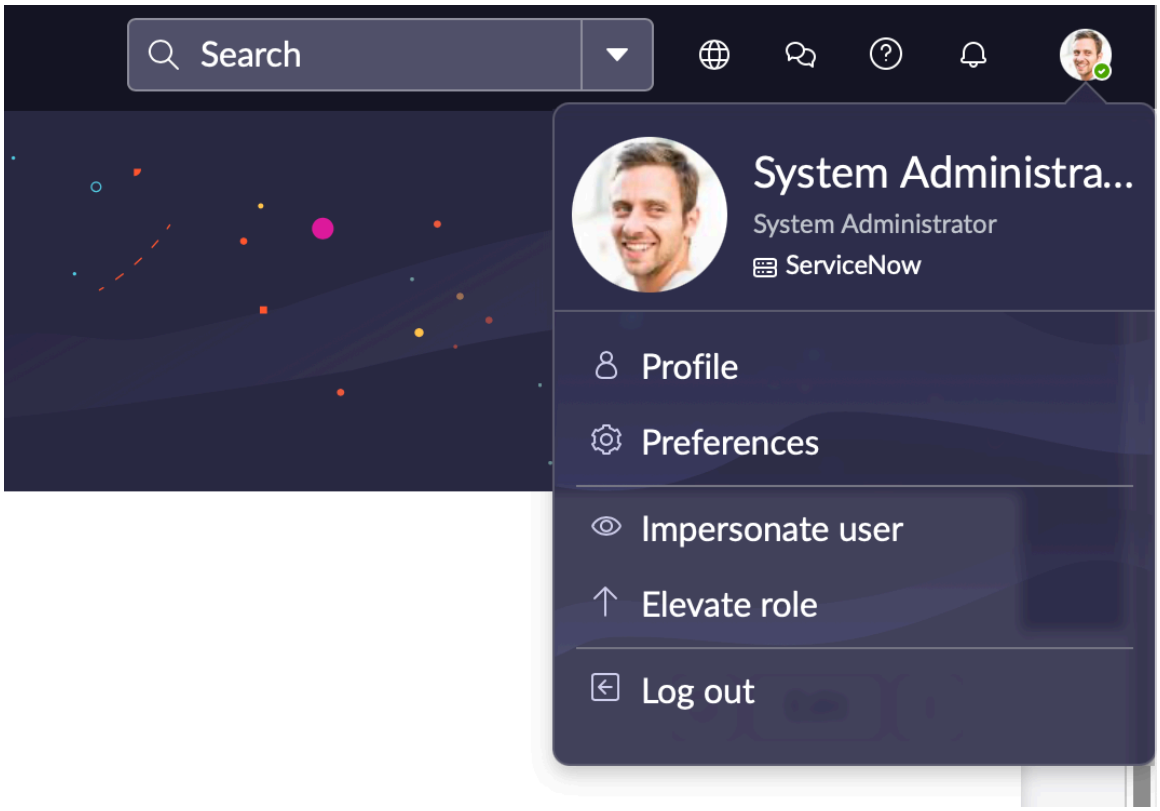
Before you begin
Role required: impersonator

Procedure

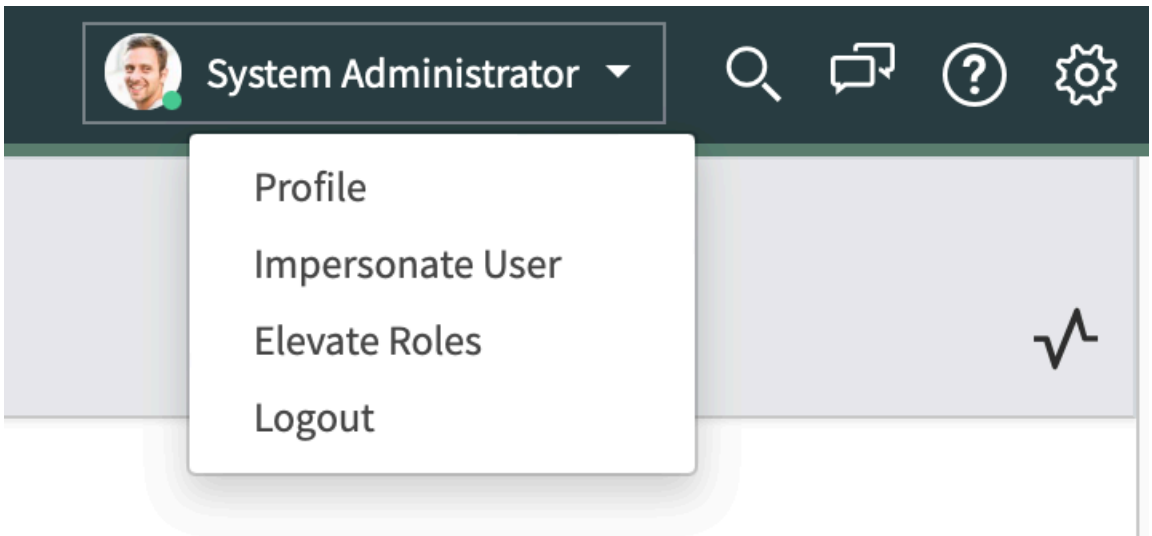
1. In the banner frame, select your user profile picture to open the user menu.
2. Select **Impersonate User**.

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- In Next Experience:



- In Core UI:

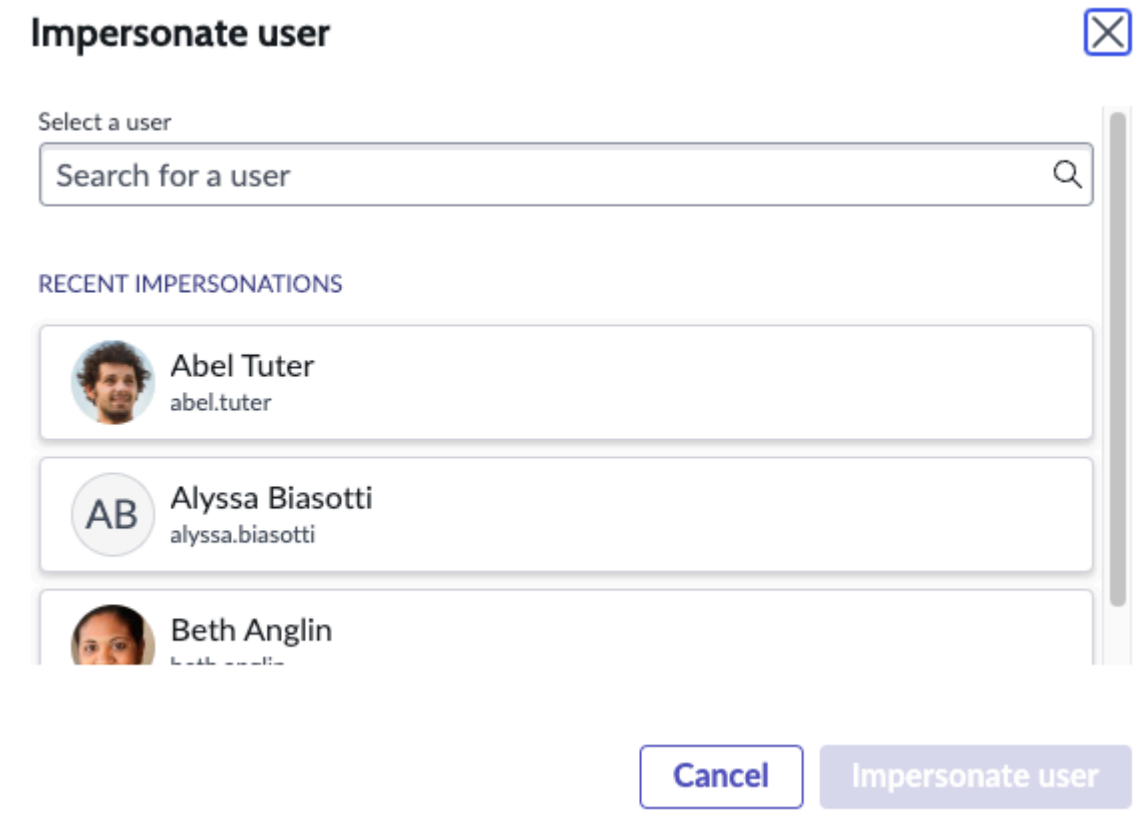


The Impersonate user dialog box displays.

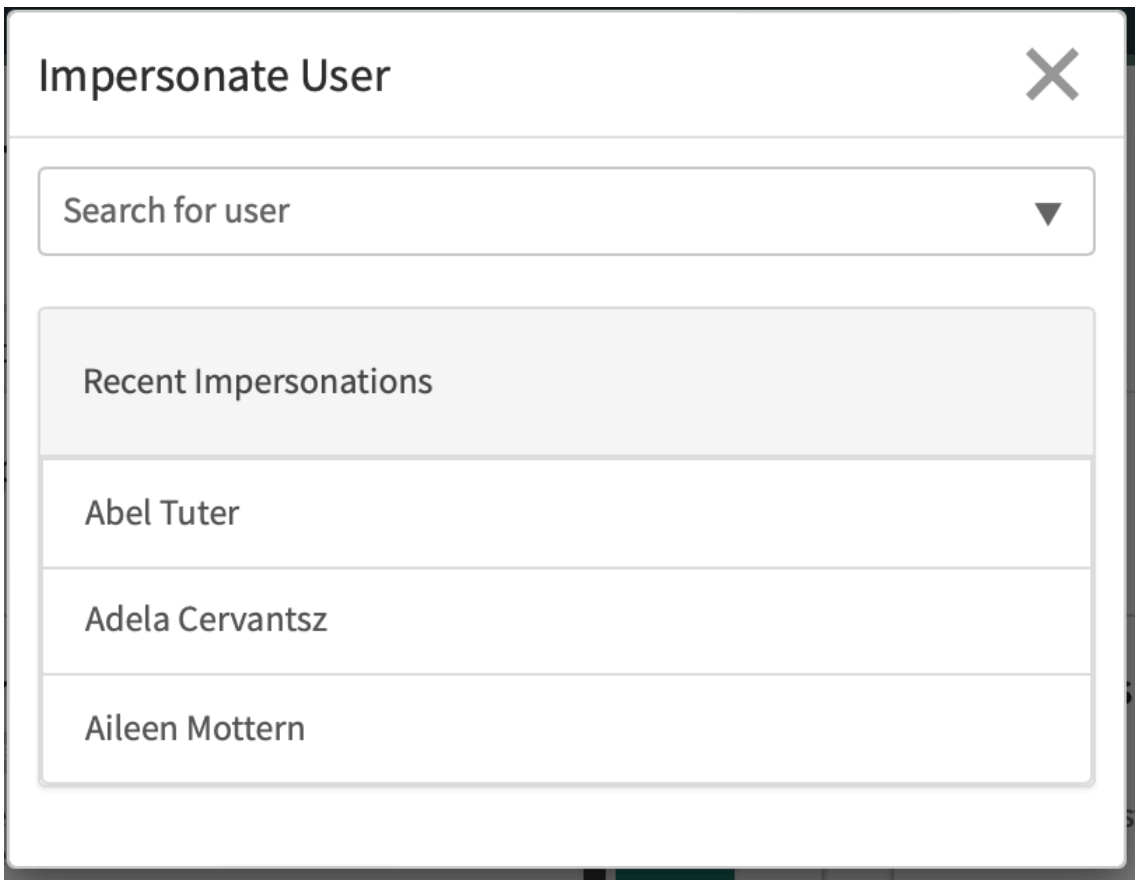
3. Select a user from the **Recent Impersonations** list or enter a different user's name in the user selection field.

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- In Next Experience:



- In Core UI:



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4. Select **Impersonate User**.
5. **Optional:** To impersonate another user while impersonating a user, open the user menu and select **Impersonate another user**.
6. To return to your original login, open the user menu and select **End Impersonation**.

> **Note:** In some cases, impersonating a user might cause an issue that makes it difficult to switch back. If you're presented with a broken page while impersonating a user in a test environment, you may need to force a logout. To do so, navigate to http://<instance name>.service-now.com/logout.do and log back in.

Impersonation logs

Impersonations are logged in the system log.

Log impersonations for either interactive (UI) or non-interactive sessions.

Impersonation logging for interactive sessions

Interactive sessions are performed through the user interface (UI). Enable or disable impersonation logging for interactive sessions using the *glide.sys.log_impersonation* property.

If you enable impersonation logging for interactive sessions by setting *glide.sys.log_impersonation* to **true**, all interactive sessions are recorded in the log.

Property	Description
glide.sys.log_impersonation	Enables (**true**) or disables (**false**) impersonation logging for interactive sessions.

Impersonation logging for non-interactive sessions

Non-interactive sessions are performed by applications and scripts, not through the UI.

Impersonation logging of non-interactive sessions is turned off by default. If you enable impersonation logging by setting the *glide.sys.log_impersonation.non_interactive* property to **true**, impersonations of non-interactive sessions are recorded in the impersonate log.

Even with *glide.sys.log_impersonation.non_interactive* set to **true**, the system doesn't log certain common impersonation tasks performed on behalf of the default users (*system*, *soap.guest*, and *guest*) because the application impersonates those default users to perform a variety of tasks.

Use the *glide.sys.log_impersonation.non_interactive.exclusion* property to exclude impersonations by other users in addition to the default users.

Property	Description
glide.sys.log_impersonation.non_interactive	Enables (**true**) or disables (**false**) impersonation logging for

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Property	Description
	non-interactive sessions.
glide.sys.log_impersonation.non_interactive.exclusion	Excludes impersonation logging of non-interactive sessions for specified users. Enter user names as a comma-separated list. Default users (**system**, **soap.guest**, and **guest**) don't need to be included in the list.

User impersonation auditing

User impersonation auditing creates a structured, dedicated audit trail for every impersonation session.

Impersonation activity is indistinguishable from regular user activity in a standard audit trail, you can't reliably attribute changes to the administrator who made them rather than the user they were impersonating. With the user impersonation auditing you can capture every impersonation session as a self-contained audit set, clearly separated from ordinary session data and accessible to administrators through system logs.

Plugin and feature property

- Plugin required for user impersonation auditing (`com.glide.security.audit`).
- Property to control the feature user impersonation auditing (`glide.audit.user.impersonation.enabled`).

Accessing impersonation audit records

Impersonation audit records are available to security administrators through **System Logs** > **User Impersonation**. The list view displays a summary of all impersonation sessions recorded on the instance, including the identities of both parties and the session duration. Selecting any session record opens the detail view, which presents the complete audit set — the start entry, all actions in chronological order, and the closing entry — in a single place. This allows a security administrator to verify that the actions taken during a session were appropriate and within the expected scope of the impersonation.

Audit record fields

Each entry in an impersonation audit set, whether a session-level record or an action-level entry, captures the following information.

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Impersonation audit record fields

Field	Description	Example value
Impersonated by	User who initiated the impersonation session.	`john.smith`
Impersonated to	User whose identity is being assumed.	`jane.doe`
Impersonation Start Time	Timestamp when the impersonation session began.	`2024-06-10 09:15:32` UTC
Impersonation End Time	Timestamp when the session was terminated.	`2024-06-10 09:47:11` UTC

Select the **Impersonation Start Time** to know more about the impersonation activity. Following details are displayed:

- Created
- Type
- Origin Application
- Created by
- Response time
- Output length
- SQL count
- SQL time
- Business rule count
- ACL Time
- URL

You can use the **Personailze List Columns** options to add more columns to the log.

Note: Impersonation audit records follow the same retention policy as transaction logs. The default retention period is `seven` days, but this is configurable by a system administrator. Any change to the transaction log retention setting applies equally to impersonation audit records.

Managing user sessions

The ServiceNow AI Platform provides the ability to view and terminate individual user sessions, lock out users from the system, and make users inactive.

Regardless of the number of windows you have open in a browser, it's considered to be one session. However, if you have two separate browsers open (such as Google Chrome and Safari), it's considered to be two separate sessions.

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- Terminating a user session effectively logs that user out of the next transaction, which is usually the next browser select. Use the terminate sessions feature when you want to perform system maintenance.
- Locking a user out of the system means they can no longer log in or generate any actions from any email messages that they send to the instance. Locking users out also terminates their sessions.
- Making a user inactive means they don't show up in any fields that reference active users on the **User** table.

Configure a maximum active time for user sessions

Secure your instance by enforcing a maximum time for sessions regardless of user activity.

Before you begin

Role required: admin

About this task

By default, sessions expire only after a period of inactivity. Enforcing a maximum active session time ends sessions regardless of whether a user has been active recently, including whether they recently selected to extend a session. The active session timeout should be greater than the value configured for the inactive session timeout. For example, if sessions are configured to time out after 30 minutes of inactivity, the active session timeout should be greater than 30 minutes.

Procedure

1. In the navigation filter, enter `sys_properties.list`.
2. Filter the System Properties [sys_properties] list for the following properties and then select a property to open its record.
   - *`glide.ui.active.session.life_span`*: Sets the maximum session time for authenticated user sessions regardless of user activity. Authenticated users are logged out of the instance after the time specified and must enter their credentials again to access the instance.
   - *`glide.guest.active.session.life_span`*: Sets the maximum session time for guest user sessions regardless of user activity. This setting helps secure an instance using applications that involve guest user sessions, such as Agent Chat.
3. In the **Value** field, enter the number of minutes before the session times out regardless of user activity.
   The value should be greater than the value of the corresponding properties for an inactive session timeout: *`glide.ui.session_timeout`* for authenticated users or *`glide.guest.session_timeout`* for guest users. By default, the inactive session timeout for both authenticated and guest users is 30 minutes.
4. Select **Update**.

Related topics

Configure a maximum active time for integration sessions

Modify user session timeout after inactivity

Specify when to time out user sessions after a period of inactivity.

Before you begin

Role required: admin

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About this task

By default, after 30 minutes of inactivity in the application, the platform logs the user out automatically, unless the **Remember Me** check box in the login screen is selected. Making the interval longer can lead to the unnecessary maintenance of inactive sessions in memory. Adjust this timeout setting to no more than a few hours, although up to 24 hours is workable.

Note:

- Ajax calls to the server keep the session alive (such as Labels and Refreshing dashboards).
- Polling keeps the session alive when the chat desktop is open (requires the Chat plugin).

Procedure

1. Clear the **Remember Me** check box in the login screen.
2. In the navigation filter, enter `sys_properties.list`.
3. From the System Property [sys_properties] list, search for *`glide.ui.session_timeout`*.
4. If *`glide.ui.session_timeout`* doesn't exist, select **New** to add a new property using the following values:
   - **Name**: *`glide.ui.session_timeout`*
   - **Description**: Type a brief description. In this case, enter something like `Override the default session timeout (30). This value is in minutes.`
   - **Type**: Select the appropriate data type. In this case, select **Integer**.
   - **Value**: Change the default value from 30 minutes to a value of your choice.

   Note: The session timeout can also be set through installation exit customizations.

What to do next

Administrators may also want to add the following properties to the System Properties table.

- *`glide.security.csrf.handle.ajax.timeout`*: Handles errors for timed out Ajax requests when set to **true**.
- *`glide.security.auto.resubmit.ajax`*: Automatically resubmits timed-out Ajax requests when set to **true** and the Log in to an instance check box is selected or Change the default value of the Remember me check box. A pop-up appears to users asking them to continue.
- *`glide.ui.auto_req.extend.session`*: When set to **true**, the system automatically extends a user's session by the value they select for the homepage refresh time. If there's no homepage refresh time, the standard timeout value applies. Tablet and mobile devices don't support this property. When set to **false**, user sessions time out when the **Remember me** check box is clear. The timeout is based on whether there's a homepage refresh time. When there's no homepage refresh time, the standard timeout value applies. When there's a homepage refresh time, the user session times out after the timeout value plus one interval of the homepage refresh time. For example, if a user selects a refresh interval of five minutes, then that session expires after the timeout value plus five minutes.

  Note: Users who select the **Remember me** check box are unaffected by session timeout properties.

Administrators can also add the following properties to configure additional timeout settings for user sessions. These additional settings help to conserve system resources:

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- *glide.session.unauthorized.timeout.enabled*: Enables an alternate session timeout for unauthenticated, guest sessions. Guest sessions are created for HTTP requests to the instance that don't contain authentication information. By default this property is set to **true**.
- *glide.unauthorized.session_timeout*: Specifies the time, in minutes, after an authenticated user logs out of an instance before the session ends. Set the property to a value greater than **0** and less than the value in the *glide.ui.session_timeout* property.

Related topics

Modify integration session timeout after inactivity

Prompting users to extend a session

Configure how much time users have to extend a session before it times out due to inactivity.

Before you begin
Role required: admin

About this task
By default, users are prompted to extend their session two minutes before it expires with an "Extend your session" dialog box. This procedure explains how to adjust the timing of when users are presented with this prompt.

Procedure

1. Navigate to **All**, and then enter `sys_properties.list` in the navigation filter.
2. Open the *glide.ui.session_timeleft* property.
3. In the **Value** field, enter the number of minutes before the session timeout to prompt users to extend their session.
   Setting the value to zero turns off prompting users to extend their sessions.
4. Select **Update**.

Lock out a user

Lock out a user when you don't want the user to access the instance.

Before you begin
Role required: user_admin or admin

Procedure

1. Navigate to **All** > **User Administration** > **Users** and select the user from the list.
2. Select the **Locked Out** check box, and update the record.

Mark a user inactive

You can mark a user inactive so the user doesn't show up in any fields that reference active users on the **User** table.

Before you begin
Role required: admin

About this task
Note: By default, when you mark a user inactive, you lock out that user. The **Lock Out Inactive Users** business rule governs this behavior.

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If you clear the **Active** checkbox, the user is locked out and cannot access the instance. This functionality is controlled through a Glide property *glide.authenticate.only.allow.active.user.login* which will only allow the active users to access the instance.

Procedure

1. Navigate to **All** > **User Administration** > **Users** and select the user from the list.
2. Clear the **Active** check box, and update the record.

Terminate a user session

You can terminate a user session, for example, if you're going to perform system maintenance and users are still logged in.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Logged in users**.
   You can only see users who are logged in to the same application node as you. If the Active field on a user record value is false, the user is logged in but not currently running a transaction. Most users appear as inactive at any given time.
2. Select the session that you want to end.
3. Select **Lock Out Session**.
   The session is terminated, and the user is redirected to the login page at the next attempted transaction. The user isn't locked out. Multiple user sessions may be associated with one user. Terminating a user session only affects the specific session.

Note: Mobile user sessions can't be terminated using this process.

Non-interactive sessions

The Non-Interactive Sessions plugin creates a distinction between interactive and non-interactive users.

Interactive users

New users added to the instance automatically become interactive users. Interactive users can perform the following actions:

- Use their user name and password to log in to the UI or a service portal.
- Connect to an instance from a URL that calls a UI page, form, or list, for example, https://<instance name>.service-now.com/incident.do.
- Connect with single sign-on, for example, digest authentication or a Security assertion markup language (SAML).
- Use their credentials to authorize SOAP connections if allowed by strict security.
- Use their credentials for other API connections such as WSDL, JSON, XML, or XSD without restriction.

Non-interactive users

Non-interactive users can only use their credentials to authorize API connections such as JSON, SOAP, and WSDL. They can't log in to the ServiceNow UI. The strict security high security setting determines if non-interactive users are subject to Contextual Security Manager requirements.

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Distinguishing between interactive and non-interactive users increases instance security by helping to ensure that users abide by the principle of least privilege.

Installed with Non-Interactive Sessions

Note: Non-Interactive Sessions is enabled for all new instances since the Calgary release. If you don't see it in the list of plugins, request it using the Activate Plugin service catalog item in Now Support.

- Adds a column titled **Web Service Access Only** [web_service_access_only] to the **User** [sys_user] table.
- Changes all existing users to be interactive users (web_service_access_only=false).
- Updates the User form to display the **Web Service Access Only** [web_service_access_only] field by default.

Create a non-interactive user for web services

Non-interactive users can only connect to a ServiceNow instance from an API protocol. Use this feature to set up user accounts for web service authentication purposes.

Before you begin
Role required: user_admin or admin

About this task
Non-interactive users can't log in to an instance or a service portal or connect through single-sign-on. They can be used as a MID Server user if they're flagged as an Internal Integration User.

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Search for the user to be updated.

   Example
   For example, SOAP user.
3. Select the **Web Service Access Only** check box.
4. Select **Update**.

Note:

The ServiceNow platform uses any user name and password credentials supplied with a request even if the High Security Settings don't require authorization for a given API protocol. For example, if a SOAP request supplies a user name and password, the instance verifies those credentials even if SOAP requests don't require authorization. To avoid verifying user credentials, the request must not include them.

Make a non-interactive user record interactive

Manually switch a non-interactive user to an interactive user.

Before you begin
Role required: user_admin or admin

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Search for the user you want to update.

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For example, **System Administrator**.

3. Clear the **Web Service Access Only** check box.
4. Select **Update**.

Update web service user accounts for strict security

If your instance requires strict security, add the soap role to any user accounts used for web services.

Before you begin
Role required: user_admin or admin

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Select a web service user from the list.
3. From the **Roles** related list, select **Edit**.
4. Add soap to the **Roles List**.
5. Select **Save**.
6. Select **Update**.

Require authentication

You can specify whether non-interactive sessions require authentication from the **High Security Settings** module.

Before you begin
Role required: admin with elevated privileges

About this task
A non-interactive session bypasses the UI to connect to the instance at an API level. Typically, non-interactive sessions use set protocols such as JSON, SOAP, XSD, or WSDL. By default, all non-interactive sessions require authentication.

Procedure

1. Log in with an administrator user with the security_admin role.
2. Elevate your privileges to use security_admin.
3. Navigate to **All** > **System Security** > **High Security Settings**.
4. Select the matching **Requires authorization...** option for the protocol you want to set.
   For example, **Requires authorization for incoming SOAP requests**.
5. Select the check box to require authentication for the non-interactive session method.

   Clear the check box to enable the non-interactive session method to connect without providing any credentials.

Note:

Activating the Non-Interactive Sessions plugin might restrict existing users who manage SOAP and WSDL-based integrations from logging in, unless they already possess the SOAP role.

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ServiceNow AI Platform tables and data

ServiceNow provides options for managing your data on the ServiceNow AI Platform.

Table administration	Data management	Export data	Roll back and delete recovery
			
Learn about working with complex, large amounts of data, by using tables and records on the ServiceNow AI Platform.	Explore options for storing and deleting data with ServiceNow.	Learn about exporting data from the ServiceNow AI Platform.	Learn how to roll back actions and recover deleted records.

Table administration

Handle data and process management for all your ServiceNow applications. Administrative roles on the ServiceNow AI Platform give you access to tables and records to manage incidents, problems, database changes, and more. Build graphical representations of tables and their relationships (such as parent or child tables) using Schema maps, and define elements in your database with Data Dictionary tables. Work with complex relationships between multiple sets of records using Many-to-Many Task Relations.

Data Management

Manage the growth of data on your instance with our set of Data Management tools. Keep performance smooth by archiving records, delete older records using table cleaner, and manage large tables with database rotations.

Exporting data

Export individual or multiple records from the ServiceNow AI Platform in a variety of formats.

Roll back and delete recovery

Roll back a software upgrade or plugin activation. Recover deleted records and related changes.

Table administration

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table.

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Get started

Explore



Learn the basics of tables and table administration.

Manage



Manage tables and indexes, and create relational connections between records.

Work with the Task table



Use the Task table to track task-specific functions, and connect with Incident and Problem tables.

Create database views



Create database views for reporting purposes.

Exploring ServiceNow AI Platform® tables

Applications use tables and records to manage data and processes, such as Incident, Problem, and CMDB. Tables can extend other tables, creating parent tables and child tables.

Table administration overview

The ServiceNow AI Platform® uses a table-based data structure to store and organize information. Pre-built tables are included for common IT service management (ITSM) processes, with their data fully importable and exportable in CSV, XML, or other formats.

Table administration users

Users

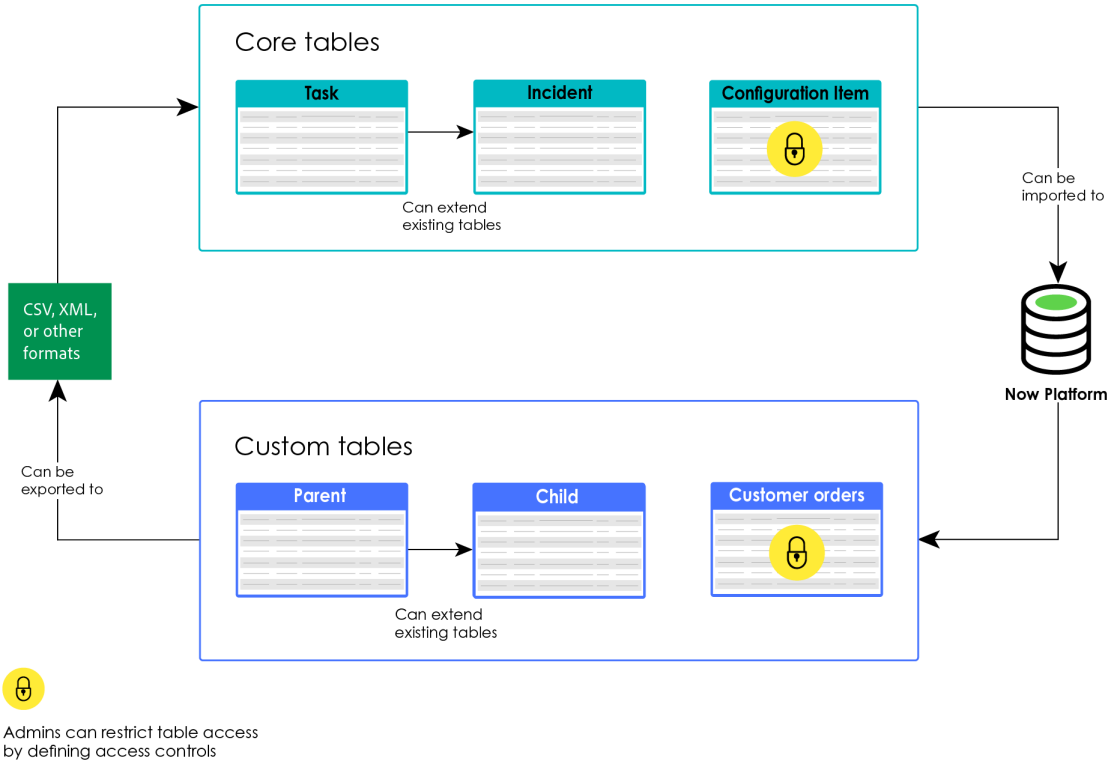
User	Description
Administrator	Admins can create custom tables for specific business requirements, define field properties, create relationships between tables, and extend existing tables without modifying the originals. Administrators also define access controls to allow only approved user access to records, business rules for various tasks, and table cleanup policies for unused and outdated records.

Table administration workflow

This infographic depicts how an administrator can extend both core tables and custom tables.

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Extending core tables and custom Tables



1. An administrator views table relationships and learns how table extension works on the ServiceNow AI Platform®.
2. The administrator creates a custom parent table and extends it by creating a custom child table.
3. The administrator defines access controls to restrict access to each table.
4. The administrator exports and imports data to core and custom tables as needed.

Table administration benefits

Benefit	Feature	Users
Define models and entity relationships across multiple tables.	Data dictionary tables	Admin
Access visual references for tables and their contents.	Viewing table references and extensions	Admin
Store records for your instance.	Create a table	Admin
Remove unneeded tables from your instance.	Deleting custom tables	Admin
Quickly find data stored in a table.	Create a table index	Admin
Connect a list to another list of multiple entries instead of a single field.	Create a many-to-many table relationship	Admin

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Benefit	Feature	Users
Organize and store task-related data.	Working with the Task table	Admin
Connect tables for reporting purposes.	Working with database views for reporting	Admin

What to explore next

To learn more about using table administration features, see:

- Managing tables and indexes
- Working with the Task table
- Working with database views for reporting

Custom tables

Custom tables enable you to expand the functionality of the ServiceNow AI Platform and create custom applications.

About custom tables

Custom tables are tables that aren't part of the base ServiceNow AI Platform system, but are created by a ServiceNow AI Platform administrator and not otherwise exempt. Custom tables can be used to configure and extend base system workflows, and to add new functionality or custom applications to your ServiceNow AI Platform instance. For more information about building custom applications, see Building applications.

Entitlements for custom tables are included in certain subscription licenses based on the terms of the contract. If you don't have enough custom table entitlements, you can upgrade your license or purchase additional products that include custom table entitlements.

ServiceNow Store applications that consume custom tables

Some applications available from the ServiceNow Store at no additional cost require a number of unallocated custom table entitlements. If an application consumes custom table entitlements, the application listing details and contract show how many are needed. For more information about application listing details, see ServiceNow Store application listing details.

Additional information

- Custom Table Guide legal schedule

  Review the most recent complete definitions of custom and exempt tables.

  Note: Legal schedules are enforced based on when the contract is executed. For past versions of the Custom Table Guide, see Legal schedules archive.

- Map custom tables to a product subscription in Subscription Management

  Maintain accurate entitlement for custom tables in the global scope and stay in compliance by mapping the tables to a product subscription in Subscription Management. Mapping your custom tables keeps your custom table allotment updated and helps you avoid running out of custom table entitlements.

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- Map a missing custom table to a product subscription in Subscription Management

  Map a custom table in the global scope to a product subscription when that table isn't shown in the **Unmapped global custom tables** tab of Subscription Management. To stay in compliance, all custom tables must be mapped to a product subscription.

Data dictionary tables

Access details related to tables, columns, and field labels in your instance.

Tables

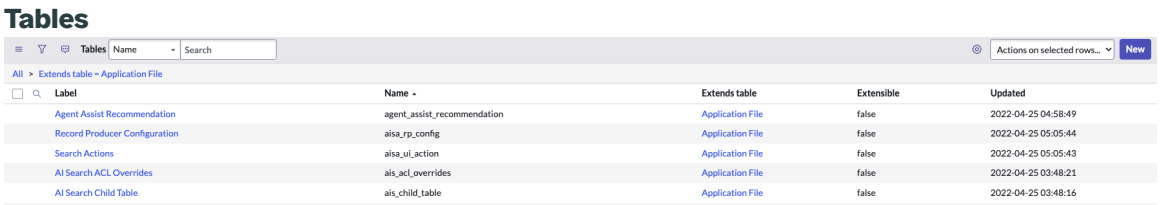
All of the information on an instance is stored in tables, which consist of a series of records. The record in turn holds a series of fields that hold the individual bits of data and can be viewed either as a list or a form.

The Tables [sys_db_object] table contains a record for each table in the database.

Access the Tables [sys_db_object] table by navigating to **System Definition** > **Tables**. From the Tables list, an administrator can create a custom table, or select an existing table to view table details. In the table form, an administrator can access table administration options.

- View, add, or modify columns with a searchable and sortable embedded list, define the auto-number format, make the table extendable by other tables, and create modules for the table.
- Launch a schema map for a table by clicking the **Show Schema Map** related link.
- Open the dictionary entries for the table by right-clicking the form header and selecting **Show Dictionary Record**.
- Navigate directly to the default list or form view for the table by clicking the **Show List** or **Show Form** related link.
- Delete all records from a table by clicking the **Delete All Records**.

The following image shows a list of the tables that extend the Application File table.



Dictionary Entries

The Dictionary Entries [sys_dictionary] table, also called the **System Dictionary**, defines every table and field in the system. It contains information about data type, character limit, default value, dependency, and other attributes of a field.

Access the system dictionary in one of these ways:

- To see the system dictionary list view, navigate to **System Definition** > **Dictionary**.
- To view particular dictionary definition, right-click the list header, form header, or field label, and select **Configure Dictionary**.

The following image shows a filtered list of dictionary entries for the Incident table and the Task table, which it extends.

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Dictionary Inc Task

Dictionary Entries | Table | Search | Actions on selected rows... | New

All > Table = incident .or. Table = task

Table	Column name	Type	Reference	Default value	Display	Text index	Audit	Updated
incident	resolved_at	Date/Time	(empty)		false	false	false	2022-04-25 04:29:00
incident	resolved_by	Reference	User		false	false	false	2022-04-25 04:29:00
incident	rfc	Reference	Change Request		false	false	false	2022-04-25 04:16:53
incident	severity	Integer	(empty)	3	false	false	false	2022-04-25 04:16:53
incident	subcategory	String	(empty)		false	false	false	2022-04-25 04:16:53
incident	sys_id	Sys ID (GUID)	(empty)		false	false	false	2022-04-25 04:16:53
task		Collection	(empty)		false	true	false	2022-04-25 05:43:21
task	active	True/False	(empty)	true	false	false	false	2022-04-25 03:45:17

Field Labels

The Field Labels [sys_documentation] table, also called the **Language File**, contains information about the labels and hints for each table and column in the system.

Access the language file in one of these ways:

- To see the list view, navigate to **System Definition** > **Language File**.
- To see the field label for a particular field, right-click the field label on the form.

The following image shows the language file filtered to display only labels on the Incident table.

Field Labels

Field Labels | Table | Search | Actions on selected rows... | New

All > Table = incident

Table	Element	Language	Label	Plural	Hint	Updated
incident	problem_id	en	Problem	Problems	Related problem, if one exists	2022-04-25 04:16:53
incident	notify	en	Notify	Notifies		2022-04-25 04:16:53
incident	business_impact	en	Business impact	Business impacts		2022-04-25 05:00:23
incident	severity	en	Severity	Severities		2022-04-25 04:16:53
incident	reopened_by	en	Last reopened by	Last reopened by		2022-04-25 04:16:53

System dictionary

View a list of all tables in columns in your instance from the system dictionary.

Each row in the system dictionary represents either a table or a column in one of the tables. The system dictionary provides options for administrators to modify tables and fields, which in turn define lists and forms.

Use caution when changing system dictionary records because changes can have a high impact on functionality. In particular, changes to dictionary entries for system tables, which are tables that begin with sys_, can create system-wide issues such as the inability to use update sets.

Dictionary changes are difficult to reverse. Also, dictionary changes automatically apply to all extended tables unless a dictionary override is defined. Be sure that changes are well-tested before applying them to a production instance.

Creation options

When you create a field from the system dictionary, it is automatically added at the end of the first section of the default form view.

In most cases, use the following interfaces rather than creating entries directly on the system dictionary:

- To create tables and fields, use the Tables module.
- To create fields, configure the table form.

Table relationships

You can create relationships between tables by extending tables, referencing records in another table, creating many-to-many relationships, and joining tables in a database view.

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Tables can be related to each other in several ways.

Extensions

A table can extend another table. The table doing the extending (child class) includes all of the fields of the other table (parent class) and adds its own fields. For instance, the Incident [incident] table has all of the Task [task] table fields (because an incident is a special form of task) and has its own incident-specific tasks. See Table extension and classes.

One-to-many

Within a table, a field can hold a reference to a record on another table. There are three types of one-to-many relationship fields.

Reference fields

Allow a user to select a record on a table defined by the reference field. For instance, the **Caller** field on the Incident table allows the user to select any record on the User table.

Glide lists

Allow a user to select multiple records on a table defined by the glide list. For instance, the **Watch list** field on the Incident [incident] table allows the user to select records on the User [sys_user] table.

Document ID fields

Allow a user to select a record on any table in the instance. These fields are much less common, but one example is the **Document** field on the Translated Text [sys_translated_text] table.

Many-to-many

Two tables can have a bi-directional relationship, so that the related records are visible from both tables in a related list.

Database views

Two tables can be joined virtually in a database view to enable reporting on data that might be stored over more than one table.

Table extension and classes

Enable one or more child tables to share fields and records with a parent table. Administrators and application developers can only extend tables during table creation.

Administrators and application developers typically extend tables to create a set of related records that share information. For example, in the base system, the Task and the Configuration Item tables have multiple extensions:

Sample extended tables in the base system

Original table	Related tables extended from original table
Task [task]	• Incident [incident] • Problem [problem] • Change Request [change_request]

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Sample extended tables in the base system (continued)

Original table	Related tables extended from original table
Configuration Item [cmdb_ci]	• Application [cmdb_ci_appl] • Computer [cmdb_ci_computer] • Database [cmdb_ci_database]

A table that extends another table is called a child class, and the table it extends is the parent class. A table can be both a parent and child class both extending and providing extensions for other tables. A parent class that is not an extension of another table is called a base class.

Administrators can use these tools to see the relationships between classes.

- Schema map
- System dictionary
- Tables module

Extending a table:

- Links the new table to the extending table.
- Creates system fields in the new table.
- Creates one or more database tables to store the parent and child classes. The number of tables the system creates depends upon the extension model selected during table creation.

Extension models

The ServiceNow AI Platform offers these extension models.

- Table per class
- Table per hierarchy
- Table per partition

The extension model determines these attributes.

- The number of database tables created
- The derivation of fields from parent classes
- The replication of records from child classes

Table per class

Tables created

Creates a separate database table for the parent class and each child class.

Fields derived from parent class

Child classes derive fields from parent classes.

Dictionary records created for parent class

A parent class has a Dictionary record for the collection and for each field that can be derived from it. For example, the Contract [ast_contract] table has 59 Dictionary records, which define the table and its fields.

Dictionary records created for child classes

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Each child class only has Dictionary entries for fields unique to the class.

Records replicated

The parent class replicates each record stored in its child classes. Each child class only stores records unique to the class. Replicated records have the same Sys ID value in each table. The system replicates any change you make to a child record to the matching record in the parent table. For example, Contract [ast_contract] table replicates records from the Lease [ast_lease] and Warranty [ast_warranty] tables.

Table per hierarchy

Tables created

Creates one database table for the parent class, which stores all records for the parent and child classes. Child classes do not have separate database tables.

Fields derived from parent class

Child classes derive fields from parent classes. For example, the Incident table derives fields from the Task table.

Dictionary records created for parent class

A parent class has a Dictionary record for the collection and for each field that can be derived from it. For example, the Task table is a parent class that has 66 Dictionary records, which define the table and its fields.

The Dictionary entry for the parent class contains a sys_class_name column whose value indicates which child class each record belongs to. For example, Incident records have a sys_class_name value of incident, and change records have a sys_class_name value of change.

Dictionary records created for child classes

Each child class only has Dictionary entries for fields unique to the class. For example, the Incident table only has 22 Dictionary records, which are not already defined in the Task table.

Records replicated

Record replication is not needed, because the parent class stores all records that belong to the hierarchy. For example, the Task table contains all records from its child classes such as the Change, Incident, and Problem tables.

Table per partition

Tables created

Creates one database table for the parent class, which stores all records for the parent and child classes. Child classes do not have separate database tables. As the database table reaches a storage limit, the system dynamically adds storage tables (partitions) to store additional records.

Fields derived from parent class

Child classes do not derive fields from parent classes. Instead each child class has its own list of fields. For example, the Base Configuration Item [cmdb], Configuration Item [cmdb_ci], and Hardware [cmdb_ci_hardware] tables all have their own field definitions.

Dictionary records created for parent class

A parent class has a Dictionary record for the collection and for each field relevant to it. For example, the Base Configuration Item [cmdb] table is a parent class that has 48 Dictionary records.

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The system replicates changes made to parent class Dictionary entries to child class Dictionary entries. For example, when you change the name column in the parent class Base Configuration Item [cmdb] table, the system replicates it to child class Dictionary entries such as the Configuration Item [cmdb_ci] and Hardware [cmdb_ci_hardware] tables.

The Dictionary entry for the parent class contains columns for sys_class_name and sys_class_path whose values indicate which child class each record belongs to. For example, Hardware records have a sys_class_name value of cmdb_ci_hardware, and computer records have a sys_class_name value of cmdb_ci_computer.

When the database table reaches a storage limit, the system updates the Dictionary entry for the parent class to include columns for sys_storage_alias and storage_table_name. These storage column Dictionary entries allow administrators to manage the parent class and its storage tables as a single logical unit.

Dictionary records created for child classes

Each child class has a Dictionary record for the collection and for each field relevant to it. For example, the Hardware table has 73 Dictionary records with some records duplicating columns in the parent class.

Records replicated

Record replication is not needed, because the parent class stores all records that belong to the hierarchy. For example, the Base Configuration Item [cmdb] table contains all records from its child classes such as the Application [cmdb_ci_appl], Computer [cmdb_ci_computer], and Hardware [cmdb_ci_hardware] tables.

Storage aliases

Learn about the role storage aliases play in data manipulation and field creation in the ServiceNow AI Platform.

Understanding storage aliases is important for effective data management and schema customization in the ServiceNow AI Platform, particularly when dealing with complex table hierarchies like those in the Task [task] table.

By default, administrators have access to the Storage Column Aliases [sys_storage_alias] table within an instance. However, transactional processes against this table can't be performed by an administrator from the user interface.

Table hierarchy and models

Understanding storage aliasing requires knowledge of table hierarchies within the Task [task] table, which involves two models: Table per hierarchy and Table per class.

Table per hierarchy

This model uses a single physical table, the Task [task] table, which features a flattened hierarchy where all columns within the task hierarchy exist only on the task table. For example, fields related to change requests aren't on a separate Change Request [change_request] table but are integrated into the Task [task] table. You can verify whether a table is Table per hierarchy by checking the extension model field in the Tables [sys_db_object] table. If the table's parent is a direct child of the Task [task] table, the table uses Table per hierarchy.

An extended table inherits the hierarchy of its parent. For example, the IMAC [change_request_imac] table is a child table of the Change Request [change_request] table, which extends the Task [task] table. Because the Change Request [change_request] table is Table per hierarchy, the IMAC [change_request_imac] table model is also Table per hierarchy. Legacy tables

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such as the Incident [incident] table, Change Request [change_request] table, and Problem [problem] table are all part of the flattened Task [task] table hierarchy.

Table per class

This model applies to tables that physically exist in the database. It's used for new tables directly extending from the Task [task] table when the task row count exceeds 1 million rows. Unlike Table per hierarchy, Table per class doesn't use glomming because it doesn't operate within a flattened hierarchy.

Storage alias definition

A storage alias is created for every field on a table within an instance. Familiarize yourself with the key fields on the Storage Column Aliases [sys_storage_alias] table.

Element Name

Indicates how the field appears to users, which is important for user interface interactions and scripting.

Storage Alias

Indicates the exact physical column where the data for a field is stored. The storage alias value is used in combination with the table_name value to identify what data to manipulate. The storage alias value is the actual physical column on the Task [task] table.

Storage Table Name

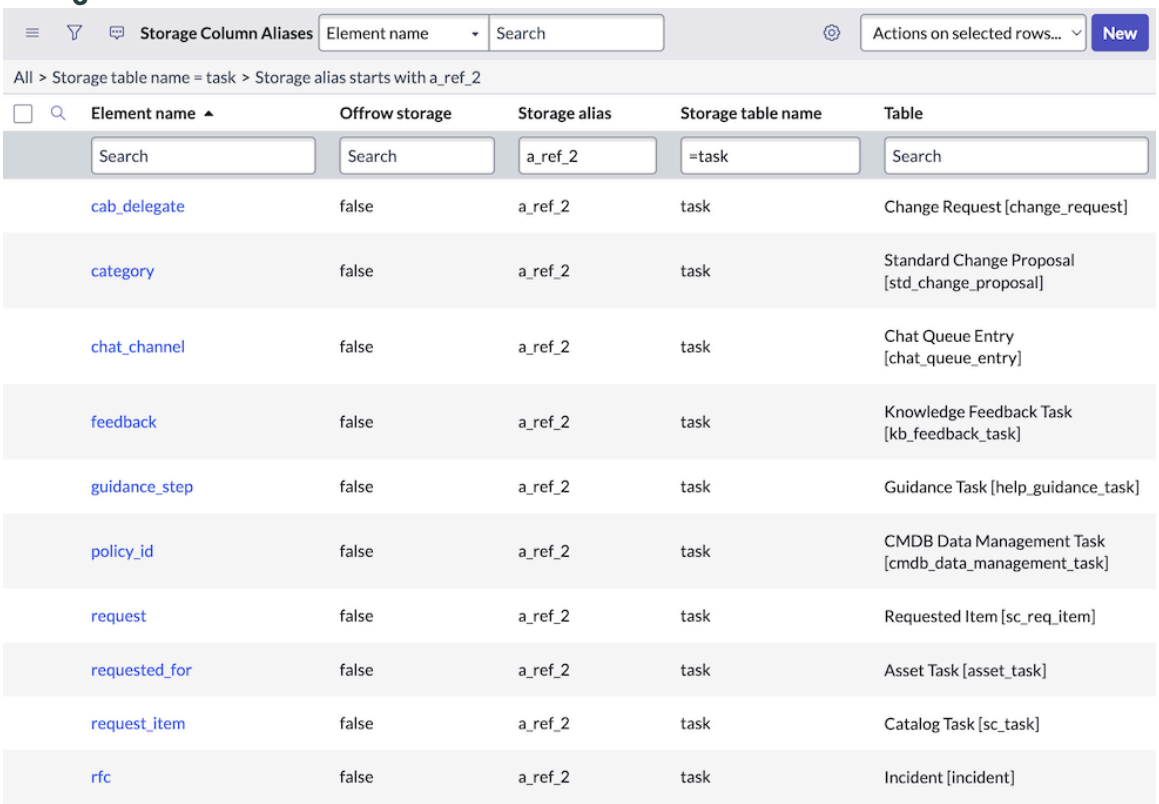
Specifies the physical table that houses the element. For Table per hierarchy tables, the value is always task. For Table per class tables, the value is the name of the physical table.

Table

Specifies the logical class that each element links to on the physical Task [task] table. The Table element holds the table_name value which is the class discriminator.

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Storage column aliases



Storage Column Aliases | Element name | Search | Actions on selected rows... | New

All > Storage table name = task > Storage alias starts with a_ref_2

Element name	Offrow storage	Storage alias	Storage table name	Table
Search	Search	a_ref_2	=task	Search
cab_delegate	false	a_ref_2	task	Change Request [change_request]
category	false	a_ref_2	task	Standard Change Proposal [std_change_proposal]
chat_channel	false	a_ref_2	task	Chat Queue Entry [chat_queue_entry]
feedback	false	a_ref_2	task	Knowledge Feedback Task [kb_feedback_task]
guidance_step	false	a_ref_2	task	Guidance Task [help_guidance_task]
policy_id	false	a_ref_2	task	CMDB Data Management Task [cmdb_data_management_task]
request	false	a_ref_2	task	Requested Item [sc_req_item]
requested_for	false	a_ref_2	task	Asset Task [asset_task]
request_item	false	a_ref_2	task	Catalog Task [sc_task]
rfc	false	a_ref_2	task	Incident [incident]

In this example, the storage alias for the cab_delegate element is a_ref_2 and the physical storage table where the data is stored is task. The example depicts 10 logical elements in different logical classes on the Task [table] that all link to the same alias a_ref_2 on the physical Task [task] table.

The sibling elements are glommed, which means they share one physical column on the Task [task] table. You can query data from the logical element cab_delegate using a query like:

```
SELECT a_ref_2 from task WHERE sys_class_name='change_request'
 AND a_ref_2 IS NOT NULL
```

The query specifies data in the physical column a_ref_2. The class discriminator change_request is used in combination with the storage alias a_ref_2 to query the logical element cab_delegate from the logical class change_request on the physical Task [task] table.

The naming convention for fields created in the actual physical tables can vary depending on the type of field. In this example, a_ref_2 is an alias on the Task [task] table that holds values for reference fields.

Functionality and usage

Storage aliases serve multiple purposes.

Mapping

Aliases map logical elements (Table per hierarchy) or physical elements (Table per class) to the actual physical columns in the backend database. The logical element can be glommed to a physical column that is larger than the logical element's max_length.

Glomming

Aliases allow multiple sibling elements to share a single physical column in a Table per hierarchy model.

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Label mapping

Aliases associate sys_documentation (label) records with their respective elements, enhancing visibility in forms, reports, and list views.

Restrictions and rules

- Two logical elements within the same class can't share a physical column. For example, two string fields created on the Incident [incident] table can't map to the same physical column in the database.
- A parent element and its child can't share a physical column. For example, a field created on the Incident [incident] table can't be mapped to a physical column when that physical column is already mapped to a field on the Task [task] table.
- Only sibling elements can share a physical column. For example, a reference field on the Change Request [change_request] table and a reference field on the Incident [incident] table and can both map to the same physical column.
- Fields created directly on the Task [task] table (where sys_class_name is 'task') can't be glommed.

Managing tables and indexes

Administrators can modify the database structure using table administration tools.

Custom tables and fields

Administrators can add custom tables, define fields, and manage field labels. Administrators can also delete custom tables that aren't needed or delete all the records in a table without deleting the table itself.

Dictionary entries

The system dictionary is a table, called Dictionary Entry `[sys_dictionary]`, that contains details for each table and defines every column within each table in an instance. Administrators can modify tables and fields in the system dictionary, which subsequently define the lists and forms that users access throughout the instance.

Dictionary attributes

Dictionary attributes define global behavior for fields. An administrator applies attributes directly to the dictionary entry to control various aspects of how the table or field behaves across the entire system.

Dictionary overrides

Dictionary overrides enable administrators to override field settings on extended tables. Dictionary overrides enable administrators to customize the behavior of a field for a specific table that inherits from another table. Overrides are used to change the inherited dictionary attributes on child tables without affecting the parent table or other child tables.

Table flattening

With table flattening, the Task [task] table and Base Configuration Item [cmdb] table have a hierarchy of related tables where one or more child tables extend from a parent table.

The extension model does not affect how the tables appear or function in the instance. All table functionality, including database views, remains unchanged by the extension model.

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Table indexes

An index puts unordered tables into order, and efficiently speeds up queries to columns in your tables, by creating pointers to where information is stored in your database. Administrators can add indexes to access table data more easily.

Many-to-many table relationships

Many-to-many (M2M) table relationships enable administrators to associate records between two tables in a bidirectional and flexible manner. This relationship type is used to create links between records where each record from one table can relate to multiple records in another table, and vice versa.

Note: It is to be noted that when you de-activate or delete a field from the dictionary on a table, it might impact on the personalized UI view lists and will remove all regardless if they contain the de-activated/deleted field.

Create a table

Administrators and application developers can create custom tables to store application data. After you create a table, you can also modify field types and field labels.

Before you begin

Role required: admin

Check your custom table entitlements before creating custom tables. See Managing custom tables and applications in Subscription Management.

About this task

ServiceNow AI Platform application subscriptions include custom table entitlements. You can create custom tables for any purpose, up to the entitlement limit in the subscription. To learn more about how your usage administrator maps the custom tables that you create to subscriptions, see Map custom tables to a product subscription in Subscription Management.

Note: It is best to create tables when building applications with tools. To learn more, see Building applications. To minimize the existence of unneeded and extraneous tables in an instance, don't overdo table creation. Create only those tables you need to minimize administration tasks and shorten upgrade times. Do not extend the [sys_choice] table. Extending the [sys_choice] table is not supported.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select **New**.
3. On the form, fill in the fields.

Control	Description
Label	Enter a unique label for the table (such as **Laptops** or **Thin Clients**). The label appears on list and form views for the table. Updating the **Label** field also updates the label record in the language file for the current language. See Field Labels in Data dictionary tables.
Name	Edit the table name, which is automatically populated based on the table label and a prefix as follows:

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Control	Description
	○ For a table in a scoped application, the name is prefixed with a namespace identifier to indicate that it is part of an application. ○ For a table in the global application, the name is prefixed with the string `u_`. ○ For a remote table in a scoped application, the name is prefixed with a namespace identifier and the string `st_` to indicate that it's remote and part of an application. ○ For a remote table in the global application, the name is prefixed with the string `u_st_`. You cannot modify the prefix; however, you can modify the rest of the table name. The name can contain only lowercase, alphanumeric ASCII characters and underscores (_).
Extends Table	Select the table to extend. Extending a base table incorporates all the fields of the original table and creates system fields for the new table. If they are in the same scope or if they can be configured from other scopes, you can extend tables that are marked as extensible. This option is not available if you select the **Scriptable Table** check box to designate that this table is scriptable.
Application	[Read only] Displays the application associated with this table. If you are working on an application or are creating a table from an application record, the field defaults to that application. Otherwise, the field defaults to **Global**. Any records that are created from the table record, such as modules and security rules, are assigned to this application by default.
Remote Table	Option to designate this table as a remote table. A remote table is a table to which you can associate a script definition for retrieval of data from an external data source. Unlike a standard internal table, the data doesn't come from records in the current instance. If you select this check box, you cannot access the **Extends Table** option because scriptable tables cannot be extended from other tables. **Note:** To learn more about scriptable tables, see: ○ Retrieving and caching external data using remote tables ○ Create a remote table ○ Create a script definition for a remote table
Create module	Select the check box and then complete the **Add module to menu** field to create a list module in the application menu. This option is available only when creating a table.
Add module to menu	Select an existing menu or select **Create new** and enter a new menu name. This option is available only when the **Create module** check box is selected.

4. In the **Columns** section, use the **Table Columns** embedded list to add columns to the table.

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Column	Description
Column label	Define a unique label for the column. The label appears on list headers and form fields for the column. When you update the **Column label** field, the system also updates the label in the language file for the current language.
Type	[Mandatory] Define the field type for the column. See Field administration and Field types. To preserve existing data, only change fields between the same basic type (for example, **Choice** and **String**). A warning appears if a change to a custom field results in data loss. You cannot change a base system field, that results in data loss.
Reference	Make the field into a Reference field type by entering the referenced table name. **Note:** Dynamic reference creation is enabled for this field. So, if you enter a table name that does not match an existing table, a new table is created when you save changes to the current table record. If the current table has a module in the application navigator, then a module for the newly created table is automatically created in the same application menu.
Max length	[String fields only] Limit the length of the field. A length of under 254 appears as a single-line text field. Anything 255 characters or over appears as a multi-line text box.

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Column	Description
	Note: ○ You can only change this value if the **Type** of the field is **String**. Changes for any other type of field are ignored. ○ On an Oracle instance, you cannot increase the maximum length of a string field to greater than 4000 because it requires the CLOB datatype in Oracle. To increase beyond this size, log an incident with ServiceNow Technical Support to request the change. ○ To prevent data from being lost, only decrease the length of a string field when you are developing a new application and not when a field contains data. A warning appears if a change to a custom field results in data loss. For a base system field, you cannot make a change that results in data loss.
Default value	Specify the default value of the field for any new record. Ensure that this value uses the correct field type. For example, an integer field can use a default value of *2* but cannot use a default value of *two*. These values can be overridden with dictionary overrides.
Display	Indicate whether this field is the Display values (appears on records that reference this table). **Note:** This option does not control whether this field is displayed on lists or forms.

5. In the **Controls** section, define additional table options.

Control	Description
Extensible	Select the check box to enable other tables to extend this table. Clear the check box to prevent the creation of additional child tables; existing child tables remain unchanged.
Live feed	Select the check box to enable record feeds for the table. This option adds the **Show Live Feed** icon () in the form header.

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Control	Description
Auto-number	Select the check box, and then define the number format to add an auto-numbered field to the table. The check box is available only when a number format does not exist for the table. Otherwise, you can edit the existing number format.
Create access controls	Select the check box and then complete the **User role** field to create basic security rules for the table.
User role	Enter a new name or select an existing user role that is required to access this table. This option is available only when the **Create access controls** check box is selected.

6. In the **Application Access** section, define the scope protection for the table.
For more information, see Application access settings.

Control	Description
Accessible from	Specify which application scopes can access the table: **All application scopes** Can be accessed from any application scope. **This application scope only** Can be accessed only from the current application scope.
Can read	Select the check box to enable script objects from other application scopes to read records stored in this table. This option offers runtime protection. For example, a script in another application can query data on this table. First select read access to grant any other API record operation.
Can create	Select the check box to enable script objects from other application scopes to create records in this table. This option offers runtime protection. For example, a script in another application can insert a new record in this table. This option is available only when the **Can read** check box is selected. Clear the check box to prevent script objects from other application scopes from creating records in this table.
Can update	Select the check box to enable script objects from other application scopes to modify

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Control	Description
	records stored in this table. This option offers runtime protection. For example, a script in another application can modify a field value on this table. This option is available only when the **Can read** check box is selected. Clear the check box to prevent script objects from other application scopes from modifying data stored in this table.
Can delete	Select the check box to enable script objects from other application scopes to delete records from this table. This option offers runtime protection. For example, a script in another application can remove a record from this table. This option is available only when the **Can read** check box is selected. Clear the check box to prevent script objects from other application scopes from deleting records from this table.
Allow access to this table via web services	Select the check box to enable users to make inbound Web services web service queries to this table. This option offers both design-time and runtime protection. The user performing the query must have the correct permissions to access this table, even when this check box is selected. Clear the check box to prevent users from making web service queries to this table.
Allow configuration	Select the check box to enable applications from other application scopes to create configuration records for this table that change its functionality. For example, an application designer can select this table from the **Tables** list on business rules, client scripts, or UI actions. This option offers design-time protection. Clear the check box to prevent application designers from selecting this table when creating configuration records.

7. Click **Submit**.

What to do next

To change the field labels in your table or the label of the table itself, perform the following task:

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1. Navigate to the Field Label [sys_documentation] table, and filter the table to show the table that has the fields you want to change. To find the label that represents the table itself, filter the records where **Element** is empty.
2. Open the field record that you want to change, and make your updates. For a description of each field, see Field Label table.

Global default fields

When you create a new custom table, several fields appear in the **Table Columns** embedded list. For all tables, required system fields are added automatically. You cannot delete or modify these fields.

For tables that extend another table, fields on the parent table also appear on the **Table Columns** embedded list for the current table. If you modify these fields, remember that all changes to fields on the parent table also affect all child tables, not just the current table.

These required system fields are added to all tables:

Required system fields

Field	Type	Description
Class [sys_class_name]	System Class Name	If the table is extensible, a string field that indicates which child table contains the record.
Created [sys_created_on]	Date/Time	A time-stamp field that indicates when a record was created.
Created by [sys_created_by]	String	A string field that indicates the user who created the record.
Sys_id [sys_id]	Sys ID	The Unique record identifier (sys_id) for the record.
Updates [sys_mod_count]	Integer	A numeric field that counts the number of updates for this record since record creation.
Updated by [sys_updated_by]	String	A string field that indicates the user who most recently updated the record.
Updated [sys_updated_on]	Date/Time	A time-stamp field that indicates the date and time of the most recent update.

Deleting custom tables

Administrators can delete custom tables that are no longer needed. For example, delete a table from an application that is under development because the business requirements change.

A table is custom if an administrator created it and it is not part of a system upgrade or plugin activation. Custom table names always begins with `u_`, or `x_` for scoped tables.

Warning: You cannot delete base system tables. If you inadvertently delete such a table, it is automatically recreated when you upgrade an instance.

You cannot delete a table that has associated tables that extend from it.

You must first delete all records in the table before you delete the table itself. If you do not first delete the records, errors can result on the parent table if it references the records. Deleting the records removes any references from the parent table. To learn more, see delete the records in the table.

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Delete a custom table

If you no longer need a custom table, you can delete it after you delete all the records in the table.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Open the table to delete.
3. Select **Delete All Records**.

   Deleting all records before deleting the table ensures that the business logic is properly executed (for example, reference cascade rules or other delete business rules). If you do not delete all records from the table first, then you must manually fix any other records or tables that the table deletion impacts. Cascade deletions are also taken care of in this step.
4. Select **Delete**.
   The **Delete** button is only available for custom tables beginning with u_ (global) or x_ (scoped).
5. In the confirmation dialog box, enter `delete` and click **OK**.

   The table and all items that reference the table are deleted, including:

   - Choice list items
   - Forms, form sections, lists, and related lists
   - Reports and Performance Analytics widgets
   - Reference fields that reference the table
   - Access controls

Related topics

Deleting custom tables

Delete all records from a table

You may decide to delete all the records on a table without deleting the table itself. For example, the administrator may want to delete all incidents on a test instance without deleting the incident table itself.

Before you begin
Role required: admin

About this task
When you prepare to delete many records from a table, consider the following guidelines to minimize impact on performance.

- Limit the number of records to be deleted in a single delete action to prevent the table from being locked. Use the `setLimit()` method described at setLimit.
- Minimize triggering an excessive number of business rules as a result of this deletion. Use the `setWorkflow(Boolean e)` method described at setWorkflow.

Note: Deleting all records for a table also deletes records from tables that extend the table.

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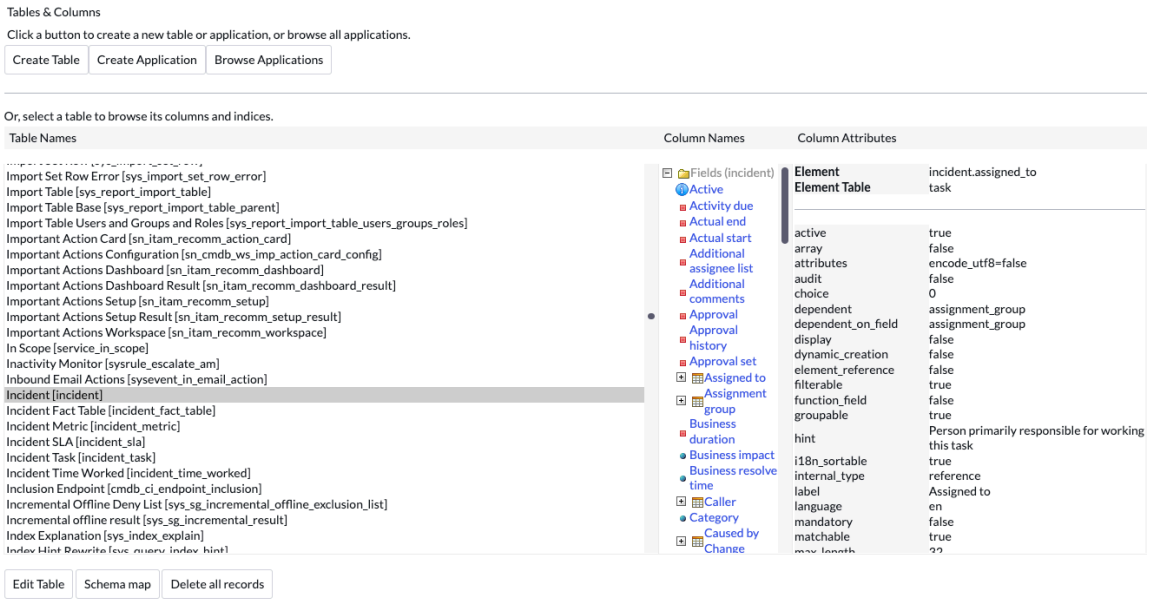
There are several methods for deleting table records. Depending on the number of records to be deleted, choose the method that would be most efficient in your environment. Use these methods with caution. Before performing this procedure, be sure that you do not need any of the records.

Procedure

- From the **Tables and Columns** module, complete the following steps.

1. Navigate to **System Definition** > **Tables & Columns**.
2. Select the table for which to delete records.

   Note: If the table you want to delete records from belongs to a scoped application, select that application in the scope picker. Alternatively, configure scope-to-scope access. See Restricted caller access privilege settings.



   Note: Some system tables do not allow this method of deleting records, for example, you cannot delete all user records [sys_user]. The list of tables does not include system tables that you cannot delete records from.

3. Click **Delete all records**.
4. In the confirmation dialog box, enter `delete` and click **OK**.

- From a list view, complete the following steps.

1. In List v2, navigate to the list view that displays the table records, click the context menu, and then navigate to **Show**.
2. In List v3, click **<Number> rows per page** in the footer.
3. Set the number of rows per page to display the max number.
4. Select all the rows on the page.
5. Click **Actions on selected rows**, and then click **Delete**.
6. Continue deleting all rows on a page until all records are deleted.

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Result
The selected table is empty of records. The table still exists, and any references to the table on other tables (such as business rules or reference fields) are preserved.

Modify dictionary entries

Modify dictionary entries by configuring a field on a form or from the Dictionary module.

Before you begin
Role required: admin

Procedure
1. Navigate to the dictionary entry one of the following ways.
   - Navigate to a field on a form, right-click the field, and select **Configure Dictionary** or **Show <field name>**.
   - Navigate to **System Definition** > **Dictionary**, and click an entry for a field or table. Entries for tables have **Type** set to **Collection**.

   The system dictionary entry opens.
2. Update the dictionary entry fields.
3. Select **Update**.

Dictionary entry form

The Dictionary Entry form was redesigned to provide an Advanced view and additional fields. You might need to configure the form to see all fields.

Dictionary Entry form

Field	Description
Table	Defines the table in which the element is created. **Note:** This list shows only the tables that meet the scope protections for adding fields.
Type	Defines the field type of the column or, if the **Type** is **Collection**, indicates that the dictionary entry represents the table. For more information, see Field administration. You can change the type of a field. To preserve existing data, only change between logical types that map to the same physical type on the database. For example, Choice and String.
Active	Enables or disables the field. When this check box is cleared, the field is hidden in lists and forms in the Classic Environment. However, inactive fields are still available for queries. Additionally, disabling a field by clearing this option doesn't remove it from a configured list. Inactive fields display in admin-configured lists until an admin updates the list layout to remove them. See below for additional behavior notes. • Forms: Deactivated fields are removed from forms. • Lists: Inactive fields continue to display in admin-configured lists until an admin updates the list layout to remove them. If an inactive field is removed from an admin-configured default view, any personal lists will reset to follow the default view, thus removing the inactive field from the personal list.

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Dictionary Entry form (continued)

Field	Description
	• Reports: Existing reports that include inactive fields will continue to work, because the data still exists in the records. However, deactivated fields are not available when creating new reports or list layouts if they are not present in admin-configured lists. • Condition Builder: Deactivated fields are not available in the Condition Builder, unless a you are using an existing URL with filters containing the inactive field. **Show Matching**, **Filter Out**, and **Group By** can also be used on an inactive field if the column is present in the list view. • ServiceNow API: The ServiceNow API does not check whether a column is active or inactive. The old values for the field remain in the records and cannot be undone. • Scripts: Inactive fields may still be referenced in scripts. (Server side scripts that use GlideRecord can read and write to inactive fields).
Function field	If selected, creates a field that displays the results of a database function, such as a mathematical operation, field length computation, or day of the week calculation. Once the new function record is saved, you cannot clear the check box to make the field a regular field.
Read only	Legacy option that controls whether users can change the field value in the user interface. This option is selected and greyed out in the following cases: • When the field was marked as read only prior to the Australia release. • When an option is selected in the **Read only option** field.
Read only option	Controls whether a field is read only and whether it can be changed by a client script or server-side APIs. For details, see Configuring read-only security options.
Audit	Enables or disables auditing for a table. Turning on Auditing (History) for a Table. **Note:** This option only applies to tables.
Text index	Determines whether searches index the text in a table. **Note:** This option only applies to tables. To exclude fields from indexing, see Remove an index for a specific field.
Column label	Defines a unique label for the column. The label appears on list headers and form fields for the column. • Updating the **Column label** field also updates the label in the language file (for the current language). • When you create a new column, the column name is populated automatically based on the label, which is prefixed with u_ to indicate that it is custom. For example, if you enter **Activity Description** as the column label, the column name defaults to **u_activity_description**.

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Dictionary Entry form (continued)

Field	Description
Column name	Defines the field name of the column. When you create a new field, this name is populated automatically based on the label and a prefix as follows: • For a field on a table in a different scope, the name is prefixed with the scope to indicate that it is custom and not part of that application. • For a field on a table in the same scoped application, the name does not have a prefix, which indicates that it is part of the application. • For a field in a global application, the name is prefixed with u_ to indicate that it is custom. You cannot modify the prefix; however, you can modify the rest of the name. The name can contain only lowercase, alphanumeric ASCII characters and underscores (_). You cannot change the name of an existing dictionary record. **Note:** You cannot enter consecutive (double) underscores in a column name. For example if you enter `my__sample_name` as the column name, it is automatically changed to `my_sample_name` when you save the dictionary entry.]
Max length	Provides a logical limit for the size of string fields to determine how the system displays them in the user interface and how to map them to physical database data types. String fields with a length under 255 characters appear as a single-line text fields. String fields with a length over 254 characters appear as a multi-line text box. The system maps the field length to the closest physical data type available on the database. Sometimes, this results in more available length than originally specified. For example, entering a length of 50 maps to the closest physical data type of VARCHAR(100), which provides up to a 100 character limit or double the requested field length. Likewise, entering a length of 1000 maps to the closest physical data type of MEDIUMTEXT, which provides up to a 4000 character limit or four times the requested field length. **Note:** • You can only change this value for a **String** field. Changes for any other type of field are ignored. • Users on an Oracle instance cannot increase the maximum length of a string field to anything greater than 4000 through the application UI as this requires the CLOB datatype in Oracle. To increase beyond this size, log an incident with technical support to request the change. • To prevent data from being lost, only decrease the length of a string field when you are developing a new application and not when a field contains data. A warning appears if a change to a custom field results in data loss. For a base system field, you cannot make a change that results in data loss.
Mandatory	Determines whether this field must contain a value to save a record. For more information, see Make a field mandatory.

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Dictionary Entry form (continued)

Field	Description
	Note: You can override this option for extended tables.
Display	Indicates that this field is the Display values for reference fields. Set this to true for the one field whose value you want to use as the text displayed in links to this table on lists and forms. By default, the **Number** field is the display value for all task tables. **Note:** • This option does not control whether a list or form displays this field as part of the layout. Instead, see List configuration and Personalizing Forms. • The display value becomes part of the form title when viewing an individual record from a table. • You can set a different display value on an extended table than the display value on a parent table by using a dictionary override.
Function definition	Defines the function that the field performs. Starts with `glidefunction:`, followed by the operation to be performed (for example, `concat`), followed by function parameters. Constants must be enclosed in single quotes. For example, the following function definition creates a field that shows the short description, followed by a space, followed by the caller name: `glidefunction:concat(short_description, ' ', caller_id.name)` **Note:** Function parameters support dot-walking. See Dot-walking to data in related tables.
Attributes [Advanced view]	Alters the behavior of a field or functionality that depends on the field. For more information, see Dictionary Attributes. Attributes can be overridden for extended tables with dictionary overrides. You can also configure attributes for this dictionary entry through the **Attributes** related list.
Default Value	
Use dynamic default [Advanced view]	Allows you to specify a default value that is generated dynamically based on a dynamic filter.
Dynamic filter value [Advanced view]	Specifies the Create a dynamic filter option that determines the default value if the **Use dynamic default** option is selected.
Default value	Specifies the default value of the field for any new record. Ensure that this value uses the correct field type. For example, an integer field uses a default value of 2 but cannot use a default value of two. These values can be overridden with dictionary overrides.

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Dictionary Entry form (continued)

Field	Description
Reference Specification	
Reference	Makes the field into a Reference field type. If you enter a name that does not match an existing table, a new table is created when you save your changes to the dictionary record. If the current table has a module in the application navigator, a module for the new table is automatically created in the same application menu.
Use reference qualifier [Advanced view]	Specifies the type of qualifier to use: • Simple: A set of choice lists where you can specify a reference qualifier condition. • Dynamic: A Create a dynamic filter option that you can use to build the qualifier. • Advanced: A static encoded query string or JavaScript code that you can use to build the qualifier.
Reference qual condition	Specifies a condition when the reference qualifier runs if the **Simple** qualifier type is selected.
Dynamic ref qual [Advanced view]	Specifies the Create a dynamic filter option that determines the reference qualifier when the **Dynamic** qualifier type is selected.
Reference qual [Advanced view]	Filters the records available for a reference field if the **Advanced** qualifier type is selected. Reference qualifiers can be overridden with dictionary overrides.
Reference key [Advanced view]	Identifies a field other than sys_id to use as the unique identifier for reference fields.
Reference cascade rule [Advanced view]	Defines what happens to a record if the record it references is deleted. Select one of the following options: • Clear: Clears the references (default). • Delete: Deletes all referencing records. • Restrict: Prevents record deletion if there is a referencing record. • None: Does not change referencing records.
Reference floats [Advanced view]	Enables the **Edit** button on related lists for one-to-many relationships.
Dynamic creation	For reference fields, determines whether entering a value that does not match an existing record creates a record on the referenced table. If selected, use the **Dynamic creation script** field to define how to create the record.

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Dictionary Entry form (continued)

Field	Description
[Advanced view]	
Dynamic creation script [Advanced view]	When the **Dynamic creation field** is selected, allows you to enter a script for creating a record on the referenced table.
Dependent Field	
Dependent on field [Advanced view]	Specifies a field on which the current field depends. For more information, see Make a field dependent **Note:** You can override this value for extended tables. .
Choice List Specification	
Choice	Allows users to see a list of suggested values in one of the following ways: • List menu without -- None -- • List menu with -- None -- • Suggestion field type If a choice is used, either define a Choice list field type or use the fields **Choice** table and **Choice** field to copy choices from another field elsewhere in the dictionary.
Choice table [Advanced view]	Populates the field choices with the same values as another choice field. If the **Choice** field is set to anything besides **None**, select a table to draw choice values from. The field **Choice field** must also be populated. For example, if **Choice table** is set to the Incident [incident] table, this field has the same choice list as one of the choice fields on Incident. **Choice field** (see below) determines which field.
Choice field [Advanced view]	Populates the field choices with the same values as another choice field. If the **Choice** field is set to anything besides **None**, select a field from the table you selected for **Choice table**. For example, if the **Choice table** field is set to the Incident [incident] table, and **Choice Field** is set to **Priority**, this field has the same choices as the **Priority** field on Incident, even if those choices change. **Note:** This field must be a choice field.
Calculated Value	
Calculated [Advanced view]	Determines whether the value of the field is calculated from other values. If selected, use the **Calculation** field to define how the calculation is performed. The **Calculation Type** field allows you to select script or formula based calculation for the column value. When filtering, sorting or grouping by a calculated field, the sort order is based on the stored field value from the last time the field was updated, not the last time the field appeared.

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Dictionary Entry form (continued)

Field	Description
	Note: In relation to business rules, calculated fields are populated first before any business rule, even a before business rule, is run. Calculated fields are then populated again if necessary after any before business rules run.
Calculation Type [Advanced view]	Allows you to select script based calculation or formula based calculation for a column. For more information about predefined functions and example formulas, see Formulas for column values in Table Builder.
Calculation [Advanced view]	Allows you to enter a script or formula based on the selected Calculation Type. When the **Calculation Type** is **Formula**, you can enter a predefined function or formula for calculating the value of the field. You can use a predefined formula or combine other formulas to create a formula according to your requirements. When the **Calculation Type** is **Script**, you can enter a script for calculating the value of the field. These can be overridden for extended tables with dictionary overrides. You can use the current object in this script. As with access control rules, the script can: • Evaluate to true or false. • Return an answer variable set to true or false. • Set a field value directly, such as: `current.display_name="name"`. **Note:** Fields display as read-only when calculated scripts are applied. For example, by adding a script to the calculated field on a dictionary record that is set to Active, the Active field is made read-only on the form. Inline editing of the Active field from the list view is also disabled.
Additional fields	
Class	Identifies the table that the current table extends. Tables that do not extend other tables specify their own name in this field. For more information, see .
Defaultsort	Obsolete.
Size class	Determines whether the platform handles this table as a large table by reducing the amount of memory stored for each row during queries. There is a scheduled job which runs and sets the value of this field.
Spell check	Enables or disables spell check on the field.
Unique	Requires the field value to be unique. **Warning:** Making a field unique when the corresponding table already has different values for that field causes data loss. Before you enforce uniqueness on a field, verify that no records in the table for the field have values, or that they all have the same value.
UI action	

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Dictionary Entry form (continued)

Field	Description
Default view or Advanced view	Changes the form view to the default or advanced view. The fields change based on the view. If you are using the default view, you must write a script to accomplish the same tasks that advanced view fields provided.
Related Lists	
Access Controls	Provides access to the access controls that permit or limit access to the data in the table.
Choices	Provides access to the options in the choice list field you are editing.
Dictionary overrides	Provides access to the dictionary overrides for this field.
Attributes	Provides access to the dictionary attributes for this entry.
Labels	Provides access to the labels used for the table or field you are editing.

Configuring read-only security options

Control the ability to edit read-only fields by configuring read-only options.

Read-only fields are intended to restrict modifications in specific situations. In addition, the system provides configurable read-only options that enable you to customize the behavior of read-only fields according to your requirements, while balancing usability and security. You can adjust the read-only behavior by updating the **Read only option** field in a dictionary record.

Available read-only options

Instance Configured

Default **Read only option** value for read-only fields created prior to the Australia release. Used for maintaining backwards compatibility and testing read-only behavior in non-production instances.

When the **Read only option** is set to Instance Configured in a dictionary record, read-only behavior is derived from the *glide.read_only.legacy_read_only_behavior* system property. By default, the property is set to client_script_modifiable, which honors the pre Australia read-only behavior, allowing changes to read-only fields through client scripts.

Display Read Only

Displays the field as read-only in the UI, but allows changes to the read-only field through client scripts and server-side operations such as *TableAPI*, *GraphQL*, and *GlideRecordSecure()*.

Client Script Modifiable

Displays the field as read-only in the UI, and allows changes to read-only fields through client scripts but not through background scripts or server-side APIs like *TableAPI*, *GraphQL*, and *GlideRecordSecure()*.

Strict read only

Displays the field as read-only in the UI, but prevents any changes from both client scripts and server-side APIs.

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Testing read-only behavior

The Instance Configured read-only option maintains backwards compatibility for read-only fields created prior to the Australia release, and also enables you to test other read-only options on a non-production instance before implementing them on your production instance.

When the **Read only option** is set to Instance Configured, read-only behavior is determined by the *glide.read_only.legacy_read_only_behavior* system property. The default value for the *glide.read_only.legacy_read_only_behavior* system property is *client_script_modifiable*, which means the field appears as read-only in the UI, but can still be changed by a client script.

You can test read-only behavior on a non-production instance by updating the system property with the following values and then validating that your fields and client scripts work as expected.

- *display_read_only*
- *client_script_modifiable*
- *strict_read_only*

Important: The *glide.read_only.legacy_read_only_behavior* system property is only intended for testing read-only behavior on non-production instances. Updating this property affects all fields where the **Read only option** field is set to Instance Configured.

For example, to verify that tighter security controls still work with your client scripts and other customizations, you can set the *glide.read_only.legacy_read_only_behavior* property to *strict_read_only* in a non-production instance, and then test the behavior. After you verify the behavior in a non-production instance, you can update individual fields on your production instance to use the Strict Read Only option on a field-by-field basis.

Test read-only options

Test read-only behavior on a non-production instance before updating **Read only option** field values on your production instance.

Before you begin

Role required: admin

About this task

Read-only fields created prior to the Australia release are automatically set to **Instance Configured** after upgrading to at least Australia. You can use the **Instance Configured** option to test the read-only options introduced in the Australia release in a non-production instance before making changes in your production instance.

When a field's **Read only option** is set to Instance Configured, read-only behavior is derived from the *glide.read_only.legacy_read_only_behavior* system property. By default, the property is set to client_script_modifiable, which honors the pre Australia read-only behavior, allowing changes to read-only fields through client scripts.

Important: The *glide.read_only.legacy_read_only_behavior* system property is only intended for testing read-only behavior on non-production instances. Updating this property affects all fields where the **Read only option** field is set to Instance Configured.

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Procedure

1. Navigate to the System Properties [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Search for a system property record with name *`glide.read_only.legacy_read_only_behavior`*.
3. Select the *`glide.read_only.legacy_read_only_behavior`* system property.
4. In the Value field, enter the read only option that you want to test.
   The option that you enter determines how strict the system treats the security of read-only values once they've been entered. Each option displays the field as read-only in the UI.

Option	Description
`display_read_only`	Allows changes to the read-only field through client scripts and server-side operations such as *`TableAPI`*, *`GraphQL`*, and *`GlideRecordSecure()`*.
`client_script_modifiable`	Allows changes to the read-only field through client scripts but not through background scripts or server-side APIs like *`TableAPI`*, *`GraphQL`*, and *`GlideRecordSecure()`*.
`strict_read_only`	Prevents any changes from both client scripts and server-side APIs.

5. Select **Update**.

What to do next

Test any client scripts or server-side APIs that update read-only fields work as expected in your non-production environment. After testing the functionality, you can update individual fields in your production instance and set the **Read only option** field to the option that you verified in your non-production instance.

Make a field read only

Control whether a field is read only and whether it can be changed by a client script and server-side APIs.

Before you begin

Role required: admin

About this task

You can customize the behavior of a read-only field, including whether a client script or server-side API can modify the read-only field value. You control the read-only behavior by updating the **Read only option** field in a dictionary record.

For details on read only options, see Configuring read-only security options.

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Procedure

1. Navigate to the field's dictionary entry in one of the following ways.
   - Navigate to a field on a form, right-click the field, and select **Configure Dictionary** or **Show <field name>**.
   - Navigate to **System Definition** > **Dictionary**, and click an entry for a field or table.
2. Make the field read only by selecting an option in the **Read only option** field.
   The option that you select determines how strict the system treats the security of read-only values once they've been entered. Each option displays the field as read-only in the UI.

Option	Description
Display Read Only	Allows changes to the read-only field through client scripts and server-side operations such as *TableAPI*, *GraphQL*, and *GlideRecordSecure()*.
Client Script Modifiable	Allows changes to the read-only field through client scripts but not through background scripts or server-side APIs like *TableAPI*, *GraphQL*, and *GlideRecordSecure()*.
Strict Read Only	Prevents any changes to the read-only field from both client scripts and server-side APIs.

3. Select **Update**.

Altering tables and fields using dictionary attributes

Dictionary attributes alter the behavior of the table or field that the dictionary record describes. Administrators can add or modify dictionary attributes.

Adding an attribute

To add or remove an attribute to a table or field, open a dictionary record, select the **Advanced** link, and modify the **Attributes** field. Alternatively, in a dictionary record, select **New** in the Attributes related list. For details on modifying dictionary entries, see Modify dictionary entries.

Attributes are comma-separated. If attributes exist on a dictionary record, add a comma with no spaces before adding an attribute.

For an attribute that accepts true/false values:

- To specify a value of true, you can either enter `attribute` or `attribute=true`.
- To specify a value of false, you can either ensure that the attribute does not appear or enter `attribute=false`. To maintain the values during upgrades, do not remove an attribute that is on a table by default.

Maintaining attribute values for upgrades

If you remove an attribute that is part of the base system, it is automatically restored during an upgrade. To prevent upgrades from changing the behavior of your system, leave the attribute on the table or field, but set its value as desired.

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For example, if a field has the attribute `knowledge_search=true` by default, do not remove the attribute to set it to false; rather set it to `knowledge_search=false`.

Available dictionary attributes

Name	Value	Target Element	Description
allow_null	true/false	field_name field	If present or true, enables you to enter `None` as the field
allow_public	true/false	table_name field	If true, the table name field displays tables from all scopes instead of only the current scope.
allow_references	true/false	field_name field	If true, a tree is displayed to select from that includes reference fields so you can dot-walk.
allowHugeAlter	true/false	any table	If true, enables you to add a column to a table with more than 100 million rows.
approval_user	name of field containing the users for the approval type this field represents	integer field	Specifies the table fields that are used to perform lookups using a matcher. You specify approvals as table fields that have an attribute of *`approval_user=<field_name>`*, where <field_name> indicates the field in the table that contains the users for this approval type. • Fields with this attribute contain an integer value that indicates the sequence for the approvals. • All approval fields with the same sequence number indicate that multiple approvals are required before continuing. • Approvals are requested in the order of the sequence numbers. For example, all approvals with sequence number 100 must be approved before approvals with sequence number 200 are requested.
attachment_index	true/false	any table	If true, attachments on the table are indexed for search purposes. To learn more, see Index attachments on a table.
barcode	true/false	string field	Enables a string field to access a camera on a mobile device to scan and process a bar code.
base_table	name of base table type	table_name field	Specifies the table_name field that enables you to select any table that is derived from the table specified

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Name	Value	Target Element	Description
			by this attribute. By default, the base table itself is also included in the list (but see *skip_root* to turn off this behavior).
calendar_elements	list of field names, separated by semicolons (";")	any calendar event table	Specifies the list of fields used when constructing the description of a calendar event. If not specified, the display name plus short description are used. The *calendar_elements* attribute does not support derived (dot-walked) fields.
collection_interval	interval specified as "HH:MM:SS" (like "01:02:30" for one hour, two minutes, and 30 seconds)	collection field	Specifies the interval of metrics collection.
close_states	inactive state integer values	task state field	Used by the *TaskStateUtil* API to identify the list of inactive state values delimited by semicolons (;)
critical	true/false	any field in the apm_application table	Defines fields that have critical information about an application, which enables tracking the entry of critical information.
current_location	true/false	string field	Enables a string field to access the GPS location of a mobile device.
disable_execute_now	true/false	any table derived from sys_auto	If present or true, disables the usual **Execute Now** button. The ServiceNow AI Platform applications that use schedules, such as Discovery, use this attribute to substitute their own more appropriate action.
default_rows	integer value	multitext fields	Sets the default number of rows in a multitext field.
default_close_state	state integer value	task state field	Used by the *TaskStateUtil* API to identify the default close state value for a task table.
default_work_state	state integer value	task state field	Used by the *TaskStateUtil* API to identify the default working state value for a task table.
detail_row	name of field to display in detail row	any table	Displays the value of the specified field as a Lists for each record in the list view. UI15 is required to use this attribute.

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Name	Value	Target Element	Description
			Note: If different *detail_row* attributes are defined for a parent table and a child table, the system uses the child table attribute.
display_image	true/false	table with fields of the user_image type	If present or true, displays records of the user_image type in an image form. If the record is in the [sys_user] table, and the image is not available, the user initials are displayed.
document_viewer_audit	view, download, or all	any table	When the Document Viewer is enabled, this attribute keeps a record of the user actions that are performed on attachments. The values are as follows: • **view**: Enables an audit when users view an attachment • **download**: Supplies audit information for only downloaded attachments • **all**: Shows audit information when attachments are viewed and downloaded
email_client	true/false	any table	If present or true, causes an icon (an envelope) to appear in the more options menu in the form header. If you click it, a pop-up email client appears.
enforce_dot_walk_cross_scope_access	true/false	any table	This attribute enforces dot-walk cross-scope access restrictions for individual tables. The attribute must be added to the dictionary record for the table (the record in sys_dictionary with Type = "Collection" for the specific table). • To enable enforcement, add *enforce_dot_walk_cross_scope_access* or *enforce_dot_walk_cross_scope_access* • To turn off enforcement, add *enforce_dot_walk_cross_scope_access*
exclude_auto_recovery	true/false	any table	Disables automatic recovery of draft records for this table and its extensions.
exclude_from_rollback	true/false	any table	Excludes this table (and any of its descendant tables) from being

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Name	Value	Target Element	Description
			recorded for rollback. For example, use this attribute to preserve records that are created from an automated test. For tables excluded by default, see Tables excluded from rollback after running an automated test.
extensions_only	true/false	any table	Specifies that the table should only have records in tables that extend it. For example, the Task table has this attribute because you would create incident, problem, change records, and not task records.
field_list_selector	true/false	any glide_list	Enables the user to select a field from the dependent table (or current if the dependent is not specified). Some workflow activities use this attribute.
field_decorations	UI Macro name list, separated by semicolons (";")	most fields (except list and multiline text fields)	Similar to *ref_contributions*, causes the named UI macro to be invoked when the field is rendered on a form.
format	format name	any numeric field	Specifies a named format to use instead of the standard numeric formatting. Options are as follows: • **glide_duration**: Formats a time specified in milliseconds as **ddd hh:mm:ss**. • **none**: Disables automatic number formatting (for example, changes 2,500–2500). **Note:** This attribute applies only to display values and not user input values.
glide.db.oracle.ps.query	true/false	any table	If present and false, prevents the use of Oracle prepared queries on the table.
global_visibility	true/false	any table with a sys_domain column	If present or true, makes this table visible globally even if there are domain restrictions (that is, the sys_domain field has a value).
hasLabels	true/false	any table	If present or true, marks this table as being the target of a label at some point. You can manually set this attribute, but it is normally set automatically whenever a label is generated. When true, the label engine runs on any change to the

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Name	Value	Target Element	Description
			table, and updates the labels as needed.
hasListeners	true/false	any table	If present or true, marks this table as available for listeners to get events (insert, update, delete).
hasWorkflow	true/false	any table	Instructs the workflow engine to listen for changes to the table and fires events to a workflow when a record associated with a particular workflow has changed.
hide_email_icon	true/false	email field	If true, the default email icon does not display. The default value is false.
html_sanitize	true/false	any HTML or translated HTML field	If present or true, enables HTML sanitization for the selected HTML or Translated HTML field. By default, performs HTML Sanitization on all HTML and Translated HTML fields. Set this attribute to false to disable sanitization.
html_sanitize_config	name of custom sanitizer configuration file	any HTML or translated HTML field	If present, performs sanitization using the specified configuration file instead of the default platform sanitizer. For example, the Embedded Help [sys_embedded_help_content] table uses a specified file (EmbeddedHelpSanitizerConfig) for the help **Content** field.
i18n_locale_text_match	true/false	any string field	If true, enables case and accent (diacritic) sensitivity for text search of the column. If false, text search of the column is case and accent insensitive. The default behavior is false. This attribute can't be set to true when i18n_session_language_sortable is true on the same column. To learn more see Set case and accent sensitivity on a per-column basis.
i18n_session_language_sortable	true/false	any string field	If true, enables sorting the column by the user's session language. If false, sorting by the user's session language is disabled and the column is sorted according to the English alphabet. This attribute can't be set to true when i18n_locale_text_match is true on the same column. To learn more see Sorting according to the session language

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Name	Value	Target Element	Description
icons	name of JavaScript class	any workflow field	Specifies a JavaScript class that produces workflow icons.
ignore_filter_on_new	true/false	any field	If true, prevents the fields on a form from populating with values from a filtered list.
image	relative path of image file	any table	Specifies an image file to use when a module or BSM map uses this table. This specification overrides the icons that would otherwise be used for the table.
include_container_types	true/false	any internal_type field	Causes the field to render with container (split) types as well other types.
ip_data_control	• none • canonical • expanded • canonicalize_when_possible (default value)	field type on any table	Checks whether the data should be normalized through the *ip_data_control* attribute. • If the attribute is none, no conversion happens and data is inserted as-is. • If the attribute is canonical, values are inserted in their smaller canonical form. • If the attribute is expanded, values are inserted in the larger expanded form to facilitate comparisons. • If the attribute is canonicalize_when_possible, values are inserted in canonical form when it is a valid IP or as-is when it is not.
isOrder	true/false	any field	Sets the field as the default field that is used for the sort order in lists. Overridden by the **ORDERBY** URL parameter, or the user's sort preferences.
iterativeDelete	true/false	any table	If present or true, forces all row deletes to execute iteratively. Otherwise, you can perform some deletes using a more efficient bulk method.
json_view	true/false	any table	if a JSON object is associated with the field, places an icon next to a field that, when you click it, displays the data interchange information.

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Name	Value	Target Element	Description
knowledge_custom	name of JavaScript function	any field	Specifies a JavaScript function to implement a custom knowledge search (see *knowledge_search*).
knowledge_search	true/false	string fields	If present or true, causes a knowledge search icon (a small book) to appear next to the field. Clicking this icon launches a pop-up window for searching the knowledge base, unless a custom knowledge search function has been specified. To learn more, see *knowledge_custom*.
largeTable	true/false	any table	If present or true, marks this table as "large" to preventing table locking with specific MySQL database operations (adding/removing a column/index, compacting a table). Without this attribute (or the *smallTable* attribute), the *glide.db.large.threshold* property, or the default value of **5,000**, determines whether a table is large.
listen	true/false	any field	If present or true, calls a JavaScript function named *<tableName>_<fieldName>Listen*, or *globalListen* if that function does not exist. It calls the function with arguments (*tableName*, *fieldName*, *oldValue*, *newValue*).
live_feed	true/false	any field	If present or true, creates a toggle option on the activity formatter header for incidents, tasks, and problems. The toggle provides a choice between the **Live Feed** for that record (also known as a document feed) or the activity formatter fields already in use. To learn more, see Activity formatter for more details.
long_label	true/false	any reference field	Long or short labels refer to the label that appears for reference fields on a form. For example, if the reference field contains the caller's email address, the long label would be Caller Email, while the short label would be Email.

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Name	Value	Target Element	Description
			• Usually the placement of the reference field on the form makes it clear what the field represents. • It uses the global property (*glide.short.labels*) to specify the type of labels that appear for all reference fields on any form. • You can override the global property for any reference field by setting the *short_label=true* or *long_label=true* attribute in the dictionary for the reference field.
maintain_order	true/false	any glide_list	If present or true, the up/down arrow order buttons appear to the right of the list of selected items. **Note:** You need to use the **Add multiple** button to see the order buttons.
mode_toggler	true/false	any composite_name field	If present or true, causes a name mode toggle icon (a small right-pointing triangle) to appear to the right of the label. Clicking this icon causes the field's rendering to change from a text field that accepts <tablename>.<fieldname> to a pair of reference choice boxes (one for the table, the other for the field). The latter is the default.
model_class	binary Java class name	any field of type glide_var	Specifies a model variable within the Java code. The model must have a class that implements the IVariablesModel interface.
model_field	see description	any field of type glide_var	Identifies a reference field in the record that has the model defined for it. For example, a workflow activity is associated with an activity definition. The activity definition has a related list of questions that make up the model for that activity definition. By using the activity_definition as the model_field for the activity, it builds the workflow activity model by reading the questions that are defined for the referenced activity definition.

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Name	Value	Target Element	Description
nibble_size	positive integer	any table affected by the table cleaner	Specifies the maximum number of records that the table cleaner can delete in a single operation. The default value for this attribute is **250**.
nibble_sleep	true/false	any table affected by the table cleaner	If false, causes the table cleaner to perform cleanup operations without a pause between each operation.
no_add_me	true/false	any table	If present or true, hides the display of the Add Me icon that appears next to certain fields, such as the **Watch List** field.
no_attachment	true/false	any table	If present or true, prevents the attachment icon (a paperclip) from appearing on the form header.
no_attachments	true/false	any table	If present or true, attachments are not checked for and deleted when a record from this table is deleted. Meant for high-activity tables that never have attachments.
no_audit	true/false	any table	If present, this field is not audited, even if the table is being audited. The true or false value is ignored.
no_audit_delete	true/false	any table	If present or true, a sys_audit_delete record is never created when you delete a record from this table. Meant for high-activity tables that never need sys_audit_delete information.
no_auto_map	true/false	any table	If true, this field is not mapped during an import set. Primarily used for LDAP imports.
no_email	true/false	any glide_list field referencing sys_user	If present or true, the email box is removed from the glide_list field like the **Watch list** field.
no_multiple	true/false	any glide_list field	Hides the select multiple icons.
no_optimize	true/false	any table affected by the table cleaner.	If present or true, prevents the MySQL table compaction operation from running on the specified table. The table compaction operation typically runs after the table cleaner deletes at least 50 percent of the data in the specified table.
no_separation	true/false	any table	If present or true, marks this table as not participating in domain separation. To learn more, see Domain separation for service providers.

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Name	Value	Target Element	Description
no_text_index	true/false	any field on a text indexed table, or any child table of a text indexed table	If a table is text indexed, the *no_text_index* field attribute prevents this field or child table from being included in the text index.
no_truncate	true/false	any string field	In a list view, shows the entire text value of the multitext value in a list, without truncating it. Without this attribute, the string is truncated based on the UI property **Number of characters displayed in list cells** which is **40** by default.
no_update	true/false	table	True for tables in which records are inserted or deleted but not updated. Prevents the system from creating sys_mod_count, sys_updated_by, sys_updated_on fields in the table when created. Does not stop updates of the table. This attribute setting is used to save space on high volume system tables, such as syslog and sys_audit.
no_view	true/false	any glide_list field	Hides the view-selected item icon.
omit_sys_original	true/false	price and currency type fields	When true, avoids retrieving the original value of a field during calculations. Omitting the sys_original value from being referenced during calculations can reduce performance issues when dealing with currencies or prices.
onlineAlter	true/false	any table	Tables with the *onlineAlter* attribute perform MySQL database operations using online schema changes. • Online schema changes provide a lock-free table upgrade when adding, modifying, or removing columns and when adding or dropping indexes. Without online schema changes, these changes to the database lock write access during execution. • Online schema changes use additional system resources. Oracle databases do not lock tables by default and do not use online schema changes.

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Name	Value	Target Element	Description
order	numeric value	model variable fields	Used internally only (for model variables).
pop-up_processor	binary Java class name	any field or table	Specifies a custom pop-up processor for processing the field (or all fields in a table).
readable	true/false	any conditions field	When true, causes rendering of the conditions field in any list view as a human-readable condition (instead of the encoded query that is stored in the database).
ref_ac_columns	list of field names separated by semi-colons	any reference field with an auto completer (see ref_auto_completer)	Specifies the columns whose display values should appear in an auto completion list, in addition to the name. To learn more, see the cmdb_ci field (**Configuration Item**) on the Incident form for a working example.
ref_ac_columns_search	true/false	any reference field with an auto completer (see ref_auto_completer)	Causes auto-complete to work with all fields that are specified in the *ref_ac_columns* attribute. This attribute overrides the default behavior, which searches only the display value column. To learn more, see Configure auto-complete to match text from any reference field.
ref_ac_display_value	true/false	any reference field with an auto completer (see ref_auto_completer)	Causes the reference field to hide the display value column so that the auto-complete function only matches the text from the columns that are listed in the *ref_ac_columns* attribute. This feature requires the use of the *AJAXTableCompleter* class and the *ref_ac_columns*, *ref_ac_columns_search*, and *ref_ac_display_value* attributes. To learn more, see Remove the display value column. **Note:** The ref_ac_display_value function does not work with Catalog Item variables.
ref_ac_order_by	field name	any reference field with an auto completer (see ref_auto_completer)	Specifies the column that is used to order the auto completion list.
ref_auto_completer	JavaScript class name	any reference field (can be applied to a	Specifies the name of a JavaScript class (client side) that creates the list

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Name	Value	Target Element	Description
		table to affect all reference fields on the table.)	auto completion choices. Valid class values include: • *AJAXReferenceCompleter*: Matching auto-complete choices appear as a list. Only the Display values column of the reference table appears. If there is no other auto-completion class specified, reference fields automatically use this class. • *AJAXTableCompleter*: Matching auto-complete choices appear as rows in a table. The display value column of the reference table appears, with any columns listed in the *ref_ac_columns* attribute. • *AJAXReferenceChoice*: Displays matching auto-complete choices as a list. Only the display value column of the reference table, and up to 25 matching choices, appear. If there are more than 25 auto-complete choices, the choices for the *AJAXTableCompleter* class appear for the reference field instead. For more information, see Auto-complete for reference fields.
ref_contributions	UI Macro name list, separated by semicolons (";")	any reference field	When the field renders on a form, it invokes the named UI macro.
ref_decoration_disabled	true/false	any reference field	When set to `true`, disables the display of the reference icon on a selected field.
ref_list_label	label text	any table	Specifies the title to use in a list banner.
ref_qual_elements	field name list, separated by semicolons (";")	any reference field with a reference_qual field	Specifies a list of fields to send back to the server to get an updated reference.
ref_sequence	list of fields in referenced table, separated by top hats ("^")	any reference field	Specifies the fields in the referenced table that are used to order the list. This attribute works like an ORDER BY clause in SQL, with each element in ascending order.

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Name	Value	Target Element	Description
reference_types	list of valid reference types that are clickable separated by semicolons (";")	field_name field	Limits the reference fields that appear in the tree to the specified types.
remoteDependent	name of database and table (like "model.matcher")	any script field	Defines the remote (such as in another database) table that the script depends on.
repeat_type_field	field name	a repeat count field for schedule rotation	Specifies the field that contains the repeat type (daily, weekly, monthly, or yearly).
ro_collapsible	true/false	any multiline field	If present or true, causes an icon (either a "+" or a "-") to appear next to the field label, allowing the field itself to be expanded or collapsed.
saver_exempt	• exempt_always= field will be skipped from writing to xml for all install contexts. • exempt_never= field will not be skipped from writing to xml (Default). • exempt_vcs_only= field will be skipped from writing to xml only in source control context.	Fields of metadata records	When present, determines if the field is written to the xml representation of the record. An absence of the attribute is equivalent to exempt_never. When exempt_always, the field is skipped from writing to xml when exporting (publish, commit to source control, update set). When exempt_vcs_only, the field is skipped from writing to xml only in the source control context.
scale	integer	decimal field	Sets the number of decimal places to use on a Decimal field type. The default is 2. This attribute is applied to the max length attribute setting for the field. The decimal places for a field are a combination of the max length attribute setting and the scale attribute. For example, if you want four decimal places for the field, you need a max length attribute setting of 4, plus the default of 15 or 19. You would set the scale attribute to 4 to indicate the number of decimal places. Six decimal places require a max length

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Name	Value	Target Element	Description
			setting of 21, a scale attribute setting of 6, and so on. **Note:** Increase the max length attribute to a value greater than 15 to increase this attribute.
script	a function that returns the contents of the field	any slushbucket field	Enables you to write a script to define what is loaded into the slush bucket field.
short_label	true/false	any reference field	Long or short labels refer to the label that appears for reference fields on a form. For example, if the reference field contains the caller's email address, the long label would be Caller Email, while the short label would be Email. • Usually the placement of the reference field on the form makes it clear what the field represents. • The global property (*glide.short.labels*) specifies the type of labels that appear for all reference fields on any form. • You can override the global property for any reference field by setting the *short_label=true* or *long_label=true* attribute for the reference field in the dictionary
show_all_tables	true/false	document ID fields	Enables users to select documents from system tables. For example, sys_script or sys_user. By default, users cannot select records from system tables.
show_condition_count	true/false	condition fields	Enables or disables the condition count widget to preview how many records are a set of conditions. To learn more, see Add the condition count to a condition field.
skip_root	true/false	table_name field	If present or true, removes the base table from the list. To learn more, see base_table.
sla_basis	list of table names separated by semicolons (";")	any field of date type (glide_date_time, glide_date,	Defines the tables for which this field determines the start (open) time of an SLA.

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Name	Value	Target Element	Description
		due_date, date, or datetime)	
sla_closure	list of table names separated by semicolons (";")	any field of date type (glide_date_time, glide_date, due_date, date, or datetime)	Defines the tables for which this field determines the ending (close) time of an SLA.
slushbucket_ref_no_expand	true/false	any reference field	If present or true, prevents users from expanding the field from a form or list slush bucket.
smallTable	true/false	any table	If present or true, marks this table as Small (that is, not large) for querying purposes. Without this attribute (or the *`largeTable`* attribute), the *`glide.db.large.threshold`* property, or a default value of **5,000** determines whether the table is large.
start_locked	true/false	any glide_list field	Determines whether the field is locked or unlocked by default. Set the value to false to unlock the field by default.
staticDependent	name of table	any script field	Specifies the table that the script depends on.
strip_html_in_pdf	true/false	any field	Attempts to remove HTML tags from a field when that field is exported to a PDF. This attribute is most useful on HTML fields.
synch_attachments	true/false	any table	Similar to *`update_synch`* but writes the file attachments of the record to update sets. To learn more, see Index attachments on a table.
table	name of table	field_name field	Displays the specified table fields.
tableChoicesScript	name of script include	table_name field	Specifies the name of a script include whose *`process()`* method returns an array of table names from which to select.
target_field	percent_complete_target decimal field name	any percent complete field any decimal field	Works in combination with the target_threshold_colors attribute to define thresholds for percent complete fields. See the description for target_threshold colors. Example: `target_field=percent_complete_target,target_threshold_colors=0:tomato;50:khaki;90:lightgreen`

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Name	Value	Target Element	Description
			Specify an additional target_field attribute to compare the actual completion percentage of a task with a target percentage in a different decimal field that specifies where the task should be at this point. Use the column name of the decimal field. Example: `target_field=percent_complete_target,target_threshold_colors=0:tomato;50:khaki;90:lightgreen,target_field=u_expected_completion` If you do not specify an additional target_field, a target value of 100 is used, allowing you to use the color thresholds with a single field value. See Target threshold colors attribute.
target_form	name of form	any table	Specifies the alternative form to be used when this table is referenced through a pop-up window on a reference field.
target_threshold_colors	threshold limit:color	any percent complete field with the target_field attribute	Works in combination with the target_field attribute to define thresholds for percent complete fields. See the description for target_field.
text_index_filter_junk	true/false	any table	Sets the value to false to Enable or disable the Zing junk filter for the table. • By default, Zing does not index or search for two-digit numbers and single character words (unless they are Chinese or Japanese characters). • Regenerate the index after disabling the junk filter. This attribute results in a larger table index. • For optimal performance, do not apply it unless it is required.
text_search_only	true/false	table_name field	Limits the tables listed to those tables that are searchable by text.
text_index_translations	true/false	any table	If present or true, forces indexes to be recalculated when translated

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Name	Value	Target Element	Description
			strings are added. You must have a sys-admin role to modify this attribute. This one is automatically set for indexed fields that are translated, and to fields that have a translation and are being indexed. The *glide.i18n.force_index system* property, which defaults to true, overrides this attribute.
time_zone_field	name of field containing the time zone	any schedule date/time field	Specifies the field in the parent record that contains the reference time zone for this field.
timeDimension	true/false	any field of date type (glide_date_time, glide_date, due_date, date, or datetime) in a table subclassed from the task table	If present or true, enables the production of time dimension data for use by OLAP (to produce reports based on quarters, weeks, or other time periods). **Note:** OLAP functionality has been deprecated.
track_record_for_unauthenticated_user	true/false	any table	Enables record tracking within Web Embeddables components. This attribute is set as needed through the Web Embeddables capability.For more information about how Web Embeddables are configured and used, see Configure Web Embeddables.
tree_picker	true/false	reference field to a hierarchical table	Displays the hierarchy of reference values in a tree display (such as locations). **Note:** The tree display hierarchy does not appear in reference fields when you are using mobile applications.
ts_weight	integer value	any field	Controls the relative importance of a match in the field for a text search. To learn more, see Set the relative weight of a field.
types	list of valid element types separated by semicolons (";")	field_name field	Limits the display of fields to the specified types.
update_exempt	true/false	any field from a table that has update_synch set to true	If present or true, you can change this field without skipping updates to the rest of the record. During software upgrades, the value of this field is preserved, while the rest of

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Name	Value	Target Element	Description
			the record receives upgrades. By default, the Active field on a tracked table is treated as update_exempt even if the attribute is not present.
update_synch	true/false	any table	Indicates that changes in the table are tracked in update sets. Administrators cannot modify this attribute. To migrate data, use an Importing from another ServiceNow instance.
use_document_viewer	true/false	any table	If present or true, enables users to open supported attachments in a document viewer within the platform, rather than downloading the files directly to their own file system.
use_workflow	true/false	any table that has delivery plans or uses workflow	If present or true, causes a workflow to be used instead of delivery plans.
user_preference	true/false	any field	If present or true, causes any user preferences to be used instead of the normal default value.
vertical_layout	true/false	radio buttons	If true, displays the radio buttons vertically.

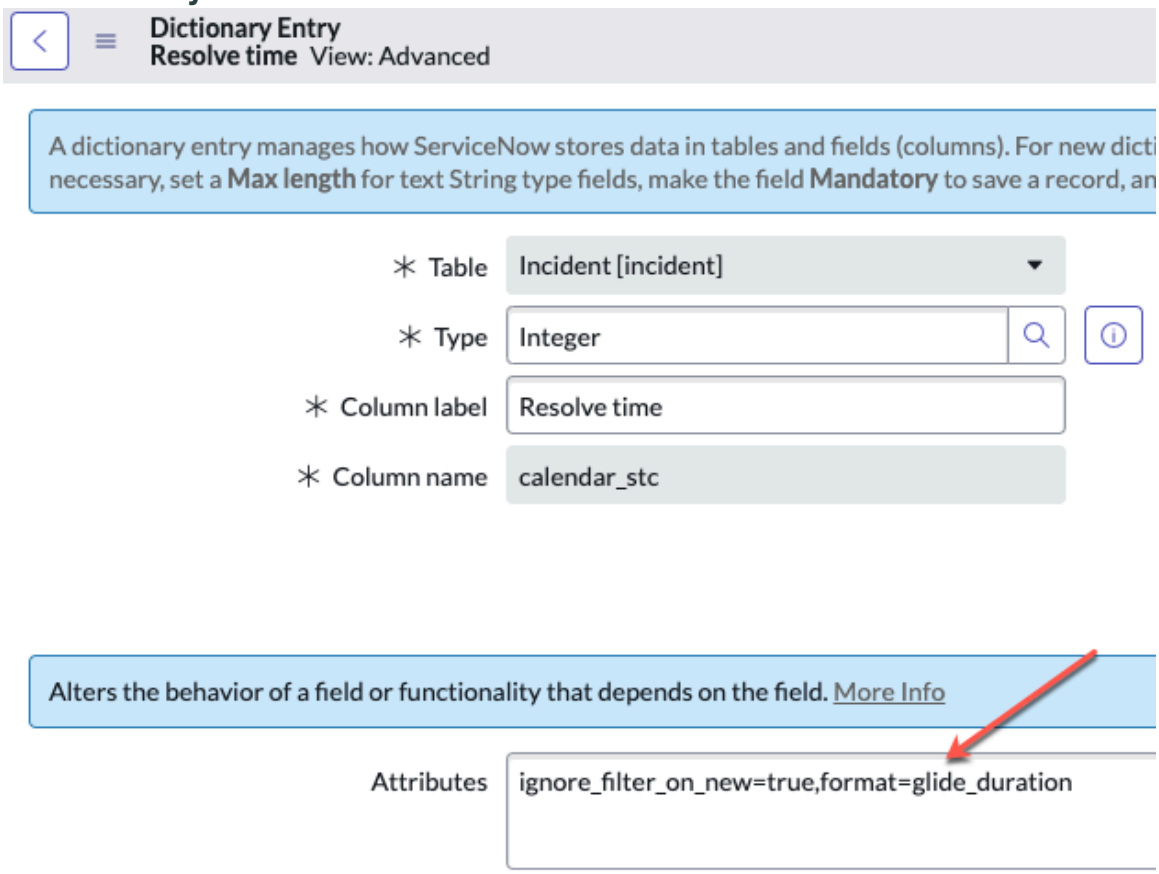
Modify the Glide durations format

To convert fields that are displayed in milliseconds (such as 'Resolution Time' on the Incident table) to a duration format (Months/Days/Hours/Seconds), populate the attribute field on the dictionary with: `format=glide_duration`.

Now the value is displayed as a duration in lists and can be utilized in the Configure Calculations functions. This may be useful to illustrate ITIL KPIs such as Mean Time To Repair.

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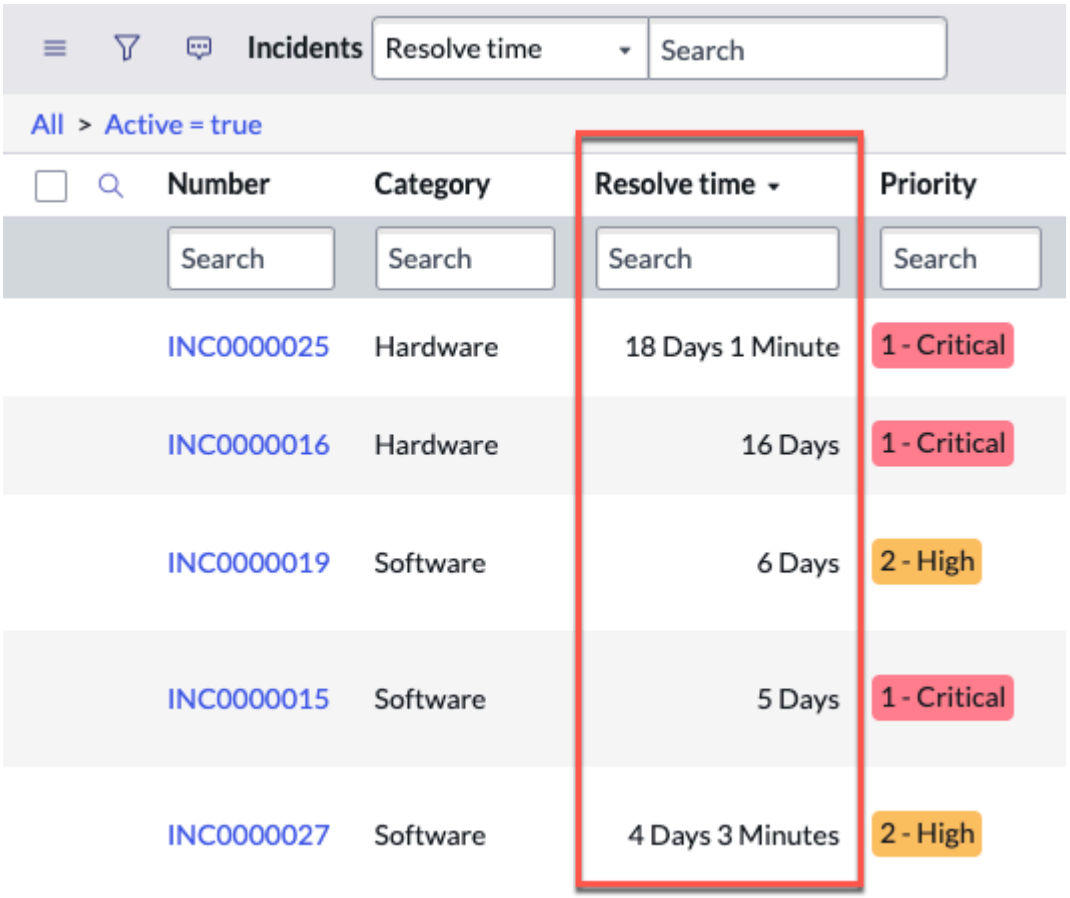
Field dictionary



Results in list:

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Results in list



Dictionary overrides

Dictionary overrides provide the ability to define a field on an extended table differently from the field on the parent table.

For example, for a field on the Task [task] table, a dictionary override can change the default value on the Incident [incident] table without affecting the default value on Task [task] or on Change [change].

Administrators can override these aspects of a field:

- Reference qualifiers
- Dictionary attributes
- Default values
- Calculations
- Field dependencies
- Default column display values
- Mandatory and read-only status

Define a dictionary override

Use a dictionary override to allow a field in a child table to have a different value or behavior than the same field in a parent table. For example, a dictionary override changes the default value of the priority field from 4 in the parent table to 5 in the Incident table.

Before you begin

Role required: admin.

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About this task

Dictionary overrides are only available for tables that support table extension.

Dictionary overrides are inherited by extended tables, so it may be necessary to define additional overrides to change the value of fields on extended tables. For example, if you define the default value of cmdb_ci.install_status to be 3, and create an override for the same field on cmdb_ci_hardware to be 5, all tables extended from the Hardware table will also default to 5. So if you want the default cmdb_ci_computer.install_status to be 3, you will need another override.

You can add a dictionary override in a scoped app, but you must add the override while working in the scoped app context and you can only select child tables from within that scope. Open the scoped app, edit the field's dictionary entry, add a new dictionary override, select the child table, and then provide the override details.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Open the record for the field.
3. In the **Dictionary Overrides** related list, click **New**.
4. Fill in the fields on the form, as appropriate (see table).

Dictionary overrides table fields

Field	Description
Application	The application scope to which the record belongs.
Base table	The parent table containing the field to override.
Table	Select the extended table to which the dictionary override applies. **Note:** The list shows only tables and database views that are in the same scope as the dictionary override.
Override reference qualifier	Select the check box to display the **Reference qualifier** field, which overrides the Reference qualifiers for the field on the extended table.
Override dependent	Select the check box to display the **Dependent** field, which overrides the field on which the current field depends.
Override attributes	Select the check box to display the **Attributes** field, which overrides the dictionary attributes for the field on the extended table.

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Field	Description
	Note: Any attributes defined on the base table are ignored. If there are attributes on the base table that should still apply to the extended table, make sure to include them in this field.
Override default value	Select the check box to display the **Default Value** field, which overrides the default value for the field on the extended table.
Override calculation	Select the check box to display the **Calculation** field, which overrides the calculation of the value for the field on the extended table.
Override mandatory	Select the check box to display the **Mandatory** field, which overrides whether the field on the extended table must contain a value to save a record.
Override read only	Select the check box to display the **Read only** field, which overrides whether a user can change the field value on the extended table.
Override display value	Select the check box to use this field as the display value on the extended table. For example, the Story [`rm_story`] table uses the short description as the display value in reference fields instead of the number, as defined in the Task [`task`] table. **Note:** Only fields that exist at the task table can be used as display value overrides.

5. Click **Submit**.

Table flattening

Table flattening stores a hierarchy of related tables as one table in a relational database.

Extension models

The system offers these extension models to store a table hierarchy on a relational database.

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Available extension models

Extension model	Flattens tables?
Table per class	No
Table per hierarchy	Yes
Table per partition	Yes

Table per class

The Table per class extension model stores each table of the hierarchy in its own physical table on the relational database. Each physical table uses the table prefix of the source table each stores a different class of records. An example of the Table per class extension model is the Asset [alm_asset] table, and its child tables: Hardware [alm_hardware], Consumable [alm_consumable], Facility [alm_facility], and Software License [alm_license]. The parent table of the hierarchy, Asset, stores a copy of every record in its descendant tables.

To find records in the Table per class extension model, the system queries records from multiple tables and joins the results. For example, when searching for hardware in a related facility, the system must join results from the Hardware, Facility, and Asset tables.

Table joins cause a performance bottleneck on relational databases. The more classes a query includes, the worse the query performance. Therefore any query for records from the top of the table hierarchy has the worst performance because it requires joining all descendant tables.

The system uses the Table per class extension model by default when creating tables. Most system tables also use the Table per class extension model as there is no performance benefit from flattening them.

Table per hierarchy

The Table per hierarchy extension model stores an entire table hierarchy in a single flat physical table on the relational database. The physical table is named after the parent table of the hierarchy, such as Task. The physical table contains all records of the table hierarchy and assigns a class name column value to each descendant table of the hierarchy. The system uses the name of the source table as the class name value. For example, Task records can have class names such as Change, Incident, or Problem.

To find records in a table hierarchy, the system queries the physical table and uses the class name column to constrain the results. Since such queries do not require joining results from multiple tables, the system provides better search performance.

The system uses the Table per hierarchy extension model for the Task table hierarchy on MySQL databases. Other tables use the Table per class extension model because there is no performance benefit to flattening them. To use Table per hierarchy on an Oracle database, contact Technical Support.

Table per partition

The Table per partition extension model stores an entire table hierarchy in a single flat logical table on the relational database. Each logical table can have multiple physical storage tables called partitions supporting it. Each partition optimizes the database resources available to a physical table such as the column count, index count, and row size. The system adds a partition whenever the logical table needs additional relational database resources.

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Each logical table is named after the parent table of the hierarchy, and each supporting physical partition consists of the logical name plus a partition name. For example, the Base Configuration Item [cmdb] table starts as a logical table with no partitions. Suppose your hardware configuration items consume enough database resources that the system creates a partition called **cmdb$par1** to store them. Later, computer configuration items could consume enough database resources to warrant the system creating a second partition called **cmdb$par2** to store these records.

Within each logical table, the system assigns a class name column value to each descendant table of the hierarchy. For example, within the Base Configuration Item logical table there are records with class names for Application, Computer, and IP Router. The system also assigns a two-digit class path value to each descendant table of the hierarchy. The class path is based on the table location in the hierarchy. For example, the parent class Hardware might have a class path such as **/!!/!D** and the child class Computer might have a class path such as **/!!/!D/!!**.

To find records in the Table per partition extension model, the system queries the logical table and its partitions and uses the class path column to constrain the results. Since these queries do not require joining results from multiple tables, the system provides better search performance. In addition, the class path reduces the total number of records to search, which further improves search performance.

The system uses the Table per partition extension model for the Base Configuration Item [cmdb] table hierarchy on MySQL databases. To use Table per partition on an Oracle database, contact Technical Support.

View a table hierarchy and the extension model

Determine the extension model used by a table.

Before you begin

Role required: admin

About this task

The extension model used by a table is not immediately apparent. While a hierarchy can use a single physical table, the platform displays tables as if each logical table has a unique physical table. For example, when specifying a table for a workflow, you can select Change [change_request] or Incident [incident] even though the parent table, Task [task], uses a single physical table.

Administrators can view the status of flattened table hierarchies, but cannot flatten additional hierarchies. You can configure the form to add the **Extension model** field if necessary.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select a table record.
3. Review the **Extension model** field value, which indicates whether the table hierarchy uses multiple unique tables or a single flat table.
   - **None**: Indicates that the table uses the table per class model. Defines a unique physical table per logical table in a hierarchy. For example, there are separate physical tables for the Asset [alm_asset] table, and its child tables: Hardware [alm_hardware], Consumable [alm_consumable], Facility [alm_facility], and Software License [alm_license].

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> **Note:** If a table has an empty Extension Model field, it is not necessarily a Table Per Class table. If the table extends another table, it actually inherits the model from any parent tables it is extending, and only when none of the parents have a defined extension model is the table's extension model Table Per Class. This can be seen on many tables that extend the Task table. Incident is a logical table that extends Task and is physically located on Task, but by default has a blank Extension Model value.
>
> When a table doesn't extend anything at all, and has a blank Extension Model field, it is a Table Per Class table.

- **Table per hierarchy**: Defines a single physical table per logical table hierarchy. For example, there is a single Task [task] table on the MySQL database that contains all the Task, Incident, Problem and Change records. This single physical table is represented as separate logical tables.

Viewing table references and extensions

View table relationships in a visual manner using the schema map.

The schema map displays the details of tables and their relationships visually, allowing administrators to view and easily access different parts of the database schema.

The schema map can also be printed directly from a browser.

Table relationships depicted in the schema map

Relationship type	Color used
Referenced by	Red
Referencing	Orange
Extended by	Green
Extending	Blue

By default, each type of relationship is displayed. However, you can view or hide each type as needed.

Generate a schema map

Generate a schema map to view different parts of the database schema.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables & Columns**.
2. In the **Table Names** pane, select a table.
3. Click **Schema map**.

   The schema map for the selected table opens in a separate tab or window.

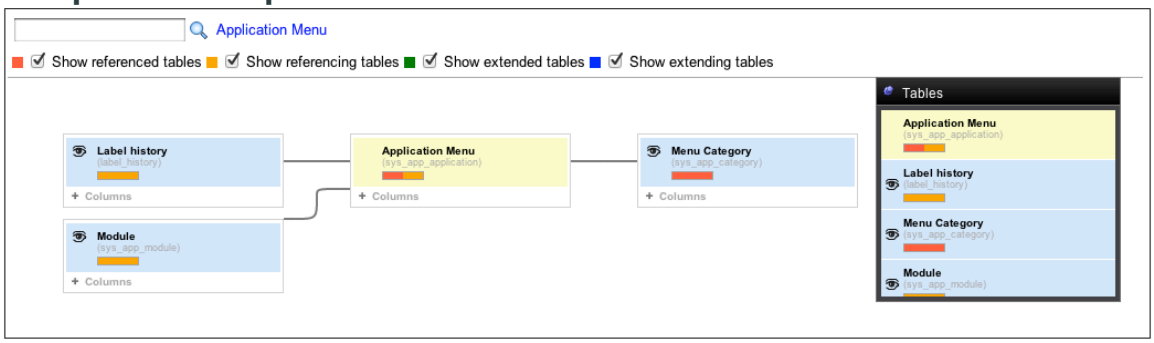
   If required, you can print this map from the browser.

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Analyzing table relationships

The schema map shows the selected table in yellow, typically centered, and all tables related to that table, typically shown at the sides.

Example schema map



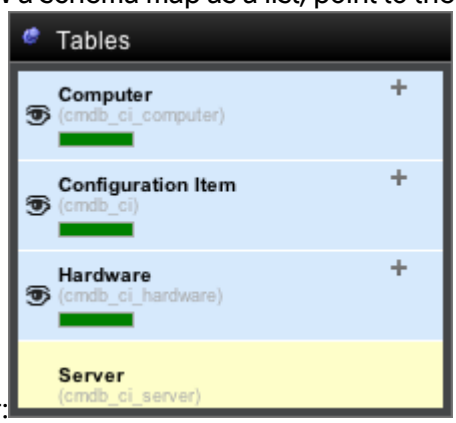
From this map:

- The check boxes at the top allow you to control which relationships to display. Select or clear a relationship type to display or hide tables with that relationship to the selected table.
- Each related table has a colored bar indicating the relationship to the selected table.
- You can point to the connector lines to display the details of a relationship between the two tables.

Note: Since relationships are shown as single lines for simplicity, the diagrams rendered are not entity relationship diagrams.

Using the Table Selector:

To view a schema map as a list, point to the table selector in the right corner:



You can:

- Click a table in the list to scroll the schema map to that table.
- Click the eye icon beside a listed table to hide or show that table in the schema map.
- Click the pin icon in the selector to keep the list open.

Using Related Tables:

Right-click a table node header to display a context menu with these functions:

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- **Focus on this table**: Make the selected table the new focus table and redraw the schema map based on the new selection.

  The new focus table is added as a breadcrumb at the top, allowing you to return to the previous table at any time.

- **Go to list**: Display the list of records for the table.
- **Go to dictionary**: Display the system dictionary, filtered for the selected table.

To hide a related table from view, click the eye icon in the node header (the node can be made visible again with the table selector).

For tables that are part of their own derivation hierarchy, click the expand button (**+**) in the node header to add their derivation hierarchy to the schema map.

Viewing More Information

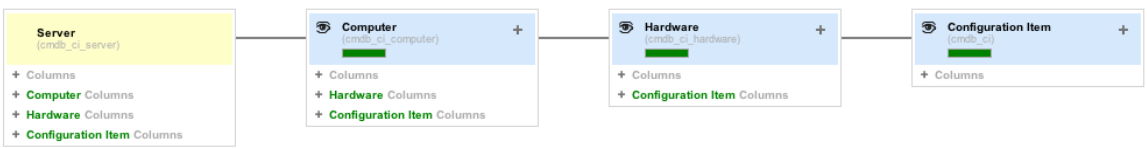
Click the expand button (**+**) beside **Columns** to expand the table fields.

Columns -

Business resolve time:	integer
Caller:	reference to User
Category:	string
Caused by Change:	reference to Change Request
Change Request:	reference to Change Request
Child Incidents:	integer
Close code:	string
Incident state:	integer
Notify:	integer
Parent Incident:	reference to Incident
Problem:	reference to Problem
Reopen count:	integer
Resolve time:	integer
Severity:	integer
Subcategory:	string

The reference fields show a red notation of the table they refer to.

If any tables extend from a table, their columns are displayed in reverse derivation order. For example:



Here, the Server `[cmdb_ci_server]` table extends from Computer `[cmdb_ci_computer]`, Hardware `[cmdb_ci_hardware]`, and Configuration Item `[cmdb_ci]`, and displays the columns from those tables.

Similarly, the Computer table displays the columns from the Hardware and Configuration Item tables.

Create a table index

Build indexes to access the data held in your tables more easily.

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Before you begin
Role required: admin

About this task
Note: Constructing an effective index requires specialized knowledge in database architecture. If you don't have this expertise, consult with a database administrator.

Creating an index on a large table can significantly affect system performance. A large table in this case is generally considered to be any table around 1 TB in size. Therefore, consider creating indexes on larger tables only during off-peak hours. For example, avoid adding an index to a CMDB table while a discovery job is running, as this can lead to increased load and potential delays.

Procedure
1. Access the Index creator in one of the following ways.

Option	Steps
Tables & Columns module	**a.** Navigate to **All** > **System Definition** > **Tables & Columns**. **b.** In the list, find the table you want and select its label. **c.** Navigate to the Index creator.
Database Indexes related list	**a.** Navigate to **All** > **System Definition** > **Tables**. **b.** In the list, find the table you want and select its label. **c.** Navigate to the **Database Indexes** related list. **d.** Select **New**.

2. Select the fields you want included in the index.
   The order in which you select the fields affects how the index works. If you do not have expertise in database design, you should consult someone who does.
3. To create a unique index, select the **Unique Index** check box.
4. Select **Create Index**.
   The **Table Name** field is there for your reference only. Overriding the default has no effect.
5. Select an index type.
   - **btree**

     The default index type.
   - **Columnstore (RaptorDB Pro)**

     Optimize data storage and retrieval by creating a columnstore index. Columnstore indexes store data in a compressed, column-oriented format that can improve query performance, especially when querying large datasets. Available with RaptorDB Professional.

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Drop a custom index

Remove a custom index by dropping it from a table.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the table that contains the custom index you want to drop.
3. On the **Table** form, select the Database Indexes related list.
4. In the list, select the custom index that you want to drop.
5. On the Database Indexes form, select **Drop**.

Result
The custom index is dropped from the table.

Create a many-to-many table relationship

Create a bi-directional relationship between two tables, so that the related records are visible from both tables in a related list.

Before you begin
Role required: admin.

About this task
Many-to-many relationships allow a list to point to a list of entries, rather than to single field.

If a knowledge base article points to a list of related configuration items, it uses a related list. Not all lists can be used as related lists, however. For a list to be related to another list, a many-to-many relationship that refers to both tables must exist.

The Many to Many Definitions `[sys_m2m]` table allows administrators to create custom many-to-many relationships.

Many-to-Many tables aren't considered custom tables and don't count toward your custom table allotment.

Procedure

1. In the navigation filter, enter `sys_m2m.list`.
2. Click **New**.
3. In the **From table** field, specify a parent table.
4. In the **To table** field, specify a child table.
   The Many-to-Many form automatically populates the other fields with suggested values.
5. **Optional:** Edit other field values, if appropriate.

> **Note:** Many-to-Many table names cannot exceed 30 characters.

Related topics

Reference default many-to-many relationships

Reference default many-to-many relationships

Some many-to-many relationships are defined by default.

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To reference many-to-many relationships that are available in the base system, administrators can enter `sys_collection.list` in the navigation filter.

Note: Only use this table to view many-to-many relationships in the base system. To create a new relationship, always use the Many-to-Many Definitions table.

Working with the Task table

The Tasks [task] table is one of the core tables provided with the base system.

The Tasks [task] table provides a series of standard fields used on each of the tables that extend it, such as the Incident [incident] and Problem [problem] tables. In addition, any table that extends the Tasks [task] table can take advantage of task-specific functionality for driving tasks.

The Planned Task plugin provides the Planned Task [planned_task] table, which extends the Tasks [task] table to provide more fields for tasks to measure duration and effort.

Creating tasks

The Tasks [task] table provides means for creating and completing tasks, as well as tracking their workflow in your instance.

Tasks aren't created directly on the Tasks [task] table. Instead, tasks are created on task child tables. To create a record in a task child table, access the Tasks [task] table by entering `task.list` in the navigation filter, and then select **New**. In the Task Interceptor, select the desired task child table.

Tools for completing tasks

These tools can be run on any table which extends Task.

- Approvals

  Approvals can be generated to a list of Approvers, either manually or automatically, according to Approval Rules. Approvals can be incorporated into workflows or can stand alone. For more information, see Process approvals.

  Approvals can be used on tables that do not extend Task.

- Assignments

  Assignment rules can automatically assign tasks to users or groups, ensuring that the most appropriate team members handle the tasks. For more information, see Defining Assignment Rules.

- Service levels

  Service level agreements can track the amount of time that a task has been open, to ensure that tasks are completed within an allotted time.

- Inactivity monitors

  Inactivity monitors ensure that tasks do not fall by the wayside by notifying users when tasks have been untouched for a predefined period of time. For more information, see Set an inactivity monitor.

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- Workflow Studio

  A process owner can design a flow for tasks that meet certain conditions. After a task is created that meets the conditions, the flow applies an automated process to the task. The process is defined in Workflow Studio. For more information, see Flow Designer.

Modifying the Task table

Modifications made to the Tasks [task} table are applied to all child tables.

Be sure that changes are appropriate for all the child tables. Adding fields is a low-impact change, because you can hide fields on tables that don't need them. However, if the fields are being used across tables, deleting fields may cause unwanted data loss.

Note: When adding choice list entries to a choice list on the Tasks [task] table, make sure that the entry value is unique.

You can use dictionary overrides to change some parts of a field definition in a way that does not to not apply to all child tables.

Tasks workflow

An administrator can specify a specific workflow process to apply to tasks that meet certain conditions.

Once a task is created that meets the conditions, the workflow applies the process to the task, asking for approvals, notifying users, generating other tasks, running scripts, and so on.

Task table structure

The Task table structure provides a framework to organize and store task-related data, and includes extensive customization options.

Important Task table fields

The Task table is a base class that provides fields for the core ITSM applications such as Incident, Problem, and Change Management. All applications that extend the Task table share these fields in common.

Label	Name	Type	Description
Active	active	boolean	Specifies whether work is still being done on a task or whether the work for the task is complete. By default, only application-specific business rules set the value of this field. For example, the *incident autoclose* business rule closes resolved incidents that have not been updated for one day.
Additional comments	comments	journal_input	Displays and allows the entry of comments about the task record. Each comment is inserted into the **Activity** field. For more information, see Journal field type.
Approval History	approval_history	journal	Displays the history of approvals for the record. For more information, see Tools for completing tasks.

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Label	Name	Type	Description
Assigned To	assigned_to	reference	Specifies the user assigned to complete the task. By default, this field uses a Reference qualifiers to only display users with the itil role. Some applications override the parent reference qualifier to display relevant users. For example, the Service Order and Project Task tables filter users based on their skills.
Created	sys_created_on	glide_date_time	Displays the date and time when the task record was created.
Description	description	string	Displays and allows the entry of a multi-line description of the work to be done.
Escalation	escalation	integer	Indicates how long the task has been open. Escalations are dynamically populated using service level agreements, which specify how long a task remains in each escalation state. Escalation states go from **Normal** to **Moderate** to **High**, and finally to **Overdue**. Record lists color code each task by escalation state.
Number	number	string	Displays an identifying number for each task record. This field is the display value for the Task table. The system generates this number when the task is created. To manage number generation, see Record numbering.
Opened	opened_at	glide_date_time	Displays the date and time when a human opened the task record for the first time.
Priority	priority	integer	Specifies how high a priority the task should be for the assignee. By default, the *calculatePriority* business rule calculates this value based on the **Impact** and **Urgency** values. Record lists color code each task by degree of priority.
Short Description	short_description	String	Displays and allows the entry of a short description of the task, which is a human-readable title for the record.
State	state	Integer	Displays a choice list for status of the task: • Pending • Open • Work in Progress • Closed Complete

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Label	Name	Type	Description
			• Closed Incomplete • Closed Skipped Applications typically use Dictionary overrides to display application-specific states.
Sys ID	sys_id	GUID	Displays the Unique record identifier (sys_id).
Task Type	sys_class_name	sys_class_name	Specifies the type of task, which corresponds to the child class. The system populates this value when a record is created on a child table.
Time Worked	time_worked	timer	Display a timer which measures how long a record is open in the form view.
Watch list	watch_list	glide_list	Specifies users who receive Email and SMS notifications when the record is updated. By default, only the Incident, Change, and Service Catalog applications notify users listed in this field. For other Task-based applications, you must create custom email notifications sent to the users listed in this field. For information about addming more users to the watch list, see Add users to a watch list.
Work notes	work_notes	journal_input	Displays and allows the entry of comments viewable only by ITIL users. Each comment is inserted into the **Activity** field. For more information, see Journal field type.
Work notes list	work_notes_list	glide_list	Specifies users who receive Email and SMS notifications when work notes are added to the record. By default, only the Change, Problem, and Service Catalog applications notify users listed in this field. For other Task-based applications, you must create custom email notifications sent to the users listed in this field.

Journal fields

Journal fields work together to create a log of changes and comments as tasks are worked on.

Note: Journal fields are shown regardless of the table audit enabled/disabled setting.

Fields of the journal_input type are multi-line text boxes which, upon save, add the comments into the Activity field with a notation. The most common types of journal fields are work notes and additional comments.

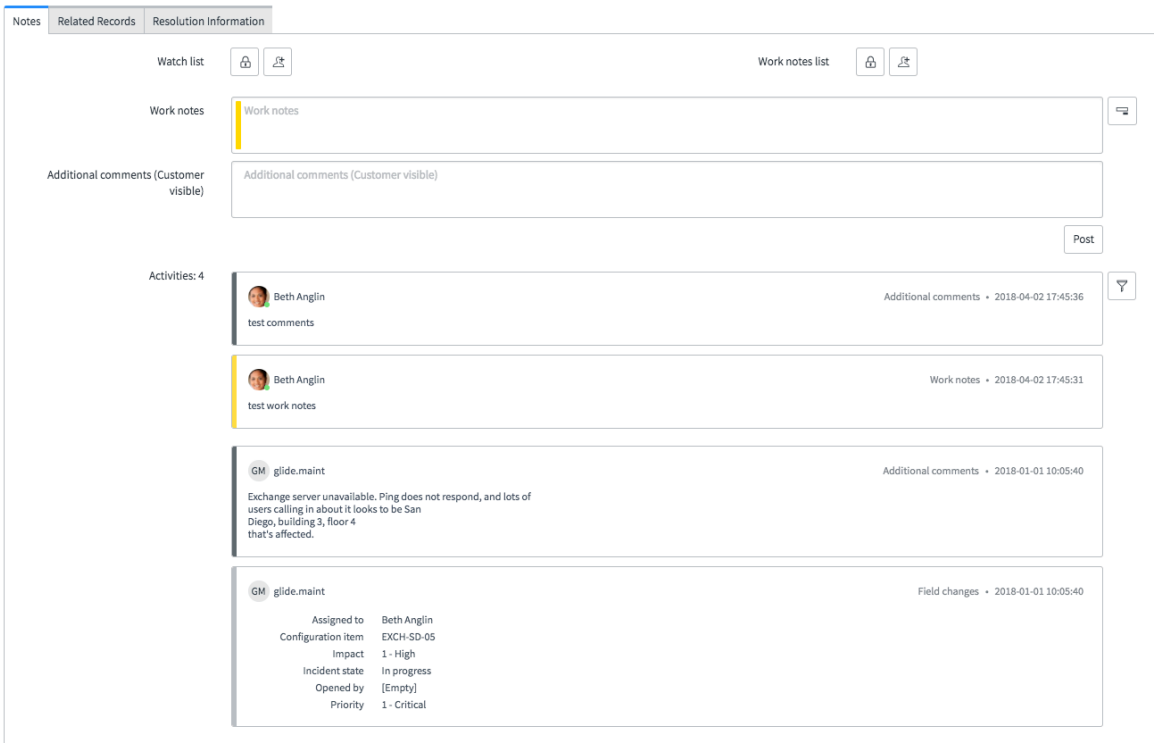
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Fields that accept input into the journal

Field	Description
Additional comments	Any user can update.
Work notes	ITIL users can update.

These comments, as well as any changes to the record or email notifications sent out because of the record, are displayed in the activity formatter, which can be added to the form like a field.

Activity formatter for journal fields



Reminder table

The Reminder [reminder] table provides a way to auto-generate reminders for a task.

Any table that extends the Task table, such as the Incident [incident] table, can use the Reminder [reminder] table.

You can add Reminders as a related list to the Incident form by opening the form context menu, navigating to **Configure** > **Related Lists**, and then adding **Reminders->Task**.

By default, only an administrator can create or modify a Reminder record. To enable non-administrators to create reminders, you must add create and read ACL rules to the Reminder [reminder] table and specify the user's role.

Note: You can only create reminders for active task records.

To access the Reminder table, type `reminder.do` in the filter navigator.

Reminder table

Field	Description
Task	Refers to the parent task record.

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Reminder table (continued)

Field	Description
User	Specifies the user who has logged in to the system.
Remind me	Specifies the time before which the reminder must be sent. Available values are: **15 minutes**, **30 minutes**, **1 hour**, and **2 hours**. You can add values to this field as required. **Note:** Internally in the system, the value is always converted to minutes and then stored in the **Remind me** field.
Before	Refers to a date field on the parent task record. **Note:** The **Activity due** and **SLA due** fields are legacy fields with an **UNKNOWN** value that you can't use. You can only use the **Due date** and **Follow up** fields. Note the following details about using the **Before** field. • The parent task record must have a value in the field you specify. For example, if you select **Due date**, the parent task record must have a value in **Due date** before you can save the reminder. • You can use a date field other than **Due date** or **Follow up** by performing the following steps: 1. Select either **Due date** or **Follow up**in the **Before** field. 2. Save the reminder. 3. Find the reminder in a list view using one of the following methods: ▪ In the parent task record, configure the form, and then add Reminders as a related list. ▪ Navigate to `reminder.do` and search for the reminder. 4. In the list view, change the **Before** field value to a different date field from the parent task. Use the field name and make sure the field has a value. For example, enter `work_start` to use the **Actual start** field instead. Note that you can't make additional changes on the reminder form without changing the **Before** field value back to either **Due date** or **Follow up**.
Using	Specifies the method by which the reminder must be sent. Available options are: **Send an Email** and **Outlook Calendar**.
Subject	Specifies the subject or the reason of the reminder. Maximum number of characters allowed on this field is 100.
Notes	Provides a space where you can enter your comments regarding the reminder. Maximum number of characters allowed on this field is 8000.

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Defining assignment rules

The instance can automatically assign a task to a user or group based on pre-defined conditions by using data lookup rules and assignment rules.

Assignment rules module

The Assignment rules module allows you to automatically set a value in the assigned_to and assignment_group fields when a set of conditions occurs.

You can modify and create assignment rules by navigating to **All** > **Routing and Assignment** > **Assignment Rule**. An assignment rule must also meet these additional criteria to run:

- The task record has been created or updated. Assignment rules do not apply to unsaved changes on a form.
- The task record must be unassigned. The record cannot have an existing value for either the *assigned_to* or *assignment_group* fields. Assignment rules cannot overwrite existing assignments (including assignments set by a default value or a previously run assignment rule).
- The assignment rule is the first rule that matches the table and conditions. If more than one assignment rule matches the conditions, only the rule with the lowest order value runs.

Data lookup rules

Data lookup rules offer a generic way to change any field value, not just assignment fields.

Data lookup and record matching support offer the following improvements over the *Assignment* module:

- Ability to change any field value not just an assignment field
- More options to define when a rule runs:
  - On form change (Allows assignment rules to apply to unsaved changes on a form)
  - On record insert
  - On record update
- Option to replace existing values (including default values)

Note: You can define data lookup and *Assignment* rules at the same time. The system ignores any duplicate rules after an incident has been assigned unless you are using a data lookup definition option to replace existing values.

Related topics

Precedence between data lookup, assignment, and business rules

Precedence between data lookup, assignment, and business rules

Scripts, assignment rules, business rules, workflows, escalations, and engines all take effect in relation to a database operation, such as insert or update. In many cases, the order of these events is important.

Note: Client-based code that executes in the browser, using Ajax or running as JavaScript, executes before the form submission to the server.

The order of execution is as follows:

1. Before business rules: Scripts configured to execute before the database operation with an order less than 1000.
2. Before engines. The following aren't executed in any specific order:

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- Approval engine (for task and sys_approval_approver tables)
- Assignment rules engine (for task tables)
- Escalation engine
- Data policy engine
- Field normalization engine
- Role engine - keeps role changes in sync with sys_user_has_role table (for sys_user, sys_user_group, sys_user_grmember, and sys_user_role tables)
- Execution plan engine (for task tables)
- Update version engine - creates version entry when sys_update_xml entry is written (for sys_update_xml table)
- Data lookup engine inserts or updates
- Workflow engine (for default workflows)

3. Before business rules: Scripts configured to execute before the database operation with an order greater than or equal to 1000.
4. Database operation: The system performs the insert, update, or delete operation on the database.
5. After business rules: Scripts configured to execute after the database operation with an order less than 1000.
6. After engines. The following aren't executed in any specific order:
   - Label engine
   - Listener engine
   - Table notifications engine
   - Role engine - keeps role changes in sync with sys_user_has_role table (for sys_user, sys_user_group, sys_user_grmember and sys_user_role tables)
   - Text indexing engine
   - Update sync engine
   - Workflow engine (for deferred workflows)
   - Trigger engine (for all Workflow Studio flows).
7. Email notifications: The following are executed based on notification weight:
   - Notifications sent on an insert, update, or delete
   - Event-based notifications
8. After business rules (active records only): Scripts configured to execute after the database operation with an order greater than or equal to 1000.

Note: Like After business rules, Async business rules execute their logic after a database operation occurs. Unlike After business rules, Async business rules execute asynchronously, running in the background simultaneously with other processes. Async business rules run after the user submits the form and after the scheduler runs the scheduled job created from the business rule. The system creates a scheduled job from the business rule after the user submits the form but before any action is taken on the record in the database.

Related topics

Business rules

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Workflow assignments

An alternative to creating data lookup or assignment rules is to create one or more workflow tasks that assign a task record as part of a workflow.

Consider using Task workflow activities for assignment if your process includes multiple steps or conditions such as requiring a particular group approve a request.

When using a workflow to manage task assignments, add a brief Timer workflow activity to the start of the workflow. Without this timer activity, the workflow runs before the parent record, the current record, is inserted into the database. After the timer activity completes, the workflow resumes using the parent record information from the database instead of the original current. Pausing a workflow in this way does not change a default workflow to a deferred workflow. For more information on how the workflow engine interacts with the database, see Workflow engine operation order.

Baseline assignment rules example

A baseline instance contains certain assignment rules.

Baseline instance rules

Name	Table	Conditions	Assigned to user, Assigned to group, or Script
Networking	incident	Category is Network	User: System Administrator Group: Network
Database or Software	incident	Category is one of Request, Inquiry / Help, Software, Hardware	User: System Administrator Group: Software
SC Item fulfillment - Field Services	Ticket	Parent.Task type is Request item	Group: Field Services
Release Planning	release_phase	Name is Plan	Script: `current.release.product.service.assigned_to;`
IT Hardware	sc_req_item	Approval is Approved and Item.Category is Request Computers and Hardware	User: System Administrator Group: Hardware
Service Desk	incident	Active is true	Group: Service Desk

Create an assignment rule

Automatically assign a record according to one or more conditions in an assignment rule. Assignment rules are designed to run at the time you open a record.

Before you begin

Role required: assignment_rule_admin or admin

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Procedure

1. Navigate to **All** > **System Policy** > **Rules** > **Assignment**.
2. Select **New**.
3. On the form, fill in the fields.

Assignment rule form

Field	Description
Name	The descriptive name for the assignment rule.
Active	Option to activate the assignment rule.
Applies to	
Table	The table with the records that the assignment rule applies to. The list shows only tables and database views that are in the same scope as the assignment rule. If you select a custom table that extends the task table, and for the assignment rule to work properly, you must clear the instance cache by navigating to https://<instance_name>.service-now.com/cache.do. **Important:** Clearing the system cache can affect overall performance, and degrade system response times. Do not run cache flushes during business hours, and do not trigger cache flushes automatically.
Conditions	The conditions under which the assignment rule applies.
Assign to	
User	The user the event is assigned to.
Group	The group the event is assigned to.
Script	
Script	A script to specify advanced assignment rule functionality. The script should evaluate to the sys_id of a user or user group. The `current.variable_pool` set of variables is available. **Note:** Make sure the input in the script is correct, and that the input type matches the field type in the Assignment Rule script. For example, if the assignment rule script sets the value of an Integer field, and the value in the script is set to String, the assignment rule may yield unexpected results.
Optional fields	
Match conditions	**Any** If any of the conditions are met, assignment rule applies. **All** If all the conditions are met, assignment rule applies.
Execution Order	The order in which the assignment rule is processed. If assignment rules conflict, a rule with a lower-order value takes precedence over a rule with a

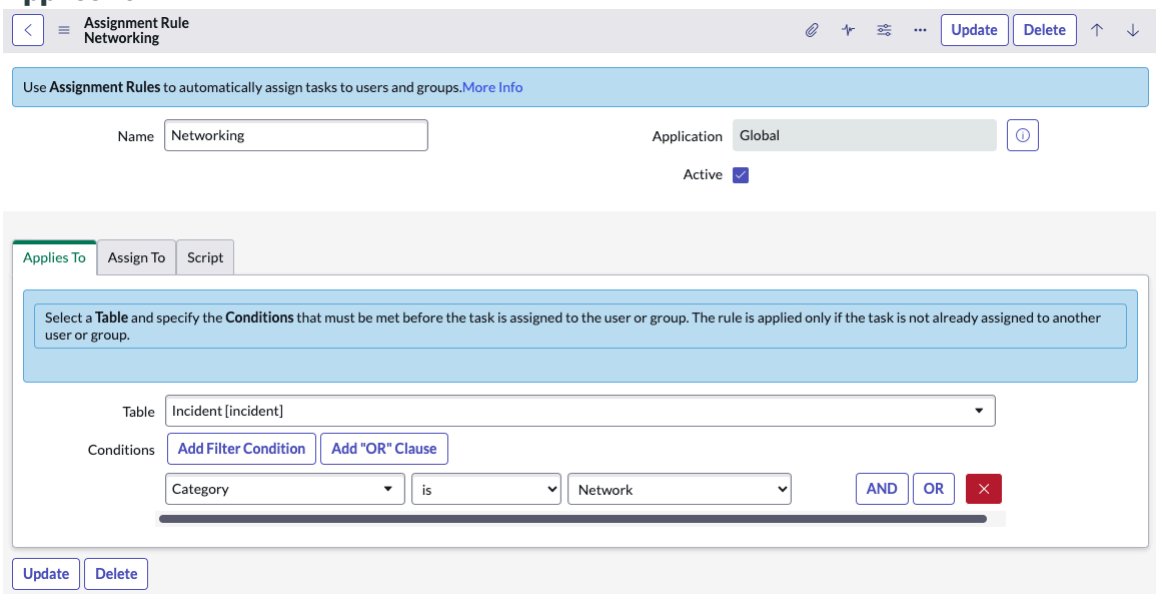
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Field	Description
	higher value. If the order values are set to the same number, the assignment rule with the first matching condition takes precedence over the others. Only the first assignment rule with a matching condition runs against a record.

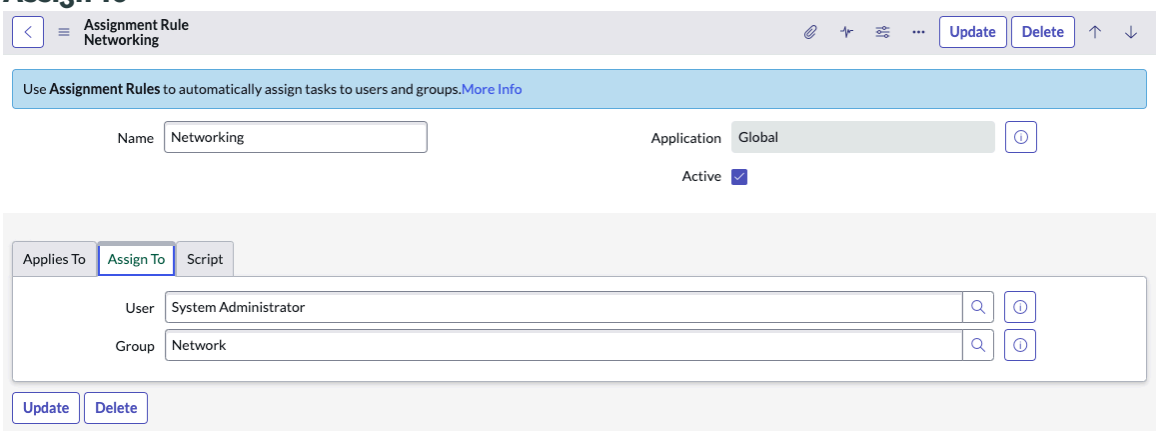
Example: Condition editor

In this example, the condition statement automatically assigns any incident opened in the Network category to the system administrator in the Network assignment group.

Applies To



Assign To



Create an assignment data lookup rule

Automatically assign a record using Data Lookup and Record Matching.

Before you begin

Role required: assignment_rule_admin or admin

Procedure

1. Navigate to **All** > **System Policy** > **Rules** > **Assignment Lookup Rules**.
2. Select **New**.
3. On the form, fill in the fields.

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Assignment Data Lookup fields

Field	Description
Category	The category the data lookup matches against.
Subcategory	The subcategory the data lookup matches against.
Configuration item	The configuration item the data lookup matches against.
Location	The location the data lookup matches against.
Assignment group	The assignment group to assign the incident to.
Assigned to	The user to assign the incident to.
Active	Option to run the rule or deactivate the rule.
Order	Order in which the rule runs compared to other rules on the same table. The Data Lookup Plugin runs the rule with the lowest order and matching values.

4. Select **Submit**.

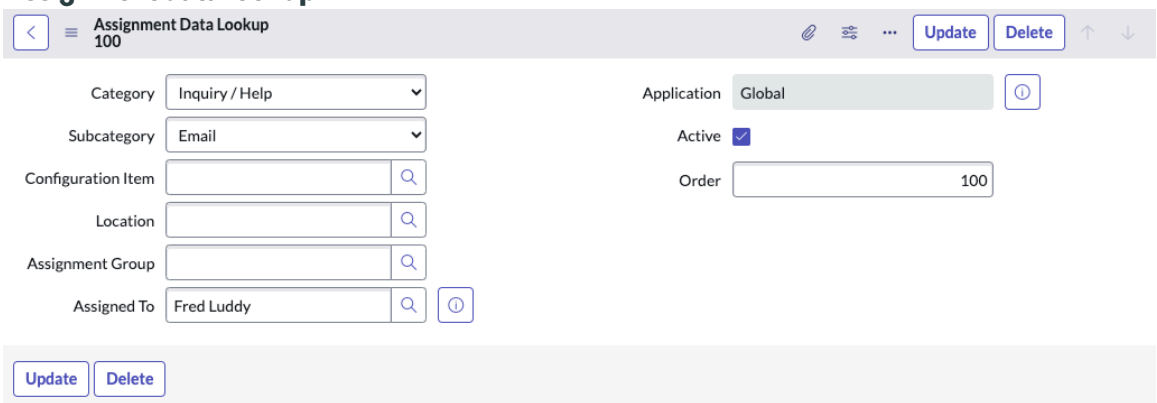
Result

The rule assigns incidents to the values in the *Assignment Group* and *Assigned To* fields based on the values selected in the **Category**, **Subcategory**, **Configuration Item**, or **Location** fields. A valid assignment lookup rule requires at least one matcher field and one setter field.

Example: Assignment Data Lookup

In this example, the Assignment Data Lookup rule automatically assigns any incident with the Category of Inquiry/Help and Subcategory of Email to Fred Luddy.

Assignment data lookup



Extending the Task table with Planned tasks

The Planned Task plugin provides a Planned Task `[planned_task]` table that extends the Task `[task]` table.

The Planned Task plugin cannot be activated independently. It gets activated when activating the Project Management plugin (through PPM Standard plugin).

Planned tasks provide additional fields for tasks pertaining to time and effort as part of a planned, multi-stage process. You can create a planned task by entering `planned_task.list` in the navigator filter and selecting **New** from the planned task list.

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Note: If the Planned Task_v2 (`com.snc.planned_taskv2`) plugin is active when you upgrade to the Geneva or later releases, the system adds the Task column to the Planned Task [planned_task] table. The Task column is of type Composite Field, and stores the Short Description and Number of the task. During the upgrade, the system updates all records in the Planned Task table.

Modify a Planned Task Interceptor

Customize the Planned Task Interceptor to control what type of planned task record users can create and what choices they see when creating new planned tasks.

Before you begin

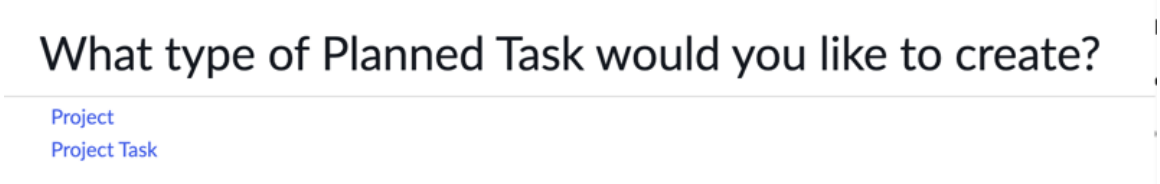
The Project Management plugin must be activated. For more information, see Extending the Task table with Planned tasks.

Role required: admin.

About this task

An Interceptor helps decide what type of record should be created when it isn't clear what the correct record type is. The Interceptor prompts users to make additional choices that determine the correct type of record.

By default, the Planned Task Interceptor prompts users to choose whether a new planned task is a planned project task, or a planned project. The answers can be modified or added to as needed.



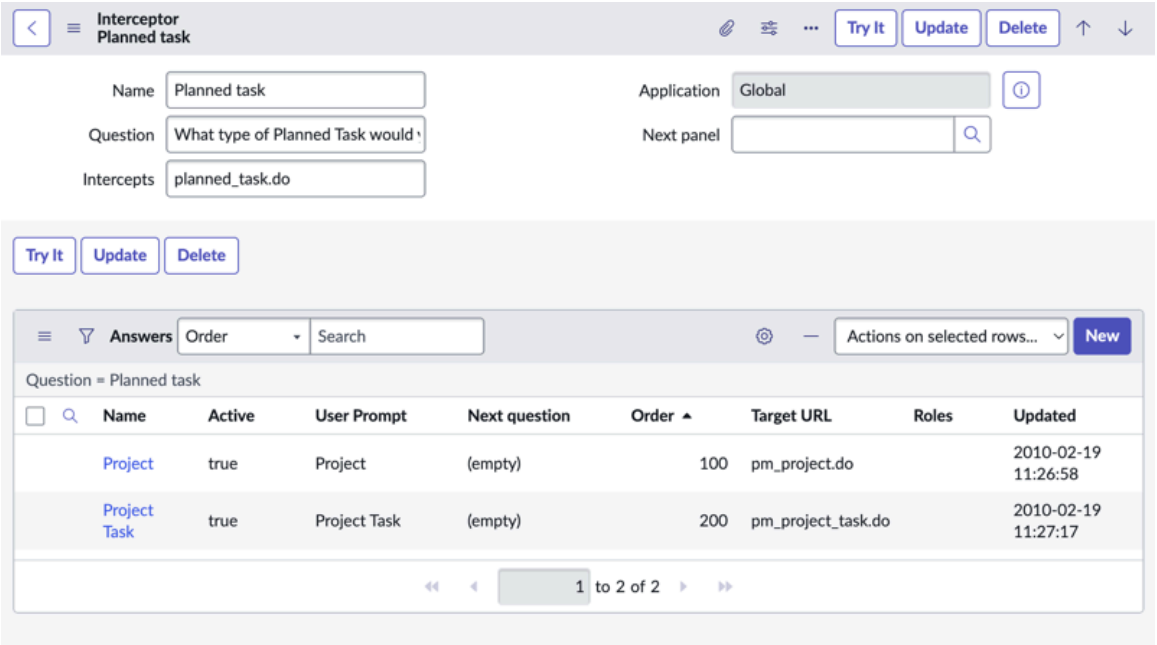
Procedure

1. Navigate to **All** > **System Definition** > **Interceptors**.
2. Select the **Planned Task** Interceptor.
3. Modify the **Answers** related list as desired.

   The **Answers** related list specifies what choices are presented, and where the user is redirected after selecting the choice. You can modify the preexisting answer records, or use **New** to create an answer based on what kind of prompt you want to give the user.

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You can modify answers by adding scripts. For more information about scripting in the ServiceNow AI Platform, see Exploring scripting.



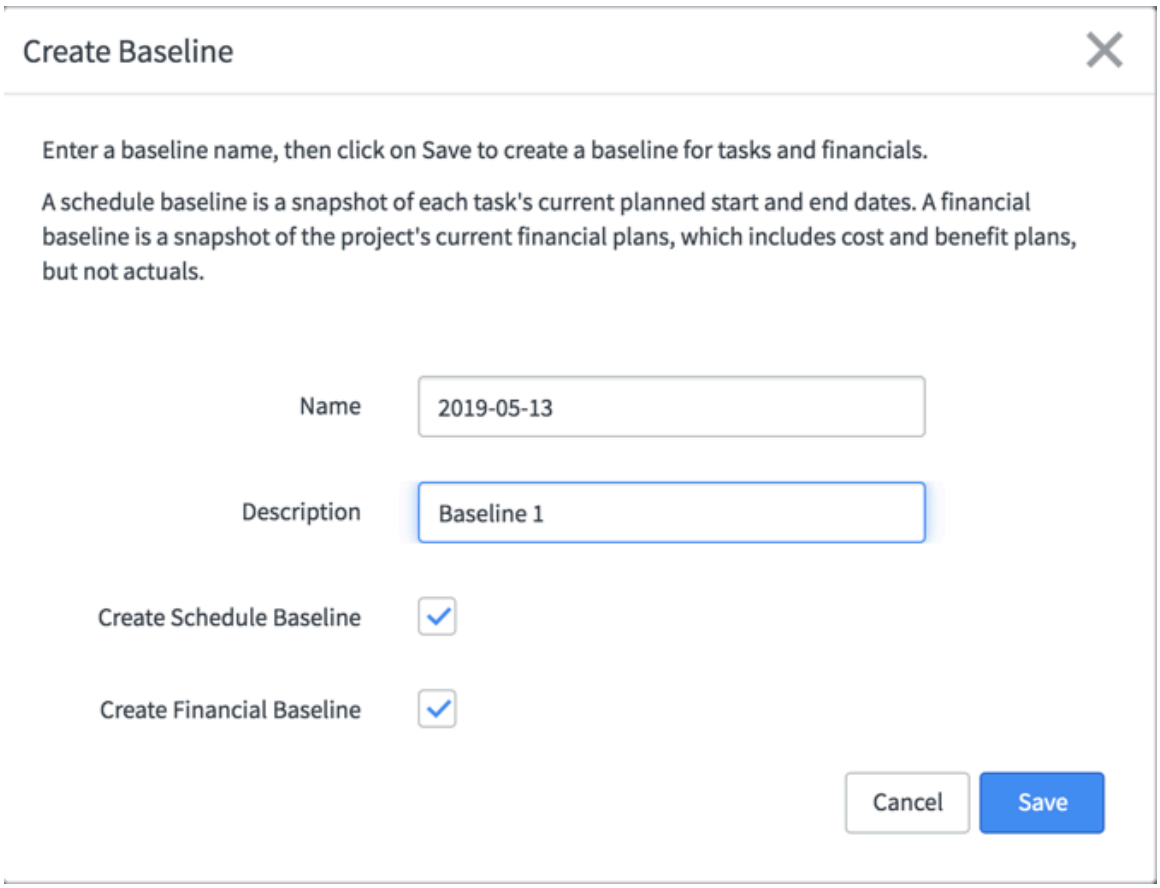
Create a baseline

A Planned Task Baseline is a record of the start and end times of the planned task at a particular moment in time.

To create a baseline, navigate to the form of the top planned task and select the **Create a Baseline** related link:

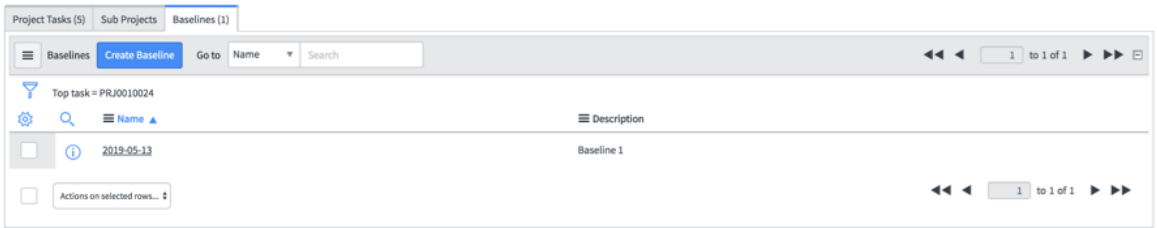
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Create baseline



To view the baseline, configure the related lists to add a related list of baselines:

Baselines tab



The baseline can be viewed on a Gantt Chart using the related link.

Measure time and effort

The Planned Task [planned_task] form provides standard fields for tracking duration and effort.

Duration measures the time from start to end date. Effort measures the hours of work exerted on the project. Both duration and effort are measured with fields in the Dates section of the Planned Task record.

Duration

- Planned duration: The projected length of time for the planned task. You can enter this value manually.
- Actual duration: The actual length of time so far for the planned task. This value is calculated based on the amount of time elapsed since a task enters the open state.
- Remaining duration: The Planned duration minus the Actual duration, which represents the projected length of time left.

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Effort

- Planned effort: The projected amount of time that will be spent on the planned task. You can enter this value manually.
- Actual effort: The actual amount of time that has already been spent on the planned task. You can enter this value manually.
- Remaining effort: The Planned effort minus the Actual effort, which represents the amount of project work left.
- Percent complete: For the parent task, the percent complete field is not editable and is rolled up from the percent completion of child tasks using the following formula:

  Percent complete of parent task = sum (planned duration of child tasks * percent complete of child tasks) / sum (planned duration of child tasks)

  For a child task, the percent complete is entered manually.

Date Calculation: All planned dates and actual dates of the child tasks are rolled up to the parent task automatically. Planned end date for a child task is calculated based on the planned start date and planned duration. If actual start is present, then planned end date is calculated from actual start date and planned duration.

Important planned task table fields

The Planned Task table has these fields.

Important Planned Task Table Fields

Label	Name	Type	Description
Actual cost	`work_cost`	currency	The actual cost of the planned task, to be compared with the Estimated cost.
Actual duration	`work_duration`	glide_duration	The actual length of time (from start time to end time) of work on the planned task, to be compared with the Planned duration.
Actual effort	`work_effort`	glide_duration	The actual time spent working, to be compared to the Planned effort.
Critical Path	`critical_path`	boolean	
Estimated cost	cost	currency	An estimation of the cost of the planned task, to be compared with the actual cost.
HTML Description	`html_description`	html	A description field that accepts HTML mark-up.
Percent Complete	`percent_complete`	decimal	A percentage of the completed effort. Generated using the Planned effort and Actual effort fields.
Planned duration	duration	glide_duration	The estimated length of time (from start time to end time) of the planned task.

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Important Planned Task Table Fields (continued)

Label	Name	Type	Description
Planned effort	effort	glide_duration	The estimated amount of time spent working on the planned task.
Planned end date	`end_date`	glide_date_time	The estimated date and time for the planned task to end.
Planned start date	`start_date`	glide_date_time	The estimated date and time for the planned task to start.
Remaining duration	`remaining_duration`	glide_duration	The difference in planned and actual duration, representing the time left for the planned task.
Remaining effort	`remaining_effort`	glide_duration	The difference in planned and actual effort, representing the amount of work time left for the planned task.
Rollup	rollup	boolean	Read-only field managed by the system that identifies the task as having child tasks. A rollup task has several its fields calculated from the children so those fields are read-only.
Time constraint	`time_constraint`	string	A description of time constraints that apply to the planned task.
Top Task	`top_task`	reference (planned_task)	When different planned tasks are stacked in a hierarchy, this field populates with the highest-level parent task. For example, if Project A has a child Project B, and Project B has a child Project C, then the Top Task for Project C is Project A. The Top Task field for Project A is blank.
Actual start date	`work_start`	glide_date_time	The actual date when the work starts on the planned task.
Actual end date	`work_end`	glide_date_time	The actual date when the work ends on the planned task.

Planned task scripts

Several business rules and one script include determines the dynamic calculation of crucial Planned Task fields.

Planned Task Scripts

Business Rule	Description
Set actual work start value	Sets the Actual Start Date of the planned task when State is set to the default work state.
Set close data on inactive	Sets the close data of the planned task when task becomes inactive.

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Planned Task Scripts (continued)

Business Rule	Description
Recalculate	Recalculates the planned task schedule fields when one of the schedule fields changes.
Planned task global events	Raises global event for every insert or update of planned task record. For more information, see Global events.
Update parent actual effort	Rolls up actual effort from child task to parent task.
Update parent effort	Rolls up planned effort from child task to parent task.
Update parent percent complete	Rolls up percent complete from child task to parent task.
Validate duration	Validates the value in the planned duration field is not 0 or negative.
Validate percent complete	Validates the value in the percent complete field is between 0 and 100.
Validate work end before work start	Validates that the actual end date is not earlier than the actual start date.
Set top task	Sets top tasks to maintain hierarchy of tasks.
Set top task on children	Sets top tasks on child tasks to maintain hierarchy of tasks.

Planned task hierarchy

The **Task Hierarchy** tool available for Planned Task displays the relationship between parent and child planned tasks.

Before you begin

Role required: admin

About this task

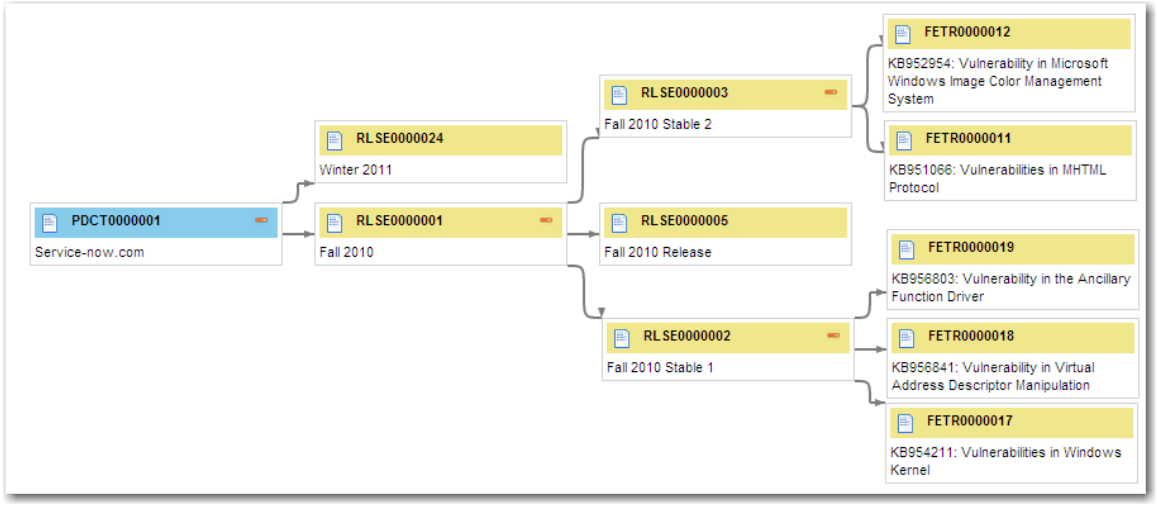
Out-of-box, the **Task Hierarchy** tool is available in both Project and Release Management.

Different **Planned Task** tables have different UI actions to launch the task hierarchy:

- To view the hierarchy of a Project, navigate to the use the **Task hierarchy** context menu action.
- To view the hierarchy of a Product in Release v2, navigate to the product and click the **Product hierarchy** related link.
- To view the hierarchy of a Release in Release v2, navigate to the release and click the **Release hierarchy** related link.

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Rm2 Hierarchy



The Task Hierarchy can be added to any planned task table by:

Procedure

1. Navigating to **System UI** > **UI Actions**.
2. Selecting one of the existing Task Hierarchy UI Actions (for example, **Task hierarchy** if Project Management is activated).
3. Change the table to the desired table and rename the UI Action if appropriate, and insert.

   The hierarchy should now be available as a UI Action on the form of the new table.

Configure rollup for planned task fields

You can configure the planned task fields to roll up the field values in the parent entity.

Before you begin

Role required: admin

About this task

By default the following fields are configured to roll up for any planned task and planned task derivatives:

Cost, **Budget**, **Effort**, **Actual date**, **Planned date**, **Duration**, **Percent Complete**

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Open the **Planned task rollup** table.
3. In the Related links, click **Show List**.
4. Click **New**.
5. Fill out the Planned task rollup form (see table).
6. Click **Submit**.

Planned task rollup form fields

Field	Description
Child	Select the table you want to include or exclude.

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Field	Description
Field	Select the column name you want to include or exclude.
Navigator	The reference column of the parent to which the value must be rolled up.
Parent	Select the parent table.
Application	Auto-generated value.
Rollup	Select the check box to allow roll up. Leave the field unchecked to exclude the field from rollup.

Creating many-to-many task relations

By default, tasks can be related to each other using a parent/child relationship, such as a Problem with a group of child Incidents or a Catalog Request with a group of child Catalog Tasks.

However, it may prove useful to record exactly the nature of the relationship between the task records. When activated, the Many-to-Many Task Relations plugin allows administrators to define relationships between different tasks.

Request many to many task relations

The Many to Many Task Relations plugin (com.snc.task_relations) is included with several plugins. You can request activation of the plugin by itself.

Before you begin

Role required: admin

About this task

- Planned Task
- Field Service Management
- Project Management
- Governance, Risk, and Compliance

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.

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Field	Description
	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.

Plugin manifest

When the plugin is activated, the Task Relationships application is available with certain modules.

Task relationships

Module	Description
Knowledge Relation Types	Contains the definitions for the possible types of relationships between knowledge articles and tasks.
Knowledge Relationships	Displays all the defined relationships between existing tasks and knowledge articles.
Relationship Types	Contains the definitions for the possible types of relationships between tasks.
Relationships	Contains all the defined relationships between existing tasks.

The following Relation Types are available by default:

- Solution is documented in::Documenting solution for
- Caused by::Causes
- Contains::Task of
- Documenting Solution for::Solution is documented in
- Investigated by::Investigates
- Permanent correction for::Permanently corrected by
- Related to::Related to
- Requesting::Requested by
- Solved by::Solves

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Define a relationship type

Create type codes that define the relationship between parent and child tasks.

Before you begin

Activate the Many to Many Task Relations plugin (com.snc.task_relations) first. See Request many to many task relations.

Role required: admin

Procedure

1. Navigate to **All** > **Task Relationships** > **Relation Types** and select **New**.
2. Populate the *Parent Descriptor* and *Child Descriptor* fields with a short description of the relationship between the two tasks, such as a parent descriptor of *Caused By* and a child descriptor of *Causes*.
3. Select and hold (or right-click) the form header bar and select **Save**.
   The *Name* field automatically populates with the Parent and Child descriptors.

Define a task relationship allowed from the task relationship type record

Define the Task Relationships Allowed from the Task Relationship Type record.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Task Relationships** > **Relationship Types**.
2. Select a Task Relationship Type record.
3. In the Task Relationship Allowed related list, select **New**.
4. Populate the parent and child tables to define which tables are able to accept the relationship.
5. **Optional:** Define scripts to run in the *Parent* and *Child* script fields.

   (Optional) These scripts are run when a parent or child record is run to automatically generate the other task (child or parent). These scripts use the current value of the new record, as opposed to the source record which triggered the script.
6. Select **Submit**.

Modify the displayed field

The list view of the Reference Lookup defines the fields displayed in the Task Relations field and editing interface.

Before you begin

Role required: admin

Procedure

1. Navigate to a form that has a reference to the table whose display values you would like to modify within Task Relations field.
2. Click the magnifying glass to display the Reference Lookup list view.
3. Right-click the list header and select **Configure** > **List Layout**.

   The selected List layout is used as the display value for records within the Task Relations field.

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Mark as Solution button

The **Mark as Solution** button is added to the KB popup view and displayed when you search the knowledge base from a task record.

Selecting **Mark as Solution** creates a record in the Task / KB Relationships `[task_rel_kb]` table to associate the KB article with a task. You can disable this button by marking the active field false on the 'solution_button' UI macro.

Task relationships with UI actions

After defining task relationships, you can use UI Actions to define the task relationship when a new task is being created from an old task.

Below are a few examples.

Warning: These examples may not work on all instances. They are provided as illustrative examples.

UI Actions examples

Cause an incident

This UI Action allows the change management team to log an incident directly from the change request and records that the change caused the incident.

Create a UI Action on the Change Request [change_request] table and place the following into the script:

```
var inccaus =new GlideRecord("incident");
inccaus.short_description= current.short_description;
inccaus.comments= current.comments.getHTMLValue();
// inccaus.parent = current.sys_id;
inccaus.insert();
CauIncident();

gs.addInfoMessage("Incident "+ inccaus.number+" created");
action.setRedirectURL(current);
action.setReturnURL(inccaus);


function CauIncident(){
var m2m =new GlideRecord('task_rel_task');
m2m.initialize();
m2m.child= current.sys_id;
m2m.parent= inccaus.sys_id;
m2m.type.setDisplayValue("Caused by::Causes");
m2m.insert();}
```

Cause a problem

This UI Action allows the change management team to record a problem from a change request and record that the change caused the problem.

Create a UI Action on the Change Request [change_request] table and paste the following script:

```
var probcaus =new GlideRecord("problem");
probcaus.short_description= current.short_description;
probcaus.comments= current.comments.getHTMLValue();
// probcaus.parent = current.sys_id;
```

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```
probcaus.insert();
CauProblem();

gs.addInfoMessage("Problem "+ probcaus.number+" created");
action.setRedirectURL(current);
action.setReturnURL(probcaus);


function CauProblem(){
var m2m =new GlideRecord('task_rel_task');
m2m.initialize();
m2m.child= current.sys_id;
m2m.parent= probcaus.sys_id;
m2m.type.setDisplayValue("Caused by::Causes");
m2m.insert();}
```

Fix a problem

This UI Action allows a change request to be generated from a problem, recording that the change fixes the problem.

Create a UI Action on the Problem [problem] table, and paste the following code:

```
var fixchg =new GlideRecord("change_request");
fixchg.short_description= current.short_description;
fixchg.comments= current.comments.getHTMLValue();
// fixchg.parent = current.sys_id;
fixchg.insert();
FixChange();

gs.addInfoMessage("Change "+ fixchg.number+" created");
action.setRedirectURL(current);
action.setReturnURL(fixchg);


function FixChange(){
var m2m =new GlideRecord('task_rel_task');
m2m.initialize();
m2m.child= current.sys_id;
m2m.parent= fixchg.sys_id;
m2m.type.setDisplayValue("Fixes::Fixed by");
m2m.insert();}
```

Time Card Management

The Time Card Management feature enables time card users such as task assignees to report and track their time for the assigned tasks.

https://player.vimeo.com/video/1107432259?h=08347ba78f&badge=0&autopause=0&player_id=0&app_id=58479

Watch this three-minute video to learn about setup of the time tracking feature, entering time and approvals.

Time Card Management works with the Task table to record time worked on various task types, such as projects, incidents, problems, and change requests.

With the Time Card Management feature:

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- The time card users can record the time worked on a task using time cards and time sheets. They can submit their time cards and time sheets for approval.
- Time cards and time sheets are routed for approval based on the **Non-project time approver** and **Project time approver** fields in the user time sheet policy. User managers with time card approver role can also log time and submit the time sheet of their resources
- The time card approvers can perform the following tasks:
  - Review and approve or reject the time cards in a submitted time sheet.
  - Recall the approved time sheets or time cards to return them to the users for corrections.
  - Use dashboards to view reports of time card and time sheet exceptions, and categorize time reported by the users.
  - Delegate another time card approver to process time sheets from your resources when you might not have time or will be unavailable. Note the following points for delegation:
    - You cannot delegate approval only for an individual resource.
    - The delegated time card approver cannot further delegate your time sheet approvals.

  The project_manager and the resource_manager roles contain the timecard_approver role in the base system. However, the timecard_approver role can also be used independently without these roles.
- The time card admin can create and manage time sheet policies, and can also approve or reject by exception and process the time sheets. Time card admin can also create or edit time cards of any users if the time cards are in Pending or Rejected state.

Note: The Time Card Management plugin is required to use time cards. Some of the procedures require the project management feature, which activates time cards automatically. For more information, see Project Management (com.snc.financial_planning_pmo).

Assign a time card user to a project or project task

A user who has only the timecard_user role, and no project role such as it_project_user, can be selected in the **Assigned to** field of a project or project task. This behavior is intentional and lets the user submit time against the assigned task from the Time Sheet Portal.

Being assigned to the record gives the time card user read-only access to it. The user can't edit, close, or reassign the project or project task unless they also have a project role such as it_project_user.

Note: The Business Stakeholder role includes the timecard_user role. As a result, a user who has the Business Stakeholder role can also be selected in the **Assigned to** field of a project or project task, with the same read-only access. To stop time card users from appearing in the **Assigned to** field, override the reference qualifier on the **Assigned to** field of the project or project task table.

Domain separation in Time Card Management

Domain separation provides complete data isolation for domain-specific users. Time card Management is domain separation compliant at the **Data only** level.

Activate Time Card Management

Administrators can activate the Time Card Management plugin (com.snc.time_card). The plugin also activates the Performance Analytics - Content Pack - Project Portfolio Suite Dashboards

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plugin (com.snc.pa.time_card). However, you need a Performance Analytics license to use the dashboards.

Before you begin
Role required: admin

About this task
Note: The Time Card Management plugin also gets activated as part of PPM Standard plugin (com.snc.financial_planning_pmo).

Procedure
1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

Time sheet policies
Time sheet policies contain the policies to which a time sheet, or a time card must adhere.

By default, the Default time sheet policy is available with the system. As a Time card admin, you can create multiple time sheet policies based on different requirements and workflows in your organization. For example, specify a time sheet policy for each department or team and assign appropriate users to them.

Time sheet policies also provide an ability to specify appropriate approval workflow for project and non-project tasks.

A time sheet policy can be set as a default policy. The default policy is a global time sheet policy which applies to all the users who are not assigned to any other time sheet policy. Only one time sheet policy can be set as a default policy.

Navigate to **Time Sheets** > **Administration** > **Time Sheet Policies** to view the list of timesheet policies.

Create a time sheet policy
As a time card administrator, you can create a time sheet policy to define the requirements for time card users to record their time worked. The time card approvers must review and process time sheets under the applicable time sheet policy.

Before you begin
Role required: timecard_admin

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Procedure

1. Navigate to **All** > **Time Sheets** > **Administration** > **Time Sheet Policies**.
2. Click **New**.
3. On the form, fill in the fields.

Time Sheet Policy form

Field	Description
Name	Unique name of the policy.
Allow blank time cards	Option to enable submission of blank time cards for approval. By default, this option is not selected.
Auto create time card on planned task update	Option to create a time card automatically when you update a planned task, if the following conditions are true: ○ You are a time card user ○ You are assigned to the task through **Assigned to** or **Additional assignee list** field ○ The task is not in a pending state. By default, this option is not selected.
Auto fill time card with time worked entries	Option to fill in time cards automatically when you enter time in the **Time worked** field on the Task form. If a time card does not exist for the task, one is created when the time worked is updated if the following conditions are true: ○ You are a time card user. ○ You are assigned to the task through the **Assigned to** or **Additional assignee list** field. By default, this option is not selected.
Auto create time cards every week	Option to generate time cards automatically every week through a scheduled job for all users assigned to the time sheet policy. The time cards are generated based on the planned task assignments and hard-allocated resource plans of the users. By default, this option is selected.
Update actual hours and cost in resource plan/reports	Option to update actual hours and actual cost of the associated resource plan based on the hours entered in the approved time card. When selected, you can associate a resource plan related to the selected task with the time card in the following ways:

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Field	Description
	○ If the task has multiple resource plans, you can select the appropriate plan. ○ If the task has one resource plan, that plan is selected by default. The hours from the time card entry and the hourly resource rate are used to update the **Actual hours** and **Actual cost** values of the associated resource plan. **Note:** If the task has no resource plan, the associated records update the corresponding project. By default, this option is not selected.
Allow recall	Option to enable the recall action on a time sheet or time card after it is approved and processed. By default, this option is selected.
Recall period allowed (days)	Number of days within which you can recall a time sheet or time card. This field appears when the **Allow recall** option is selected. The default value is 30.
Week starts on	Start day of the week for the time sheet. The default value is Sunday. **Note:** For more information on filtering Time Sheets using this field, see KB0852458 article in Now Support Knowledge Base.
Maximum hours per day	Maximum number of hours that can be entered each day in a time sheet. The default value is 24. Setting this field to -1 enables the resource to enter: ○ A value from 0 through 24 for the hours worked each day ○ A negative value, to correct the previously entered timecards.
Maximum hours per week	Maximum number of hours allowed in a week in a time sheet. The value for total hours for a week in a time sheet is the sum of hours entered per day of that week. If set to -1, the total hours per week allowed is up to 168 (24 x 7) hours. The default value is 40.
Non-project time approver	Type of approval required when you submit a time card that has a non-project task assigned.

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Field	Description
	○ **Auto**: Time card is auto-approved when submitted. ○ **User Manager**: Time card is routed to the user manager for approval when submitted. The user manager has the time card approver role and is also selected as the manager of the time card user on the User form. ○ **None**: A user with the timecard_admin role can approve time cards when submitted.
Project time approver	Type of approval required when you submit a time card that has the project task. ○ **Auto**: Time card is auto-approved when submitted. ○ **Project Manager**: Time cards for a project task are routed to the respective project manager for approval when submitted. The project manager is picked from the task against which you are submitting time. ○ **User Manager**: Time cards are routed to the user manager for approval when submitted. ○ **Both**: Time cards are routed to both the user manager and project manager for approval when submitted. A time card remains in the Submitted state when only one of the approvers approves the time card. ○ **None**: A user with the time_card admin role can approve time cards. **Note:** ○ The project manager and the user manager can view only those time cards that are routed to them for approval. ○ If the user manager or the project manager changes while the time card is still not approved, the system automatically updates the approver of the time card. ○ If the name of the project manager or the user manager is not populated on the respective form, a user with the time_card admin role can approve time cards.
Allow multiple rate types	Option to provide a rate type in a time card to be used during expense line generation. When this option is selected, the **Rate type** field displays on the Time Card form to enable the selection of a rate type. For more information, see Rate type in labor rate card.
Default rate type	Rate type used by default for the time card. If you select none, the Standard rate type option is used. This field appears when the **Allow multiple rate types** check box is selected.

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Field	Description
Default Policy	Option to set the time sheet policy as the default. The default policy is a global time sheet policy that applies to all users who are not assigned to any other time sheet policy. Only one time sheet policy can be set as the default. A time sheet policy set as the default policy cannot be deleted. You must first set another policy as the default policy.

4. Click **Submit**.

What to do next

- Set the time sheet policy as the default policy, if required.
- Assign the time sheet policy to users.

Set a time sheet policy as default policy

As a time card administrator, you can set a time sheet policy as the default policy. The default policy is a global time sheet policy which applies to all the users who are not assigned to any other time sheet policy.

Before you begin
Role required: timecard_admin

About this task
Only one time sheet policy can be set as a default policy.

Procedure

1. Navigate to **All** > **Time Sheets** > **Administration** > **Time Sheet Policies**.
2. Open the time sheet policy record.
3. Click the **Set as default** related link.

> **Note:** The related link appears only for a time sheet policy which is not already set as the default policy.

Result
The **Default Policy** option on the record form is selected to indicate that the current time sheet policy is set as the default policy. The **Default Policy** option on the earlier default time sheet policy is cleared.

You cannot delete a default time sheet policy. You must first mark another policy as the default policy to delete the current default policy.

Assign a time sheet policy to a user

As a time card administrator, you can assign a time sheet policy to a user.

Before you begin
Role required: timecard_admin

About this task
You can assign only one time sheet policy to a user.

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Procedure

1. Navigate to **All** > **Time Sheets** > **Administration** > **Time Sheet Policies**.
2. Open the time sheet policy record.
3. In the **Users** related list, click **Edit**.
4. On the Edit Members form, move the users to the **User List**.
5. Click **Save**.

Result

The selected users appear on the **Users** related list. The time sheet policy is assigned to the selected users.

Create a rate type

You can create rate types using the Rate Types feature.

Before you begin

Role required: timecard_admin

About this task

The rate type functionality is used to categorize different types of work. For example, Standard versus Overtime. It can also instruct down-stream, third-party product about the nature of the work performed.

For example:

- A user works extra time during the day and must differentiate standard time from overtime.
- A technician may be paid at a higher rate based on different types of work involved in the execution of a task.
- An appliance repair task may be billed at one rate for the first hour and a different rate for the remaining hours.
- A service call may last four hours during which specialized equipment is used for one hour. The company must capture the use of the specialized equipment for purposes ranging from additional billing to legal compliance or warranty tracking.

Procedure

1. Navigate to **All** > **Time Sheets** > **Administration** > **Rate Types**.
2. Click **New** and fill the form.

Field	Description
Name	Provide a suitable name for the rate type.
Description	(Optional) Summarize the purpose of the rate type.
Active	Deselect the check box to mark the rate type as inactive.

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Field	Description
	Note: Inactivating a rate type does not remove it from records where it exists. When time card processing encounters an inactive rate type on the time card, no matching labor rate card is found. In this case, the system rate is used for generating the expense line.

3. Click **Submit**.

Result

- The rate type is displayed in the **Rate Types** list.
- The rate type if active is also displayed in the **Rate Type** field in the Labor Rate Cards form, Time Worked form, Time Card form, and Time Sheet Portal.

Time Sheet Portal

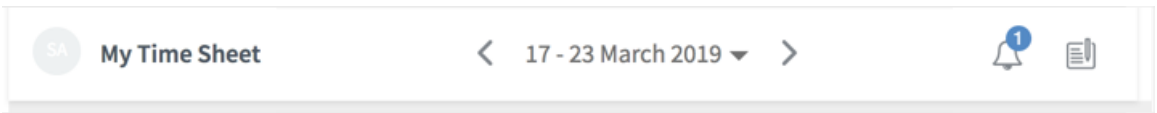
Time Sheet Portal categorizes and displays all your assigned tasks in a single view for a given week. The portal enables you to record time spent on tasks on a day-to-day basis and submit the time sheet in a single action.

Time Sheet Portal works with the Task table to record the time that you spend on various task types, such as projects, incidents, problems, and change requests. It provides a complete breakdown of the time you enter for the task, task categories, and days in a week. It enables you to:

- Generate time cards for assigned projects or project tasks.
- Copy time cards from a previous time sheet.
- Search and create a time card for a task that is not displayed in the assigned tasks list.
- Edit, delete, or add notes to a time card.
- Submit, approve, reject, and recall a time sheet.
- View notifications for the submitted, rejected, and recalled time sheets or time cards.

Time Sheet Portal comprises of the following sections:

Header

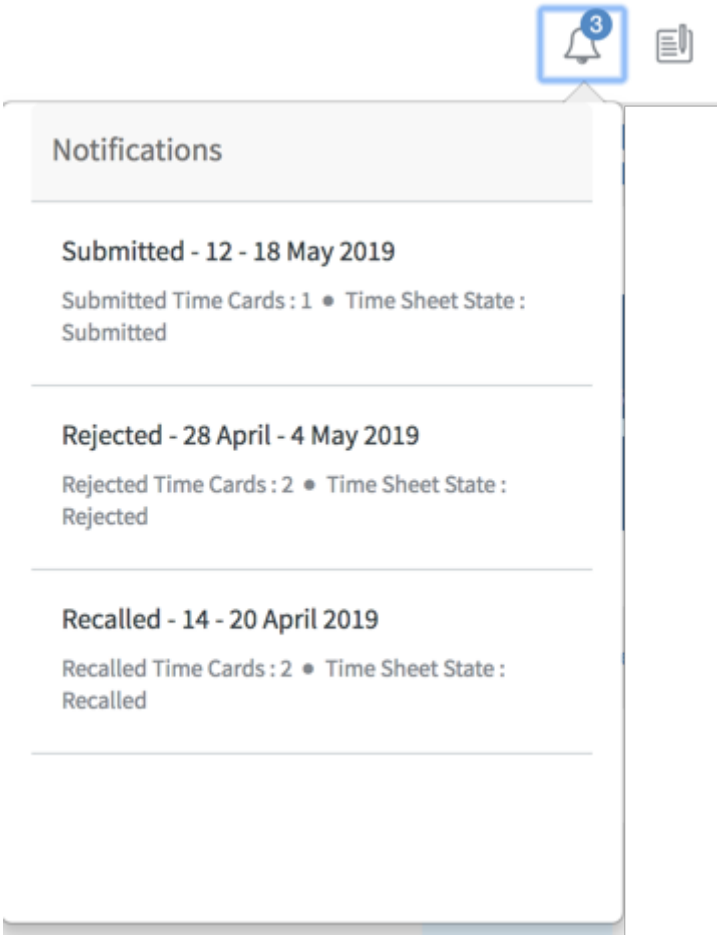


The Time Sheet Portal header:

- Displays a date range of the time sheet for the selected week and provides options to navigate to the time sheet of previous or next week.
- Provides a calendar along with the date range. Clicking a date in the calendar displays the time sheet for the week of the selected date.
- Provides a link to navigate to the time sheet for the current week when a different time sheet is being viewed.

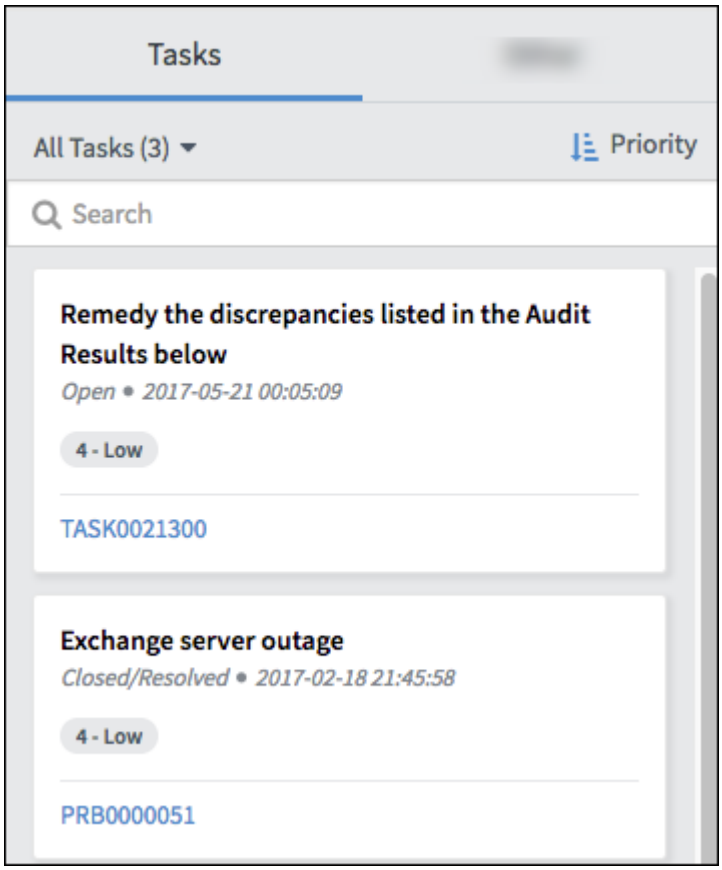
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- Provides an option under **My Time Sheet** that enables you to open and edit the time sheets of your resources. The option is available only for a user manager.
- Provides an option to view the time sheet in the Form view using time sheet form view icon ( ).
- Displays the notifications for the submitted, rejected, and recalled time sheets under the show notifications icon ( ). Each entry displays the number of time cards and their state. Click on a notification item to open the time sheet.



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Tasks



The **Tasks** tab displays your assigned tasks as cards. Each card provides information about a task, such as short description, state, last updated date and time, and priority. Tasks are derived from the following filter conditions:

- All your assigned incidents, problems, or change requests that are active.
- All your assigned incidents, problems, or change requests that are closed in the selected week.
- All tasks for which you are hard-allocated during the selected week.
- All your assigned projects or project tasks that are active during the selected week. Project or project tasks are derived from the following conditions:
  - A project or project task that has started and its actual start date is before the end of the selected week.
  - A project or project task has closed and its actual end date is after the week has begun.
  - When there are no actual dates for a project, planned dates of the project must occur within the selected week.
- All active stories assigned to you.
- All active scrum tasks assigned to you or closed in the selected week.
- All active test plans assigned to you.
- All active defect and enhancements assigned to you or closed in the selected week.

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Note: If the Customer Service Management plugin (com.sn_customerservice) is activated, your assigned tasks that are active and closed in the selected week are also derived from the following tables:

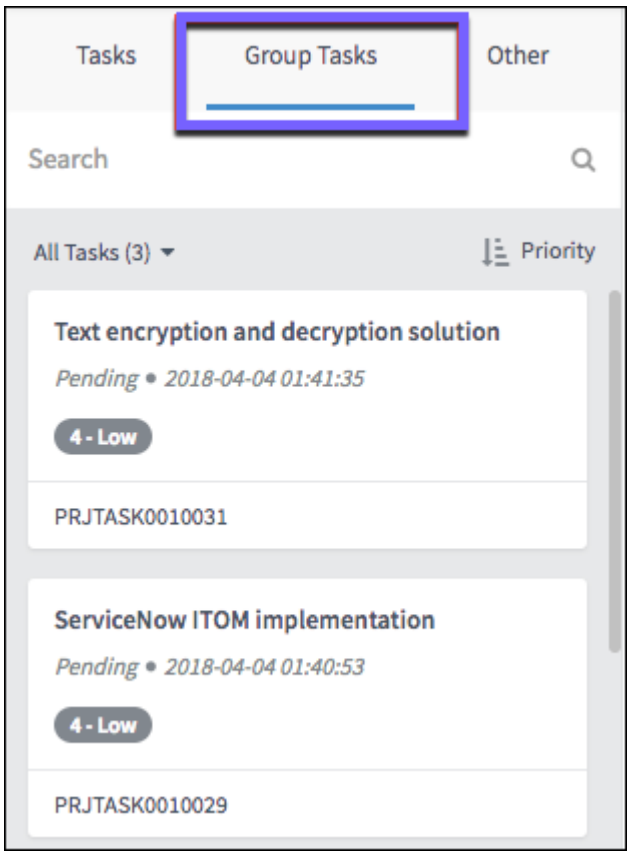
- Case [sn_customerservice_case]
- Work Order [wm_order]
- Work Order Task [wm_task]

On the **Tasks** tab, you can perform the following operations:

- Type a keyword in the search field to view only cards with details that match the keyword.
- Sort cards in ascending or descending order based on priority, irrespective of the task type.
- View cards based on a category, such as projects, project tasks, incident, problem, change, defect, enhancement, test plans, and scrum tasks.
- Create time cards for assigned tasks. See Create time cards and log time through Time Sheet Portal.

Note: Time sheet policies apply when you create or edit a time card.

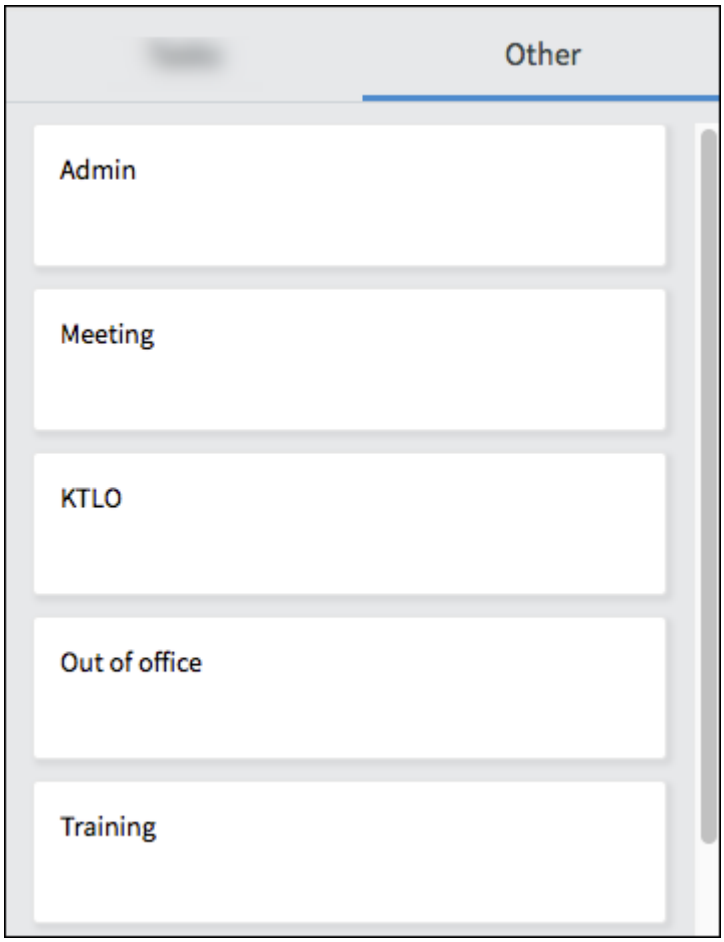
Group Tasks



The **Group Tasks** tab displays the tasks assigned to your **Assignment group**. The group tasks are displayed as cards in the tab. A card provides information about the task, such as short description, state, last updated date and time, and priority.

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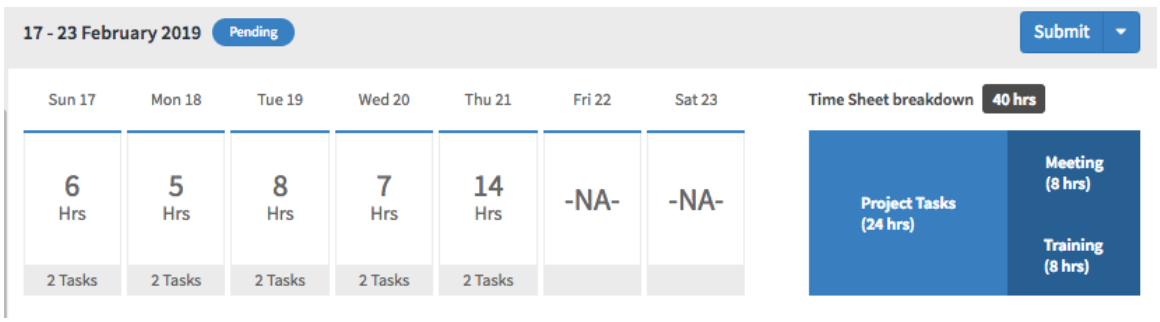
Other



The **Other** tab displays cards used to log time for operational work, such as administration, meeting, and KTLO.

Note: The list of categories in the time card controls the list of cards displayed on the **Other** tab. If an administrator marks any of the categories as inactive in the time cards, those categories are not displayed on the **Other** tab.

Time Sheet



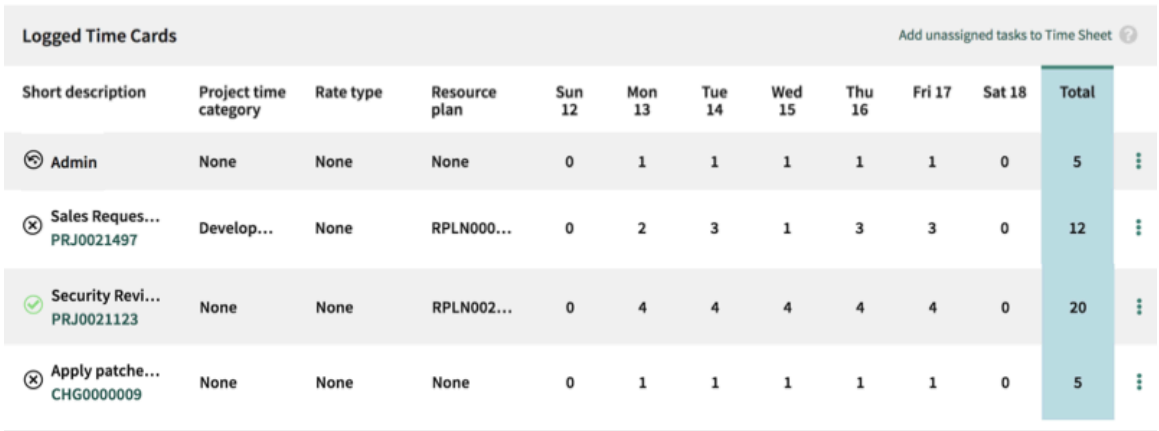
Starting Brazil release, time cards and time sheet portal supports resource assignments. Users can select a specific resource assignment while creating time cards and submitting a time card via time sheet portal. Your system administrator can enable the resource assignment column in time sheet portal. For more information on how to add resource assignment column to time sheet, see the Knowledge Base for KB1649389.

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The Time Sheet section:

- Displays the date range of the time sheet for the selected week.
- Indicates the state of the time sheet being viewed.
- Displays the total number of tasks and hours that you have entered for each day in a week. When you click a day in the time sheet, the column for that day is highlighted in both the **Time Sheet** and **Logged Time Cards** sections. The first day displayed in the Time Sheet section is based on the value specified in the **Week starts on** field in the users Time Sheet Policy. For example, if the **Week starts on** field is set to Friday, the Time Sheet section starts with Friday.
- Indicates the total number of hours that you entered in the time sheet. Time Sheet breakdown also displays a breakdown of user-entered hours in different work categories, such as project tasks, admin, meeting, follow on tasks, or change requests.
- Provides options that enable you to submit a time sheet and copy time cards from a previous time sheet. For an approver, options to approve or reject a submitted time sheet and recall a processed time sheet are available.

Logged Time Cards



Short description	Project time category	Rate type	Resource plan	Sun 12	Mon 13	Tue 14	Wed 15	Thu 16	Fri 17	Sat 18	Total
Admin	None	None	None	0	1	1	1	1	1	0	5
Sales Reques... PRJ0021497	Develop...	None	RPLN000...	0	2	3	1	3	3	0	12
Security Revi... PRJ0021123	None	None	RPLN002...	0	4	4	4	4	4	0	20
Apply patche... CHG0000009	None	None	None	0	1	1	1	1	1	0	5

Each row in the Logged Time Cards section represents a time card entry for a given week. It has details such as icon for state of the time card, short description of the task, project time category, rate type, resource plan, and logged time. Each row of the time card contains options that enable you to edit, delete, or add notes to a time card. For more information, see Create time cards and log time through Time Sheet Portal.

Note:

- The **Rate type** column is visible only when the **Allow multiple rate types** option in the time sheet policy of the user is selected.
- The **Resource plan** column is visible only when the **Update actual hours and cost in resource plan/reports** option in the time sheet policy of the user is selected.

The icon beside the short description of a row indicates a time card state. The merge icon ( ) in a time card row indicates that a duplicate time card for the same task exists in the time sheet and provides option to merge them into a single time card.

When there are no time cards, the Logged Time Cards section displays the **Generate Time Cards** and **Copy from previous time sheet** buttons to create time cards.

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Note: Time Sheet Portal is not designed for use on mobile devices, and may not appear as shown in this document.

Create time cards and log time through Time Sheet Portal

After you create time cards in Time Sheet Portal, log time in the time cards.

Before you begin

- Time sheet portal supports resource assignments created using Project Workspace. Once the time cards are approved, Project Managers can view the planned vs actual hours for an assignment in Project Workspace and Resource Management Workspace heatmap view.
- Role required: timecard_user

Procedure

1. Navigate to **All** > **Time Sheets** > **Time Sheet Portal**.
2. Create time cards in the **Logged Time Cards** section using any of the following options.

Option	Steps
Generate time cards for as signed projects or project tasks	**a.** Click choice list next to **Submit**. **b.** Select **Generate Time Cards**. The option also appears in the **Logged Time Cards** section when a user has no time cards for the selected week. **Note:** ▪ If a time card exists for a project task during the se lected week, a duplicate time card is not created. ▪ Time cards are generated only for those project tasks that are in progress or planned for the select ed week. ▪ The **Allow time card reporting on** field on the project form determines the level at which the time cards are created for project tasks.
Copy time cards from a pre vious time sheet	**a.** Click choice list next to **Submit**. **b.** Select **Copy from previous Time Sheet**. The option also ap pears in the **Logged Time Cards** section when a user has no time cards for the selected week. **Note:** ▪ Time cards for all the project tasks that are in progress or planned in the current week are copied from the selected time sheet. If a time card for a project task exists, a duplicate time card is not creat ed while copying. ▪ Time cards for all the non-task categories, such as meetings and trainings, are copied from the select ed time sheet. If a time card for a non-task category exists, a duplicate time card is created while copy ing.

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Option	Steps
Create a time card from the Tasks, Group Tasks, or Other tab	**a.** On the **Tasks**, **Group Tasks**, or **Other** tab, point to a task (card) that you want to create a time card for. **b.** Click **Add to Time Sheet**. **Note:** **Add to Time Sheet** creates a time card with the default rate type of the user, if it exists.
Create multiple time cards from the Tasks tab	**a.** On the **Tasks** tab, select multiple tasks that you want to create time cards for. **b.** Click **Add selected to Time Sheet**.
Create a time card for unassigned task	**a.** In the **Logged Time Cards** section, click **Add unassigned tasks to Time Sheet**. **b.** Enter the task number or short description of the task you worked on during the selected week.

Based on the **Allow time card reporting on** field settings in the **Preferences** tab of a project, the **Add to Time Sheet** and **Add selected to Time Sheet** options are displayed in Time Sheet Portal.

If a duplicate time card exists for a time card, you can merge both time cards to become a single one, except for time cards in the processed, approved, or recalled state. A duplicate time card is identified by comparing the values in the **Short description**, **State**, **Task**, **Category**, **Rate Type**, **Resource Plan**, or **Project Time Category** fields in the time card.

3. In the **Logged Time Cards** section, log time in a time card.

Option	Steps
Through inline editing	**a.** Select a row and press **Enter**. You can also double-click a row. **b.** Edit the values as required.
Through time card form	**a.** Point to a row and click the more actions icon . **b.** To open the Time Card form, click **Open Form View**. **c.** Enter hours on the time card form. **d.** Click **Save**.
Add notes to time cards	**a.** Point to a row and click the more actions icon. **b.** To add a note, click **Add Note**.

Result
Your time cards are created and time is logged for the selected week.

What to do next
If you encounter issues with time card creation or time logging, try the following:

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- Time cards not generating: Verify that your project tasks are in progress or planned for the selected week, and that the **Allow time card reporting on** field is configured on the project.
- Missing tasks in the portal: Ensure you are assigned to the project tasks and that the task dates overlap with the selected time sheet week.
- Duplicate time cards: Use the merge option to combine duplicate time cards. Duplicates are identified by matching Short description, State, Task, Category, Rate Type, Resource Plan, or Project Time Category fields.
- Incorrect rate type: Verify your default rate type on your user profile. Contact your time card administrator (timecard_admin role) to update rate type settings.

For issues you cannot resolve, contact your system administrator or the user with the timecard_admin role in your organization.

Submit time sheet through Time Sheet Portal

Once you update the time sheet with time worked for a given week, submit it for approval.

Before you begin

Role required: timecard_user

About this task

When you submit a time sheet, time cards are verified against the assigned time sheet policy. If there is no time sheet policy assigned, time cards are verified against the default time sheet policy. Business rules prevent you from submitting a time sheet in case any violation is found.

Procedure

1. Navigate to **All** > **Time Sheets** > **Time Sheet Portal**.
2. Click **Submit**.
   The time sheet moves to the Submitted state.

Log time and submit time sheets of your resources

As a user manager, you can log time and submit the time sheet of your resources.

Before you begin

A user manager must have time card approver role to create and edit time cards, and submit the time sheet of other time card users. The user manager has either of the required roles and is the one listed as the manager of the time card users.

Role required: timecard_approver

Procedure

1. Navigate to **All** > **Time Sheets** > **Time Sheet Portal**.
2. Click **My Time Sheet** choice list and select the user for whom you want to approve or reject time sheet for under **My Resources**.

   The **My Resources** section lists the time card users reporting to you.

   Note: The choice list with **My Time Sheet** is available only for a user manager.

3. Create time cards and log time through Time Sheet Portal as required.
4. Click **Submit**.

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Result

- The time sheet of the selected user moves to the Submitted state. The time sheet policy assigned to the time card user is used for validation when you submit the time sheet.
- All the time cards associated with the time sheet are also submitted automatically and move to the Submitted state.
- The **Approve** and **Reject** buttons appear in the Time Sheet section. The two buttons appear only for a user manager.

What to do next

Once you have submitted the time sheet for your resource, you can click **Approve** or **Reject** to approve or reject it. Only the time cards that are routed to the user manager, are approved or rejected. The routing for approval happens based on the **Non-project time approver** and **Project time approver** fields in the time sheet policy of the time card user.

Time Sheets

A time sheet groups all the time cards for a user for the given week.

With time sheets:

- Time card users can submit all the time for their work week in a single step by using a time sheet.
- Time card approvers can approve all the time cards in a time sheet for a user in a single step by approving the time sheet. They do not need to approve multiple time cards for a given user individually.
- Track the activities of a time sheet, such as who submitted or approved a time sheet, in the Activities section on the Time Sheet form. This time sheet activity audit is useful for tracking when you delegate responsibility for your time card processing to another user. To track the activities, enable the **State** field of the Time Card [time_card] table for auditing the time card activities, if it is not already enabled. For more information, see Include a table field in auditing.

A time sheet can have any of the following states:

Pending

A time sheet has been created, but the user is still making changes before submitting it.

Submitted

A time sheet has been submitted for approval. The approver can approve or reject it.

Approved

A time sheet has been approved. If the time sheet isn't automatically updated to Processed, this means there was no task associated with the time sheet.

Processed

A time sheet has been processed by the system. After a time sheet is approved, the after business rule Create expense from approved time card is triggered. This business rule creates an expense line for the associated task, and then updates the state to Processed.

Rejected

A time sheet has been sent back to the submitter for changes.

Recalled

A time sheet has been recalled by the submitter for modification.

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Create a time sheet

As a time card user, you can create a time sheet to group all your time cards for the given week and submit them in a single step.

Before you begin

Role required: timecard_user

About this task

A user can create only one time sheet per week.

Note: When a user creates a time card for a week, a time sheet is also automatically created for that week.

Procedure

1. Create the time sheet with one of these options.

Option	Steps
From the time sheet menu	Navigate to **Time Sheets** > **My Time Sheets** > **Current (This Week)**. The time sheet form for the current week opens.
From the time sheet list	**a.** Navigate to **Time Sheets** > **My Time Sheets** > **All** > **New**. **b.** Click **New**.

2. On the form, fill in the fields.

Time Sheet form

Field	Description
Week starts on	Starting date of the week for which the time sheet is created. **Note:** The time sheet policy **Week starts on** controls the start day of the week.
Total Hours	Number of hours the user has worked in that week. This field is automatically populated from the hours recorded for the associated time cards.
User	Name of the user for which time sheet is created.
State	Current state of the time sheet. All new time sheets begin as Pending. Default states: Pending, Submitted, Approved, Processed, and Rejected, Recalled.
Comments	Comments related to the time sheet.
Notes	Any additional information.

3. Click **Submit**.

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What to do next
Add time cards to the time sheet. You can use the related links and related list to add time cards. You can also add time cards using the Time Sheet Portal.

Time sheet form related links

Field	Description
Generate Time Cards	Link to generate time cards for the assigned project tasks.
Copy from previous time sheet	Link to open the **Copy Time Sheet** window for you to copy the time cards from previous time sheets.
Time Sheet Portal	Link to open the Time Sheet Portal to view and manage the time sheet.

Time sheet form related lists

Field	Description
Time Cards	List of the time cards that are part of the time sheet. To create a time card, click **New**.

Submit a time sheet

Once the time sheet is updated with time worked, you can submit the time sheet for the week to submit all the time cards for the week together.

Before you begin
Role required: timecard_user

About this task
When a user submits a time sheet, the time sheet policy assigned to the user is used for validation. If there is no time sheet policy assigned to the user, the default time sheet policy is used. Business rules prevent a user from submitting a time sheet in case any violation is found.

Note: You can also perform this task from the Time Sheet Portal.

Procedure
1. Navigate to the time sheet using one of the following options:
   - To submit a time sheet in the Pending state, navigate to**Time Sheets** > **My Time Sheets** > **Pending**.
   - To submit the time sheet for the current week, navigate to **Time Sheets** > **My Time Sheets** > **Current Time Sheet**.
   - To submit a time sheet in the Rejected state, **Time Sheets** > **My Time Sheets** > **Rejected**. You can make required changes as suggested in the rejection comments to resubmit a rejected time sheet.
2. To submit in the Time Sheets list, open the time sheet.
3. Add comments, if required.
4. Click **Submit Time Sheet**.

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Result

- The time sheet moves to the Submitted state.
- All the time cards associated with the time sheet are also submitted automatically and move to the Submitted state.

Approve or reject a time sheet

View, approve, or reject time sheet or time cards for your user, for the given week, in a single step.

Before you begin
Role required: timecard_approver or timecard_admin

About this task
A user manager is the one who has either of the required roles and is selected in the **Manager** field on User form of the time card user.

During out-of-office time, the user manager can Delegate time sheet approvals to another user with the required roles as the time sheet approver. For the specified time period, the delegated user also receives all the time sheets submitted by the time card users to process.

Note:

- You can also approve or reject the time cards within a time sheet selectively by selecting one or more time cards and approving or rejecting them.
- If a time sheet is rejected, all the associated time cards in the Submitted state are also rejected automatically. The time cards in the Approved and Processed state for the time sheet remain unaffected.
- If all the time cards in a time sheet are approved, the time sheet automatically moves to the Approved state.
- If a time card in a time sheet is in the Rejected state, then irrespective of the state of other time cards in the time sheet, the time sheet also moves to the Rejected state.

Procedure

1. Navigate to **All** > **Time Sheets** > **Time Sheets** > **Pending Approval**.
2. In the Time Sheets list, open the time sheet to approve or reject.
3. If required, add comments.
4. Click **Approve** or **Reject**.

Result
The time sheet moves to the Approved or Rejected state.

- If a time sheet is rejected, it gets listed in the notifications for the rejected time sheets under the show notifications icon () on Time Sheet Portal and is moved back to the submitter to adjust the corrections and resubmit it. For more information, see Submit a time sheet.
- Once a time sheet is approved, all the time cards associated with the time sheet are also approved or rejected automatically.
- If any time cards in the time sheet are pending approval by one of the approvers as defined by the time sheet policy, the time sheet remains in the Submitted state.

Time cards

Time cards are used to record the time worked on a task by a task assignee.

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The time card management feature works with the Task table to record time worked on Projects, Incidents, Problems, and Change Requests.

Task assignees can record time worked in the *Time worked* field on a task record or enter hours directly into their time card. Some tables support automatic time card creation based on start and end date fields.

Track the activities of a time card, such as who submitted or approved a time card, in the Activities section on the Time Card form. This time card activity audit is useful for tracking when you delegate responsibility for your time sheet processing to another user. To track the activities, enable the **State** field of the Time Card [time_card] table for auditing the time card activities, if it isn't already enabled. For more information, see Include a table field in auditing.

You can associate time cards for the project tasks and other task categories, such as meeting and training, with relevant resource plans.

When you approve a time card, the time logged in the time card is saved day-wise in the Time Card Daily [time_card_daily] table. Using daily time logged data, you can generate time card reports by days for any period irrespective of the time sheet period to which the time cards belong. For example, you can create a monthly time card report that includes time cards from the first day to the last day of the month.

Time cards also have an optional approval mechanism for project managers to approve the time cards. Administrators and time card approvers can see all the time cards for the week. All users who are in a role that is responsible for working on tasks also can access their personal time cards. A time card can have any of the following states:

Time Card states

State	Description
Pending	A Time card that isn't submitted for approval.
Submitted	A time card submitted for approvals.
Approved	An approved time card.
Processed	An approved time card with an expense line for the associated task.
Rejected	A rejected time card.
Recalled	An approved time card recalled for any required adjustments.

Create a time card

You can create time cards to log time against the work you have done.

Before you begin

Role required: timecard_user

About this task

Starting Brazil release, users can select a resource assignment to associate it with time cards to calculate the actual efforts and tag them to the respective projects.

The **Allow time card reporting on** field on the project form determines the level at which the time cards for the project tasks can be created.

Note: Time Cards created from Project form do not populate Resource plans automatically to avoid random allocations. For more information, see KB0814884 article in the Now Support Knowledge Base.

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Time cards can be created automatically or manually.

- *Automatic*: Use the following options to automatically generate the time cards:
  - *By updating task*:

    Auto create time card on task update

    Configure time cards to be created when a user updates a task record. The **Auto create time card on task update** setting in the assigned time sheet policy controls this behavior and is set to false by default.

    Auto fill time card with time worked entries

    Configure time cards to be created when a user records **Time worked**. A time card is created if a time card does not exist for the task. The time sheet policy **Auto fill time card with time worked entries** controls this behavior and is set to false by default.

    In **Project Task**, **Incident**, **Problem**, and **Change** records, the **Time worked** field does not appear by default and must be configured on the form.

  - *By scheduled job*: Configure time cards for the project tasks to be generated automatically for users through a scheduled job. Only the admin can configure a scheduled job.

Note: Time cards cannot be created automatically when you use the mobile interface. Use the desktop interface if you want to use the automatic time card feature.

- *Manual*: Create a time card for each task and enter the time manually.

Procedure

1. Create the time card using one of the following options.

Option	Steps
From the Time Sheet Portal	**a.** Navigate to **Time Sheets** > **Time Sheet Portal**. **b.** Open the week on the **Calendar** for which you want to create the time card.
From a Time sheet related list	**a.** Open the time sheet that you want to create the time card for. **b.** In the **Time Cards** related list, click **New**.
From a Time sheet related link	**a.** Open the time sheet for which you want to create the time card. **b.** Click any of the following related links: ▪ **Generate Time Cards**: This option generates the time cards for all project tasks assigned to the user for the time sheet week. With this option, time cards are generated only for the project tasks that are in progress or planned in that week.

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Option	Steps
	▪ **Copy from previous time sheet**: This option copies all the time cards (for project and non-project tasks) from a selected time sheet. **Note:** When using the related links for creating time cards: ▪ If a time card exists for a project task for the time card week, a duplicate time card is not created. ▪ Time cards are generated only for those project tasks that are in progress or planned in that week.

2. On the form, fill in the fields.

Time card form

Field	Description
Week starts on	Starting date of the week of the time sheet. **Note:** The time sheet policy **Week starts on** controls the start day of the week. A message is displayed when you try to associate a resource plan with a time card when the week on which the time card starts is outside the resource plan dates.
State	Current state of the time card. All new time cards begin in the Pending state. Different states of a time card are Pending, Submitted, Approved, Processed, Rejected, and Recalled.
Category	Type of task for which the time card is created.
Task	Task that is associated to the time card.
Project time category	Type of activity in the project that time is reported for. This field appears when you select **Project/Project Task** or **Task work** in the **Category** field.
User	Name of the user that the time card is created for.
Resource assignment	Select a resource assignment assigned to the user. When the time card is approved, the actual hours are used to view the planned vs actual hours in the heatmap view in Project Workspace and Resource Management Workspace. A resource assignment is associated with the time card in the following ways: ○ If the user has multiple resource assignments, you can select the appropriate assignment. ○ If the user has only one resource assignment, that plan is selected by default.

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Field	Description

3. Click **Submit**.

Result

- The time card is created for the selected time card period.
- If the time sheet for the week does not exist, a time sheet is created for the time card week.

What to do next

After the time card is created, the hours for that task can be incremented automatically from the **Time worked** field in the task record. The time sheet policy **Auto fill time card with time worked entries** controls the way the time is updated in time cards. The policy is set to *false* by default. If automatic updates for time worked are not configured, the user must manually update the time card.

Related topics

Map a time card category with operational work types

Copy time cards from a previous time sheet

Another option for creating time cards is to copy them from an existing timesheet, which copies all the time cards (for project as well as non-project tasks) from a selected time sheet.

Before you begin

Role required: timecard_user

About this task

You can also perform this task from the Time Sheet Portal.

Procedure

1. Open the time sheet record that you want to create the time cards for.
2. Click the **Copy from previous time sheet** related link.
3. In the **Select Time Sheet** field, select a previous time sheet that you want to copy the time cards from.
4. **Optional:** You can copy the time logged for the tasks in the previous time sheet, select the **Copy time logged** check box.
5. Click **OK**.

Result

Time cards for project tasks

Time cards for all the project tasks that are in progress or planned in the current week are copied from the selected time sheet. If a time card for a project task exists, a duplicate time card is not created during copying.

Time cards for non-task category

Time cards for all non-task category such as meetings and trainings are copied from the selected time sheet. If a time card for a non-task category exists, a duplicate time card is created during copying.

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Note:

- If the previous time sheet has rate types and the time sheet policy of the user allows rate types, then rate types are also copied into the current time sheet.
- If the previous time sheet has rate types, but the time sheet policy of the user no longer allows rate types, then rate types are not copied to the current time sheet.
- If the previous time sheet has a rate type that is inactive, that rate type is not copied. If necessary, the user can enter a different rate type before saving the individual time cards.

Auto-generate time cards

As an admin, you can configure a scheduled job to generate time cards automatically for project tasks assigned to time card users.

Before you begin

Role required: admin

About this task

In addition to the manual option **Generate Time Cards**, a scheduled job can be run to automatically generate the time cards for project tasks. A job can be scheduled to run every week, for example, on every Sunday to generate time sheets for all users for the next week. You can configure when to run the scheduled job based on the business process of the organization. By default, the scheduled job is turned off. For more information, see Schedule a script execution .

Note: The scheduled job auto-generates time cards only for those users who have the **Auto create time cards every week** option set to true in their assigned time sheet policy.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. In the Scheduled Jobs list, select **Auto Generate Time Cards**.
3. Configure the following parameters in the script as per the business requirements:
   - run for (CURRENT_WEEK, NEXT_WEEK, LAST_WEEK)
   - Group Name (includeGroups, excludeGroups)

Note:

- If a time card exists for a project task for the time card week, a duplicate time card is not created.
- Time cards are generated only for those project tasks that are in progress or planned in that week.
- The **Allow time card reporting on** field on the project form determines the level that the time cards for the project tasks are created at.

Example:

The following example script is executed when a scheduled job is run to generate time cards for the `Current week` for the `Database` and `Hardware` groups:

```
// Clone this schedule job to run separately for different
 groups at different times
// One of the following values
// TimeCardConstants.CURRENT_WEEK
// TimeCardConstants.NEXT_WEEK
```

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```
// TimeCardConstants.LAST_WEEK
var runFor = TimeCardConstants.CURRENT_WEEK;

// Comma separated group sys ids or group names.
 TimeSheet/TimeCards will be auto generated for time card users
 in the given groups.
var includeGroups = [Database,Hardware];
var excludeGroups = [];

var generator = new TimeCardGenerator();
generator.generateFromConfig(runFor, includeGroups,
 excludeGroups);
```

Submit a time card

As a time card user, once a time card for the week is updated with the time worked, you can submit the time card individually.

Before you begin

- A time card in the Pending or Rejected state can be submitted.
- Role required: timecard_user

About this task

When a user submits a time card, the time sheet policy assigned to the user is used for validation. If there's no time sheet policy assigned to the user, the default time sheet policy is used. Business rules help prevent a user from submitting a time card in case any violation is found.

Procedure

1. Navigate to **All** > **Time Sheets** > **My Time Sheets** > **All**.
2. Select the time sheet that you want to submit the time card for.
3. In the Time Card related list, open the time card to submit.
4. Select **Submit Time Card**.

> **Note:** Submit multiple time cards by selecting **Submit Time Card** from the actions on selected rows menu.

Result

- The time card moves to the Submitted state.
- The time card is submitted to an approver based on the **Project time approver** and **Non-project time approver** field values in the assigned time sheet policy.

> **Note:** If the project or user manager is changed after submitting the time card, the time card is automatically redirected to the new project or user manager for approval.

Approve or reject a time card

As a time card approver, you can view and approve or reject a submitted time card.

Before you begin

Role required: timecard_approver or timecard_admin

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About this task

You can view only those time cards that are submitted to you for approval or you have been delegated as the time card approver by one of the other user managers. The time sheet policy assigned to the user governs the approval process.

Procedure

1. Navigate to **All** > **Time Sheets** > **Time Cards** > **Pending Approval**.
2. Select the time card to approve or reject.
3. Click **Approve** or **Reject**.

Result

- The time card moves to the Approved or Rejected state.
- Expense line is created for an approved time card.
- For an approved time card, a Time Card Daily record is created.

Note:

- A user manager can also approve the time cards within a time sheet by selecting one or more time cards and approving them. When all the time cards in a time sheet are approved, the time sheet automatically moves to the Approved state.

  A user manager is one who is selected in the **Manager** field on User form of the time card user.

- If a time card is in the Rejected state, the associated time sheet also moves to the Rejected state irrespective of the state of other time cards in the time sheet.

  Note: If a time sheet is rejected, it gets listed in the notifications for the rejected time sheets under notifications icon on Time Sheet Portal.

- If **Project time approver** is set to **Both** in the assigned time sheet policy, the time card is in the Submitted state only if both approvers approve it. If one of the approver rejects, the time card state is set to Rejected and the **Approved by** field is cleared, requiring approval of both approvers on resubmission.

Record time worked

The time card retrieves time accrued on a project or spent working on any record in the Task table from the **Time worked** field.

This field does not appear by default on the Project Task, Incident, Problem, and Change forms and must be added by personalizing the form. Time recorded in this field is used to populate an existing time card or to create a new time card if one does not exist. A time sheet policy controls this behavior.

Note:

When time worked is updated, a time card is created only if:

- the user is a time card user, AND
- the user is assigned to the task through **Assigned to** or **Additional assignee list** field.

The *Time worked* field has a counter that acts like a stopwatch for the duration of the time spent in the record. A button in the field can stop and start the counter. By default, the *Time worked*

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counter is enabled and begins recording the elapsed time when the record is opened. Stop the counter with the stop button and restart it with the play button.

If you are creating time cards from time worked entries, you can ask your admin to add the **Time Worked** related list to display the time worked records on the time card form. You will also notice an informational message on the time card to let you know that changes to time worked records overrides values in the time card. This is displayed using a Create a formatter and add it to a form, which can be added or removed by configuring the form.

Manage costs

When the cost management feature is enabled, time cards can be used to manage the cost of labor in the Cost Management application.

When a time card for a project task is approved, an expense line is generated for the corresponding labor cost associated with the project. If the project has a Rate Models associated, then the hourly rate for calculating labor cost for the expense lines is derived from the rate model. If no rate model is associated to the project, the rate listed in the *Labor Rate Card* is considered. If no Labor Rate Cards is applicable, the property `com.snc.time_card.default_rate` defines the default hourly rate.

Roles

The timecard_admin role enables users to approve, modify, and delete the time cards of other users.

Related topics

Activate Cost Management

Domain separation and Time Card

Domain separation is supported in Time Card. 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.

For more information about using domain separation with Time Card, see https://community.servicenow.com/community?id=community_article&sys_id=616d706edbb318d066f1d9d9689619c1.

Related topics

Domain separation for service providers

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Working with database views for reporting

A database view defines table joins for reporting purposes.

For example, a database view can join the Incident table to the Metric Definition and Metric Instance tables. This view can be used to report on incident metrics and may include fields from any of these three tables.

Several useful database views are installed with the Database View plugin and the Database Views for Service Management plugin. These database views cover most metric reporting needs and greatly reduce the need to define new ones.

Any user who can create a report can use database views as the report source. Access control follows this hierarchy:

1. If ACLs exist on the database view itself, those ACLs are evaluated and take precedence.
2. If no database view ACLs exist, the system honors ACLs from the underlying tables.

By design, database view ACLs override table-level ACLs.

Note:

- The accumulated impact on performance grows as the number of tables that are included in the view and the number of records that those tables contain increases. To maximize the performance of the database view, ensure that the 'where' clauses that are defined in the database view are based on indexed fields.
- A database view is not treated like a custom table, so there is no licensing impact.
- Database view tables are not included in FTP exports.
- Database views evaluate the ACLs of the parent table of a table included in the database view.

Limitations

- Database views cannot be created on tables that participate in table rotation.
- It is not possible to edit data in the database view output.
- Database view tables cannot be added as a data preserver in clone requests.
- You can reference a table or database view from a different application scope in a Table Name field. However, if the field belongs to a table that extends sys_metadata, the table or database view must belong to the same application scope as that table.

ACLs and database views

You don't need to create ACLs on fields in the view. If field-level ACLs exist, the system evaluates them.

To require that read ACLs be added to the database views, set the *glide.security.expander.view.legacy* property to **true**. On upgraded instances, add this system property and set it to **true**.

When *glide.security.expander.view.legacy* is **true**, underlying table ACLs are ignored. When the property is **false** (the default), the underlying table ACLs are used if there are no database view ACLs.

You can still create additional ACLs on the database views. These ACLs are evaluated last and are always honored.

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Database view reserved words

Using the terms may cause unintended or undesirable performance. For more information, see the MySQL reserved words document.

Joining tables using database views

Join tables into a single view and then create a report based on that view.

Use the **Database Views** module to create a database view that joins tables to create a pseudo-table that combines data from each table in the view. You can create a report on this data by adding the database view as a table in a report. Accessing the database view does not require database access.

Create a database view

Create the database view.

Before you begin
Role required: admin.

Procedure

1. Navigate to **All** > **System Definition** > **Database Views**.
2. Select **New**.
3. Name the view as you would name a new table.
   The application converts capital letters to lower case and spaces to underscores.
4. Provide a label and a plural.

   The **Label** and **Plural** fields define how the database view is labeled in lists and forms. For example, give a database view with the label Duplicate installation the plural `Duplicate installations`.
5. **Optional:** Provide a description of the database view so that other users know its purpose.
6. Select **Submit**.

Result
The database view is created and accessible from the **Database Views** module.

What to do next
Add a table to the database view

Add a table to the database view

Specify the table to join to the database view.

Before you begin
Role required: admin.

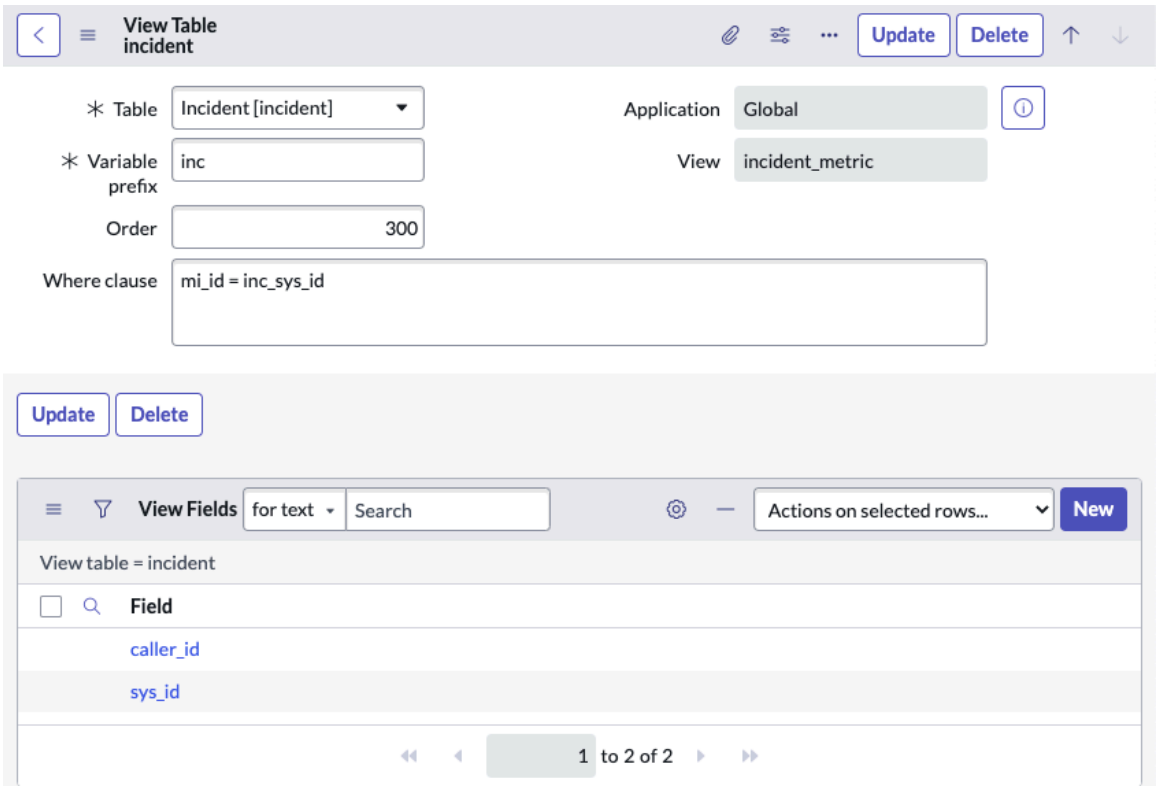
About this task
The **Table** field in the View Table form specifies the table to join to the database view. The **Variable prefix** is used by the **Where clause** to define the conditions for the join. These conditions can refer to any field, but typically define the join by matching a field in the table to a field in another table in the database view.

Note: The Variable prefix field is mandatory.

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When you write the **Where clause**, add the field name to the **Variable prefix** of its table with an underscore. In the following example, **mi_id** refers to the **id** field in the Metric Instance [metric_instance] table (mi) and **inc_sys_id** refers to the **sys_id** field in the Incident [incident] table (inc).

Database View Table form



Note:

- Database views cannot be created on tables that participate in table rotation.
- Use only lowercase characters in the **Variable prefix**. Using uppercase characters may prevent you from viewing the database view in a list.

To see an example of using left joins to create a view, see Example left join in creating a database view.

The **Where clause** supports these JavaScript conditional operators:

- =
- !=
- <
- <=
- >
- >=
- &&
- ||

There is no support for LIKE or CONTAINS conditions in the **Where clause** clause of a database view. Link tables based on the sys_id using the = operator to work with the full dataset when filtering lists, running glide queries, or running reports.

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Procedure

1. From the Database View form, select **New** on the View Tables related list.
2. Configure the form and add the **Left join** field (a check box) to the form.
3. Select **Save**.
4. Complete the form and select the **Left join** check box.
   - Selecting **Left join** causes the left-hand table in the database view to display all records, even if the join condition does not find a matching record on the right-hand table. Select this check box to view tables that specify a **Where clause**. Selecting **Left join** for view tables without a **Where clause** does not affect the query.
   - Joined tables are ordered left to right from lowest to highest **Order** values.
5. Select **Submit**.
6. Personalize the **View Tables** related list to show the **Left join** column.
   The **Left join** field is **true**.
7. Select a record to view a table.
8. To add an OR to your Where clause, use ||.

   For example, to query all incidents related to RFCs OR all incidents that are the parent of a change request, use the syntax: `inc_rfc = chg_sys_id || chg_parent = inc_sys_id`.

Example left join in creating a database view

This example shows the proper settings when using left-joins to add tables to a database view.

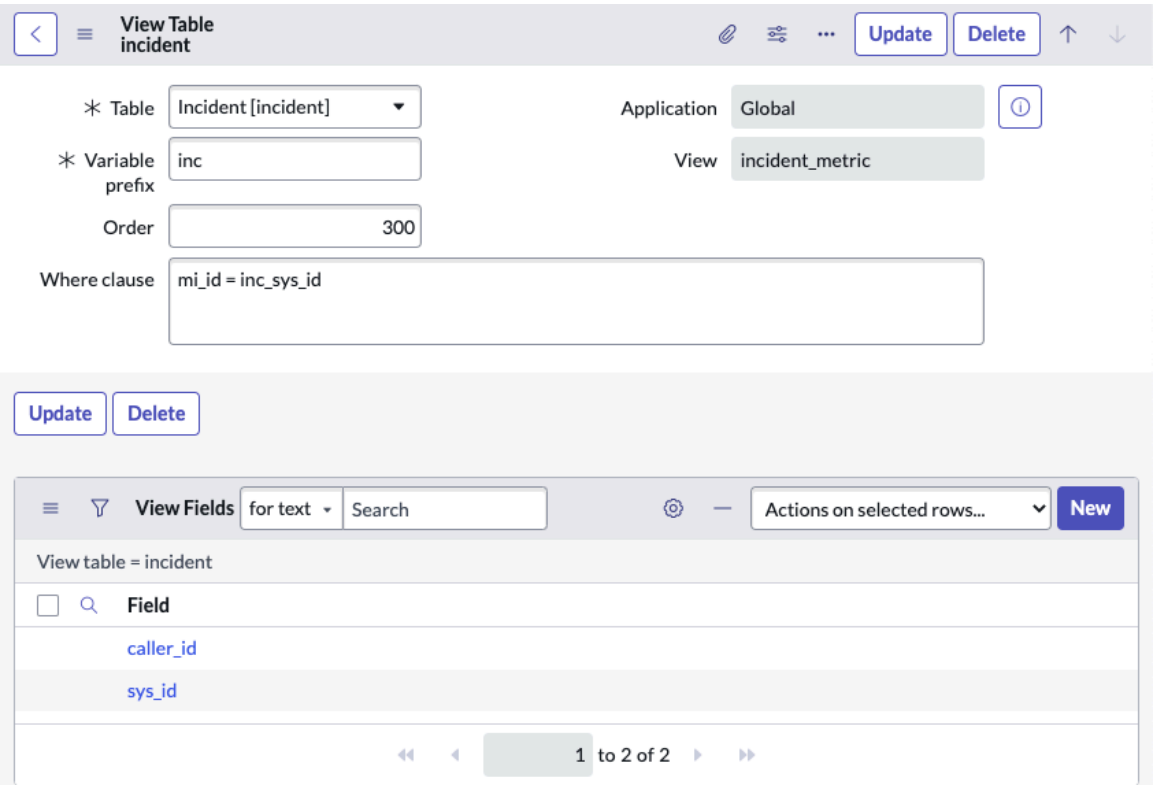
Before you begin

Role required: admin

About this task

The following procedure shows how to create a database view that includes a list of Catalog Tasks and their parents. Most of the steps take place on the View Table form.

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Procedure

1. Navigate to **All** > **System Definition** > **Database Views**.
2. Select the view you want to edit.
   The Database View page appears. In the View Tables related list, specify the tables you want in the database view.
3. In the **View Tables** related list, select **New**.
4. Add a **Left join** check box to the form by Configuring the form layout.
5. Add the Catalog Task [sc_task] table to the database view by filling in the form with the following data and then select **Submit**. Joined tables are ordered left to right from lowest to highest **Order** values.

Field	Value
Table	Catalog Task [sc_task]
Variable prefix	cat
Order	100
Where clause	Leave blank

   The Database View page appears with the Catalog Task table in the View Tables table.
6. In the **View Tables** table, select **New** and add the Requested Item [sc_req_item] table to the database view by filling in the form with the following data and then selecting **Submit**. Joined tables are ordered left to right from lowest to highest **Order** values.

Field	Value
Table	Requested Item [sc_req_item]

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Field	Value
Variable prefix	item
Order	200
Where clause	cat_parent=item_sys_id
Left join check box	True

The Database View page appears with the Requested Item table in the View Tables table.

7. In the **View Tables** table, select **New** and add the Request [sc_request] table to the database view by filling in the form with the following data and then selecting **Submit**.

Field	Value
Table	Request [sc_request]
Variable prefix	req
Order	300
Where clause	cat_parent=req_sys_id
Left join check box	True

The Database View page appears with the Request table in the View Tables table.

8. In the **View Tables** table, select **New** and add the User [sys_user] table to the database view by filling in the form with the following data and then selecting **Submit**.

Field	Value
Table	User [sys_user]
Variable prefix	user
Order	400
Where clause	cat_opened_by=user_sys_id
Left join check box	False

   - The Database View page appears with the User table in the View Tables table.
   - If the parent record of Catalog Task is a Requested Item, all the fields in the Request table will be blank.
   - If the parent record is a Request, all the fields in Requested Item will be blank.
   - Because of the two left joins, the Catalog Task record returns even if the parent is empty or is not a Requested Item or Request.
   - Because User is not a left join, there must be a matching user in sys_user for the row's Opened By field for the Catalog Task row to return.

9. **Optional:** Perform the following steps to experiment and learn more about how left joins impact database views.
   If you make the left join in:
   - User true, rows that have an empty **Created By** return.
   - Requested Item false, only Catalog Tasks that have a Requested Item as a parent return.

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- Request false, only Catalog Tasks that have a Request as a parent return.
- Requested Item and Request false, no rows return because nothing can have a Requested Item and a Request as parents.

Specify a field to return

Restrict or specify a field that you want returned by the joined table.

Before you begin

Role required: admin

About this task

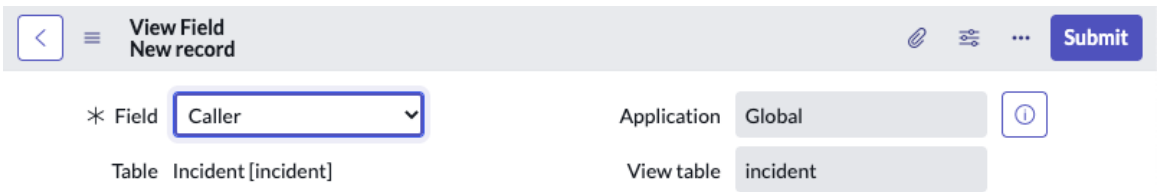
You can restrict the fields displayed in the database view output by adding fields to the View Tables related list.

When you restrict fields, you must create a View Field record for the join field from the *Where clause* in the parent record. If you omit a record for this field, it cannot be returned, and the join fails.

Procedure

1. Navigate to **All** > **System Definition** > **Database Views**.
2. Select the database view you want to add a field to return to.
3. In the database view record, select a view table, and then select **New** in the View Fields related list.
4. In the View Field form, select the field you want to display in the database view output.
   If no fields are defined in the View Fields related list, all fields are returned. If any fields are defined, then only those fields are returned. For example, you can restrict the display if there are fields that should not be viewable to all users.

View Field form



   In this example, the *Where clause* uses the *sys_id* field from the Incident table to establish the join. For the join to succeed with a restricted field list, you must include a record for the *sys_id* field in the View Fields related list.

What to do next

Verify your changes using the **Try It** related link in the database view record. See Test the database view.

Relabel a column

Sometimes, two different tables may have fields of the same name that are both important (such as two tables with a sys_updated_on field). For clarity, relabel one of the fields.

Before you begin

Role required: admin.

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About this task

To create clear reports, relabel the fields on the Database View [sys_db_view] table without changing the names of the fields.

Procedure

1. Navigate to **All** > **System Definition** > **Language File**.
2. Select **New**.
3. Fill in the form as follows:

New language file fields

Name	Description
Table	Name of the database view
Label	Display label
Plural	Plural form of the display label
Element	Name of the field on the database view in the format variable prefix_fieldname. For example, you may enter inc_name to indicate the Name field on the Incident table. **Variable prefix** is a required field when you define the tables in a database view.

4. Select **Submit**.

Configuring the number of records to return

Specify the number of records to return for a database view when the view is used in a script.

A property called *glide.db.max_view_records* controls the maximum number of rows returned when running a GlideRecord query in a script. The default value for this property is 10000. To change this value, add the property to the System Property [sys_properties] table and edit the property's **Value** field, which determines the number of rows to return.

This property only applies when querying a database view table in a script. When the database view table is used in a list or report, this property doesn't apply. Reports or lists based on the database view use all rows in the view.

Test the database view

Verify that the database view works correctly.

Before you begin

Role required: admin.

About this task

Procedure

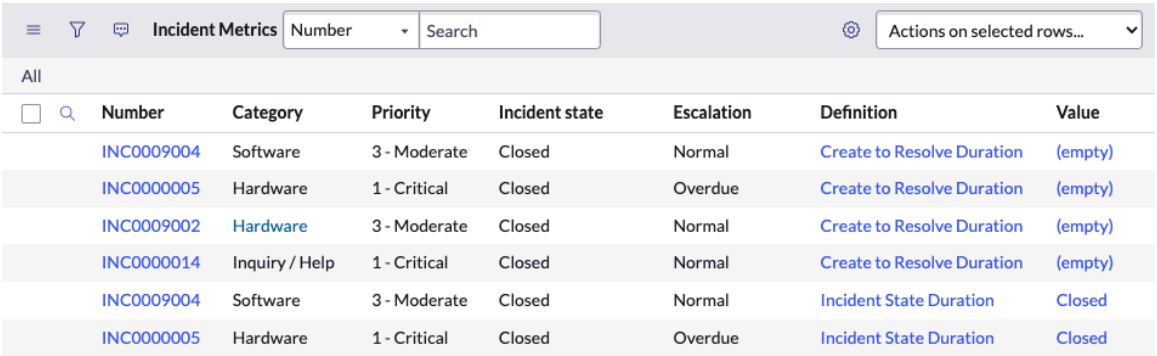
1. Navigate to **All** > **System Definition** > **Database Views**.
2. Select the database view that you want to test.
3. Test the view by clicking the **Try It** related link.

> **Note:** If you do not see the *Try It* link, the tables necessary for the view do not exist. If this problem occurs, it is possible that you did not activate the necessary plugins to create the supporting tables.

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The database view runs and a list of items is displayed. If you have specified fields in the **View Fields** related list for each table, the output is limited to those fields. If you specified view fields and the view does not display correctly, review the **View Fields** related list for each table and ensure that you include fields from the **Where clause**.

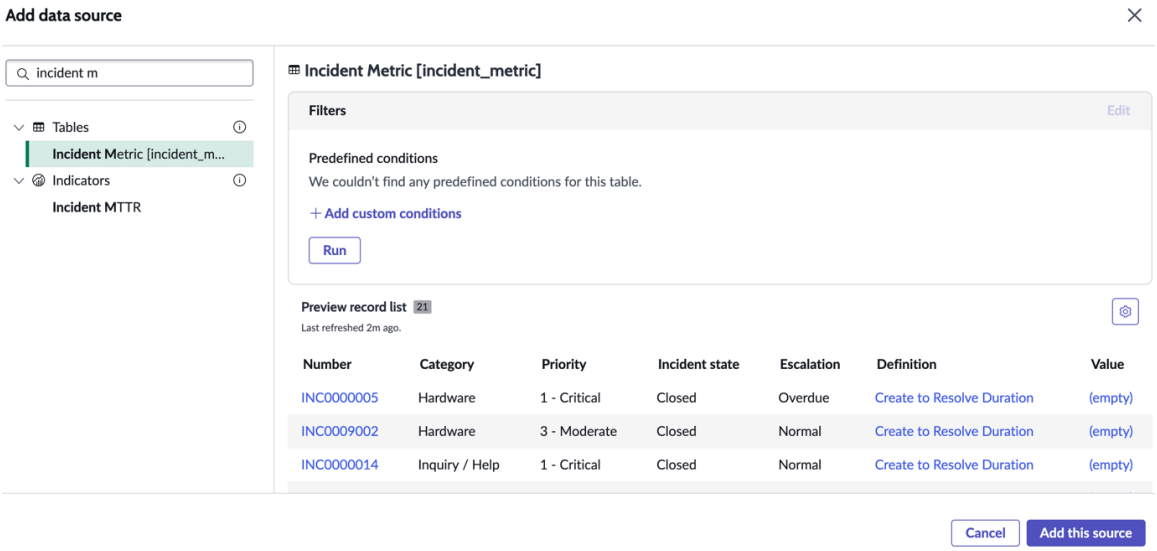
Example: Output of the sample Incident Metrics database view



Number	Category	Priority	Incident state	Escalation	Definition	Value
INC0009004	Software	3 - Moderate	Closed	Normal	Create to Resolve Duration	(empty)
INC0000005	Hardware	1 - Critical	Closed	Overdue	Create to Resolve Duration	(empty)
INC0009002	Hardware	3 - Moderate	Closed	Normal	Create to Resolve Duration	(empty)
INC0000014	Inquiry / Help	1 - Critical	Closed	Normal	Create to Resolve Duration	(empty)
INC0009004	Software	3 - Moderate	Closed	Normal	Incident State Duration	Closed
INC0000005	Hardware	1 - Critical	Closed	Overdue	Incident State Duration	Closed

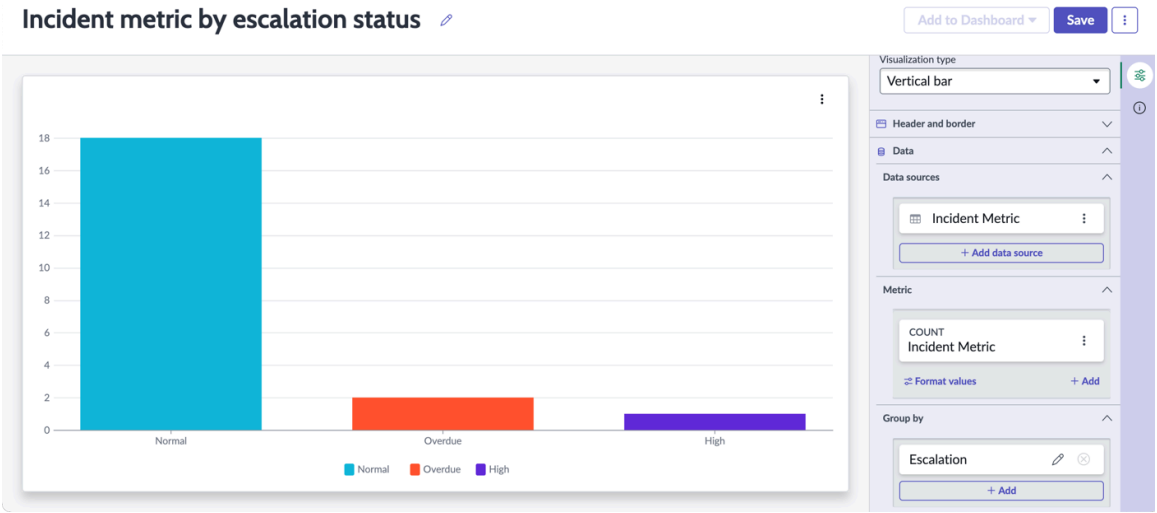
What to do next

To use the database view in a data visualization, select it from the data sources. Database views are listed under tables.



You can create any visualization type using the database view. This example shows the database view visualized as vertical bar.

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Displaying function results in a database view

Enhance the display of a database view by adding a function field to the output to display function results.

Function fields perform common database transformations and calculations on fields in the system. Function fields do not store any data, but rather display the results of a database query when the function is executed.

For example, you could identify incidents with ineffective descriptions of fewer than 10 characters by adding a function field that calculates the length of the **Short description** field.

Create a function field to perform a database function

Create a function field that displays the results of a database function, such as a mathematical operation, field length computation, or day of the week calculation.

Before you begin

Role required: admin

You can either select a function field from a physical table or create a function field directly on the database view.

If you create a function field directly on the database view, you must use the variable prefixes from the database view in the function definition to identify the columns. Before you create the function field, take note of the variable prefixes in your database view.

For example, if the variable prefix for the Incidents table is `inc2` and you want to return the length of the description field, the function definition would be `glidefunction:length(inc2_description)`. If the variable prefix for the Metric Instance table is `mi` and you want to concatenate the Definition and Value fields, the function definition would be `glidefunction:concat(mi_definition.name,' ',mi_value)`.

For information on supported functions, see Report on function fields.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Select **New**.
3. Select **Function field**.
4. On the form, fill in the fields.

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Function fields form

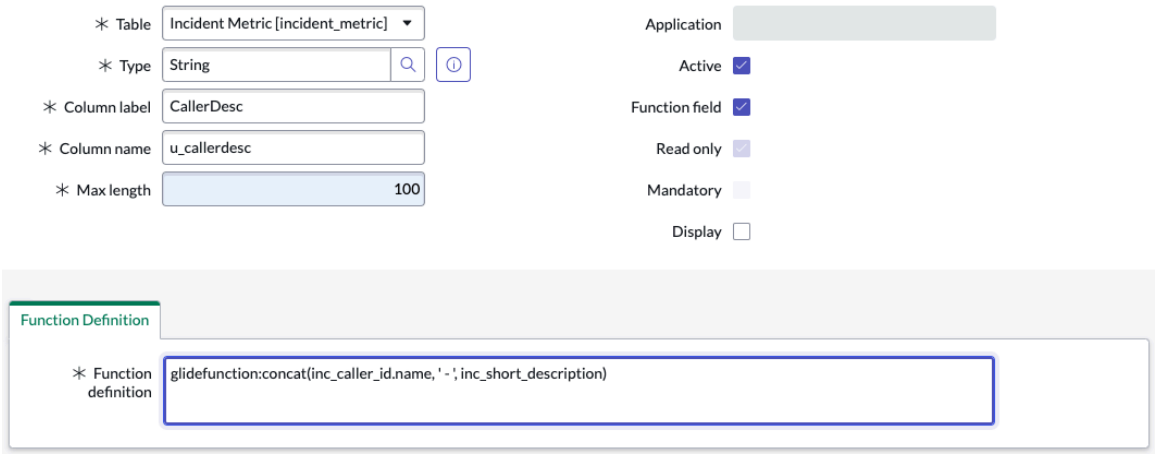
Field	Description
Table	The table or database view to which the function field is added. If you select a database view, you must include the database view's variable prefixes in the **Function definition** field.
Type	The type of field: string, number, date, and so on.
Column label	The label for the column.
Column name	The name of the column. This field is automatically set to the value of the **Column label** field.
Max length	The maximum length of the return value.
Function field	If selected, creates a field that displays the results of a database function, such as a mathematical operation, field length computation, or day of the week calculation. Once the new function record is saved, you cannot clear the check box to make the field a regular field.
Function definition	The function that the field performs. The format for functions starts with `glidefunction:`, followed by the operation to be performed (for example, `concat`), followed by function parameters. Constants must be enclosed in single quotes. **Important:** If you create the function field on a database view and not a physical table, you must include the database view's variable prefixes in the **Function definition** field.

5. Select **Submit**.

Example: Create a Function field on the Incident Metric database view

In this example, a new Function field, CallerDesc, is added to the Incident Metric database view. The field concatenates the caller name, a hyphen, and the short description.

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The variable prefix `inc` is included because the function field is defined on the Incident Metric database view and not on a physical table. The prefix is necessary to distinguish which short_description and caller_id columns to use from the tables that are part of the database view.

What to do next

Display function results in a database view

Display function results in a database view

Add a function field to the output of a database view to see function results.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Database Views**.
2. Select a database view.
3. Select the **Try it** related link.
4. Add the function field to the database view output.
   See Configure items on forms or in lists using a list collector.
5. Review the function definition if the expected value is not returned or a returned value indicates the function definition is invalid.
   - If the message **Invalid function** is returned, the function definition is invalid for string field types.
   - If an empty value is returned, the function definition is invalid for other field types.
   - If an unexpected value is returned, review the field definition in the function definition.

Result

The function field operation is executed and the results appear in the database view output.

Using disjunctions in complex queries

ServiceNow performs conjunction (AND) statements before disjunction (OR) statements in a query.

When you create a complex query that combines AND and OR conditions, you must use parenthesis around disjunctions to ensure proper grouping of query elements.

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Example

Find all closed incidents (state = 6) that are either Priority 1 or Priority 2.

- Correct query (with parentheses):

```
(priority = 1 || priority = 2) && state = 6
```

  This query returns all closed incidents where the priority is 1 OR 2.

- Incorrect query (without parentheses):

```
priority = 1 || priority = 2 && state = 6
```

  Without parentheses, this query is evaluated as: priority = 1 OR (priority = 2 AND state = 6). This returns ALL Priority 1 incidents regardless of state, plus only the closed Priority 2 incidents.

Comparison

Query	Evaluated as	Result
`(priority = 1 || priority = 2) && state = 6`	(P1 OR P2) AND Closed	Closed P1 and P2 incidents only
`priority = 1 || priority = 2 && state = 6`	P1 OR (P2 AND Closed)	ALL P1 incidents + only closed P2

Always use parentheses around OR conditions when combining them with AND conditions. This ensures your query returns the expected results.

Database views in the base system

Certain views are included in the base system with the Database Views and Database Views for Service Management plugins.

Database views

Name	Description	Label
change_request_metric	Join change to metric definition to metric instance, creating a view that can be reported on for things like: Changes that were closed by category.	Change Metric
change_request_sla	Join change_request to sla(task_sla), creating a view that can be reported on for things like change request resolved by sla per change category.	Change Request SLA
change_task_metric	Join change task to metric definition to metric instance, creating a view that can be reported on for things like: Change tasks that were closed by change state	Change Task Metric

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Database views (continued)

Name	Description	Label
change_task_sla	Join change_task to sla(task_sla), creating a view that can be reported on for things like change tasks resolved by sla.	Change Task SLA
change_task_time_worked	Join change task to task time worked to pull time worked entries associated with incidents.	Change Task Time Worked
incident_metric	Join incident to metric definition to metric instance creating a view that can be reported on for things like: Incidents that were resolved on the first call by category	Incident Metric
incident_sla	Join incident to sla(task_sla) to report on things like incidents resolved by sla per incident category.	Incident SLA
incident_time_worked	Join incident to task time worked to pull time worked entries associated with incidents.	Incident Time Worked
pm_project_metric	Join pm_project to metric definition to metric instance creating a view that can be reported on for things like: Projects that were closed by name or date	Project Metric
pm_project_sla	Join pm_project to sla(task_sla) to report on things like project names by sla.	Project SLA
pm_project_task_metric	Join pm_project_task to metric definition to metric instance creating a view that can be reported on for things like: Project tasks that were closed by name or date	Project Task Metric
pm_project_task_sla	Join pm_project to sla(task_sla) to report on things like release tasks by sla.	Project Task SLA
pm_project_task_time_worked	Join pm_project_task to task time worked to pull time worked entries associated with project tasks.	Project Task Time Worked
problem_metric	Join problem to metric definition to metric instance creating a view that can be reported on for things like: Problems that were resolved on the first call by category	Problem Metric
problem_sla	Join problem to sla(task_sla) to report on things like problems resolved by sla per problem state.	Problem SLA
release_feature_metric	Join release_feature to metric definition to metric instance creating a view that can be reported on for things like: Release Features that were closed by product	Release Feature Metric

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Database views (continued)

Name	Description	Label
release_project_metric	Join release_project to metric definition to metric instance creating a view that can be reported on for things like: Releases that were closed by category	Release Metric
release_task_metric	Join release_task to metric definition to metric instance creating a view that can be reported on for things like: Release Features that were closed by feature	Release Task Metric
release_task_sla	Join release_task to sla(task_sla) to report on things like release tasks by sla.	Release Task SLA
sc_request_metric	Join sc_request to metric definition to metric instance creating a view that can be reported on for things like: Requests that were closed by category	Catalog Request Metric
sc_request_sla	Join sc_request to sla(task_sla) to report on things like requests by sla.	Catalog Request SLA
sc_req_item_metric	Join sc_request_item to metric definition to metric instance creating a view that can be reported on for things like: Request Items that were closed by item	Catalog Request Item Metric
sc_req_item_sla	Join sc_req_item to sla(task_sla) to report on things like request items by sla.	Catalog Request Item SLA
sc_task_metric	Join sc_task to metric definition to metric instance creating a view that can be reported on for things like: Catalog tasks that were closed by item	Catalog Task Metric
sc_task_sla	Join sc_task to sla(task_sla) to report on things like tasks by sla.	Catalog Task SLA

Building hierarchical queries

Simplify and build more efficient queries by leveraging hierarchical relationships in the condition builder.

Key benefits

- Filter table data in the condition builder based on a record hierarchy.
- Search through an entire hierarchy with a single condition.
- Streamline query building with less ongoing maintenance.

Crafting queries in condition builder can become cumbersome when you need to search through each level of a hierarchical relationship using multiple OR conditions. Hierarchical queries streamline this process by allowing you to specify a single node and search down the hierarchy from there, saving time and effort.

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Record hierarchies

By default, the following record hierarchies are included with your instance:

- The Department Hierarchy on the Department [cmn_department] table
- The Location Hierarchy on the Location [cmn_location] table
- The Manager Hierarchy on the User [sys_user] table

You can view these predefined record hierarchies by navigating to **All** > **System Definition** > **Record hierarchy**.

Each record hierarchy is based on a reference field that contains parent-child relationships between records in the same table.

- The Department Hierarchy is based on the Parent reference field in the Department [cmn_department] table.
- The Location Hierarchy is based on the Parent reference field in the Location [cmn_location] table.
- The Manager Hierarchy is based on the Manager reference field in the User [sys_user] table.

For example, the Location Hierarchy on the Location [cmn_location] table uses the Parent reference field. Each location has a parent, which is another record in the Location [cmn_location] table. For example, the Chicago and Springfield location records have the Illinois location record's sys_id value in their parent field. Street addresses have sys_id locations for the cities they belong to in their parent field.

You can use the Location Hierarchy in the condition builder to create targeted queries. For example, you can specify a starting point in the Location Hierarchy and query down the hierarchy to retrieve all assets associated with locations throughout that portion of the hierarchy.

Hierarchical paths

Each record that belongs to a record hierarchy stores its hierarchical information in a path field. The path field is used for searches throughout the hierarchy in the condition builder.

Paths for each predefined record hierarchy are automatically generated by the ServiceNow AI Platform and stored in the path field on the Department [cmn_department], Location [cmn_location], and User [sys_user] tables.

- The path for departments is stored in the Parent HP1 field in the Department [cmn_department] table.
- The path for locations is stored in the Parent HP1 field in the Location [cmn_location] table.
- The management path is stored in the Manager HP1 field on the User [sys_user] table.

For example, the ServiceNow AI Platform automatically builds the hierarchy path for each location record in the Location [cmn_location] table. This creates a nested structure where each location can have sub-locations, forming a tree-like hierarchy. The ServiceNow AI Platform also updates these paths when records are added, changed, or removed.

Many other tables contain self-referential fields, indicating a parent-child relationship between records. However, hierarchical paths aren't generated by the ServiceNow AI Platform in those tables until you define a hierarchy in the Record Hierarchy [sys_record_hierarchy] table.

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Use cases

The Department [cmn_department], Location [cmn_location], and User [sys_user] tables contain reference fields with parent-child relationships by default.

Department Hierarchy

Search for assets associated with departments in your company using the `Department Hierarchy` record hierarchy.

Each department record contains a hierarchical path, allowing you to create queries in the condition builder based on the department hierarchy. Since asset records have a Department reference field, you can query assets that belong to a specific department.

- Find all assets that belong to the IT department using a query like:

  [Department] [is in hierarchy] [Department Hierarchy] starting at [IT] which is [Included]

  In this example, searching the hierarchy returns assets associated with the IT department, including assets associated with departments that are part of the IT department, and so forth.

- Find all departments under the IT department by filtering directly on the Departments [cmn_department] table using a query like:

  [Parent] [is in hierarchy] [Department Hierarchy] starting at [IT] which is [Included]

Location Hierarchy

Search for records according to location using the `Location Hierarchy` record hierarchy.

Each location record contains a hierarchical path, allowing you to create queries in the condition builder based on the location hierarchy. Since incident records have a Location reference field, you can search for incidents based on a caller's location.

- Find all incidents from callers based in Illinois using a query like:

  [Location] [is in hierarchy] [Location Hierarchy] starting at [Illinois] which is [Included]

  This query returns incidents where the caller's location is Illinois, any city in Illinois, or a street address in any city in Illinois.

- Find incidents for cities and street addresses in Illinois, but not incidents where the caller location is simply Illinois using a query like:

  [Location] [is in hierarchy] [Location Hierarchy] starting at [Illinois] which is [excluded]

- Find all incidents based on your location as the logged-in user using a dynamic filter in a query like:

  [Location] [is in hierarchy (dynamic)] [Location Hierarchy] starting at [My Location] which is [included]

Manager Hierarchy

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Search for records throughout the management chain in your organization using the `Manager Hierarchy` record hierarchy.

Each user record contains a hierarchical path, allowing you to create queries in the condition builder based on the management hierarchy. Querying any table and selecting a reference field that points to the Users [sys_user] table enables you to search through the management chain.

- Find all incidents assigned to users who report to Bud Richman using a query like:

  [Assigned to] [is in hierarchy] [Manager Hierarchy] starting at [Bud Richman] which is [Included]

  In this example, searching the hierarchy returns incidents assigned to Bud Richman, including incidents assigned to users who report to Bud and their direct reports, and so forth.

- Find all incidents assigned to you and users in your own organization using a dynamic query like:

  [Assigned to] [is in hierarchy (dynamic)] [Manager Hierarchy] starting at [Me] which is [included]

- View the management chain itself by filtering directly on the Users [sys_user] table using a query like:

  [Manager] [is in hierarchy] [Manager Hierarchy] starting at [Bud Richman] which is [included]

- View the users who report to you by filtering directly on the Users [sys_user] table using a dynamic query like:

  [Manager] [is in hierarchy (dynamic)] [Manager Hierarchy] starting at [Me] which is [included]

Overview of building a record hierarchy

In addition to the predefined record hierarchies that are included with your instance, you can build a record hierarchy on a table of your choice.

Building a hierarchy between related records in the same table requires a self-referencing field. When building the hierarchy, you can either use an existing reference field that already defines parent-child relationships or create a self-referencing field and populate it with the appropriate values for each record.

1. Identify a table that contains parent-child records that you want to use for building hierarchical queries. For example, to build queries based on related assets, you can define a record hierarchy based on the Asset [alm_asset] table.
2. Determine which reference field in the table defines the relationships between records. For example, the Parent field in the Asset [alm_asset] table describes the parent asset of an asset.
3. Create a hierarchy in the Record Hierarchies [sys_record_hierarchy] table and specify the table and reference field that you want to use. The ServiceNow AI Platform automatically adds hierarchical path information to each record in the table.
4. Create hierarchical queries in the condition builder by selecting the hierarchy that you created. Use operators to search through the hierarchy.

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Create a record hierarchy

Build a record hierarchy between records in the same table.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Record Hierarchy**.
2. Select **New**.
3. On the form, fill in the fields.

Record hierarchy form

Field	Description
Label	Label used for displaying the record hierarchy.
Name	Internal name for the record hierarchy.
Table	The table with records that you want organize into a hierarchy.
Reference Field	The self-reference field that defines parent-child relationships between records in the selected table.

4. Select **Submit**.

Result

A record hierarchy based on the specified reference field is created. The ServiceNow AI Platform automatically builds the hierarchy paths that define the relationships between records in the hierarchy.

What to do next

Build queries in condition builder using the [is in hierarchy] or [is in hierarchy (dynamic)] operators. See Operators available for filters and queries.

Data Management

Manage your instance data by configuring data management policies to archive and delete data from the tables in your primary database.

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Get started

Explore	Configure	Analyze data usage
		
Learn about Data Management benefits and features.	Configure Data Management settings.	Analyze data usage over time on your current instance.
Manage data growth	**Database rotation**	**Reference**
		
Manage the growth of data on your instance.	Learn about applying database rotation techniques.	Get details about Data Management system properties.

Exploring Data Management

Learn about Data Management capabilities and how they help you manage table data in the ServiceNow AI Platform.

Data Management overview

The Data Management capabilities enable you to manage the growth of data in your instance using data management policies.

- Define and access a set of data management rules for a table using a data management policy.
- Visualize a summary of storage consumption on your instance.
- Manage the growth of data on your instance by archiving and cleaning table data.

Data Management users

Users

User	Description
Instance admin	The instance admin monitors growth and storage of data on the instance. The instance admin configures data management policies to archive and delete older records.

Data Management workflow

This infographic depicts how an administrator uses a data management policy to configure data management rules for a table and monitor data usage on an instance.

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Managing data on your instance



1. The instance admin monitors cloud storage entitlements and data usage at the account-level in Subscription Management.
2. The instance admin finds that one instance is consuming a greater amount of storage than expected and decides to investigate.
3. The instance admin logs in to the instance and analyzes which tables are consuming the most data by viewing the Data Management Console. The instance admin notices that two tables are consuming more data than expected.
4. The instance admin reviews the data management policies for the tables in question. One of the tables has never been archived or cleaned before, so the instance admin creates a data management policy for this table.
5. The instance admin determines that older records in one of the tables can be moved to an archive table. The instance admin creates multiple archive rules using different criteria to move data from the primary table to an archive table.
6. The instance admin decides that older records in the other table aren't needed after a certain date. The admin adds a table cleaner rule to the data management policy that deletes records from the table periodically as the records age out.
7. After the archive and table cleaner jobs are finished, the instance admin continues to monitor the Data Management Console to verify that data consumption is reduced and continues to monitor the top 10 tables.

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Data Management benefits

Benefit	Feature	Users
Monitor data usage on your instance over time	Analyzing data usage on your instance	Instance admin
Archive older records	System Archive	Instance admin
Delete older or unwanted records automatically	Table cleaner	Instance admin
Preview and update records safely	Updating records safely in Core UI	Instance admin
Preview and delete records safely	Deleting records safely in Core UI	Instance admin

What to explore next

To learn more about using Data Management, see:

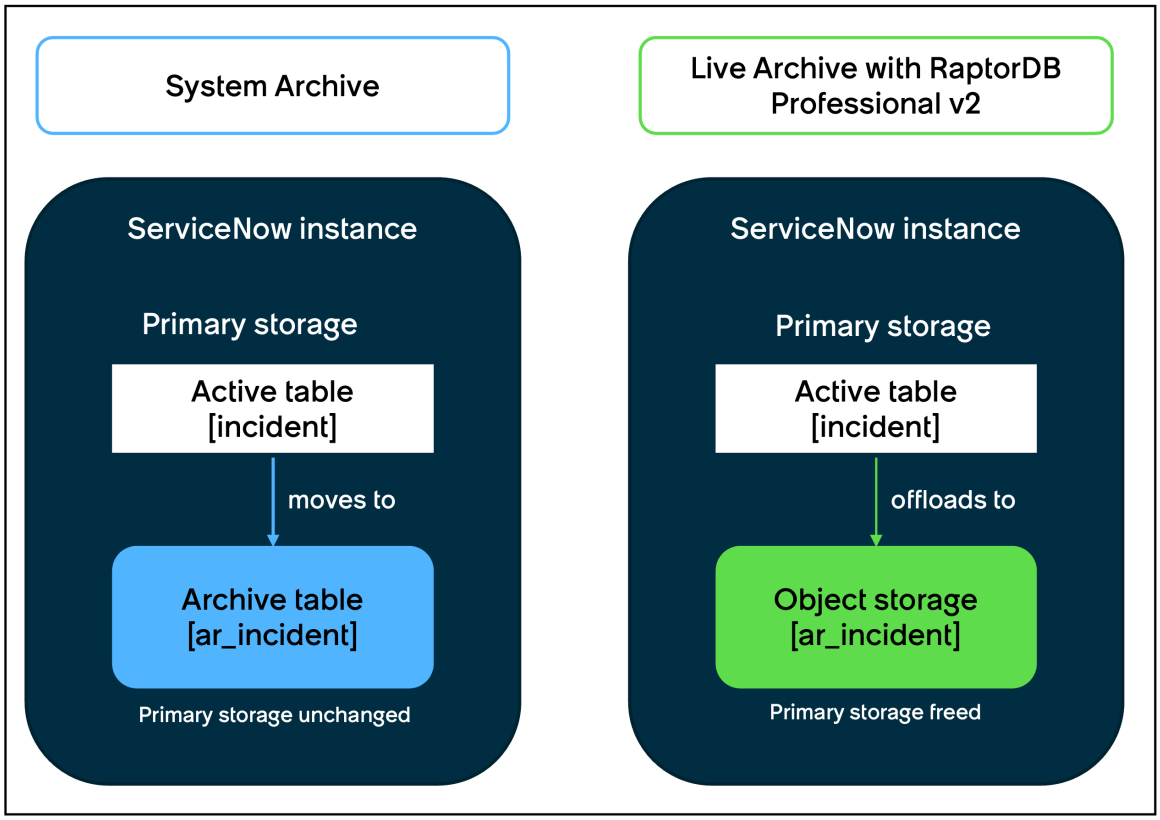
- Analyzing data usage on your instance
- Managing data growth in Core UI
- Updating records safely in Core UI
- Deleting records safely in Core UI
- Data Management reference

System Archive

System Archive enables you to manage table growth by moving inactive records out of primary tables into dedicated archive tables within the same instance.

System Archive is a platform feature that's available on all the ServiceNow instances.

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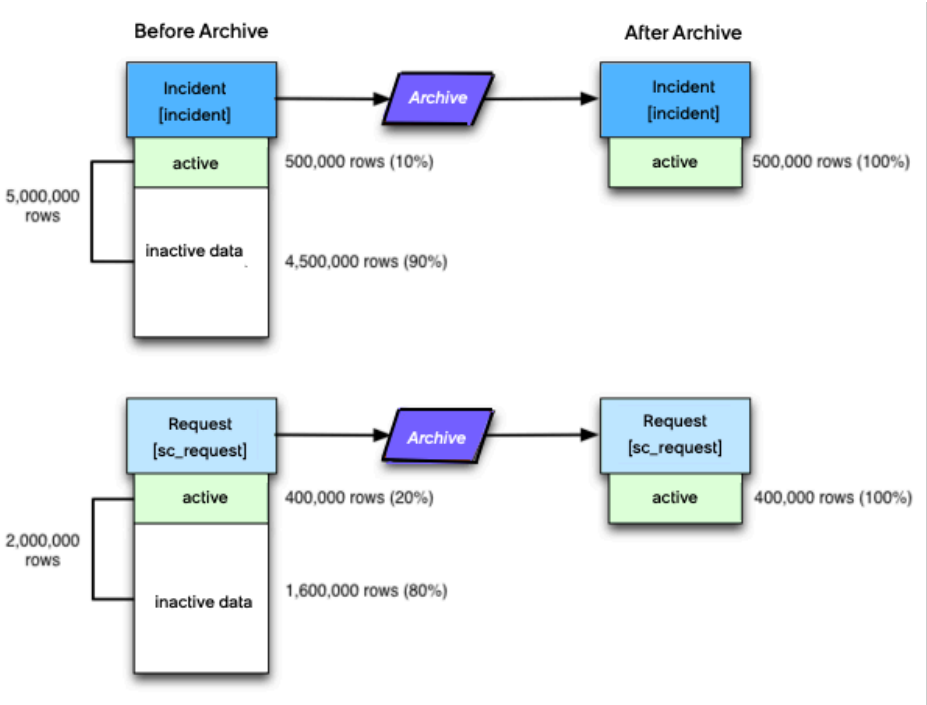


Key benefits

- Releases system resources, which improves query and report performance.
- Preserves data for auditing or historical purposes.
- Deletes archived data after a specified period using a destroy rule.

Note that System Archive does not reduce primary storage usage or move data to a separate storage tier. For information about moving records off the primary database to an object storage, see Live Archive with RaptorDB Professional V2.

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Archive rules

During archiving, records that meet the defined archive rules are moved to a corresponding archive table prefixed with `ar_`. For more information, see Viewing table rules and Viewing rule activities.

Use cases

- Instances that have been running for a long time and have accumulated data that is no longer relevant. For example, task records from two years ago are typically less relevant than currently active tasks. This old data can eventually cause performance issues by consuming system resources and slowing down queries and reports. You can archive records in core tables such as the Task [task] table and records in custom tables that you create on the ServiceNow AI Platform.
- The Incident [incident] table on your instance has grown and users are reporting that queries against the table are slow. You can create an archive rule with conditions like **[Closed] [relative] [on or before] [150] [Days] [ago]** and **[Active] [is] [false]** to move records to the Archived Incidents [ar_incident] table when they're closed for more than 150 days.
- Archive related records together to maintain data integrity for compliance and auditing requirements. This approach archives records from a primary table along with any dependent records in other tables that reference them. For example, when archiving records from the Problem [problem] table, you can include incidents that reference those problem records in the **Problem in incident** field.

For information about using the System Archive feature, see Archiving records in Core UI.

Live Archive with RaptorDB Professional V2

Live Archive (formerly Data Archiving) moves records and attachments to object storage, freeing up space in the primary database while keeping data accessible for compliance and reporting. This capability improves query performance and provides scalable storage for large archives.

When you upgrade to RaptorDB Professional V2 and install Live Archive, you can migrate archived records and attachments from the primary instance to a dedicated object storage. The

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archived data remains accessible in the same way as regular tables. This capability is exclusive to RaptorDB Professional.

Object storage doesn't require additional configuration beyond plugin installation.

During the migration to object storage, data management processes that interact with archive tables are temporarily paused. However, no downtime is required for the upgrade itself. For more information about upgrading to RaptorDB Professional, contact your account representative.

Key benefits

- Moves data to object storage in a compressed columnar format, freeing up primary storage.
- Improves query performance on active data by reducing the primary database size.
- Reuses existing archive rules without requiring changes.
- Retains closed records for compliance and audit purposes.
- Provides scalable storage capacity for larger archives without impacting primary database performance.
- Keeps archived data accessible and searchable to users on the ServiceNow AI Platform so historical data can be queried and reported on as needed.
- Applies the same security controls, ACLs, and role-based access to archived records as to live records.
- Enables you to monitor live and archive table volumes in the Data Management Console.

Live Archive architecture

Live Archive extends the existing archive rules framework. When records match the archive rule conditions, they move from primary tables to archive tables.

S3 facade

To keep archived data accessible even if a datacenter is unavailable, Live Archive uses an S3 facade, which is a communication layer between RaptorDB Professional and object storage. It handles authentication, routing, and resilience.

Live Archive automatically creates two S3 facade endpoints, one per datacenter in your instance's datacenter pair. If one datacenter is unavailable, the other endpoint keeps the archived records remain accessible. The S3 facade is verified during Live Archive installation.

Archiving with S3 facade

Archive rules

Use archive rules to define which records should be archived. Time-based conditions are common. For example, to archive incidents closed more than two years ago. However, any field-based condition is supported.

Existing archive rules operate without changes or migration. For guidance on creating and managing archive rules, see Create an archive rule in Core UI.

When an archive rule runs, records and attachments move from live tables to archive tables through the S3 facade.

Monitoring storage

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Track object storage volume in the Data Management Console. Storage stats refresh once daily and reflect compressed sizes.

Data appears in the console only after an archive table exceeds 512 MB or 2 million rows.

Primary database space reclamation

As records move to object storage, RaptorDB reclaims space in the primary database.

The primary database might not shrink immediately in absolute size, especially when new records continue to be created, but archiving slows primary database growth and reduces the volume of data processed on every query. The performance and operational benefits of archiving appear in faster query times and instance responsiveness.

Security

Live Archive maintains all ServiceNow AI Platform security controls. ACLs, role-based access, and row-level security apply to archived records the same way as live records. Users without access to live records cannot access the corresponding archived records.

Object storage data is encrypted at rest and in transit without requiring additional configuration.

To install Live Archive after upgrading to RaptorDB Professional V2, see Install Live Archive.

Table cleaner

Prevent tables from growing to an unmanageable size by deleting records automatically.

Key benefits

- Improve query performance by deleting records you no longer need.
- Delete older, expired, or unwanted records from tables automatically.
- Prevent data from growing exponentially.

Accessing table cleaner rules

You can define and access table cleanup rules for a table by navigating to **All** > **System Data Management** > **Data Management Policies** and selecting the data management policy for the table.

Use cases

- Delete closed incidents that haven't been updated in 30 days. In this scenario, you define a table cleanup rule on the Incident [incident] table using sys_updated_on as the match field and you specify 2,592,000 as the age in seconds. You specify the condition State is Closed to only delete closed incidents.
- Manage data growth in tables used by Virtual Agent and Conversational Interfaces by activating table cleanup rules for the following tables:
  - Chat Server [sys_cs_analytics]
  - Conversations [sys_cs_conversation]

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- Message Last Reads [sys_cs_message_last_read]
- Ci Analytics [sys_ci_analytics]

- Conversation-related tables can increase in size and end up affecting system performance. Limit data growth by cleaning records in tables related to Advanced Work Assignment. See .

For information on using table cleaner, see Deleting older or unwanted records in Core UI.

Configuring Data Management

Set up and configure Data Management.

Configuration overview

Data Management is a ServiceNow AI Platform capability that is active by default. You can take advantage of object storage for archive records and attachments by upgrading to RaptorDB Professional V2 and installing Live Archive.

Install Live Archive

Install Live Archive to archive data in object storage.

Before you begin

Role required: admin

Requirement	Details
Entitlement	Check your entitlements to determine whether you have access to RaptorDB Professional v2.
Platform release	At least the Australia release.
RaptorDB version	At least RaptorDB Professional version 35.1.

About this task

Consider the following aspects of Live Archive migration before starting the installation:

- Archive rule processing is paused during the migration, so plan installations around any time-sensitive archiving schedules.
- Existing archived data is converted to columnar storage format.
- Converted data is moved to the object storage as the migration progresses.
- Archive rule processing resumes after the migration completes.

Migration duration depends on the volume of data in the archive tables. Large archives require longer migration windows. Non-archived data and standard instance operations remain unaffected during the migration.

Procedure

1. Navigate to **All** > **Application Manager**.
2. Search for live archive and select **Live Archive**.
   The Live Archive plugin [com.glide.db.columnar.archive] is automatically downloaded with the product.
3. Select **Install** and review the installation instructions.

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4. Select **Install Now**.
5. **Optional:** Confirm the installation.
   a. Select the **Installed** tab.
   b. In the **Search your licensed applications and plugins** field, enter `Live Archive` and press **Enter**.
   c. Verify whether Live Archive appears in the results.
6. **Optional:** Verify that S3 facade endpoints have been created in each datacenter in the instance's datacenter pair.
   a. Navigate to **All** > **Filter** and search for `sys_service_endpoint_list.do`.
   b. In the **Name** column, enter `s3_facade`.
   c. Confirm that the two endpoints are listed, each with **Active** status set to **true**.
7. **Optional:** Verify whether a new **Object Storage** tile is available by navigating to **System Data Management** > **Data Management Console** and checking the summary section.
   It might take up to 24 hours for data to appear in the tile.

Analyzing data usage on your instance

View a summary of storage consumption and analyze data usage on your current instance over time in the Data Management Console.

Overview of analyzing data usage

- Monitor cloud capacity in Subscription Management

  View a summary of your cloud storage entitlements and track storage capacity across all the instances associated with your account in Subscription Management.

- Data Management overview

  Monitor the current size of the instance and track cloud storage consumption. For example, if you purchased shared storage for your instances, you can determine how much storage is consumed from the pool by your current instance and which tables are consuming the most amount of data.

- Viewing all tables

  Access a list of the tables on your instance and gain insight into the growth of these tables over the last thirty days. View the number of active data management rules that are configured on these tables.

- Viewing data usage by table

  Access a summary of data usage over time for specific table. Determine which tables are driving volume to the current table and how much volume the current table is contributing to associated tables.

- Viewing table rules

  Track the backlog of records in a table that meet the requirements of a data management rule but haven't been processed yet. View a summary of rule execution history on a table.

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- Viewing rule activities

  Analyze a specific rule configured on a table. Track the backlog of records that meet the rule's conditions but haven't been processed yet, and view a detailed summary of the rule's execution history.

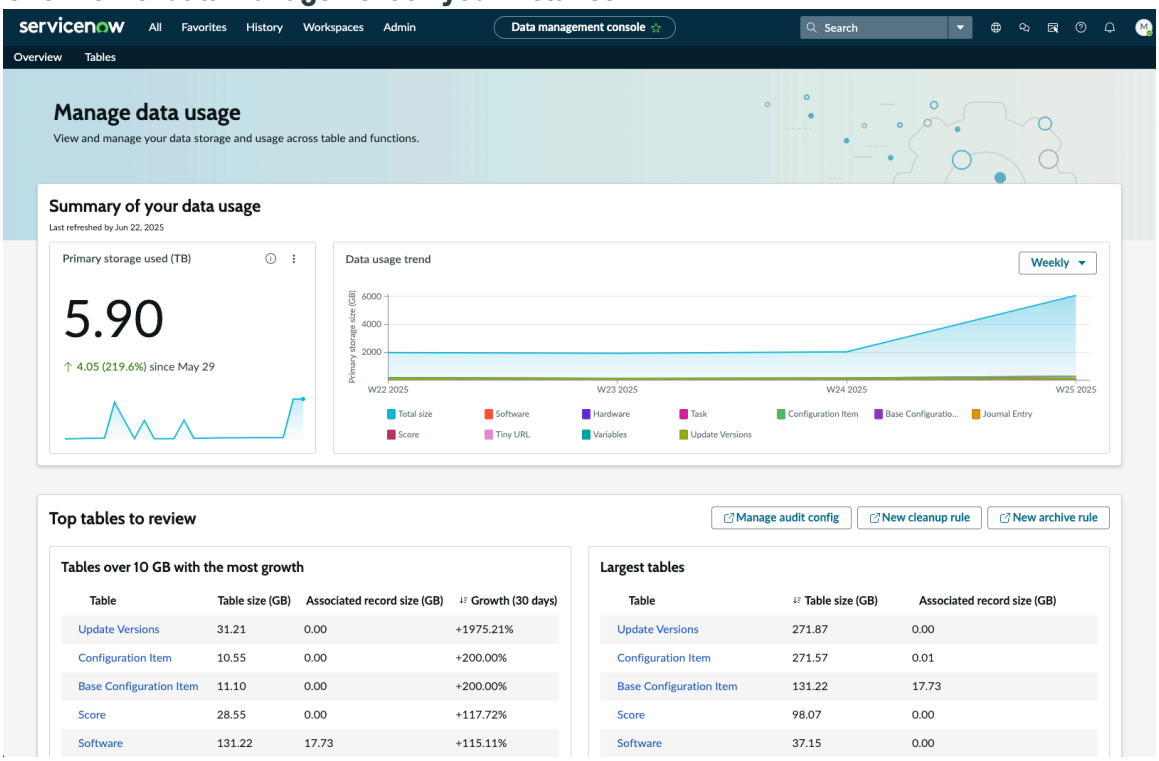
Data Management overview

View a summary of your data usage and manage the growth of data on your instance.

Key benefits

- View a summary of primary storage used on your instance and monitor data usage over time.
- Determine which tables are consuming the most amount of storage on your instance.
- Manage the growth of data on your instance directly from the Data Management Console.

Overview of data management on your instance



Required ServiceNow AI Platform roles

The admin role is required to view the Data Management Console.

Accessing overview information in the Data Management Console

Access overview information on the **Overview** tab in the Data Management Console by navigating to **All** > **System Data Management** > **Data Management Console**.

Primary storage used

View a summary of primary storage used on your instance. Note that efforts to reduce the amount of primary storage used on your instance might not be reflected until the system completes synchronization.

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- View the total amount of primary storage used on your instance.
- Track storage usage on your instance over time by viewing the percentage increase or decrease since a specific date.

Data usage trend

Monitor the top ten tables consuming the most amount of storage on your instance over time.

- Determine if usage has increased or decreased over time in a weekly or monthly view.
- Compare the total amount of primary storage used on your instance to the total amount of storage used by the largest tables on your instance.
- Compare usage between the top ten largest tables on your instance over time.

Top tables to review

To effectively manage the growth of data on your instance, review the tables that are currently growing the most in size and monitor the size of the largest tables on your instance.

In addition, you can gain a more comprehensive understanding of a table's impact on your instance's overall storage usage by monitoring the size of its associated records.

- A table that contributes to the size of an associated table is considered a driver table.
- Associated tables store attachments, audit records, and journal entries that are generated when records are created in the driver table.

Review the top tables on your instance in terms of growth and table size, and then combine that information with the associated record size to determine where to focus your data management efforts first.

Tables over 10 GB with the most growth

View the tables that are currently growing the most in size. Only tables larger than 10 GB appear in the list.

- View the size of tables with the most growth by checking the Table size (GB) column.
- Monitor the size of records from associated tables by checking the Associated record size (GB) column. To reduce the size of associated records, consider creating archive or cleanup rules in the driver table that's contributing to the growth of the associated tables.
- View the tables with the most growth over the last 30 days by checking the Growth (30 days) column. For tables that are growing at a faster rate than expected, consider creating a new cleanup rule or a new archive rule.
- View a table-level summary of data usage by selecting a table in the list.

Largest tables

View a list of the largest tables on your instance.

- View the largest tables on your instance by checking the Table size (GB) column.
- Monitor the size of records from associated tables by checking the Associated record size (GB) column. To reduce the size of associated records, consider creating archive or cleanup rules in the driver table that's contributing to the growth of the associated tables.
- View a table-level summary of data usage by selecting a table in the list.

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After reviewing the top tables, start managing the growth of data on your instance.

- Manage the growth of audit records from the audit management console by selecting **Manage audit config**.
- Delete older or unwanted records by selecting **New cleanup rule**. See Create a table cleanup rule in Core UI.
- Move data that's no longer needed to an archive table by selecting **New archive rule**. See Create an archive rule in Core UI.

Viewing all tables

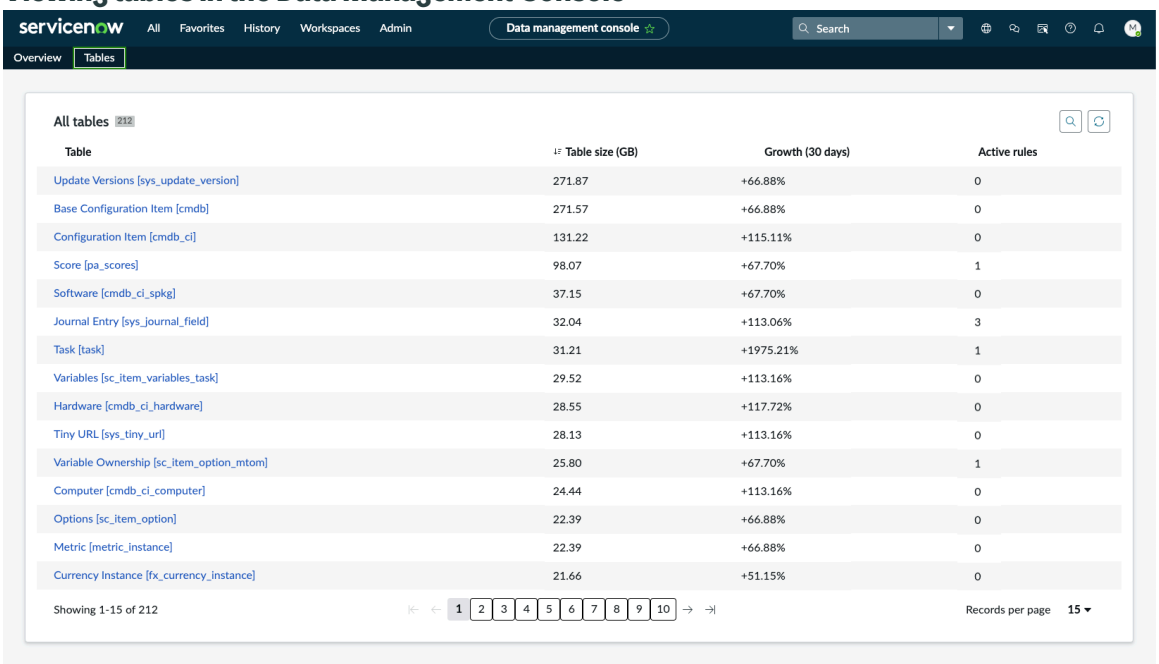
View a list of all tables on your instance and the number of active data management rules configured on each table.

Key benefits

- View tables on your instance in terms of size by checking the **Table size (GB)** column.
- Determine which tables have grown the most in size over the last thirty days by checking the **Growth (30 days)** column.
- Determine how many archive, cleanup, and one-time delete rules are active for each table by checking the **Active rules** column.

By default, the list of tables is filtered to show tables over 100 MB in size.

Viewing tables in the Data Management Console



Required ServiceNow AI Platform roles

The admin role is required to view the Data Management Console.

Accessing the Tables view in the Data Management Console

Access table information in the Data Management Console in one of the following ways: You can also access the **Tables** tab by selecting View additional tables on the Overview tab.

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- Navigate to **All** > **System Data Management** > **Data Management Console** and select the **Tables** tab.
- Navigate to **All** > **System Data Management** > **Data Management Console**. On the **Overview** tab, select **View additional tables**.

Use cases

- Monitor data usage for physical tables, including the Task [task] table.
- Monitor data usage for logical tables, including the Incident [incident], Problem [problem], and Change Request [change_request] tables.
- Access data usage and rule details by selecting a table in the list. See Viewing data usage by table.

Viewing data usage by table

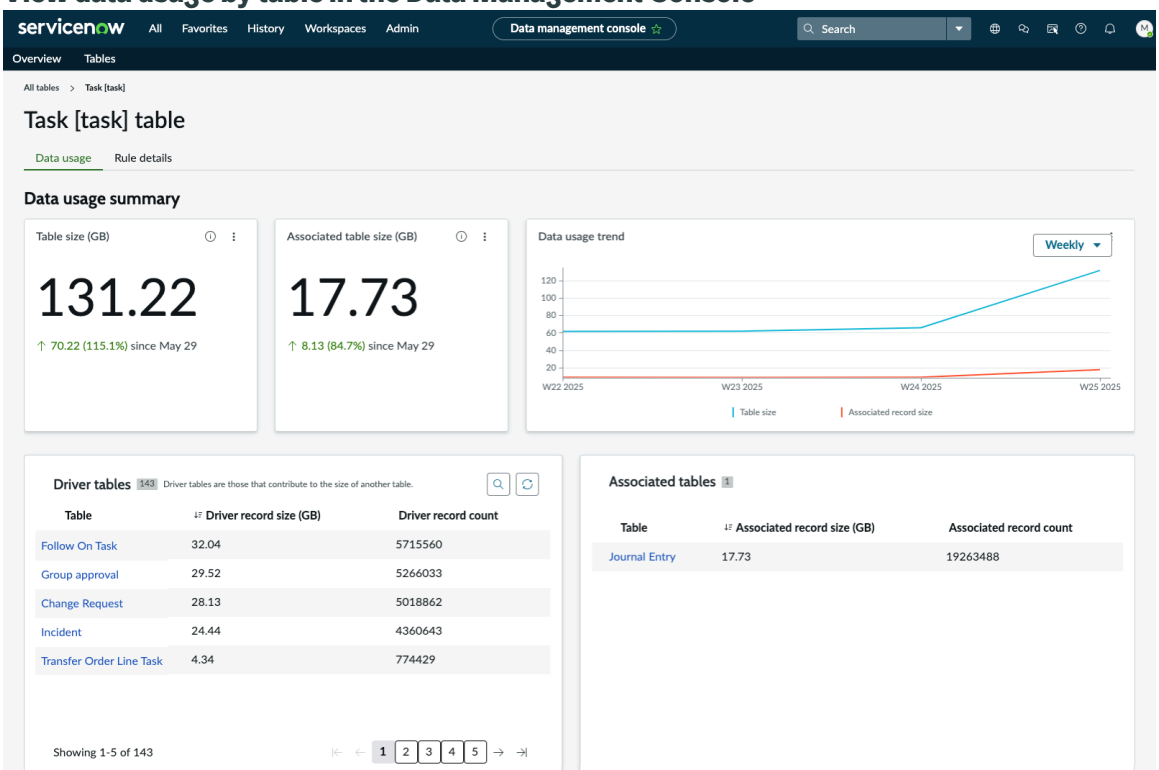
View a summary of data usage for an individual table.

Key benefits

- Analyze data usage at the table-level.
- Monitor data usage for a specific table over time.
- Access a comprehensive view of a table's impact on storage usage by checking the size and record count of driver tables and associated tables.

Details on this page are refreshed once daily.

View data usage by table in the Data Management Console



Required ServiceNow AI Platform roles

The admin role is required to view the Data Management console.

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Accessing data usage by table in the Data Management Console

Access data usage for a specific table in the Data Management Console by navigating to **All** > **System Data Management** > **Data Management Console** > **Tables** and selecting the table.

Table size (GB)

View the total amount of storage used by the current table. If you've made significant changes to your data recently, it might take up to 24 hours for changes to appear.

Track storage usage over time by viewing the percentage increase or decrease since a specific date.

Associated table size (GB)

Associated tables contain records that don't have a lifespan of their own. Examples include attachments, audits, and journals.

- View the total amount of storage used by associated tables.
- Track the rate of storage usage by viewing the percentage change since a specific date.
- Address growth in associated tables by creating data management rules on the current table.

Data usage trend

Monitor data usage for the current table over time.

- Track the size of the current table over weeks or months.
- Compare data usage between the current table and associated tables over time.

Driver tables

Driver tables are those that contribute to the size of another table. For example, the Incident [incident], Problem [problem], and Change Request [change_request] tables contribute to the growth of the Task [task] table, which makes them driver tables.

- Determine which tables are driving volume to the current table.
- View the size of each driver table and the total record count in each driver table.
- Address growth in the current table by creating data management rules in the driver tables.

Associated tables

Associated tables store records like attachments, audit records, and journal entries that don't have a lifespan of their own. For example, the Sys Audit [sys_audit], Attachment [sys_attachment], and Journal Entry [sys_journal_field] are tables associated with the Incidents table, which contributes volume to these tables.

- Determine how much volume the current table is contributing to associated tables.
- View the size of associated records and the total record count in each associated table.
- Address growth in associated tables by creating data management rules on the current table.

Viewing table rules

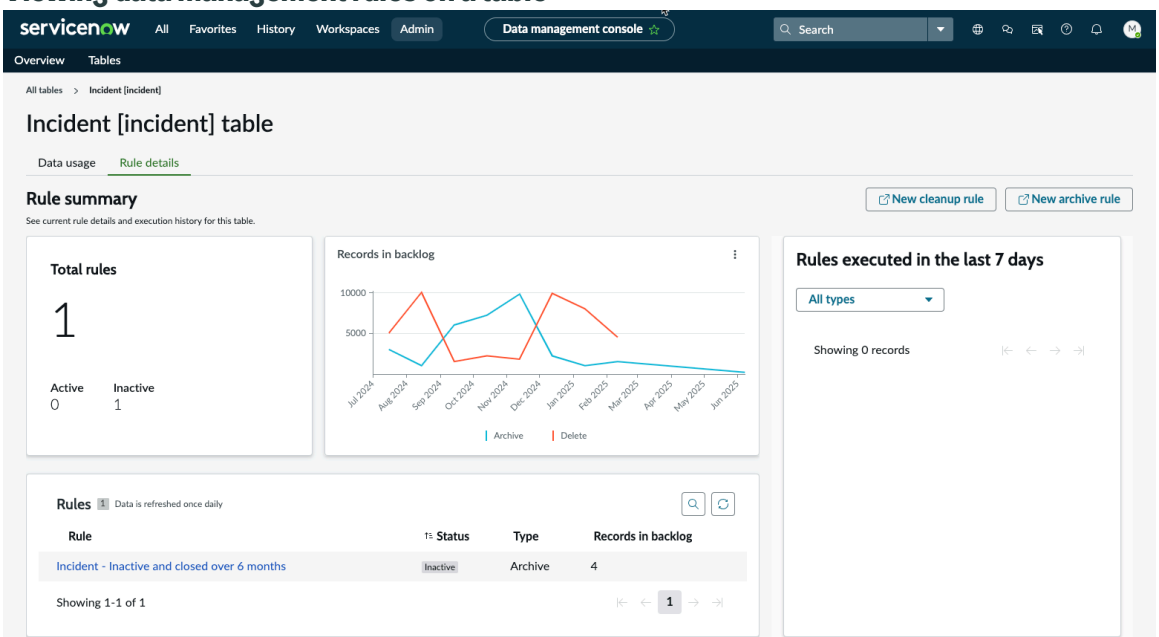
View a summary and execution history of the data management rules that have been created on a table.

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Key benefits

- View the current number of active and inactive data management rules on the table.
- Track the backlog of records that meet the requirements of a data management rule but haven't been processed yet.
- View rule execution history for the last seven days.
- View a detailed list of the table's data management rules. Select a rule to view a detailed summary.

Viewing data management rules on a table



Required ServiceNow AI Platform roles

The admin role is required to view the Data Management Console.

Accessing table rules in the Data Management Console

Access rules for a specific table in the Data Management Console by navigating to **All** > **System Data Management** > **Data Management Console** > **Tables**, selecting the table, and then selecting the **Rule details** sub-tab.

Rules

View a list of the data management rules on the current table.

- Determine whether a rule is active or inactive by checking the **Status** column.
- View the types of rules that are configured by checking the **Type** column.
- Monitor the number of records that meet the conditions for a rule but haven't been processed yet by checking the **Records in backlog** column. Data in this column is refreshed once daily.
- View a summary of records in the backlog and rule execution history by selecting a rule in the list.

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Total rules

View the total number of data management rules created on the current table, including the number of active and inactive rules. Manage the growth of data in the current table by creating data management rules or adjusting current rule conditions.

- Create a table cleaner rule to delete older or unwanted records by selecting **New cleanup rule**. See Create a table cleanup rule in Core UI.
- Create an archive rule to move data that's no longer needed every day to an archive table by selecting **New archive rule**. See Create an archive rule in Core UI.

Records in backlog

Track the count of records in the current table that meet the requirements of a data management rule but haven't been processed yet.

- Track the progress of different types of data management rules over time.
- Monitor data management rule efficiency and consider adjusting the conditions based on the trend in the backlog record count.
- Check for bottlenecks that indicate a large number of records in the backlog waiting to be processed.
- Look for spikes in the backlog across different types of data management rules. Consider scheduling rules at different times to avoid an influx of backlog records.

Rules executed in the last 7 days

View a list of recent rule activities on the current table. Filter the list by rule type and view the number of affected records for each executed rule.

Viewing rule activities

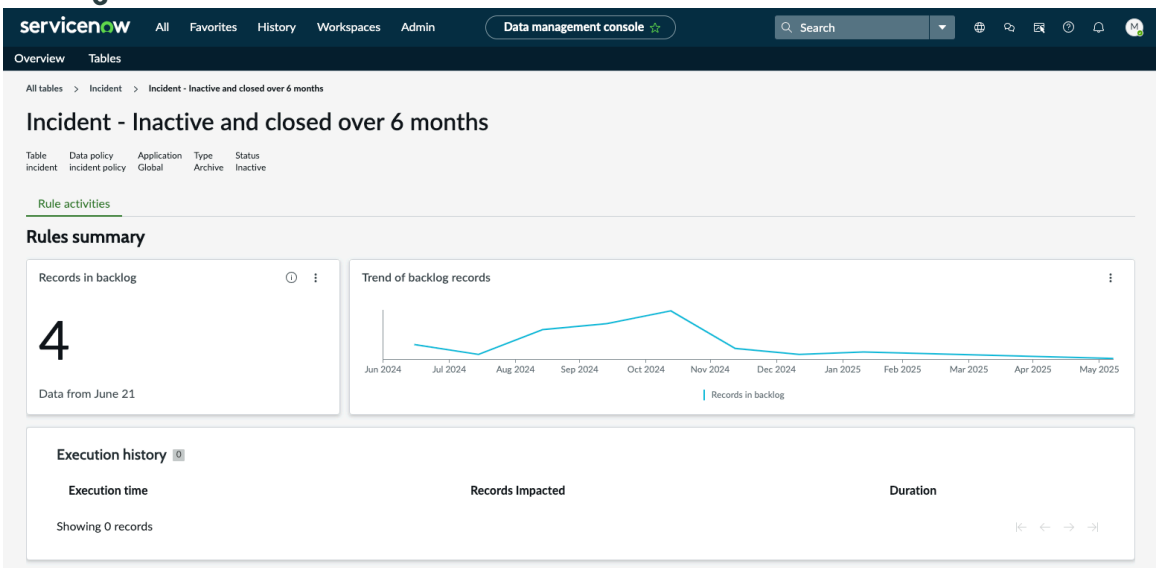
View a summary of records in the backlog and the execution history for a specific rule on the table in context.

Key benefits

- View details for a specific data management rule.
- Track the backlog of records that meet the rule's conditions but haven't been processed yet.
- View a detailed summary of the rule's execution history.

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Viewing rule activities



Required ServiceNow AI Platform roles

The admin role is required to view the Data Management Console.

Accessing rule activities in the Data Management Console

Access recent activity for a specific rule in the Data Management Console by navigating to **All** > **System Data Management** > **Data Management Console** > **Tables**. Select a table, select the **Rule details** sub-tab, and then select a specific rule.

Rule details

View basic information about a data management rule including the following details:

Table

The table to which the data management rule applies.

Data policy

The data policy to which the data management rule belongs.

Application scope

The application scope of the table.

Type

The type of data management rule, such as archive, cleanup, or one-time delete.

Status

The current status of the data management rule.

Records in backlog

View the total number of records that meet the conditions for the rule but haven't been processed yet. The count is updated once a day.

Trend of backlog records

Track the backlog of records that meet the conditions for the rule but haven't been processed yet.

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- Track the progress of the rule over time.
- Monitor data management rule efficiency and consider adjusting the conditions based on the trend in the backlog record count.
- Check for bottlenecks that indicate a large number of records in the backlog waiting to be processed.

Execution history

View a detailed summary of the rule's execution history.

- View the date and time a rule was executed by checking the **Execution time** column.
- Determine how many records were archived or deleted by checking the **Records impacted** column. Consider adjusting the rule's conditions if the number of records isn't sufficient.
- Determine how long the rule took to complete by checking the **Duration** column.

Managing data growth in Data Management Console

Manage the growth and storage of data on your instance by creating data management rules in the Data Management Console.

Overview of managing data growth

Create and manage Data Management rules directly from the Data Management Console.

- Archiving records in Data Management Console

  Move records in a primary table to an archive table, including any records in other tables that reference those records.

- Deleting older or unwanted records in Data Management Console

  Prevent data from growing exponentially by implementing table cleanup rules.

- Previewing and deleting records in Data Management Console

  Safely delete records from a table without using scripts and without deleting the table.

- Restore archived records and related records

  Restore one or more archive records and any related records back into the primary table.

Archiving records in Data Management Console

Manage table size growth and improve query performance by archiving records.

You can archive records in core tables such as the Task [task] table and records in custom tables that you create on the ServiceNow AI Platform using archive rules.

- To archive Configuration Management Database (CMDB) CI records, use the CMDB Data Manager. See Working with CMDB Data Manager.
- To archive emails, activate the Email retention plugin and use the archive and destruction rules that come with the plugin. Don’t use the archive feature to create your own archiving rules on the email table.

Archive activation

When you activate an archive rule, the system performs the following actions:

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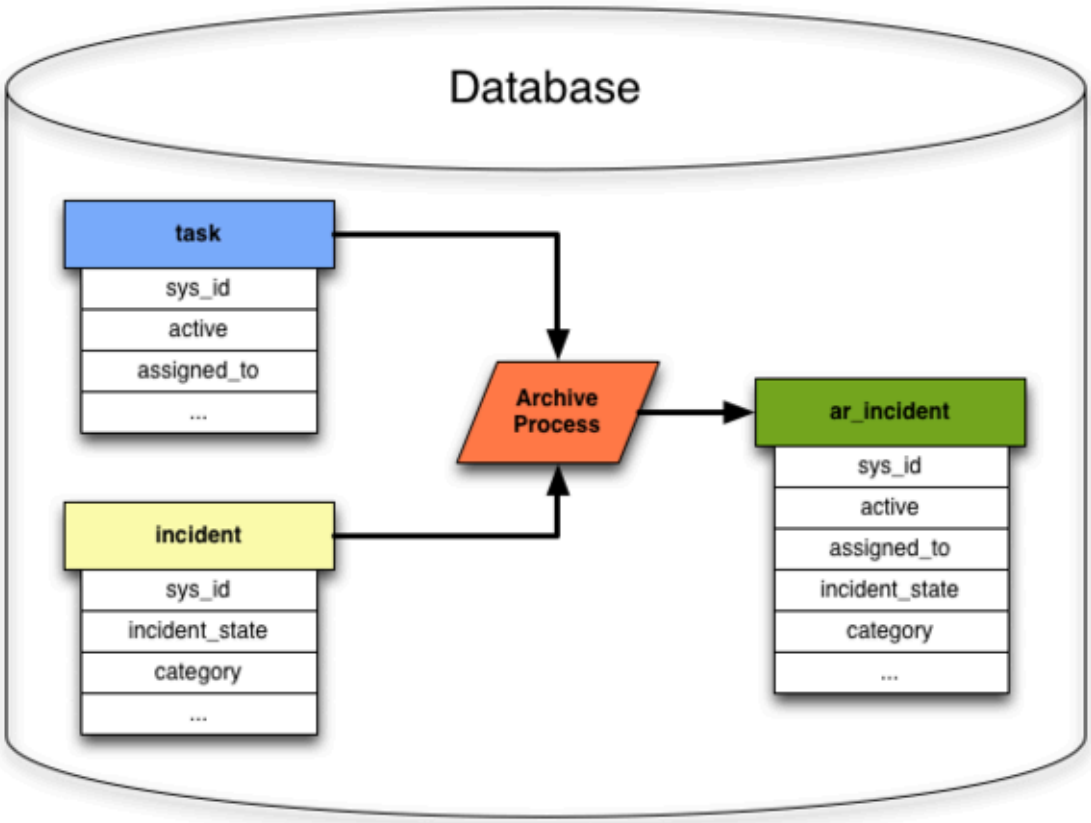
- Creates the archive table in the database. The archive table has the same name as the primary table with an "ar_" prefix. For example, if you archive the Incident `[incident]` table, the archive table is `[ar_incident]`.
- Stores an XML version of each archived record in the sys_archive_log table. This archive log is the same table for all archive rules, and you can't alter this behavior. It's also the only place where the sys_id is stored together with the display value for reference fields.

  For example, for ar_incident `<assigned_to>Fred Luddy</assigned_to>`, the sys_archive_log record is as follows:

```
<assigned_to display_value="Fred
 Luddy">5137153cc611227c000bbd1bd8cd2005</assigned_to>
```

- Converts multiple joined tables into a single flat-file archive table. The archive table no longer consists of a base table and extended tables.

Conversion of Multiple Joined Tables into a Flat Archive Table



- Converts reference field values (values set by references to records in other tables) into string values. The archive record contains the display value of the reference field at the time of the archive.
- Adds a module to the **Archive Tables** list in the **System Archiving** application. The module name is a combination of the word "Archive" plus the display name for the archived table. For example, the archive module for the Attachment `[sys_attachments]` table is **Archive Attachment**.

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- Creates a list of the archive table using the default list view.
- Creates a form for the archive table using the default form view. The form excludes any dot-walking fields such as **Caller ID.Email**.

Reference values converted to strings

Archived data is stored as a flat file with no reference fields to other tables. The archive process converts any references to other tables to string values.

In the case of a reference field, the string uses the display value such as the caller's user name. For example, the **Caller** reference field in an incident would display the string *ITIL User*. If the reference was a document ID and the archive rule included the option to archive related document IDs, the string is the document ID of the related record.

Future changes to reference values aren't reflected in archived records. For example, if you change the user name for "John Smith" to "John A Smith", all active incident records automatically show the caller as "John A Smith" because of the reference between the Incident and User tables. However, all archived incident records display the user name that existed at the time of the archive. Likewise, if you delete a user from the system, current incidents no longer display the deleted user as a caller. However, archived incidents still display the string "John Smith" because that value was used when the record was archived.

Querying archived data

Archived tables aren’t optimized for ad hoc queries. They only contain index entries for the display value, creation date, and the primary key of sys_id.

Avoid making on-demand queries against an archived table, like searching for all priority 1 archived incidents. Instead, only search against the indexed fields. For example, search for incident INC100001 or incidents created on a specific date.

Archive tables and ACLs

By default, archive tables use the ACLs for the unarchived table of the same name. For example, the archived Incident `[ar_incident]` table uses the ACLs defined for the unarchived Incident `[incident]` table.

You can manage access to archive tables explicitly by creating ACLs for specific archive tables and setting the *`glide.security.enable_archive_table_acls`* property to **true**. The system then follows one of two paths:

1. If one or more active ACLs are defined for an archive table, those ACLs control access to the archive table.
2. If no ACLs are defined for an archive table, the system reverts to default behavior and uses the ACLs for the unarchived version of the table.

Note: The two paths are mutually exclusive: If archive table ACLs deny access, the system doesn't attempt to revert to the default behavior.

The read operation is the only operation evaluated, and other operations are prevented.

The Execution Plan UI is aware of this logic and presents information accordingly. For example, adding the first ACL to an archive table shows that the archive table ACL is "masking" ACLs on the unarchived (original data) table.

If you have existing ACLs on archived tables, they’re ignored unless you set the *`glide.security.enable_archive_table_acls`* property to **true**. Those newly

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activated ACLs may possibly cause access issues. To prevent this occurrence, the system sets the *glide.security.enable_archive_table_acls* property as follows:

- Instances without the *glide.security.enable_archive_table_acls* property use the default value of **false**.
- Upgraded instances don't install the property. The property must be added manually and set to **true** to enable the archive table ACL behavior.
- Zbooted instances install the property and set it to **true**.

Setting the language of archived strings

On internationalized instances, the archive process uses the language of the SYSTEM user to select the display value strings.

If there's no SYSTEM user, the instance uses the default language setting to select the display value strings. You can either create a SYSTEM user with a specific language setting or set the system default language to select the language of archived strings.

Create an archive rule in Data Management Console

Define a rule for archiving records.

Before you begin
Role required: admin

About this task
Because you can define multiple archive rules for a table, verify any existing archive rules to avoid potential conflicts. For example, if there's a rule for archiving records older than six months, creating another rule to archive records older than three months could cause a conflict. In such cases, either rule could potentially run, each archiving records under different conditions.

Procedure
1. Access the create rule wizard in the Data Management Console in one of the following ways.

Option	Steps
Overview tab	**a.** Navigate to **All** > **System Data Management** > **Data Management Console** > . **b.** On the Overview tab, select the table with records that you want to archive. **c.** Select **Create rule**.
Rules tab	**a.** Navigate to **All** > **System Data Management** > **Data Management Console** > . **b.** On the Tables tab, select the table with records that you want to archive. **c.** On the table details page, select the Rules tab. **d.** Select **Create rule**.

2. Define the archive rule.

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a. On the Define your rule page, select **Archive** as the rule type.

b. Enter a name and description for the rule.
The name is used as the display value for references to this rule.

c. Select **Save and continue**.

Define archive rule conditions

Define one or more conditions that identify the records to be archived.

Before you begin
Role required: admin

About this task
Use the condition builder to specify filter conditions that define the records to be archived. For example, you might archive inactive records older than a certain date.

Make sure that the correct records are selected by testing the conditions in a list view before you activate the archive rule. For example,

- To archive records closed more than two years ago from today, use the relative operator in a condition like **[Closed] [relative] [before] [2] [Years] [ago]**.
- To archive records for the current year and the prior year, and not two years ago from today's date, use a condition like **[Closed] [on] [Last 2 years]**.

Procedure

1. On the Define conditions page, limit the number of records by adding one or more conditions that records must meet.

   a. Select a field, operator, and field value.

      Example
      For example, **[Category] [is] [Software]**.

   b. **Optional:** Use the OR and AND operators to add conditions.

   c. **Optional:** Select **Add condition set Criteria** to add another set of conditions.

2. Estimate the number of records to archive by selecting **Calculate archive estimate**.
   The estimate only includes primary records and excludes any related records added to the archive rule. The estimate helps you determine if the archive rule affects the number of records you expect it to. If the estimate is too high or low, change the archive rule conditions accordingly.
3. Automatically send restored records back to the archive after a set time period.
   a. Select **Auto-rearchive**.
   b. Enter the time interval in years, days, and hours before the restored record is automatically archived.
4. Select **Save and continue**.

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Define destroy rule conditions

Delete archived records after a specified amount of time by configuring optional destroy rule conditions.

Before you begin
Role required: admin

About this task
Optionally, use the condition builder to specify filter conditions that define the archive records to be destroyed. For example, you might delete archive records older than five years.

Skip this page and advance to the next one if you don't want to configure a destroy rule now.

Procedure

1. On the Destroy archived records page, select **Destroy archived records**.
2. Specify the amount of time that records stay in the archive table before the system deletes them by entering a value for the archive duration in years, days, and hours.
   The default archive duration is one year.

   Important: Archive records are destroyed immediately if all **Archive Duration** fields are empty or set to 0.

3. **Optional:** Automatically destroy related records associated with the archived records by selecting **Destroy related records**.

   Note: Associated records, which include records in the Journal Entry [sys_journal_field], Attachment [sys_attachment], and Sys Audit [sys_audit] tables are deleted automatically, even if you decide to preserve related records.

4. **Optional:** Estimate the number of archived records marked for deletion by selecting **Recalculate Destroy Estimate**.
5. **Optional:** Activate the destroy rule by selecting **Activate archive destroy rule**.
6. Select **Save and continue**.

Result
After the archive destroy rule is activated, records that have been archived longer than the archive duration value are destroyed when the scheduled job runs. You can verify the progress by checking the archive destroy log.

Manage related records

Archive, clear, or delete related records when an archive rule runs.

Before you begin
Role required: admin

Procedure

1. On the Manage related records page, select **+ Add records**.
2. Select which action to take on related records in the **Action** list.

Action	Description
Archive	Archive records that reference the archived record.

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Action	Description
Clear	Remove the reference to the archived record. The record no longer references the archived record and doesn't appear as a related record in future archives.
Cleanup	Delete records that reference the archived record.

3. Select the related records that you want to archive, clear, or delete by selecting a relationship in the **Reference** list.
   The **Reference** list contains all the relationships that exist to the archived table. There are two types of relationships in the list.

   Reference fields

   The list contains reference fields in other tables that refer to the archived table.

   For example, you create an archive rule on the Problem [problem] table. You can include related incident records by selecting the **Problem in Incident** field reference field on the Incident [incident] table.

   - The **Archive** action archives any incident record that references an archived problem.
   - The **Clear** action updates any incident record with a reference to the archived problem record by clearing the reference. If the reference is a many-to-many relationship, the related record rule deletes the reference instead of clearing the reference.
   - The **Delete** action deletes any incident record that references the archived problem record.

   Document ID fields

   The list contains document ID fields in other tables that point to the archived table. Document ID relationships display an asterisk (*) character at the end of the selection name.

   For example, you create an archive rule on the Problem [problem] table. You can include related attachment records by selecting the **Table sys ID Attachment(sys_attachment)*** reference.

   - The **Archive** action updates the attachment record to change the **Document ID** to refer to the archived table record.
   - The **Clear** action removes the **Document ID** reference to the archived record. The record no longer references the archived record and doesn't appear as a related record in future archives.
   - The **Delete** action deletes any attachment record that references the archived primary record.

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Note: You can't select references from some internal system tables or from peripheral tables. For example:

- Sys Audit [sys_audit]
- Audit Deleted Record [sys_audit_delete]
- Audit Relationship Change [sys_audit_relation]
- Attachment [sys_attachment]
- Journal Entry [sys_journal_field]

4. **Optional:** Apply an archive rule to the related records that you're archiving by selecting a rule in the **Reference table rule** list.
   For example, if you already have an archive rule for the Incident [incident] table, select the existing incident archive rule when archiving records related to incidents records.

   Note: You control the cascade depth by specifying an archive rule in the **Reference table rule** field. Related records without a specified archive rule aren't cascaded.

   - Prior to the Washington DC release, if an archive rule was defined in the system for a related record's table, the system would automatically cascade and process that archive rule and the related records associated with it.
   - Beginning in the Washington DC release, even if an archive rule exists for a related record's table, you must declare that rule in the **Reference table rule** field to achieve that cascading behavior. If you have multiple related records on multiple tables, you can decide which of those records you want to include in the cascade by specifying the reference table rule.

5. Select **Add**.
6. **Optional:** Add or delete more related records entries as needed.
7. Select **Save and continue**.

View a summary of your archive rule and activate it

View a summary of your archive rule and decide whether to activate it.

Before you begin

You must activate the archive rule and its corresponding data management policy for the archive rule to run.

Role required: admin

Procedure

1. On the Rule summary page, review the archive rule conditions and settings.
2. **Optional:** Activate the rule by selecting **Activate the rule upon creation**.

Result

Records that meet the archive rule criteria are archived during the next archive run.

Deleting older or unwanted records in Data Management Console

Delete older, expired, or unwanted records from tables automatically.

Delete older, inactive records in core tables such as the Task [task] table and records in custom tables that you create on the ServiceNow AI Platform using table cleanup rules.

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There are several table cleanup rules included in the base system by default.

- You can view a list of all the table cleaner rules in the Auto Flush [sys_auto_flush] table by entering `sys_auto_flush.list` in the filter navigator. The Auto Flush table displays rules for base system tables and their corresponding record ages.
- You can view a list of table cleaner rules defined on a single table by navigating to **All** > **Data Management Policies** and selecting the data management policy record for the table, if it exists. The system automatically creates a data management policy record for any table that has an archive rule or table cleaner rule.

Slow rule handling

The table cleaner scheduled job runs once per hour (by default). When the table cleaner job runs, each table cleaner rule runs several queries as part of the process. If there's no index on a rule's match field or on significant portions of its condition, rule processing can be slow because its queries are running inefficiently on large amounts of data.

If a table cleaner rule has a query that takes longer than 30 seconds to complete, the entire table cleaner job is stopped. By default, table cleaner waits two days before including that rule in the table cleaner job again, which enables the table cleaner job to run without disruption in the meantime. You can configure the duration of the waiting period by adding a system property. See Table cleaner properties.

Disabling table cleanup

You can prevent an administrator from creating a table cleanup rule or running the table cleaner on a specific table by adding the Disable Table Cleaner attribute to the table's dictionary record. Some internal system tables have the Disable Table Cleaner attribute added by default.

Table cleanup limitations

- As of Xanadu patch 5, table cleaner rules defined in the Auto Flush [sys_auto_flush] table are supported for extension and shard tables. However, table cleaner rules aren't supported for tables configured with table rotation.

  When using the GlideTableCleaner scriptable directly, table cleaner rules aren’t supported for tables configured with table rotation or table extension. Some tables in your instance might have legacy table cleaner rules that were established before table rotation was enabled. These legacy rules can be safely ignored.

- Performance depends on the size of the table and the conditions that you specify. For example, if you use a custom column without an index in a large table, performance is severely degraded. Performance also depends on the number of rows to be deleted.
- Table cleaner spends a maximum of 20 minutes to delete records from a single table. If queries are slow, the volume of records deleted in the 20-minute period may be small.
- Table cleaner doesn't call `DBDelete.setWorkflow()`. This means `DBDelete` objects run with `workflow=false` (false is the default value for a Java Boolean). As a result, business rules, workflows, and flows that you expected to trigger on record deletion won’t trigger in the context of table cleaner. This is important to consider if you have business logic that depends on this type of functionality.

Create a cleanup rule

Define a rule for deleting records from a primary table on a recurring basis.

Before you begin
Role required: admin

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About this task

Create a cleanup rule to delete records on a recurring basis. To delete records as a one-time operation, see Create a one-time delete rule.

Procedure

1. Access the create rule wizard in the Data Management Console in one of the following ways.

Option	Steps
Overview tab	**a.** Navigate to **All** > **System Data Management** > **Data Management Console** > . **b.** On the Overview tab, select the table with records that you want to clean up. **c.** Select **Create rule**.
Rules tab	**a.** Navigate to **All** > **System Data Management** > **Data Management Console** > . **b.** On the Tables tab, select the table with records that you want to clean up. **c.** On the table details page, select the Rules tab. **d.** Select **Create rule**.

2. Define the cleanup rule.

   a. On the Define your rule page, select **Cleanup** as the rule type.

   b. Enter a name and description for the rule.
   The name is used as the display value for references to this rule.

   c. Select **Save and continue**.

Define cleanup rule conditions

Define one or more conditions that identify the records to be deleted.

Before you begin

Role required: admin

About this task

Use the condition builder to specify filter conditions that define the records to be deleted. For example, you might specify that only records where 'active = false AND state =closed' are deleted.

Procedure

1. On the Define conditions page, select the Date/Time field that you want to use for monitoring duration in the **Date field**.
2. Specify the amount of time that the system must wait before deleting records by entering a duration (in years, days, and hours).
3. Limit the number of records by adding one or more conditions that records must meet.

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a. Select a field, operator, and field value.

Example
For example, **[Active] [is] [false]**.

b. **Optional:** Use the OR and AND operators to add conditions.

c. **Optional:** Select **Add condition set Criteria** to add another set of conditions.

4. Select **Save and continue**.

Select associated records to delete

Specify which associated records to delete when the cleanup rule runs.

Before you begin
Role required: admin

Procedure

1. On the Clean up associated records page, select which associated records to delete when the cleanup rule runs.

Associated records	Description
Attachments	Selected by default. Associated attachments are always deleted.
Journals	If selected, related records in the Journal En try [sys_journal_field] table are also deleted. If cleared, the system deletes records from the target table, but not any related journal records in this table.
Audits	If selected, related records in the following au dit tables are also deleted: ○ Sys Audit [sys_audit] table ○ Audit Relationship Change [sys_audit_rela tion] table **Note:** Audit records that are created by table cleaner in the Audit Deleted Record [sys_audit_delete] table are pre served. If cleared, the system deletes records from the target table, but not any related audit records in these tables.

2. **Optional:** Delete all matching records plus any records referring to them by selecting **Cascade delete**.
   If this option is cleared, the system deletes matching records, but not records referring to them.
3. Select **Save and continue**.

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View a summary of your cleanup rule and activate it

View a summary of your cleanup rule and decide whether to activate it.

Before you begin

You must activate the cleanup rule and its corresponding data management policy for the cleanup rule to run.

Role required: admin

Procedure

1. On the Rule summary page, review the cleanup rule conditions and settings.
2. **Optional:** Activate the rule by selecting **Activate the rule upon creation**.

Result

The table cleanup rule runs automatically and deletes records when they meet the specified record age and any conditions that you set for them.

Previewing and deleting records in Data Management Console

Safely delete records from a table without using scripts and without deleting the table by creating one-time delete rules.

Overview of deleting records using one-time delete rules

1. Create a one-time delete rule

   Define a rule for deleting records now or at a later date.

2. Define one-time delete rule conditions

   Define one or more conditions that identify the records to be deleted.

3. Select associated records to delete

   Specify which associated records to delete when the one-time delete rule runs.

4. Schedule or execute a one-time delete rule

   Schedule a date and time to execute a one-time delete rule or execute it after you finish creating it.

5. View a summary of your one-time delete rule

   View a summary of your one-time delete rule and decide whether to activate it.

If you must delete a large number of records from a table rather than a selection of records, use the table cleaner option. For details, see Deleting older or unwanted records in Data Management Console.

Create a one-time delete rule

Define a rule for deleting records now or at a later date.

Before you begin

Role required: admin

About this task

Create a one-time delete rule to delete records once. To delete records on a recurring basis, see Create a cleanup rule.

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Procedure

1. Access the create rule wizard in the Data Management Console in one of the following ways.

Option	Steps
Overview tab	**a.** Navigate to **All** > **System Data Management** > **Data Management Console** > . **b.** On the Overview tab, select the table with records that you want to delete. **c.** Select **Create rule**.
Rules tab	**a.** Navigate to **All** > **System Data Management** > **Data Management Console** > . **b.** On the Tables tab, select the table with records that you want to delete. **c.** On the table details page, select the Rules tab. **d.** Select **Create rule**.

2. Define the one-time delete rule.

   a. On the Define your rule page, select **One-time delete** as the rule type.

   b. Enter a name and description for the rule.
   The name is used as the display value for references to this rule.

   c. Select **Save and continue**.

Define one-time delete rule conditions

Define one or more conditions that identify the records to be deleted.

Before you begin
Role required: admin

About this task
Use the condition builder to specify filter conditions that define the records to be deleted.

> **Important:** Deleting records can cause unexpected cascade deletion. Preview the number of records that will be affected before activating the rule and change the conditions as needed.

Procedure

1. On the Define conditions page, limit the number of records by adding one or more conditions that records must meet.

   a. Select a field, operator, and field value.

   Example
   For example, **[Category] [is] [Software]**.

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b. Optional: Use the OR and AND operators to add conditions.

c. Optional: Select **Add condition set Criteria** to add another set of conditions.

Note: Limiting the number of records that are added to the one-time delete job can help prevent the table from being locked when the job is executed.

2. **Optional:** View the records that match the conditions by selecting **Preview affected records**. The list of records appears in a new browser tab.
3. On the Define conditions page, select **Save and continue**.

Select associated records to delete

Specify which associated records to delete when the one-time delete rule runs.

Before you begin
Role required: admin

About this task
Deleting records in a table also deletes records from tables that extend or reference the source table. Preview the affected records before you execute a delete job and learn about other tables that are impacted.

Up to three levels of cascaded records are deleted when the job is executed. For example, if the preview identifies incidents that match the conditions, it will also delete any problems that reference those incidents, defects that reference those problems, and test records that reference the defects. If sys_attachment and sys_attachment_docs table records are associated with the incidents, those records might not appear in the preview but they are deleted as well.

Procedure

1. On the Delete associated records page, view the count of records from the source table that match the conditions in the one-time delete rule by selecting **Preview cascade**.
   The **Preview cascade delete records** dialog displays the estimate. Counts for records in other tables that reference those source records are listed as well, although those counts are only close estimates.
2. Review the count of affected records by table to ensure that the records are safe to delete.
3. Note that a rollback context is created by default.

Important: If you need to restore records deleted by accident, you have up to fourteen days to execute the rollback job.

4. **Optional:** Run predefined business rules after records are deleted by selecting **Run business rules and engines**.
5. Select **Save and continue**.

Schedule or execute a one-time delete rule

Schedule a date and time to execute a one-time delete rule or execute it after you finish creating it.

Before you begin
Role required: admin

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About this task

Consider scheduling the one-time delete rule to run during non-business hours to minimize the potential performance impact on your users. Deleting all records in a table temporarily locks the table, which prevents inserts and updates. If you want to delete all records from a table, use a cleanup rule instead. For more information, see Deleting older or unwanted records in Data Management Console.

Procedure

1. On the Set up schedule page, schedule the one-time delete rule to run now or at a later date.

Option	Description
Schedule later	Set up a schedule at a later time.
Execute upon creation	Run the one-time delete rule immediately af ter you finish creating it.
Run at	Select a date and time to run the one-time delete rule. **Note:** Scheduling at a later date and time might affect a different number of records.

2. Select **Save and continue**.

View a summary of your one-time delete rule

View a summary of your one-time delete rule and acknowledge the deletion.

Before you begin

You must activate the one-time delete rule and its corresponding data management policy for it to run.

Role required: admin

Procedure

1. On the Rule summary page, review the one-time delete rule conditions and settings.
2. Read and verify the deletion by selecting the acknowledgment statement.

Result

The one-time delete rule runs based on the chosen schedule and deletes records when they meet the conditions that you set for them.

Restore archived records and related records

Restore one or more archive records and any related records back into the primary table.

Before you begin

Role required: admin

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Procedure

1. Navigate to the table with archived records that you want to restore in one of the following ways.

   a. Navigate to **All** > **System Data Management** > **Data Management Console**.

   b. Select the **Tables** tab.

   c. Find the table with records that you want to restore.
   Tables with archived records have the Archive value in the Status column.

2. Select **View records**.
3. Select one or more records that you want to restore.
4. Restore the selected records using one of the following options.
   - Select the **Restore All Records Matching Conditions** related link.
   - Open the **Actions on selected rows...** drop-down, and then select **Restore Selected**.
5. In the Bulk Restore Request Success confirmation dialog box that appears, select **OK**.

Result

One or more records are restored to the primary table. The corresponding archive records are deleted from the archive table.

What to do next

View the restore date and time in the **Restored** column in the Archive Log related list.

Managing data growth in Core UI

Manage the growth and storage of data on your instance by creating data management rules in Core UI.

Overview of managing data growth

Create and manage Data Management rules in Core UI.

- Create a data management policy in Core UI

  Create a data management policy for any table that accumulates data that you want to archive or delete periodically.

- Archiving records in Core UI

  Move records in a primary table to an archive table, including any records in other tables that reference those records.

- Deleting older or unwanted records in Core UI

  Prevent data from growing exponentially by implementing table cleanup rules.

- Updating records safely in Core UI

  Update several records simultaneously without using scripts by creating and executing a batch update job.

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- Deleting records safely in Core UI

  Safely delete records from a table without using scripts and without deleting the table by creating and executing delete jobs.

Create a data management policy in Core UI

Define a set of rules for managing table data on your instance.

About this task

Data management policies streamline administration by allowing you to define multiple archive and table cleaner rules for a table within a single policy record. Additionally, you can easily activate or deactivate all rules simultaneously from the data management policy record.

After upgrading to Xanadu or higher, data management policies are automatically created for any table with an archive rule or table cleaner rule. If a data management policy doesn't exist for a table on your instance, you can create one manually.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Data Management** > **Data Management Policies**.
2. **Optional:** Determine if a data management policy exists for the table that you want to manage by searching the **Tablename** column.
   If the table already has a data management policy record, use that record instead of creating one.
3. Select **New**.
4. On the form, fill in the fields.

Data Management Policy form

Field	Description
Name	The name of the data management policy that typically includes the table name.
Tablename	The table that you want to manage to use a data management policy.
Description	An optional summary of the data management policy and its rules.
Active	Option to activate the data management policy. You must activate the data management policy for any of its rules to be activated. Clear this option to deactivate all the rules under the data management policy.

5. Select **Update**.

Result

A data management policy is established for the designated table. You can now create multiple data management rules for the table directly from the data management policy record.

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What to do next

Define archive and cleanup rules for the table by creating rules in the data management policy.

- Create an archive rule in Core UI
- Create a table cleanup rule in Core UI

Archiving records in Core UI

Manage table size growth and improve query performance by archiving records.

You can archive records in core tables such as the Task [task] table and records in custom tables that you create on the ServiceNow AI Platform using archive rules.

Overview of archive rules in Core UI

Create and manage archive rules in Core UI.

- Create an archive rule in Core UI

  Define the criteria for archiving records by creating an archive rule.

- Archive related records in Core UI

  Archive, clear, or delete related records from an archive rule.

- Managing archived data in Core UI

  Change the schedule for an archive rule, stop the archive rule from running, or restore your archived data.

Create an archive rule in Core UI

Define the criteria for archiving records by creating an archive rule.

Before you begin

Because you can define multiple archive rules for a table, verify any existing archive rules to avoid potential conflicts. For example, if there's a rule for archiving records older than six months, creating another rule to archive records older than three months could cause a conflict. In such cases, either rule could potentially run, each archiving records under different conditions.

Role required: admin

Procedure

1. Access the new archive rule form in one of the following ways.

Option	Steps
Using the Data Management Console	**a.** Navigate to **All** > **System Data Management** > **Data Management Console** > . **b.** On the Overview tab, select **New archive rule**.

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Option	Steps
Using a data management policy	**a.** Navigate to **All** > **System Data Management** > **Data Management Policies**. **b.** Select the data management policy for the table with records that you want to archive. **c.** In the Archive Rules related list, select **New**.
Using the Archive Rules module	**a.** Navigate to **All** > **System Archiving** > **Archive Rules**. **b.** Select **New**.

2. On the form, fill in the fields.

Archive Rule form

Field	Description
Name	Name that identifies the rule. Used as the display value for references to this archive rule.
Table	The table with records that you want to archive. ○ You can't change the table in an existing archive rule. To archive records in a different table, create a new archive rule. ○ You can't select a table in a different application scope. ○ You can't create an archive rule for a table where *update_synch* is set to true in the dictionary entry for the table. ○ You can't create archive rules for some internal system tables or peripheral tables. For example: ▪ Sys Audit [sys_audit] ▪ Audit Deleted Record [sys_audit_delete] ▪ Audit Relationship Change [sys_audit_relation] ▪ Attachment [sys_attachment] ▪ Journal Entry [sys_journal_field]
Retain references	Option to keep the sys_id for a reference field instead of storing the display name as a string in the archive table. **Important:** The **Retain references** check box becomes read only after you select it and save the archive rule. When you enable this option on a table with archived records, the system automatically reprocesses all existing archive records and enables references. This process can take time to complete for larger archive tables. You can track the status by viewing the Archive Rule Reference Migrations [sys_archive_ref_migration] table. For details on manually retaining references, see Migrating non-reference fields to reference fields.
Description	Description of the archive rule.

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Field	Description
Conditions	Condition builder for specifying filter conditions that define the records to be archived. For example, you might archive inactive records older than a certain date. Make sure that the correct records are selected by testing the conditions in a list view before you activate the archive rule. For example, ○ To archive records closed more than two years ago from today, use the relative operator in a condition like **[Closed] [relative] [before] [2] [Years] [ago]**. ○ To archive records for the current year and the prior year, and not two years ago from today's date, use a condition like **[Closed] [before] [Last 2 years]**.
Auto Rearchive	Option that enables a restored record to be automatically rearchived after a set time period.
Auto Rearchive Duration	The time interval before the restored record is automatically archived.

3. **Optional:** Estimate the number of records to archive by selecting the **Recalculate Archive Estimate** related link.
   The estimate only includes primary records and excludes any related records added to the archive rule. The estimate helps you determine if the archive rule affects the number of records you expect it to. If the estimate is too high or low, change the archive rule conditions accordingly.
   The updated count appears in the **Record estimate** field.
4. Select **Submit**.

Activate an archive rule

Preview the records that you want to archive, and then activate an archive rule.

Before you begin

Role required: admin

About this task

You must activate the archive rule and its corresponding data management policy for the archive rule to run.

The sample archive rules are inactive by default.

Procedure

1. Access the archive rule that you want to activate in one of the following ways.

Option	Steps
Using a data management policy	**a.** Navigate to **All** > **System Data Management** > **Data Management Policies**. **b.** Select the data management policy for the table with records that you want to archive. **c.** In the Archive Rules related list, select the archive rule that you want to activate.

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Option	Steps
Using the Archive Rules module	**a.** Navigate to **All** > **System Archiving** > **Archive Rules**. **b.** Select the archive rule that you want to acti vate.

2. **Optional:** Estimate the number of archive records by selecting the **Recalculate Archive Estimate** related link.
   The estimate only includes primary records and excludes any related records added to the archive rule. The estimate helps you determine if the archive rule affects the number of records that you expect. If the estimate is too high or low, change the archive rule conditions accordingly.
   The updated count appears in the **Record estimate** field.
3. Activate the archive rule by selecting the **Active** check box.
4. **Optional:** Archive records immediately by selecting the **Run Archive Now** related link.
   The **Run Archive Now** related link is only available if the corresponding data management policy is activated.

Result
Records that meet the archive rule criteria are archived during the next archive run.

What to do next
View the archived records by navigating to **All** > **System Archiving** > **Archive Tables** and selecting the module for the archived table, for example, **Archive Incidents**.

Create a destroy rule

Delete archived records and related records after a specified amount of time.

Before you begin
Role required: admin

About this task
You can associate a destroy rule with any archive rule in a data management policy.

If you need to amend the destroy rule properties running against your archived data, see System properties.

Procedure
1. On the archive rule form, select **Create Destroy Rule**.
2. In the Destroy Rule tab, fill out the fields.

Field	Description
Active	Option to activate the destroy rule.
Destroy Related Records	Option to automatically destroy related records associated with the archived records.

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Field	Description
	Note: Peripheral records, which include records in the Journal Entry [sys_journal_field], Attachment [sys_attachment], and Sys Audit [sys_audit] tables are deleted automatically, even if you decide to preserve related records.
Archive Duration	Specify the amount of time that records stay in the archive table before the system deletes them. **Important:** Archive records are destroyed immediately if the **Archive Duration** field is empty or set to 0.

3. **Optional:** Estimate the number of archived records marked for deletion by selecting the **Recalculate Destroy Estimate** related link.
4. Select **Submit**.

Result
Records that have been archived longer than the archive duration value are destroyed when the scheduled job runs. You can verify the progress by checking the archive destroy log.

Archive related records in Core UI

Archive, clear, or delete related records from an archive rule.

Before you begin
Role required: admin.

Procedure
1. Access the archive rule that you want to configure in one of the following ways.

Option	Steps
Using a data management policy	**a.** Navigate to **All** > **System Data Management** > **Data Management Policies**. **b.** Select the data management policy that contains the archive rule. **c.** In the Archive Rules related list, select the archive rule that you want to configure. **d.** In the **Archive Related Records** related list, select **New**.
Using the Archive Rules module	**a.** Navigate to **All** > **System Archiving** > **Archive Rules**. **b.** Select the archive rule that you want to con figure. **c.** In the **Archive Related Records** related list, select **New**.

2. Select which action to take on related records in the **Action** field.

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Action	Description
Archive	Archive records that reference the archived record.
Clear	Remove the reference to the archived record. The record no longer references the archived record and doesn't appear as a related record in future archives.
Delete	Delete records that reference the archived record.

3. Select the related records that you want to archive, clear, or delete by selecting a relationship in the **Reference** field.
   The **Reference** field lists all the relationships that exist to the archived table. There are two types of relationships in the list.

   Reference fields

   The list contains reference fields in other tables that refer to the archived table.

   For example, you create an archive rule on the Problem [problem] table. You can include related incident records by selecting the **Problem in Incident** field reference field on the Incident [incident] table.

   - The **Archive** action archives any incident record that references an archived problem.
   - The **Clear** action updates any incident record with a reference to the archived problem record by clearing the reference. If the reference is a many-to-many relationship, the related record rule deletes the reference instead of clearing the reference.
   - The **Delete** action deletes any incident record that references the archived problem record.

   Document ID fields

   The list contains document ID fields in other tables that point to the archived table. Document ID relationships display an asterisk (*) character at the end of the selection name.

   For example, you create an archive rule on the Problem [problem] table. You can include related attachment records by selecting the **Table sys ID Attachment(sys_attachment)*** reference.

   - The **Archive** action updates the attachment record to change the **Document ID** to refer to the archived table record.
   - The **Clear** action removes the **Document ID** reference to the archived record. The record no longer references the archived record and doesn't appear as a related record in future archives.
   - The **Delete** action deletes any attachment record that references the archived primary record.

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Note: You can't select references from some internal system tables or from peripheral tables. For example:

- Sys Audit [sys_audit]
- Audit Deleted Record [sys_audit_delete]
- Audit Relationship Change [sys_audit_relation]
- Attachment [sys_attachment]
- Journal Entry [sys_journal_field]

4. **Optional:** Apply an archive rule to the related records that you're archiving by selecting a rule in the **Reference table rule** field.
   For example, if you already have an archive rule for the Incident [incident] table, select the existing incident archive rule when archiving records related to incidents records.

   Note: You control the cascade depth by specifying an archive rule in the **Reference table rule** field. Related records without a specified archive rule aren't cascaded.

   - Prior to the Washington DC release, if an archive rule was defined in the system for a related record's table, the system would automatically cascade and process that archive rule and the related records associated with it.
   - Beginning in the Washington DC release, even if an archive rule exists for a related record's table, you must declare that rule in the **Reference table rule** field to achieve that cascading behavior. If you have multiple related records on multiple tables, you can decide which of those records you want to include in the cascade by specifying the reference table rule.

5. Select **Submit**.

Managing archived data in Core UI

Change the schedule for an archive rule, stop the archive rule from running, or restore your archived data.

Change an archive schedule in Core UI

Modify the system-scheduled job if you need to change the archive interval.

Before you begin
Role required: admin

About this task
All active archive rules are executed by a system-scheduled job set to run every 60 minutes.

Procedure

1. Navigate to **All** > **System Scheduler** > **Scheduled Jobs**.
2. Open the **Archive** record.
3. Modify the **repeat** value.

Stop an active archive rule in Core UI

Stop archiving by deactivating, deleting, or canceling an archive rule.

Before you begin
Role required: admin

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Procedure

1. Access the archive rule that you want to stop in one of the following ways.

Option	Steps
Using a data management policy	**a.** Navigate to **All** > **System Data Management** > **Data Management Policies**. **b.** Select the data management policy with the archive rule that you want to stop. **c.** In the Archive Rules related list, select the archive rule that you want to stop.
Using the Archive Rules module	**a.** Navigate to **All** > **System Archiving** > **Archive Rules**. **b.** Select the archive rule that you want to stop.

2. Stop the archive rule from running.
   - Deactivate the archive rule by clearing the **Active** check box. The *`Archive - Handle archive chunks`* business rule updates the state of the corresponding record in the Archive Job Execution Chunks [sys_archive_run_chunk] table from **waiting** to **not-needed**.
   - Contact Customer Service and Support to delete the archive rule.
   - Cancel the archive rule by calling *`GlideArchiver().cancel()`* from **System Maintenance** > **Scripts - Background**. This automatically changes the chunks in the Archive Job Execution Chunks [sys_archive_run_chunk] table from **running** to **cancelled**.

Result
No additional chunks are processed.

Restore archived records and related records in Core UI

Restore an archive record and optionally any related records back into the primary table.

Before you begin
Role required: admin

Procedure

1. Navigate to the archived record that you want to restore in one of the following ways.

Option	Steps
Using a data management policy	**a.** Navigate to **All** > **System Data Management** > **Data Management Policies**. **b.** Select the data management policy that contains the archive rule. **c.** In the Archive Rules related list, select the archive rule that archived the record.

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Option	Steps
	d. In the Archive Run related list, select the archive run that was executed. **e.** In the Archive Log related list, select the archived record that you want to restore.
Using the Archive Log module	**a.** Navigate to **All** > **System Archiving** > **Archive Log**. **b.** Select the archived record to restore.

2. In the Archive Log form, select the applicable related link:
   - **Restore Record**
   - **Restore Record and Related Records**

Warning: Don't delete archive record log entries. Deleting an archive log entry prevents you from restoring the data for the archived records.

Result
The record is restored to the primary table. The archive record is deleted from the archive table.

What to do next
View the restore date and time in the **Restored** column in the Archive Log related list.

Deleting older or unwanted records in Core UI

Delete older, expired, or unwanted records from tables automatically.

Delete older, inactive records in core tables such as the Task [task] table and records in custom tables that you create on the ServiceNow AI Platform using table cleanup rules that you create in Core UI.

Overview of table cleaner rules in Core UI

Create and manage table cleaner rules in Core UI.

- Create a table cleanup rule in Core UI

  Define the criteria for deleting unwanted records in a table cleanup rule.

- Manage table cleaner resource usage

  Control the system resources used table cleaner by updating the table cleaner job.

Create a table cleanup rule in Core UI

Define the criteria for deleting unwanted records in a table cleanup rule.

Before you begin
Role required: admin

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Procedure

1. Access the new Auto Flush form in one of the following ways.

Option	Steps
Using the Data Management Console	**a.** Navigate to **All** > **System Data Management** > **Data Management Console** > . **b.** On the Overview tab, select **New cleanup rule**.
Using a data management policy	**a.** Navigate to **All** > **System Data Management** > **Data Management Policies**. **b.** Select the data management policy for the table with records that you want to delete. **c.** In the Table Cleanup Rules related list, select **New**.

2. On the form, fill in the fields.

Auto Flush form

Field	Description`
Tablename	The name of the target table.
Matchfield	The Date/Time field in the target table that is used to monitor duration. Defaults to sys_created_on, which deletes records based on the amount of time since their creation date.
Age in seconds	The amount of time the system waits before deleting records. When the **Matchfield** value becomes older than the **Age in seconds**, the record is deleted.
Active	Option to activate or deactivate table cleaning for this table.
Application	The application scope to which this table cleaner job applies.
Clean journals	If selected, related records in the Journal Entry [sys_journal_field] table are also deleted. If cleared, the system deletes records from the target table, but not any related journal records in this table.
Clean audit	If selected, related records in these audit tables are also deleted: ○ Sys Audit [sys_audit] table ○ Audit Relationship Change [sys_audit_relation] table

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Field	Description`
	Note that the audit records that are created by table cleaner in the Audit Deleted Record [sys_audit_delete] table are preserved. If cleared, the system deletes records from the target table, but not any related audit records in these tables.
Cascade delete	If selected, this option deletes all matching records plus any records referring to them. If cleared, the system deletes matching records, but not records referring to them.
Conditions	Condition builder for specifying filter conditions that define the records to be removed. For example, you might specify that only records where 'active = false AND state =closed' are deleted.

3. Select **Submit**.

Result
The table cleanup rule runs automatically and deletes records when they meet the specified record age and any conditions that you set for them.

Manage table cleaner resource usage

Control the system resources used table cleaner by updating the table cleaner job.

Before you begin
Role required: admin

About this task
By default, the table cleaner job runs asynchronously with multiple producer threads creating chunks of records for deletion and multiple consumer threads processing the chunks and deleting records.

You can mitigate the impact to system performance by starting a table cleaner run using a smaller dataset, checking resource usage as it runs, and then adjusting the number of producer and consumer threads as necessary to complete the job with minimal impact to your users.

Procedure

1. Open the DMJobs [sys_dm_job] table by entering `sys_dm_job.list` in the filter navigator.
2. Select the DMTableCleaner job record.
3. **Optional:** Contact ServiceNow Support to change the number of producers or consumers devoted to creating or deleting chunks of records.
4. Select **Update**.

Result
Table cleaner begins the next run using the updated DMTableCleaner job configuration.

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What to do next

Check the status of the next table cleaner run by checking the values in the Chunks Errored column in the DMJob Runs [sys_dm_run] table. If a problem occurs, determine whether the issue occurred in all chunks or a single chunk. View the status of the individual chunks in the DMJob Chunks [sys_dm_chunk] table by checking the values in the Message and State columns.

Updating records safely in Core UI

Update several records simultaneously without using scripts by creating and executing a batch update job.

Overview of updating records safely

1. Mark records for updating

   Determine which records to update by creating an update job. Preview the number of affected records before you schedule or execute the job. For example, you might want to update the Assigned to value for multiple incidents on a test instance without running a script.

2. Schedule or execute a job to update records

   Schedule the job to run later or execute the job immediately.

3. Rollback an update job

   Use the rollback option in the update job if you need to restore the updated records to their previous state.

Mark records for updating

Mark records for updating according to one or more criteria by creating an update job.

Before you begin

Role required: admin

Procedure

1. Either choose to mark specific records for updating or mark all records in a list for updating.
   - To mark only specific records for updating, navigate to **All** > **System Data Management** > **Update Jobs**.
   - To mark all records in a list for updating, in any list of records, right-click a column heading, and then select **Data Management** > **Update All with preview**.
2. Select the table that contains the records you want to update.
3. **Optional:** Limit the number of records in the update job by adding a condition or conditions that records must meet.

   a. Select a field, operator, and field value.

   Example
   For example, **[Category] [is] [Software]**.

   b. **Optional:** Use the OR and AND operators to add conditions.

   c. **Optional:** Select **New Criteria** to add another set of conditions.

   Note: Limiting the number of records that are added to the update job can help prevent the table from being locked when the job is executed.

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4. **Optional:** View the number of records that match the conditions.
   a. Select **Preview**.
   b. Select the link with the number of matching records.
5. In the Fields & values lists, select the field that you want to update and a new value.
6. **Optional:** Select additional fields and values to update more fields.
7. Select **Continue**.

Result
The job is saved and the form provides options to schedule the job or execute it now.

What to do next
Schedule or execute a job to update records

Schedule or execute a job to update records

Schedule a date and time to execute an update job or execute the job immediately.

Before you begin
Role required: admin

About this task
Consider scheduling the update job to run during non-business hours to minimize the potential performance impact on your users. Updating a large number of records can degrade performance depending on the size of the table. On instances running MariaDB, UPDATE operations affecting a majority of rows may trigger gap locks, escalating to a full table lock until the update completes. INSERT operations are not affected by this locking behavior.

Procedure
1. Navigate to **All** > **System Data Management** > **Update jobs**.
2. Select an update job record.
3. Determine whether to schedule the update job for a later time or run it right away.

Option	Description
Schedule the update job	**a.** Select the calendar icon in the **Run at** field. **b.** Enter the date and time you want the up date job to run. **c.** Select **Update**. Note that you must select **Update** to successfully schedule the job.
Run the update job now	**a.** Select **Execute Now** to run the update job immediately. **b.** When prompted, select **Proceed** to update the records now. **c.** On the Progress page, select **Cancel** to stop the job from continuing to run. **d.** Select **Check execution results** to return to the update job form.

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Result
The records are scheduled for update or updated immediately. If you want to revert the updates to the records, see Rollback an update job.

Rollback an update job

Rollback a completed update job to revert the updates to the records.

Before you begin
Role required: admin

About this task
If you want to revert the updates to records made through an update job, execute a rollback operation.

Procedure
1. Navigate to **All** > **System Data Management** > **Update jobs**.
2. Select an update job that has been executed.
3. Select the **Rollback** related link to revert the updated records.
4. When prompted, confirm that you want to rollback the delete job.

Result
The rollback job is executed immediately and the updated records are reverted to their prior versions. If you want to update the records again, create an update job using the same conditions, and then schedule the update job or execute it immediately.

Deleting records safely in Core UI

Safely delete records from a table without using scripts and without deleting the table by creating and executing delete jobs.

Overview of deleting records safely

1. Mark records for deletion

   Determine which records to delete by creating a delete job.

2. Preview affected records for deletion

   Preview the affected records before you schedule or execute the job. For example, you might want to preview a set of incident records that will be deleted before you delete them.

3. Schedule or execute a job to delete records

   Schedule the job to run later or execute the job immediately.

4. Rollback a delete job

   Use the rollback option in the delete job If you need to restore deleted records after the job has run.

If you must delete a large number of records from a table rather than a selection of records, use the table cleaner option. For details, see Deleting older or unwanted records in Core UI.

Mark records for deletion

Mark records for deletion according to one or more criteria by creating a delete job.

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Before you begin
Role required: admin

Procedure
1. Either choose to mark specific records for deletion or mark all records in a list for deletion.
   - To mark only specific records for deletion, navigate to **All** > **System Data Management** > **Delete Jobs**.
   - To mark all records in a list for deletion, in any list of records, right-click a column heading, and then select **Data Management** > **Delete All with preview**.
2. Select the table that contains the records you want to delete.
3. **Optional:** Limit the number of records in the delete job by adding one or more conditions that records must meet.

   a. Select a field, operator, and field value.

   Example
   For example, **[Category] [is] [Software]**.

   b. **Optional:** Use the OR and AND operators to add conditions.

   c. **Optional:** Select **New Criteria** to add another set of conditions.

   Note: Limiting the number of records that are added to the delete job can help prevent the table from being locked when the job is executed.

4. **Optional:** View the records that match the conditions.
   a. Select **Preview**.
   b. Select the link with the number of matching records.
   The list of records appears in a new browser tab.
5. Return to the Delete Job tab.
6. Select **Continue** to save the current job information.

Result
The job is saved and the form displays options to schedule the job or execute it now.

What to do next
Preview affected records for deletion.

Preview affected records for deletion

Before you run a delete job, preview the count of affected records to see the impact of executing the delete job.

Before you begin
Role required: admin

About this task
Deleting records in a table also deletes records from tables that extend or reference the source table. Preview the affected records before you execute a delete job and learn about other tables that are impacted.

Up to three levels of cascaded records are deleted when the job is executed. For example, if the preview identifies incidents that match the conditions, it will also delete any problems

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that reference those incidents, defects that reference those problems, and test records that reference the defects. If sys_attachment and sys_attachment_docs table records are associated with the incidents, those records might not appear in the preview but they are deleted as well.

Procedure

1. Navigate to **All** > **System Data Management** > **Delete jobs**.
2. Select a delete job record.
3. Select the **Preview Cascade** related link to view the count of records from the source table that match the conditions in the delete job.
   The record count appears in the **Preview record count** column. Counts for records in other tables that reference those source records are listed as well, although those counts are only close estimates.
4. Review the count of affected records by table to ensure that the records are safe to delete.

What to do next

Schedule or execute a job to delete records

Schedule or execute a job to delete records

Schedule a date and time to execute a delete job or execute the job immediately.

Before you begin

Role required: admin

About this task

Consider scheduling the delete job to run during non-business hours to minimize the potential performance impact on your users. Deleting all records in a table temporarily locks the table, which prevents inserts and updates. If you want to delete all records from a table, use the table cleaner option instead. For more information, see Deleting older or unwanted records in Core UI.

Procedure

1. Navigate to **All** > **System Data Management** > **Delete jobs**.
2. Select a delete job record.
3. Determine whether to schedule the delete job for a later time or run it right away.

Result

The records are scheduled for deletion or deleted immediately. If you want to restore the deleted records, see Rollback a delete job.

Rollback a delete job

Rollback a completed delete job to restore the deleted records.

Before you begin

Role required: admin

About this task

If you want to restore records deleted through a delete job, execute a rollback operation.

Procedure

1. Navigate to **All** > **System Data Management** > **Delete jobs**.
2. Select a delete job that has been executed.

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3. Select the **Rollback** related link to restore the deleted records.
4. When prompted, confirm that you want to rollback the delete job.

Result

The rollback job is executed immediately and the deleted records are restored. If you want to delete the restored records, create a delete job using the same conditions, and then schedule the delete job or execute it immediately.

Migrating non-reference fields to reference fields

Manually preserve sys_ids in reference fields instead of storing the display name as a string.

Determining tables to migrate

To begin the data migration process, run the following background script. This script creates migration records for both direct table extensions and related archived records in the Archive Rule Reference Migration [sys_archive_ref_migration] table, ensuring that only valid tables are processed.

```
var tables =
 GlideDBObjectManager.get().getAllExtensions(current.table);
    for (i = 0; i < tables.size(); i++) {
        var gr = new GlideRecord('sys_archive_ref_migration');
        gr.addQuery('table', 'ar_' + tables.get(i));
        gr.query();
        if (!gr.next()) {
            if (GlideTableDescriptor.isValid('ar_' +
 tables.get(i))) {
                var gr2 = new GlideRecord("sys_archive_ref_migration");
                gr2.initialize();
                gr2.setValue('rule', current.sys_id);
                gr2.setValue('table', 'ar_' + tables.get(i));
                gr2.setValue('reference_migration_progress', 'waiting');
                gr2.insert();
            }
        }
    }
    //Also get insert related records tables as well
    var map = new GlideRecord('sys_archive');
    map.addQuery('table', current.table);
    map.query();
    if (map.next()) {
        var id = map.getValue('sys_id');
        if (!(id === undefined)) {
            var related = new GlideRecord('sys_archive_related');
            related.addQuery('archive_map', id);
            related.addQuery('action', 'archive');
            related.query();
            while (related.next()) {
                if (!GlideTableDescriptor.isValid('ar_' +
 related.getValue('table'))) {
                    gs.log('Related Record table: ' +
 related.getValue('table') + ' not created yet');
                    continue;
                }

                var gr3 = new GlideRecord("sys_archive_ref_migration");
```

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```
                gr3.initialize();
                gr3.setValue('rule', current.sys_id);
                gr3.setValue('table', 'ar_' +
 related.getValue('table'));
                gr3.setValue('reference_migration_progress', 'waiting');
                gr3.insert();
            }
        }
    }
```

Copying archive references

For each table that goes through the migration process, the Archive Reference Copy (RefCopyJob) job identifies the sys_id of the reference fields and updates the display value to be the correct sys_id. The job configures 10k records at a time unless there are more than 10k records with the same timestamp. The migration progress relies on the archived timestamp.

Changing field types from string to reference

After the tables associated with an archive rule completely migrate, the ArchiveRefJob job executes. This job changes the sys_dictionary types of the archive table from string to reference.

Fixing node failures for RefCopyJob and ArchiveRefJob

If node failure occurs while these jobs are running, it leaves the status of the data migration in an improper state. If the *RefCopyJob* fails, it can leave a table in a migrating status. You can verify this condition by checking if rows in the sys_archive_ref_migration are stuck in **migrating** status for an extraordinary amount of time. Update the specific row status from **migrating** to **waiting** and the *RefCopyJob* continues the data migration on the table when the job runs again.

The node can also fail when the *ArchiveRefJob* terminates prematurely. Check if tables have fields that are reference fields and some that are still string type fields. The job might have stopped in the middle of changing the field types. You can resolve this condition by setting up a trigger job to execute in a background script, which starts the process over again:

```
GlideRecord trigger = new GlideRecord('sys_trigger');
trigger.initialize();
trigger.setValue('state', 0);
trigger.setValue('trigger_type', 0);
trigger.setValue('next_action', new GlideDateTime());
trigger.setValue('job_context', 'fcRuleId=' + ruleId);
trigger.setValue('name', 'Job Reference Migration' + ' Node - ' + new
 GlideClusterSynchronizer().getSystemID());
trigger.setValue('trigger_class', 'com.glide.db.auxiliary.job.ArchiveRefJob');
trigger.insert();
```

Applying database rotation techniques

Manage table size growth, archive data, and boost query performance by configuring database rotation.

Instance data grows quickly, and as these tables grow in size they require management. Database rotation preserves instance performance and averts risk associated with querying growing data sets utilizing three techniques. These techniques are based on the concept of managing large quantities of data by separating whole sets into individual tables. After this task is performed, each technique handles data in a different manner:

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- Table Rotation works by rotating among a small set of tables, and deleting and reusing the old tables for new data.
- Table Extension works by periodically starting a new table and allowing old tables to be easily archived and removed from the system.
- Table Sharding works by enabling records to be grouped in a single table by document ID.

Database Rotation

Functionality	Tables applied to

Table Rotation	`syslog`
	`sys_querystat`
	`ecc_queue`
	`ecc_event`
	`cmdb_metric`
	`sysevent`

Table Extension	`sys_email`

Activate database rotation

Learn how to activate database rotation.

Before you begin

Role required: admin

About this task

There are two database rotation plugins.

- The Database Rotations (com.snc.db.rotation) plugin activates Table Rotation and Table Extension without any tables automatically included.
- The Database Rotations Default Tables (com.snc.db.rotation_default_tables) plugin applies Table Rotation and Extension to specific tables.

> **Note:** Deployment of this plugin should be executed in partnership with a ServiceNow representative.

For new instances, database rotation is active by default. If you are upgrading from a previous version, users with the admin role can activate the Database Rotations (com.snc.db.rotation) plugin if it isn't already active.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

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

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

What to do next

Do not activate the Database Rotations Default Tables (com.snc.db.rotation_default_tables) plugin. Instead, specify the tables manually, after consulting a ServiceNow representative.

Table rotation

Optimize performance and manage data lifecycle by rotating tables, allowing older data to be systematically archived while maintaining system efficiency.

Table rotation preserves instance performance and averts risk associated with querying growing data sets. This feature uses the sys_created_on field to separate data sets into multiple tables based on date.

Functionality

The administrator specifies the time parameter (duration) of the process and the number of tables (rotations) within. After the rotation writes the last table in a rotation, the rotation overwrites the first table in the rotation.

Examples:

- The query `Records created between 2015/12/10 08:49 and 2015/12/09 07/34 where topic=SystemCommand` is translated to a SQL query on a single table, because the clause on **sys_created_on** targets a single shard.
- The query `Records updated between 2015/12/10 08:49 and 2015/12/09 07/34 where topic=SystemCommand`, or without a date range, needs to target all shards and therefore is translated as a union query on all shards.

Advantages

- Allows deletion of old data without affecting current data (for example, to drop or truncate a table).
- Ensures tables only grow to a reasonable size.
- Reduces working set of data when date is known for query.

Disadvantages

- Queries that do not use the table rotation date (for example, by using the **sys_created_on** field), force an inefficient union query to query time ranges that span multiple tables and can be extremely slow if the number of sub-tables is large.

  To improve performance, it is recommended that the query includes a window of created dates.

- Users can't dot-walk to a rotated table.

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You can use table rotation for sequentially-written tables or for insert-only tables. You cannot use table rotation for sys_import tables or tables that extend the Task [task] table.

Apply table rotation

Preserve instance performance by applying table rotation.

Before you begin

Determine the type of table you have and whether you can apply table rotation yourself.

- You can apply table rotation to custom tables that begin with a u_ prefix at your own discretion.
- Do not apply table rotation to scoped tables that begin with an x_ prefix without consulting ServiceNow or the third-party plugin developer first.
- Do not apply table rotation to out-of-the-box tables that begin with a sys_ prefix. Contact Customer Service and Support for help with these tables.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Table Rotations**.
2. Select **New**.
3. On the form, fill in the fields.

Table Rotation Group form

Field	Description
Name	The name of the table.
Type	The type of rotation. Select *`Rotation`*.
Rotations	The number of tables to maintain through the duration.
Duration	The days and hours during which data is written to each shard.
Clean base rotation	The date to clean (truncate) the base table.

4. Select **Submit**.

Result

A schedule is created and new data is written to one of the tables in the rotation group. The group includes the original table plus several additional tables.

Note: Deleting a rotation deletes the additional tables and all the data. Do not delete the rotation if you still need the data.

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Example: New table rotation group

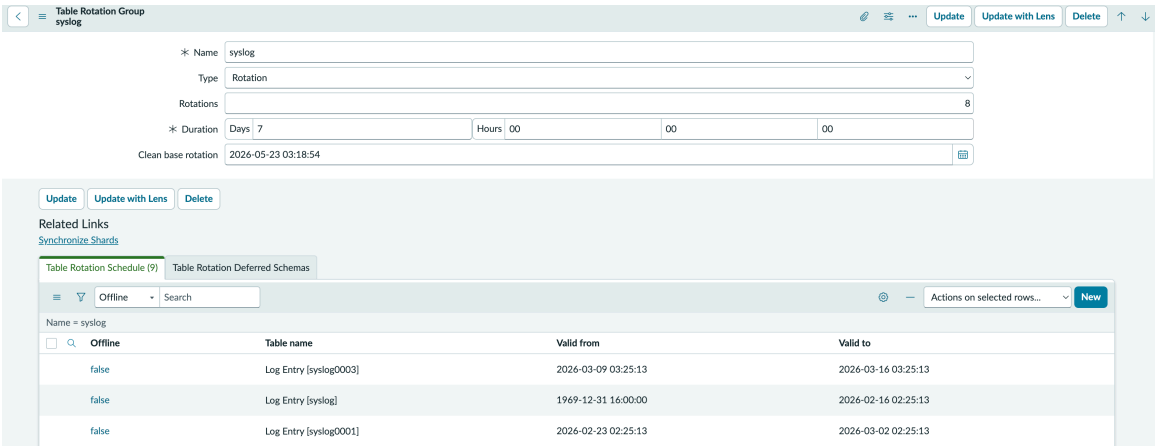


Table extension

Partition and preserve data sets for extended periods without overwriting.

Table extension is based around a base table and a number of shards. The shards are given a duration which determines the period of time across which data is written to each shard. Shards in a table extension don't rotate. Instead of the oldest shard being truncated and re-used, an extension creates new shards indefinitely. This way, data remains logically separated across shards due to creation date and no data is ever deleted.

An advantage of table extension is to partition data across tables. It also allows you to archive data while ensuring that tables stay reasonably-sized. The working set of data is reduced when a date is known for the query.

The disadvantage is that table extension requires a union query when you query for a time range that spans multiple tables. Union queries are less efficient than queries against a single table.

Consider using table extension when you have sequentially-written tables or insert-only type tables (there are exceptions to this parameter). Table extension is also useful in tables where data is needed for long periods of time.

Apply table extension

Preserve data sets using table extension.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Table Rotations**.
2. Select **New**.
3. On the form, fill in the fields.

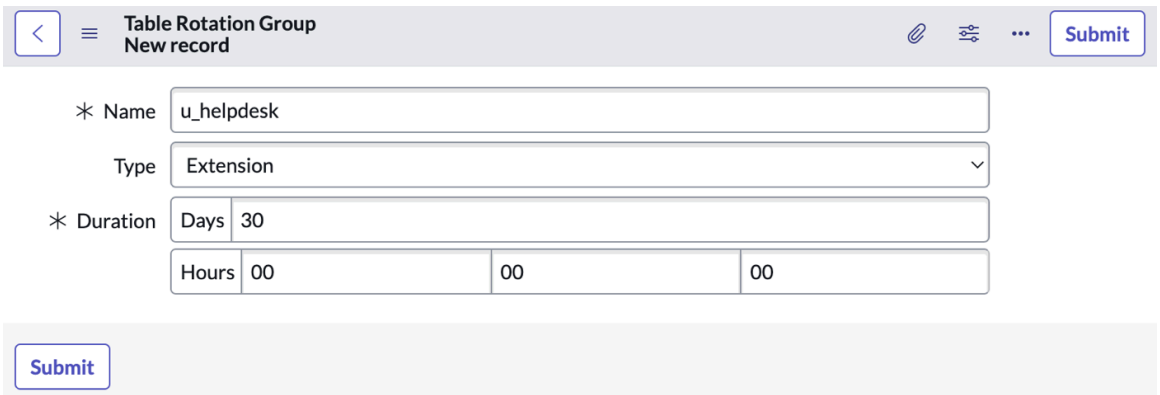
Table Rotation Group form

Field	Description
Name	The name of the table.
Type	The type of rotation.

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Field	Description
	Select *Extension*.
Duration	The days and hours during which data is written to each shard.

4. Select **Submit**.



Result
A schedule is created and new shards are added indefinitely to preserve data.

Note: Deleting a rotation deletes the additional tables and all the data. Do not delete the rotation if you still need the data.

Data Management reference

Reference topics provide information about system properties and data limits.

System properties

These system properties control the behavior of the Data Management capabilities.

Archive rule and destroy rule properties

Rules to prevent the archive process from consuming too many system resources have been automated. You can manually change the system behavior.

The archive process uses a producer and consumer model. Records are queued for archiving in the Archive Job Execution Chunks [sys_archive_run_chunk] table in batches.

- The ArchiveProducerJob creates chunks of sys_ids records that need to be archived. Each chunk contains records pertaining to a single archive rule. The maximum number of records in a chunk is specified by the property *glide.db.archive.chunk_size*. The maximum number of records for a single rule across all chunks is specified by *glide.db.archive.max.rule.records*.
- The producer starts up 4 (default) ArchiverJob consumers. The exact number of consumers is specified by *glide.db.archiving.max_consumer_workers*.
- Consumers read and process chunks of sys_ids. The number of chunks each consumer processes is specified by *glide.db.archive.max.batches*. The chunks processed by each consumer may be from different archive rules.
- Consumers repeat reading chunks of sys_ids until none remain or the limit of chunks a consumer can process (specified by *glide.db.archive.max.batches*) is reached, after which it shuts down and schedules another consumer.

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- If a chunk remains in the running state longer than what's specified in *glide.db.archive.chunk.max.process.time*, the system assumes that the consumer abruptly terminated, and it changes the chunk's status to error. This doesn't stop or end any running consumers.

Note: The archive and destroy properties listed in the table are not used if the Archive Job Execution Chunks [sys_archive_run_chunk] table is deleted.

To manually control how many records the archive rule and destroy processes at one interval, you can change these default settings by adding the following system properties.

Archive System Properties

Name	Description	Type	Default Value
glide.db.archive.chunk_size	Number of unique identifiers added to each record in the Archive Job Execution Chunks [sys_archive_run_chunk] table. The record is formatted as CSV values in the keys field of the Archive Job Execution Chunk (sys_archive_run_chunk.do) form.	Integer	1000
glide.db.archive.chunk.max.process.time	Number of milliseconds a record can remain in the Active state in the Archive Job Execution Chunks [sys_archive_run_chunk] table. The time is the difference between the system time and the value of the **Start** field in the Archive Job Execution Chunks [sys_archive_run_chunk] table.	Integer	600000
glide.db.archive.max.rule.records	Maximum number of records to batch per consumer, per rule.	Integer	10000
glide.db.archive.debug	Option that enables verbose logging when copying the column definitions	true | false	false

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Archive System Properties (continued)

Name	Description	Type	Default Value
	from the original table to the archive table.		
glide.db.archive.max.batches	Number of chunks, which are records from the Archive Job Execution Chunks [sys_archive_run_chunk] table, processed by a consumer before it shuts down and schedules another consumer.	Integer	10
glide.db.archiving.max_consumer_workers	The maximum number of concurrent consumers cluster-wide.	Integer	4

Table cleaner properties

To set table cleaner system properties, navigate to the System Properties [sys_properties] table and add the property.

System properties

Property	Description
Configure the number of days table cleaner must wait before attempting to reprocess a slow rule. `glide.db.tablecleaner.days_before_slow_rule_reattempt`	When a table cleaner rule has a query that takes longer than 30 seconds to complete, the entire table cleaner job is stopped. By default, table cleaner waits two days before including that rule in the table cleaner job again. You can change the default waiting period by adding this property. • Type: integer • Default value: 2
Configure a time limit for a table cleaner rule. `glide.db.tablecleaner.chunk_delete_max_time_spent`	Limits how long the cleaner spends trying to batch-delete records per rule during a single run. The value is given in seconds and defaults to 1200 (20 minutes), which means the table cleaner runs hourly for a maximum of 20 minutes. You can change the default time limit by adding this property.

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System properties (continued)

Property	Description
	• Type: integer • Default value: 1200

Archive table size limits

There are constraints to the size of the table you use to archive your instance data.

Limits on data archive tables

There is a limit on the size of an archive table you can create to store data. The limit is based on the size of the data, not the record count. If you receive an error that an archive table could not be created, it might be related to this size limitation.

Archive table size limits

Table Attribute	Size
Static row size limit	65535 bytes
Row size limit	8126 bytes
Columns	1000 for Oracle 1011 for others

Review the custom columns on the table being archived. Also review the custom fields on the tables the table extends from. Determine if those columns are no longer needed and are not being used by current customizations. If you identify unused columns, you can remove them. Doing this might reduce the row size of the table being archived. If that is unsuccessful, contact ServiceNow® Customer Service and Support to see what other alternatives are available.

Unique record identifier (sys_id)

A unique 32-character GUID (Globally Unique ID), called a Sys ID (sys_id) identifies each record in an instance.

When created within the application, sys_id values are unique. The ServiceNow AI Platform and database should manage all operations on sys_id values. The same sys_id value is never generated twice, which ensures that every record created in every table in every instance in the world has a unique identifier. If two records have the same sys_id value, it occurs as a result of the following situations:

- If a record with the sys_id was copied to the other at the database level outside of the ServiceNow AI Platform.
- If a record with the sys_id was copied using an Update Set or via XML, its sys_id is the same.

Note: A new record has a sys_id of -1, and once inserted, it is assigned a new sys_id. The sys_id is not meant to show as a field on a form or as a column in a list. To learn more, see the Users are unable to add the sys_id field to a form or list view [KB0690876] article in the Now Support Knowledge Base.

You can access the sys_id from a record URL or by using a script.

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- To access the sys_id from the URL, navigate to any record, right-click the header bar, and select **Copy URL**. The sys_id is inside of the URL, after the parameter sys_id=.
- To access the sys_id using a script, use one of the following options.
  - Find the sys_id of a record in a business rule (or any other server-side JavaScript) by dot-walking from the GlideRecord.

    ```
    var id = current.sys_id;
    ```

  - Find the sys_id of a record in client-side JavaScript using g_form.getUniqueValue().

    ```
    function onLoad() {
        var incSysid = g_form.getUniqueValue();
        alert(incSysid);
    }
    ```

Domain separation and Data Management

Domain separation is supported in Data 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

- There is business logic to ensure data goes into the proper domain for the application's service provider use cases.
- In the application, the user interface, cache keys, reporting, rollups, aggregations, and so on, all consider domain at run time.
- The owner of the instance needs to be able to set up the application to function normally across multiple tenants.

Use case: As a service provider when I use chat to respond to a tenant-customer's message, the client must be able to see my response.

Overview

Data archiving supports Domain separation for service providers. For example, incidents that belong to a domain keep their domain designation even after they are archived.

Related topics

Domain separation for service providers

Data Management roles

Data Management includes the following roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

Data Management tools admin [data_mgt_tools_admin]

The data_mgmt_tools_admin role is a granular admin role designed to provide more targeted permissions for data management tasks, reducing the need to grant full admin access.

Contains Roles

List of roles contained within the role.

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None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Granting data_mgmt_tools_admin alone is not sufficient for most data management operations. To enable full functionality for the data_mgmt_tools_admin role, you must also assign the following roles:

- delegated_developer: Required for access to tables, columns, and application scopes
- events_admin: Required to write trigger data for scheduling jobs
- context_rollback_executor: Required to roll back records that have been updated or deleted

These roles are not embedded within data_mgmt_tools_admin by default. You must assign these additional roles to the user explicitly.

After assigning these roles, also add roles that provide CRUD (Create, Read, Update, Delete) access to data tables (for example, itil and itil_admin). For example, adding the itil_admin enables an ITIL administrator to archive or update records in the associated ITIL tables (incident, problem, change, and so on) depending on configuration. If these roles aren't assigned, some or all data management functionality will be limited or unavailable.

Exporting data

Export data from the ServiceNow AI Platform in a variety of formats.

Key benefits

- Export an individual record to a PDF or XML file directly from a form. See Export data from a record.
- Export multiple records to a CSV, Excel, PDF, XML, or Google Sheets file directly from a list. See Export data from a list.
- Export multiple records from a table using the CSV, Excel, PDF, or XML processor in a URL with optional parameters. See Export directly from a URL.

You can also export data from your instance using the following options:

- Export multiple records from a table via a web services request. For example, you can create an external application or process to automate the retrieval of data from an instance via web services such as REST or SOAP. For more information, see Web services.
- Push all the data that you want to export to an external file by creating an export set. For more information, see Export sets.

Associated roles

You can export form data to PDF or XML, depending on your role.

- The PDF options are available to all users.
- The XML option is only available to users with the admin role.

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You can export records in a list to Excel, CSV, XML, JSON, PDF, or an Export Set depending on your role.

- The Excel, CSV, JSON, PDF, and Google Sheets options are available to all users.
- The XML option is only available to users with the admin role.
- The Export Set option is only available to users with the export_set_admin or admin role.

Export formats

Available export formats

Export format	Description
CSV	Export table records as a comma-separated value text file. Use this option to export the currently displayed fields in the list or form as a text file. Configure the list or form to add or remove fields from the export. When exported to CSV, dot-walked fields appear using their full field name, such as u_assignment_group.parent. **Note:** By default, ServiceNow exports all CSV files in Windows-1252 encoding. If you need to export translated data, set the *glide.export.csv.charset* system property to UTF-8.
Excel	Export table records as a Microsoft Excel spreadsheet. Use this option to export the currently displayed fields in the list or form as an Excel spreadsheet. Configure the list or form to add or remove fields from the export.
XML	Export table records as an XML document. Use this option to export all data from a table or all data for a particular record. The XML file has an XML element for each column in the table. See Exporting and importing data via XML. **Note:** Image field data is not preserved when exporting to XML.
PDF	Export table records as a Portable Document Format file. Use this option to export the currently displayed fields in the list or form as a PDF file. Configure the list or form to add or remove fields from the export. **Note:** The PDF export processor prints data from left-to-right, which can produce rendering errors when displaying right-to-left language data.
JSON	Export the table records as a JSON string. The JSON file has an element for each column in the table.
Google Sheets	Export table records directly to cloud-based spreadsheets in Google Drive without going through extra steps. The exported file retains the structure of the original table, including rows and columns. You can view, edit and share these Google Sheets online in real time.

Column headers

The file type you export to, such as CSV or PDF, determines how column headers are exported. In general, formats meant for human consumption such as PDF display the column label, whereas formats meant for machine use, such as CSV, use the database field_name.

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Header format by file type

File type	Column header format
Excel	Label
PDF	Label
CSV	field_name
XML	field_name
JSON	field_name

Export data from a record

Export a record to PDF or XML.

Before you begin
Role required: none for exporting to PDF. Exporting to XML requires the admin role.

About this task
When exporting to PDF, any field hidden by UI scripts (UI policies, UI actions, client scripts) and any fields visible from the current view are exported. When exporting to XML, all fields are exported, regardless of the view.

A PDF is generated only if the form has been submitted. An unsubmitted form generates an empty page.

Procedure
1. Navigate to the record that you want to export.
2. Select the Additional actions menu ( ).
3. Select an export option.

   Note: For export to PDF, when the accessibility property is enabled, users will get a pop up when they export to PDF where they can specify whether to create an accessible PDF or not. For more information, see PDF generation and accessibility.

   - To export the form data to PDF in portrait mode, select **Export** > **PDF** > **Portrait**, select **Export**.
   - To export the form data to PDF in landscape mode, select **Export** > **PDF** > **Landscape**, select **Export**.
   - To export all fields in the record to XML, select **Export** > **XML (This Record)**.

   When exporting to XML, the system prompts you to save the file, or the browser automatically saves the file to the downloads folder specified in the browser preferences.

Export data from a list

Export a list of records to a variety of file formats.

Before you begin
Role required: none. Exporting to XML requires the admin role.

About this task
Note the following important details:

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- Data exported from a list may be different from what a user sees in the list view. This generally happens when a table has ACLs that are dependent on the user's current session. To avoid blocking user activity on the browser, list export is executed from a background thread and doesn't have access to user session data.
- To export records in an embedded list, export the record containing the list. See Export data from a record.
- To control how line breaks appear in exported CSV data, use the glide.csv.export.line_break system property. See glide.csv.export.line_break.
- To remove unwanted HTML tags from list data, see the blog Rendering HTML in Exported Lists by a ServiceNow employee in the ServiceNow Community.
- The platform provides a default upper limit for data exports. See Export limits.

Procedure

1. Navigate to the list of records that you want to export.
2. Select and hold (or right-click) any column header in the list.
3. Select an export option.

   Note: For export to PDF, when the accessibility property is enabled, users will get a pop up when they export to PDF where they can specify whether to create an accessible PDF or not. For more information, see PDF generation and accessibility.

   - To export the list to Excel, select **Export** > **Excel (.xlsx)**.
   - To export the list to CSV, select **Export** > **CSV**.
   - To export the list to XML, select **Export** > **XML**
   - To export the list to JSON, select **Export** > **JSON**.
   - To export the list to PDF in portrait mode, select **Export** > **PDF** > **Portrait** > **Export**
   - To export the list to PDF in landscape mode, select **Export** > **PDF** > **Landscape** > **Export**
   - To export the list and the associated form for each record in portrait mode, select **Export** > **PDF** > **Detailed PortraitExport**.
   - To export the list and the associated form for each record in landscape mode, select **Export** > **PDF** > **Details Landscape** > **Export**.
   - To export the list to a file using an export set, select **Export** > **Export Set**.
   - To export the list to a Google spreadsheet, select **Export** > **Google Sheets**.

   For details on using export sets, see Export sets.
4. When the export completes, select **Download**.

Export directly from a URL

Dynamically export data from a script or web service by building a URL query.

Before you begin

Role required: None

Note: ServiceNow enforces basic authentication for direct URL access. The data extracted from the URL contains only the fields to which the currently authenticated user has read access.

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About this task

You can use URL queries to generate filtered lists of records programmatically before exporting them. URL queries are useful for scripts that generate a list of records or when no user can manually add the filter from the UI.

You must be familiar with the ServiceNow table and column names to export data directly from the URL. See Navigate to a record or a module using a URL.

You can control whether to export the display value or raw value of fields and the field label or field name for headers using query parameters or system properties.

- For details on using query parameters, see Query parameters for display value and header.
- For details on using system properties, see System properties for display value and header.

Query parameters, if present, override system properties.

Procedure

1. Specify the instance URL.
   For example:

```
https://<instance name>.service-now.com/
```

2. Specify the table form or list to export.
   For example:

```
incident_list.do
```

3. Specify the export format processor to use for the export.
   You can specify CSV, XLS, JSON, XLSX, or XML. For example:

```
?CSV
```

   Note: The XML processor in a URL export doesn't export attachments or journal fields. To export attachments and journal fields like the **Work Notes** or **Additional Comments** fields, export the records from a list by using the **Export** > **XML** option in the context menu.

4. **Optional:** Query for specific records by adding the *sysparm_query* parameter.
   The required syntax is `sysparm_query=[column name][operator][value]`. For example:

```
https://<instance
 name>.service-now.com/incident_list.do?XML&sysparm_query=prior
ity=1
```

   Note: All queries use a column name, an operator, and a value. See Condition Builder for a list of available operators.

5. **Optional:** Sort the records by column name using the *sysparm_orderby* parameter.
   The required syntax is `sysparm_orderby=[column name]`. For example:

```
https://<instance
 name>.service-now.com/incident_list.do?XML&sysparm_query=prior
ity=1&sysparm_orderby=assigned_to
```

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Note: You can sort by only one column using *sysparm_orderby*. To sort by multiple columns, use multiple orderby entries. For example:

```
sysparm_query=ORDERBYassigned_to^ORDERBYpriority
```

6. **Optional:** Export fields from a specific view using the *sysparm_view* parameter. The required syntax is `sysparm_view=[view name]`. For example:

```
https://<instance
 name>.service-now.com/incident.do?CSV&sysparm_view=ess
```

This URL exports incident fields visible from the Self Service (ess) view.

- By default, exporting data from a list exports only the fields that are visible from the current view. If you want to export fields from another list view, you can switch views from the UI. See View management.
- If you're exporting CSV or Excel data and don't specify a view, the export uses the default list view.
- If you're exporting XML data, all fields are exported by default unless you specify a particular view.

7. **Optional:** Export specific fields from the table using the *sysparm_fields* parameter. The required syntax is `sysparm_fields=[field1],[field2]`. For example:

```
https://<instance
 name>.service-now.com/incident_list.do?CSV&sysparm_fields=sys_
id,number
```

8. **Optional:** Export all fields from the table, including the sys_id, using the *sysparm_default_export_fields* parameter. The required syntax is `sysparm_default_export_fields=all`. For example:

```
https://<instance
 name>.service-now.com/incident_list.do?CSV&sysparm_default_exp
ort_fields=all
```

The *sysparm_default_export_fields* parameter has no effect on XML exports unless you include the *sysparm_view* parameter to specify a non-default view.

Example: Sample URLs

URL	Description
https://<instance name>.service-now.com/incident_list.do?CSV	Export all incidents to a comma-separated value text file.
https://<instance name>.service-now.com/incident_list.do?CSV&sysparm_query=sys_id%3E%3Db4aedb520a0a0b1001af10e278657d27	Export a particular incident to a comma-separated value text file.
https://<instance name>.service-now.com/incident_list.do?CSV&sysparm_orderby=sys_id	Export all incidents to a comma-separated value text file and sort the list by sys_id.
https://<instance name>.service-now.com/incident_list.do?XML&sysparm_query=priority=1&sysparm_orderby=assigned_to	Export a list of all priority 1 incidents to an XML file and

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URL	Description
	sort the list by **Assigned to** field.

Call URL export programmatically

Dynamically export data from a script or web service by calling a URL export from any programming language.

Before you begin

Role required: none

About this task

The following procedure includes code samples that demonstrate calling a URL export in C# for a .Net framework call:

Procedure

1. Add the following Imports:

```
using System.Net;
using System.IO;
```

2. Call the Download method:

```
static void Main(string[] args)

     {
        // Call to DownloadFile method supplying the URL and
 location to save CSV file locally
        int read =
 DownloadFile("https://
<instance>.service-now.com/incident_list.do?CSV&sysparm_query=p
riority=1&sysparm_orderby=assigned_to",
                     "c:\\test\\incident.csv");
    }
```

3. Create a Download method as follows:

```
public static int DownloadFile(String url,
                                       String localFilename)
    {
        // Function will return the number of bytes processed
        // to the caller. Initialize to 0 here.
        int bytesProcessed = 0;
        // Assign values to these objects here so that they can
        // be referenced in the finally block
        Stream remoteStream = null;
        Stream localStream = null;
        WebResponse response = null;
        // Use a try/catch/finally block as both the WebRequest
 and Stream
        // classes throw exceptions upon error
        try
        {
            // Create a request for the specified remote file
 name
```

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```
            WebRequest request = WebRequest.Create(url);
            // Create the credentials required for Basic
Authentication
            System.Net.ICredentials cred = new
System.Net.NetworkCredential("user_name", "password");
            // Add the credentials to the request
            request.Credentials = cred;
            if (request != null)
            {
                // Send the request to the server and retrieve
the
                // WebResponse object
                response = request.GetResponse();
                if (response != null)
                {
                    // Once the WebResponse object has been
retrieved,
                    // get the stream object associated with
the response's data
                    remoteStream =
response.GetResponseStream();
                    // Create the local file
                    localStream = File.Create(localFilename);
                    // Allocate a 1k buffer
                    byte[] buffer = new byte[1024];
                    int bytesRead;
                    // Simple do/while loop to read from stream
until
                    // no bytes are returned
                    do
                    {
                        // Read data (up to 1k) from the stream
                        bytesRead = remoteStream.Read(buffer,
0, buffer.Length);
                        // Write the data to the local file
                        localStream.Write(buffer, 0,
bytesRead);
                        // Increment total bytes processed
                        bytesProcessed += bytesRead;
                    } while (bytesRead > 0);
                }
            }
        }
        catch (Exception e)
        {
            Console.WriteLine(e.Message);
        }
        finally
        {
            // Close the response and streams objects here
            // to make sure they're closed even if an exception
            // is thrown at some point
            if (response != null) response.Close();
            if (remoteStream != null) remoteStream.Close();
            if (localStream != null) localStream.Close();
        }
        // Return total bytes processed to caller.
```

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```
        return bytesProcessed;
    }
```

Break up a large export

If the number of records to be exported exceeds the actual export limit, you may want to break the export into smaller increments that do not place a significant performance load on the platform.

Before you begin
Role required: none

Procedure

1. Create a filtered list of records that you want to export by following the steps in Export directly from a URL.
2. Write down the number of records returned.
3. If the record number is higher than the defined threshold, issue a *sysparm* query for the first 10,000 records using the following syntax:

   ```
   https://<instance
    name>.service-now.com/syslog_list.do?XML&sysparm_orderby=sys_i
   d&sysparm_record_count=10000
   ```

   This exports the first 10,000 records in order, sorted by the *sys_id* number.

4. Find the next record in order, such as 10,001.
   You can find the next Sys ID value by creating a database view on the table and adding the sys_id column to the view. You don't need to specify a where clause. After you create the database view, view the records and their Sys ID values by selecting **Try it**. You can sort by the sys_id column and enter 10,001 to skip to that row.
5. Right-click the row and copy the sys_id of the next record you want to export.
6. Access the next series of records with a *greater than or equal to* query run against the *sys_id* of record 10,001.

   The following example shows a query that uses a sys_id of b4aedb520a0a0b1001af10e278657d27. Use the syntax shown in this query to export the next set of records.

   ```
   https://<instance
    name>.service-now.com/syslog_list.do?XML&sysparm_query=sys
   _id%3E
   %3Db4aedb520a0a0b1001af10e278657d27&sysparm_orderby=sys_id&sysp
   arm_record_count=10000
   ```

   Note: URL queries use typical percent encoding. In this example, the greater than sign (>) is encoded as %3E and the equal sign (=) is encoded as %3D.

7. **Optional:** Continue issuing this query, using the starting sys_id for the next set of records until you have exported all the necessary records.

Exporting and importing data via XML

Migrate data from one instance to another by exporting and importing XML files.

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Key benefits

- Directly export records as XML from any list or form.
- Transfer all fields and values exactly from one instance to another.
- Perform unscheduled data imports as needed.
- Save time by not building import sets or transform maps.

Use cases

- Export smaller batches of records on an infrequent basis by exporting and importing data via XML.
- Export and import data using XML files for records created in a development instance that must be migrated with an update set as part of a migration procedure. Examples of these records include lookup tables, unit test records, and other information required to support production. Typically, this information is only migrated once and the overhead of an import set is not justified.

Important considerations

- The XML export preserves all record field values including system generated field values such as:
  - Sys ID
  - Creation date
  - Update date
- Image field data is not preserved when exporting to XML.
- The XML import directly inserts records into the target table. During the import the system:
  - Ignores any business rules that normally apply to the table.
  - Does not provide any opportunity to transform incoming data.
  - Automatically matches a reference field's display value to the local Sys ID for some tables.
- Data export and import via XML is helpful for copying records from one system to another but does not remove the need to know the relationships between tables. If you need validate or transform data or reconcile the sys ID values of reference fields, use an XML import set instead. See Export sets.

Export data to XML

Export data from a source instance to an XML file.

Before you begin
Role required: admin

Procedure

1. Log in to the source instance (the instance that should send the data).
2. Export a record or a list of records to XML.

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Option	Description
Export a record to XML	**a.** Navigate to the record that you want to ex port. **b.** Select the Additional actions menu (). **c.** Select **Export** > **XML This Record)**.
Export a list of records to XML	**a.** Navigate to the list of records that you want to export. **b.** Select and hold (or right-click) any column header in the list. **c.** Select **Export** > **XML**. **d.** When the export completes, select **Down load**.

What to do next
Import data from XML

Import data from XML

After you have successfully exported data from the source instance to XML, import the XML file directly to the target instance.

Before you begin
Role required: admin

About this task
Importing XML doesn't trigger business rules or update the instance cache.

Procedure

1. Log in to the target instance (the instance that should receive the data).
2. Navigate to any list in the system.
   Any list can be used because the XML file contains the destination table name for the records.
3. Select and hold (or right-click) any column title and select **Import XML**.
4. In the Import XML form, select **Choose File** and select the previously exported XML file.
5. Select **Upload**.

Result
Data is imported into the target instance.

Trouble?
If the data doesn't import, navigate to **System Definition** > **Tables & Columns** and verify that the table from which the data was exported also exists in the target instance. If the table doesn't exist, you can move it using an update set. For details on using update sets, see Get started with update sets.

Automatic matching of display values

During the import of XML records, the system attempts to match some reference field display values to a local sys_id value.

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If the system finds an existing record with a matching display value on the local instance, the import uses the sys_id of the existing record rather than the sys_id of the imported record.

For example, suppose you export an incident record that is assigned to the user John Smith. In the exported XML file there is an entry such as:

```
<incident>
 ...
 <assigned_to display_value="John
 Smith">7712173d2ba80200c5244f74b4da159a</assigned_to>
 ...
</incident>
```

This user already exists on the target instance but has a different sys_id value such as:

```
<sys_user><name>John Smith</name>
 ...
 <sys_id>18cab8de2be80200c5244f74b4da15f7</sys_id>
 ...
</sys_user>
```

Since the display value matches an existing record, the system uses the local instance's existing sys_id value for the reference field such as:

```
<incident>
 ...
 <assigned_to display_value="John
 Smith">18cab8de2be80200c5244f74b4da15f7</assigned_to>
 ...
</incident>
```

The system can match display values for the following tables.

- User [sys_user]
- Group [sys_user_group]
- Role [sys_user_role]
- Group Roles [sys_group_has_role]

Exporting currency fields to Excel

Exporting currency fields to Excel applies Account formatting and can be configured to convert all values to US dollars or to export values in the user's session currency.

When exporting currency fields to Microsoft Excel, the cells containing currency data use Accounting formatting. This formatting allows you to perform numeric operations on those values as well as view the currency symbol, such as $ or €.

When exporting currency fields the type of currency, such as $ or €, is preserved by default. The conversion rates for non-USD currencies are stored on the Exchange Rates [fx_rate] table.

You can choose to export all currency values either in US dollars or in the user's session currency.

- To export all currency values in US dollars, set the property *glide.excel.fixed_currency_usd* to **true**.
- To export all currency values in the user's session currency, set the property *glide.excel.convert_to_user_currency* to **true**.

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If both *glide.excel.fixed_currency_usd* and *glide.excel.convert_to_user_currency* are set to **true**, *glide.excel.fixed_currency_usd* overrides *glide.excel.convert_to_user_currency*.

Currency export behavior and symbols

The behavior of the currency field in Excel depends on the **Symbol** of the currency.

- When the currency symbol is $, the Excel cell type is set as **Currency**.
- When the currency symbol is 1 character (such as ¥ or ¢) or more than 1 character (such as KR), the Excel cell type is set to **Custom**.

Related topics

Currency administration

Single-currency mode

Control default currency field configuration and use in an instance

Enable export debug logging

When the property *glide.export.debug* is true, the instance logs export processing including database query time and the time taken to write data to the file.

When the property *glide.export.debug* is *true*, the instance logs export processing including database query time and the time taken to write data to the file. Debug logs are indicated by the text *Export API*. Prolonged use of this property can affect performance, so it is best to use it while debugging export processing, and then set the property back to *false*.

```
7/17/14 15:53:48 (500) EB39A310EB022100C46AC2EEF106FED9 Maximum
 record count for this instance is: 10000: , request is for: 0
 Cap the Record count to Maximum Record Count
07/17/14 15:53:48 (522) EB39A310EB022100C46AC2EEF106FED9 Export
 API - ExportProcessor : Processing EXCEL export request,
 ExportParameters:TableName=incident, Query=active=true,
 Limit=10000, SortBy=null
07/17/14 15:53:48 (527) EB39A310EB022100C46AC2EEF106FED9 Export
 API - ExportProcessor : Export using background thread
07/17/14 15:53:48 (528) EB39A310EB022100C46AC2EEF106FED9
 #748 /poll_processor.do -- total transaction time: 0:00:03.357,
 total wait time: 0:00:00.000, session wait: 0:00:00.000,
 semaphore wait: 0:00:00.000, source: 0:0:0:0:0:0:0:1%0
07/17/14 15:53:48 (550) SYSTEM Enabling elevated role:
 security_admin
07/17/14 15:53:48 (588) SYSTEM Export API - ExcelExporter : 29
 rows retrieved from database duration_milliseconds=2
07/17/14 15:53:49 (534) NONE New transaction
 EB39A310EB022100C46AC2EEF106FED9 #751 /poll_processor.do
07/17/14 15:53:49 (544) EB39A310EB022100C46AC2EEF106FED9
 #751 /poll_processor.do Parameters ------------------------
    sys_action=poll
    sysparm_processor=poll_processor
    job_id=a61a2314eb022100c46ac2eef106fe0a
07/17/14 15:53:49 (547) EB39A310EB022100C46AC2EEF106FED9
 #751 /poll_processor.do -- total transaction time: 0:00:00.013,
 total wait time: 0:00:00.000, session wait: 0:00:00.000,
 semaphore wait: 0:00:00.000, source: 0:0:0:0:0:0:0:1%0
```

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```
07/17/14 15:53:49 (740) SYSTEM Export API - ExcelExporter : Rows
 written to file duration_milliseconds=1150
```

Data export reference

Reference topics provide details on exporting data.

Default values for column headers and column values

Default values are used for column headers and column values, unless overridden by query parameters, Export Set fields, or system properties.

The following table describes the default values used if you do not use query parameters, Export Set fields, or system properties to control output format.

Output format	Column headers	Column values
CSV	**Use field name**	**Use raw value** if *glide.export.csv.raw.value* set, otherwise **Use display value**.
Excel	**Use field label**	**Use display label**
JSON	N/A	**Use raw value**
XLSX	**Use field label**	**Use display value**
XML	N/A	**Use raw value**

Field types affected by export controls

Different field types are affected differently by export controls.

The following table describes how different field types are affected by export controls.

Field type	Display value	Raw value
Date/Time	CSV: User timezone date/time with user format.	CSV: UTC timezone date/time with system format.
	Excel/XLSX: User timezone date/time with user format if *glide.excel.use_user_date_format* set, otherwise system format.	Excel/XLSX: UTC timezone date/time with user format if *glide.excel.use_user_date_format* set, otherwise system format.
Date	Date with user format.	Date with system format.
	Excel/XLSX: Date with user format if *glide.excel.use_user_date_format* set, otherwise system format.	Excel/XLSX: Date with user format if *glide.excel.use_user_date_format* set, otherwise system format.
Time	CSV: Time with user format.	CSV: UTC time, assuming 1970-01-01 as the date with system format.
	Excel/XLSX: User timezone time with user format if *glide.excel.use_user_date_format* set, otherwise system format.	Excel/XLSX: UTC time, assuming 1970-01-01 as the date with user format if *glide.excel.use_user_date_format* set, otherwise system format.
References	Display value of the referenced record.	Sys_id of the referenced record.

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Field type	Display value	Raw value
Choice	Label of the selected choice.	Value of the selected choice.
Currency	Value with the currency symbol.	USD value without the currency symbol.
Price (calculated)	Value with the currency symbol.	USD value without the currency symbol.
Price (fixed)	Value with the currency symbol.	USD value without the currency symbol.

System properties for display value and header

Use system properties to export the display value or raw value of fields and the field label or field name for headers.

System properties control the output for the CSV, Excel, JSON, and XLSX file formats. System properties define default behavior if overrides such as query parameters are not specified. System properties apply to exported files downloaded with URL parameters, exported from list view, or generated by export sets.

The following table describes each of the system properties that control display values and headers.

Format	Property	Default Value
CSV	*glide.export.csv.raw.value*	**false** **Note:** Setting the property as false also crops the value's string to 32000 characters.
	glide.export.csv.column_header_label	**false**
Excel	*glide.export.excel.display_value*	**true**
	glide.export.excel.column_header_label	**true**
JSON	*glide.json.return_displayValue*	**false**
XLSX	*glide.export.xlsx.display_value*	**true**
	glide.export.xlsx.column_header_label	**true**

Example: CSV

Example:

glide.export.csv.raw.value = **false** (default)

glide.export.csv.column_header_label = **false** (default)

number	opened_at	short_description	caller_id	state	assignment_group	assigned_to
INC0000060	12/12/16 7:19	Unable to connect to email	Joe Employee	Closed	Network	David Loo
INC0000059	8/10/16 9:14	Unable to access team file share	Rick Berzle	New		
INC0000058	8/10/16 9:37	Performance problems with email	Bow Ruggeri	New		
INC0000057	8/10/16 9:14	Performance problems with wifi	Bertie Luby	New		
INC0000055	9/20/17 21:47	SAP Sales app is not accessible	Carol Coughlin	In Progress	Service Desk	Beth Anglin

Example:

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glide.export.csv.raw.value = **true**

glide.export.csv.column_header_label = **true**

Number	Opened	Short description	Caller	State	Assignment group	Assigned to
INC0000060	12/12/16 15:19	Unable to connect to email	681ccaf9c0a8016400b98a06818d57c7	7	287ebd7da9fe198100f92cc8d1d2154e	5137153cc611227c000bbd1bd8cd2007
INC0000059	8/10/16 16:14	Unable to access team file share	5137153cc611227c000bbd1bd8cd2006	1		
INC0000058	8/10/16 16:37	Performance problems with email	f298d2d2c611227b0106c6be7f154bc8	1		
INC0000057	8/10/16 16:14	Performance problems with wifi	7a82abf03710200044e0bfc8bcbe5d27	1		
INC0000055	9/21/17 4:47	SAP Sales app is not accessible	46c1293aa9fe1981000dc753e75ebeee	2	d625dccec0a8016700a222a0f7900d06	46d44a23a9fe19810012d100cca80666

Example: Excel

Example:

glide.export.excel.display_value = **true** (default)

glide.export.excel.column_header_label = **true** (default)

Number	Opened	Short description	Caller	State	Assignment	Assigned to
INC0000060	2016-12-12 07:19:57	Unable to connect to email	Joe Employee	Closed	Network	David Loo
INC0000059	2016-08-10 09:14:29	Unable to access team file share	Rick Berzle	New		
INC0000058	2016-08-10 09:37:45	Performance problems with email	Bow Ruggeri	New		
INC0000057	2016-08-10 09:14:59	Performance problems with wifi	Bertie Luby	New		
INC0000055	2017-09-20 21:47:23	SAP Sales app is not accessible	Carol Coughlin	In Progress	Service Desk	Beth Anglin

Example:

glide.export.excel.display_value = **false**

glide.export.excel.column_header_label = **false**

number	opened_at	short_description	caller_id	state	assignment_group	assigned_to
INC0000060	2016-12-12 15:19:57	Unable to connect to email	681ccaf9c0a8016400b98a06818d57c7	7	287ebd7da9fe198100f92cc8d1d2154e	5137153cc611227c000bbd1bd8cd2007
INC0000059	2016-08-10 16:14:29	Unable to access team file share	5137153cc611227c000bbd1bd8cd2006	1		
INC0000058	2016-08-10 16:37:45	Performance problems with email	f298d2d2c611227b0106c6be7f154bc8	1		
INC0000057	2016-08-10 16:14:59	Performance problems with wifi	7a82abf03710200044e0bfc8bcbe5d27	1		
INC0000055	2017-09-21 04:47:23	SAP Sales app is not accessible	46c1293aa9fe1981000dc753e75ebeee	2	d625dccec0a8016700a222a0f7900d06	46d44a23a9fe19810012d100cca80666

Example: JSON

Example:

glide.json.return_displayValue = **false** (default)


```
{"records":
[{"parent":"","made_sla":"false","caused_by":"","watch_list":"","upon_reject":"","sys_upda
ted_on":"2017-10-11
20:16:07","child_incidents":"","hold_reason":"","approval_history":"","number":"INC0000001
","resolved_by":"6816f79cc0a8016401c5a33be04be441","sys_updated_by":"admin","opened_by":"6
81ccaf9c0a8016400b98a06818d57c7","user_input":"","sys_created_on":"2016-02-10
```


Example:

glide.json.return_displayValue = **true**


```
{"records":
[{"parent":"","made_sla":"false","caused_by":"","watch_list":"","upon_reject":null,"sys_up
dated_on":"2017-10-11
13:16:07","child_incidents":"","hold_reason":"","approval_history":"","number":"INC0000001
","resolved_by":"System Administrator","sys_updated_by":"admin","opened_by":"Joe
Employee","user_input":"","sys_created_on":"2016-02-10
```


Example: XLSX

Example:

glide.export.xlsx.display_value = **true** (default)

glide.export.xlsx.column_header_label = **true** (default)

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Number	Opened	Short description	Caller	State	Assignment group	Assigned to
INC0000060	2016-12-12 07:19:57	Unable to connect to email	Joe Employee	Closed	Network	David Loo
INC0000059	2016-08-10 09:14:29	Unable to access team file share	Rick Berzle	New		
INC0000058	2016-08-10 09:37:45	Performance problems with email	Bow Ruggeri	New		
INC0000057	2016-08-10 09:14:59	Performance problems with wifi	Bertie Luby	New		
INC0000055	2017-09-20 21:47:23	SAP Sales app is not accessible	Carol Coughlin	In Progress	Service Desk	Beth Anglin

Example:

glide.export.xlsx.display_value = **false**

glide.export.xlsx.column_header_label = **false**

number	opened_at	short_description	caller_id	state	assignment_group	assigned_to
INC0000060	2016-12-12 15:19:57	Unable to connect to email	681ccaf9c0a8016400b98a06818d57c7	7	287ebd7da9fe198100f92cc8d1d2154e	5137153cc611227c000bbd1bd8cd2007
INC0000059	2016-08-10 16:14:29	Unable to access team file share	5137153cc611227c000bbd1bd8cd2006	1		
INC0000058	2016-08-10 16:37:45	Performance problems with email	f298d2d2c611227b0106c6be7f154bc8	1		
INC0000057	2016-08-10 16:14:59	Performance problems with wifi	7a82abf03710200044e0bfc8bcbe5d27	1		
INC0000055	2017-09-21 04:47:23	SAP Sales app is not accessible	46c1293aa9fe1981000dc753e75ebeee	2	d625dccec0a8016700a222a0f7900d06	46d44a23a9fe19810012d100cca80666

Query parameters for display value and header

Use query parameters to export the display value or raw value of fields and the field label or field name for headers.

Query parameters control the output for CSV, XLS, JSON, XLSX, and XML file formats. Query parameters, if present, override system properties.

The following table describes each of the query parameters that control display values and headers.

Query parameter	Description
sysparm_display_value	Exports the display value (**true**) or raw value (**false**) for the CSV, XLS, XLSX, and XML file formats. See Field types affected by export controls for more information.
displayvalue	Exports the display value (**true**), raw value (**false**), or both (**All**) for the JSON file format. See Field types affected by export controls for more information.
sysparm_export_column_header_label	Exports the CSV, XLS, and XLSX file formats with the field label (**true**) or field name (**false**).

Example: sysparm_display_value

Example: *sysparm_display_value* **= true**

Number	Opened	Short description	Caller	State	Assignment group	Assigned to
INC0000060	2016-12-12 07:19:57	Unable to connect to email	Joe Employee	Closed	Network	David Loo
INC0000059	2016-08-10 09:14:29	Unable to access team file share	Rick Berzle	New		
INC0000058	2016-08-10 09:37:45	Performance problems with email	Bow Ruggeri	New		
INC0000057	2016-08-10 09:14:59	Performance problems with wifi	Bertie Luby	New		
INC0000055	2017-09-20 21:47:23	SAP Sales app is not accessible	Carol Coughlin	In Progress	Service Desk	Beth Anglin

Example: *sysparm_display_value* **= false**

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Number	Opened	Short description	Caller	State	Assignment group	Assigned to
INC0000060	2016-12-12 15:19:57	Unable to connect to email	681ccaf9c0a8016400b98a06818d57c7	7	287ebd7da9fe198100f92cc8d1d2154e	5137153cc611227c000bbd1bd8cd2007
INC0000059	2016-08-10 16:14:29	Unable to access team file share	5137153cc611227c000bbd1bd8cd2006	1		
INC0000058	2016-08-10 16:37:45	Performance problems with email	f298d2d2c611227b0106c6be7f154bc8	1		
INC0000057	2016-08-10 16:14:59	Performance problems with wifi	7a82abf03710200044e0bfc8bcbe5d27	1		
INC0000055	2017-09-21 04:47:23	SAP Sales app is not accessible	46c1293aa9fe1981000dc753e75ebeee	2	d625dccec0a8016700a222a0f7900d06	46d44a23a9fe19810012d100cca80666

Example: displayvalue

Example: *displayvalue* = true


```
{
  "records": [
    {
      "parent": "",
      "made_sla": "false",
      "caused_by": "",
      "watch_list": "",
      "upon_reject": null,
      "sys_updated_on": "2017-10-11 13:16:07",
      "child_incidents": "",
      "hold_reason": "",
      "approval_history": "",
      "number": "INC0000001",
      "resolved_by": "System Administrator",
      "sys_updated_by": "admin",
      "opened_by": "Joe Employee",
```


Example: *displayvalue* = false


```
{
  "records": [
    {
      "parent": "",
      "made_sla": "false",
      "caused_by": "",
      "watch_list": "",
      "upon_reject": "",
      "sys_updated_on": "2017-10-11 20:16:07",
      "child_incidents": "",
      "hold_reason": "",
      "approval_history": "",
      "number": "INC0000001",
      "resolved_by": "6816f79cc0a8016401c5a33be04be441",
      "sys_updated_by": "admin",
      "opened_by": "681ccaf9c0a8016400b98a06818d57c7",
```


Example: *displayvalue* = All


```
{
  "records": [
    {
      "parent": "",
      "dv_incident_state": "Closed",
      "caused_by": "",
      "watch_list": "",
      "dv_sys_mod_count": "21",
      "dv_opened_by": "Joe Employee",
      "dv_sys_id": "9c573169c611228700193229fff72400",
      "upon_reject": "",
      "sys_updated_on": "2017-10-11 20:16:07",
      "approval_history": "",
      "number": "INC0000001",
      "dv_work_end": "",
      "dv_made_sla": "false",
```


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Example: sysparm_export_column_header_label

Example: *sysparm_export_column_header_label* **= true**

Number	Opened	Short description	Caller	State	Assignment group	Assigned to
INC0000060	2016-12-12 07:19:57	Unable to connect to email	Joe Employee	Closed	Network	David Loo
INC0000059	2016-08-10 09:14:29	Unable to access team file share	Rick Berzle	New		
INC0000058	2016-08-10 09:37:45	Performance problems with email	Bow Ruggeri	New		
INC0000057	2016-08-10 09:14:59	Performance problems with wifi	Bertie Luby	New		
INC0000055	2017-09-20 21:47:23	SAP Sales app is not accessible	Carol Coughlin	In Progress	Service Desk	Beth Anglin

Example: *sysparm_export_column_header_label* **= false**

number	opened_at	short_description	caller_id	state	assignment_group	assigned_to
INC0000060	2016-12-12 07:19:57	Unable to connect to email	Joe Employee	Closed	Network	David Loo
INC0000059	2016-08-10 09:14:29	Unable to access team file share	Rick Berzle	New		
INC0000058	2016-08-10 09:37:45	Performance problems with email	Bow Ruggeri	New		
INC0000057	2016-08-10 09:14:59	Performance problems with wifi	Bertie Luby	New		
INC0000055	2017-09-20 21:47:23	SAP Sales app is not accessible	Carol Coughlin	In Progress	Service Desk	Beth Anglin

Export limits

The platform provides a default upper limit for data exports.

The purpose of the upper limit is to avoid creating performance issues when a table is excessively large. If you must export more records than the threshold permits, Break up a large export into separate manageable chunks.

Export limit properties

You can set the number of records to return during an export using the *sysparm_record_count* URL parameter.

However, the system analyzes the following settings to determine whether an export limit should be applied.

1. First, the platform checks the property that defines the format-specific export limit. Each format can have a different limit. Although this property can be set to any value, exceeding the default export limit can impact system performance. You may want to set the property at or below the default limit and have users Break up a large export to export large amounts of data.
2. If the format-specific property is not set, the system checks the property for the general export limit. This property can also be set to any value, but exceeding the default export limit can impact system performance.
3. If both the format-specific export limit and the general export limit property aren't set, the system enforces the default export limit.

Important: To set these properties, navigate to **System Properties** > **Import Export**.

Default export limit

Format	Format-specific export limit	General export limit	Default export limit
XML	glide.xml.export.limit	glide.ui.export.limit	10,000
CSV	glide.csv.export.limit	glide.ui.export.limit	10,000
EXCEL (XLSX)	glide.xlsx.export.limit	glide.ui.export.limit	10,000

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Default export limit (continued)

Format	Format-specific export limit	General export limit	Default export limit
EXCEL (XLS)	glide.excel.export.limit	glide.ui.export.limit	10,000
EXCEL (XLSX)	glide.xlsx.max_cells	N/A	500,000
EXCEL (XLS)	glide.excel.max_cells	N/A	500,000
PDF	glide.pdf.max_detail_pages **Note:** The number of rows can be set from 0 to 250. If no value is specified, the default is 250. If a value greater than 250 is specified, the default value of 250 is used.	250	250
PDF	glide.pdf.max_rows **Note:** The number of rows can be set from 0 to 5,000. If no value is specified, the default is 1,000. If a value greater than 5,000 is specified, the default value of 1,000 is used.	N/A	1,000
PDF	glide.pdf.max_columns **Note:** Only 25 header labels fit on a page.	N/A	25
JSON	glide.json.export.limit	glide.ui.export.limit	10,000

A warning threshold property called *glide.ui.export.warn.threshold* controls how the records are exported. When you export enough records from a list to exceed the threshold, a choice dialog appears. You can choose to wait for the export to complete or email the exported records as an attachment. The warning threshold can be changed in the system property. The email attachment must not exceed the maximum Email size limits.

Export limit examples

Example	Property	Breaking export limits
Exporting to CSV	• glide.csv.export.limit = 20,000 • glide.ui.export.limit = 10,000 • com.glide.processors.XMLProcessor.max_record_count = 20,000 • Default export limit for CSV = 10,000	If you export 30,000 records, the number of records returned from the database is 20,000. The number of records specified for export exceeds the value set in the *glide.csv.export.limit* property.

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Export limit examples (continued)

Example	Property	Breaking export limits
Exporting to Excel (XLSX)	• glide.xlsx.export.limit = no entry • glide.ui.export.limit = no entry • Default export limit for Excel (XLSX) = 10,000	If you export 30,000 records, the number of records returned from the database is 10,000. The number of records specified for export exceeds the default export limit for Excel.
Exporting to PDF	• glide.pdf.max_rows = 1,000 • Default export limit for PDF = 1,000 • Maximum export limit for PDF = 5,000	If you export 5,000 records, the number of records returned from the database is 1,000. The number of records returned is limited because the number of records specified for export exceeds the default value in the *glide.pdf.max_rows* property.

Excel export threshold

Excel exports are intended for relatively small exports with fewer than 500,000 cells. CSV can handle larger exports.

If an exported spreadsheet has more than 500,000 cells, the export process stops. You receive the Excel file at that point. The following message displays in the bottom row: `Export stopped due to excessive size. Use CSV for a complete export.`

The Excel export cell threshold is customizable using the *glide.xlsx.max_cells* integer property (or *glide.excel.max_cells* if using XLS).

Note: Increasing this threshold may cause a memory issue in your instance. The threshold is set at an appropriate level to prevent resource issues.

The export puts the information into the Excel document with 32,000 rows per spreadsheet. You can customize this limit by setting the following properties:

Rows per sheet limit

Property	Maximum export limits
glide.export.xls.max.rows.per.sheet	64,000
glide.export.xlsx.max.rows.per.sheet	1,000,000

Exporting your table records to Google Sheets

Integrate your ServiceNow instance and Google Cloud Console so that you can export table records directly to the cloud-based Google Sheets in Google Drive. With this integration, you can view, share, and work on data outside the platform by using spreadsheets.

In the Google Cloud Console, enable the Google Sheets API to authenticate the requests from your ServiceNow instance through an OAuth application.

Note: OAuth enables you to grant access to your data and files to third parties without sharing usernames or passwords.

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Before you can do the integration, you must set up the OAuth application so that you can authenticate the requests from your ServiceNow instance. For more information on how to do the setup, see Set up the OAuth application on the Google Sheets API at https://console.developers.google.com/.

Next, you register the Google Drive application in your ServiceNow instance to enable OAuth authorization for exporting your table records directly to Google Sheets.

Then, you configure the connection and credential aliases to authenticate the integration between your ServiceNow instance and Google Drive.

Note: Aliases help keep credentials separate from the integration logic, making it easier and safer to manage sensitive information.

The connection and credentials record contains the information that the Google Sheets API needs to authenticate the requests from your ServiceNow instance. It includes the user credentials and connection type, which are required for your instance to communicate with Google Cloud.

Set up the OAuth application on the Google Sheets API

Set up the OAuth application on the Google Sheets API so that you can authenticate requests from your ServiceNow instance to access Google Sheets.

Before you begin

- Create a business account on https://console.developers.google.com/.
- Create a domain and an email address that is associated with the domain. For example, www.mydomain.com and jane-admin@mydomain.com.

  Note: You can register only one email address per domain in Google Workspace.

- Role required: admin

About this task

Setting up the OAuth application on the Google Sheets API enables you to access and update spreadsheets securely from your instance. For example, if you're exporting incident records from the ServiceNow instance to a Google Sheet, OAuth ensures that the system has permission to create or update the sheet on your behalf, without needing you to log in manually each time.

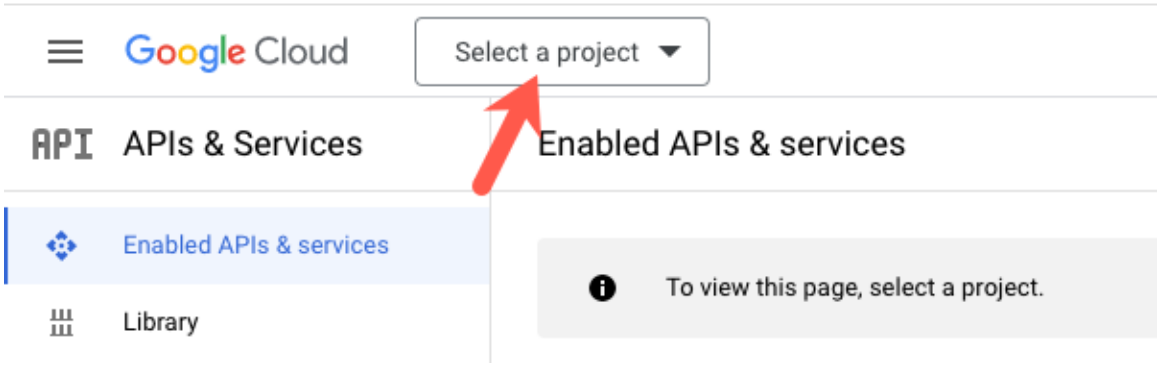
Procedure

1. Navigate to Google Workspace and set up a project.
   The project includes the details of the OAuth application and the API permissions, if applicable.

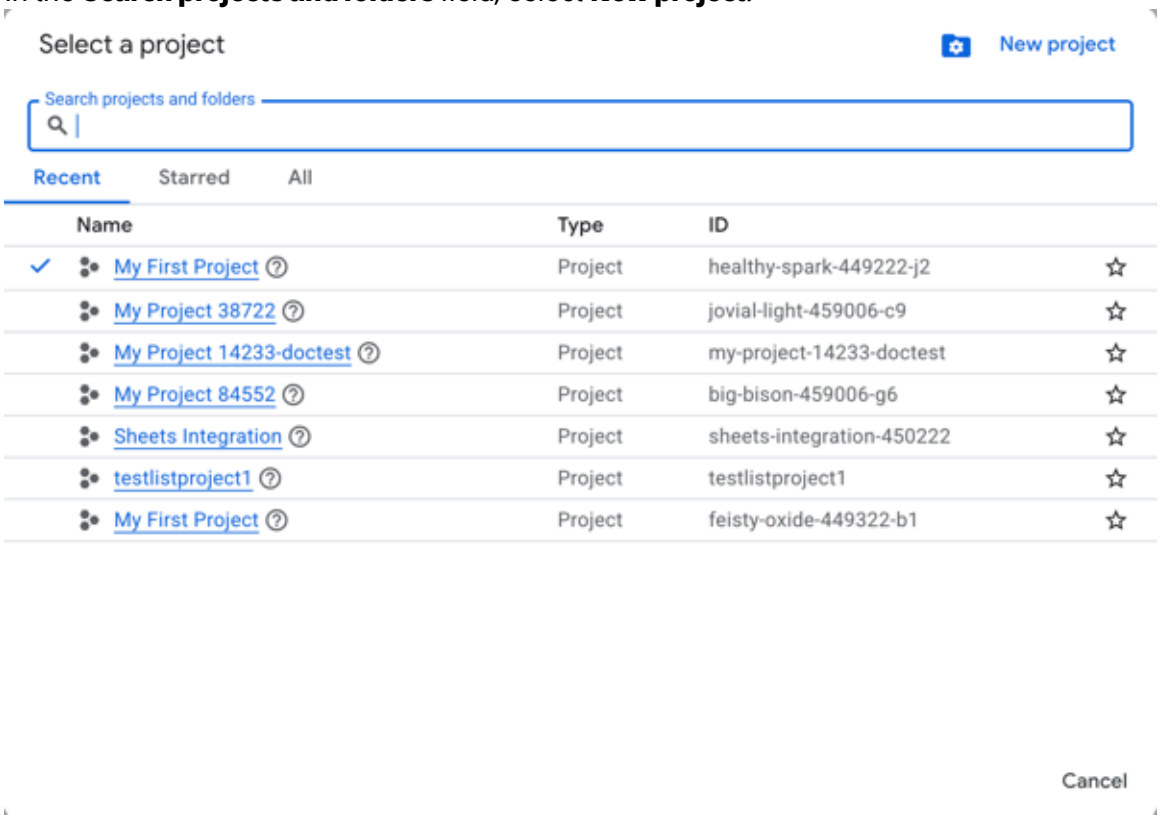
   a. Log in to https://console.developers.google.com/ with the same domain email ID and password as mentioned in the prerequisites.

   b. In the Google Cloud Console, select **Select a project**.

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c. In the **Search projects and folders** field, select **New project**.



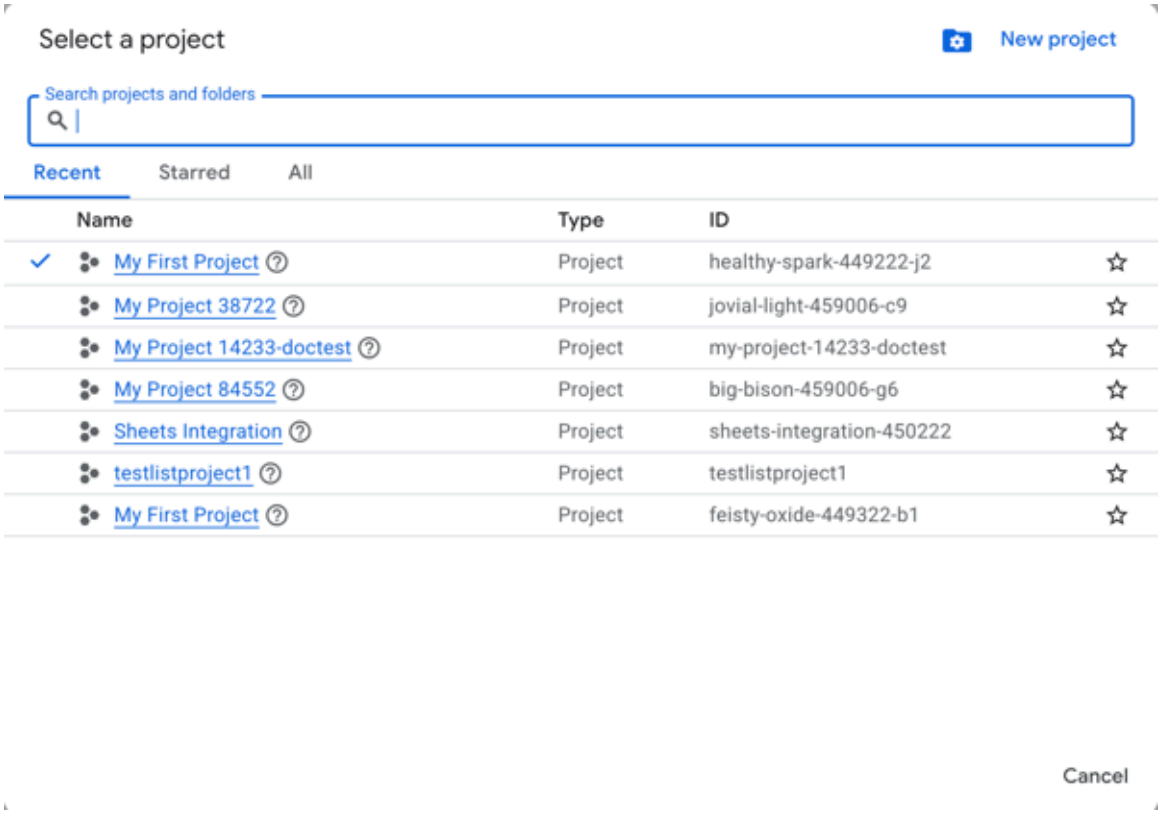
d. In the **Project name*** field, enter a unique name for the project.

e. In the **Location*** field, select **Browse** and then select an organization.

f. Select **Create**.
The project is created and appears in the Notifications box.

2. Enable the Google Sheets API.

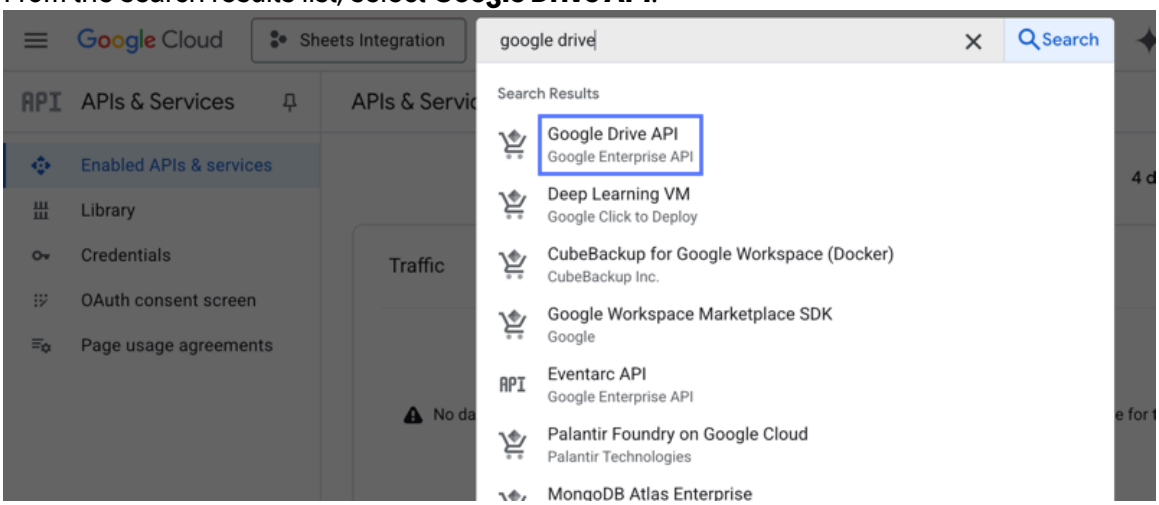
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a. Open the project that you created in step 1.
The API and services dashboard page opens for the selected project.

b. In the search box, enter `Google Drive`.

c. From the search results list, select **Google Drive API**.

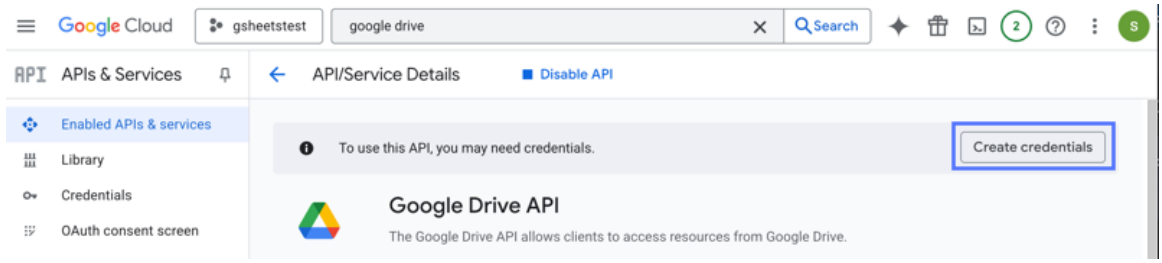


d. Select **Enable**.
The Google Drive APIs are enabled on your project.

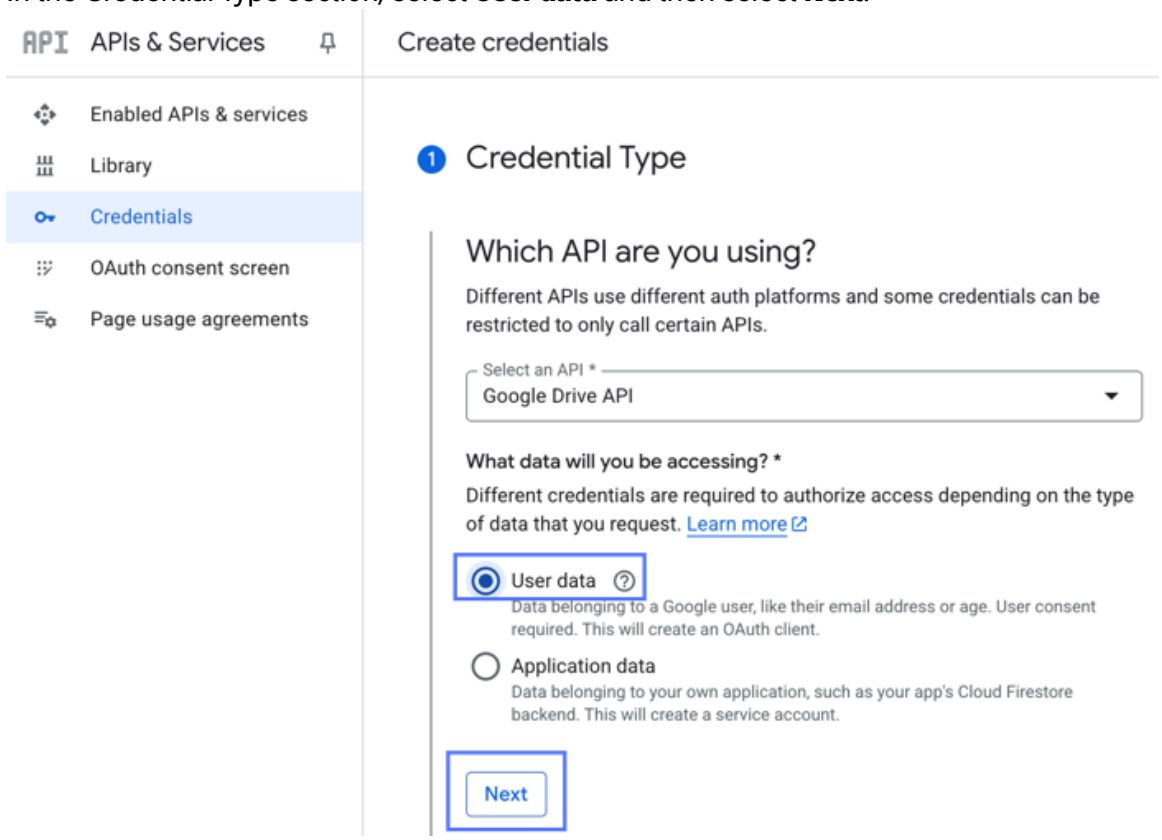
3. Create the OAuth app and credentials.

a. In the Enabled APIs & services dashboard, select **Create credentials**.
The Create credentials page is displayed.

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b. In the Credential Type section, select **User data** and then select **Next**.



c. On the form in the OAuth Consent, fill in the fields.

OAuth Consent Screen form

Field	Description
App name	Name of the OAuth app.
User support email	Email at which users can send queries to you about their consent.
Logo file to upload	Logo representing the OAuth app.
Developer contact information	Developer to contact for changes to the project.

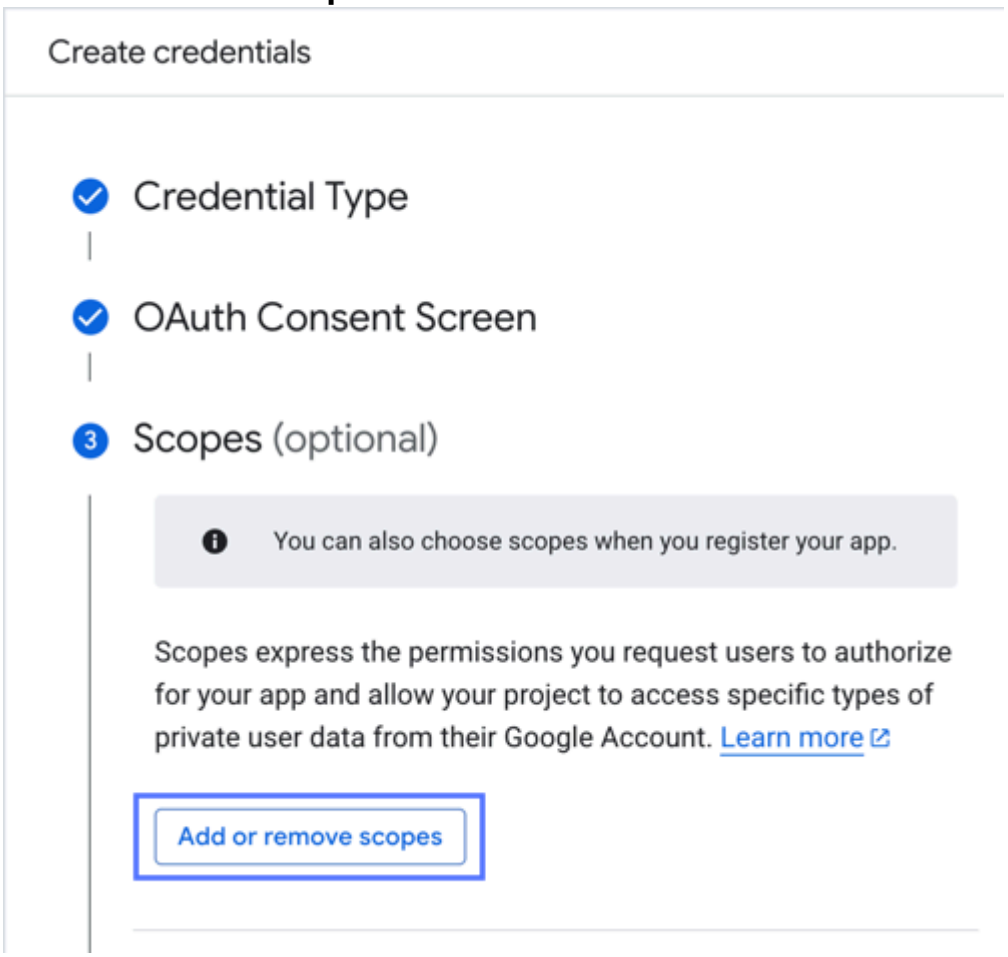
d. Select **Save and continue**.

4. In the Scopes section, define the API scopes.

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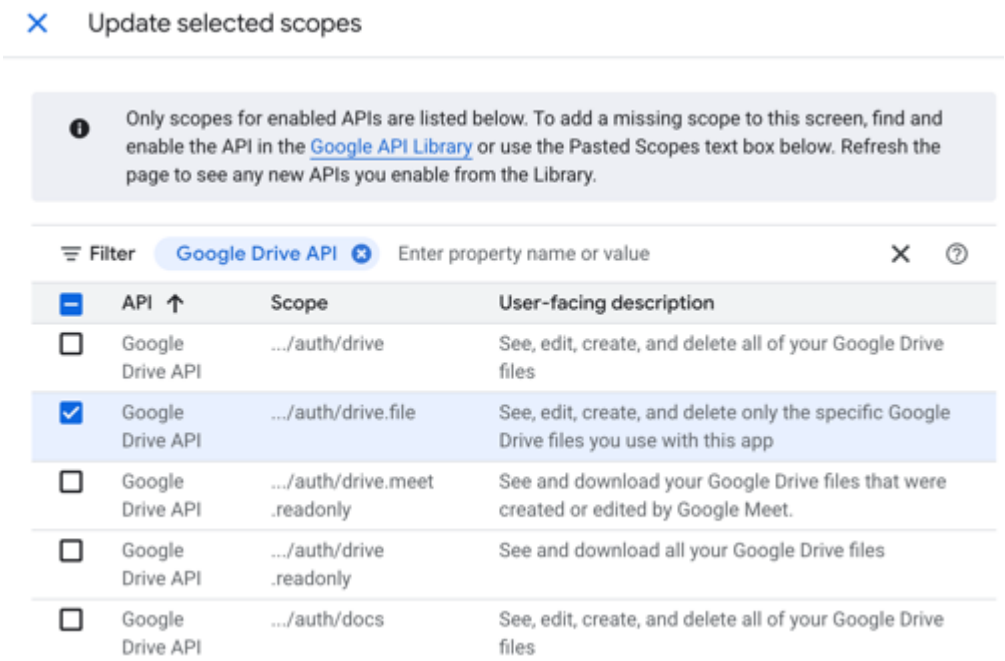
API scopes enable you to select specific APIs. For example, the /auth/spreadsheets scope enables you to create, edit, or remove spreadsheets.

a. Select **Add or remove scopes**.



b. In the Update selected scopes list, search for Google Drive API, and then select the `.../auth/drive.file` scope.

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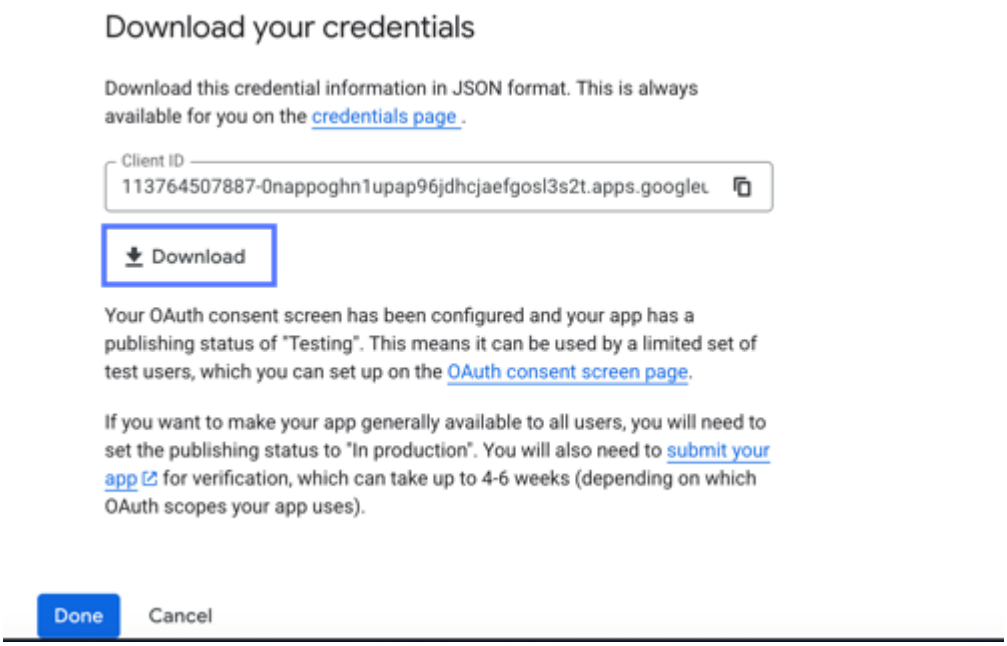
c. Select **Update** and then select **Save and continue**.

The API scope is selected.

5. In the OAuth Client ID section, create the OAuth client ID.
   a. From the Application type* list, select **Web application**.
   b. In the **Name*** field, enter a unique name for the OAuth client.
6. On the Authorized redirect URIs heading, select **+ ADD URI**.
7. In the **URI** field, enter the redirect URI in the following format: `https://instance.service-now.com/oauth_redirect.do`.
8. Select **Create**.
   The OAuth details are generated in a JSON file.

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Tip: Select **DOWNLOAD** to download the JSON file for later reference.



9. Select **Done**.
   The OAuth application on Google Workspace is created.
10. Configure the audience allowed to access Google Sheets API.
    For example, your audience is the ServiceNow instance.
    a. In the APIs & Services dashboard menu, select **OAuth consent screen** and then select **Audience**.
    b. In the User type section, select **External** and add the user that you want to give access to the instance.

Result
The OAuth application is enabled to authenticate the access of Google Sheets from your instance.

What to do next
To enable OAuth authorization for exporting table records to Google Sheets, register the Google Drive application in your instance. For more information, see Create an application registry for Google Sheets on a ServiceNow instance.

Create an application registry for Google Sheets on a ServiceNow instance

Register the Google Drive application in your ServiceNow instance to enable OAuth authorization for exporting table records directly to Google Sheets.

Before you begin
Role required: admin

About this task
An Application Registry is a record that defines how your ServiceNow instance can connect to an external application, such as Google Sheets, using OAuth.

It includes the following information:

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- Client ID and Client Secret: Credentials for the external application.
- Authorization and Token URLs: Web addresses used to log in and get access.
- Redirect URL: Where the OAuth server sends the user after authorization.
- Scopes and Profiles: Define what areas of ServiceNow the external application is allowed to access.

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **New**.
3. From the list of OAuth application types, select#**Connect to a third party OAuth Provider**.
4. On the form, fill in the fields.

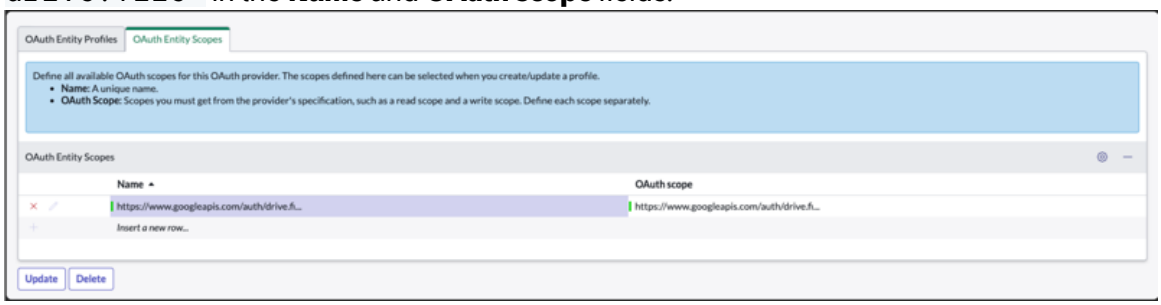
Application Registries form

Field	Description
Name	Name to uniquely identify the record. For example, Sheets Integration.
Client ID	Client ID of the Google Drive application that you registered in Google Workspace. You can find the Google Client ID in the downloaded OAuth credentials JSON file. For more information, see Set up the OAuth application on the Google Sheets API.
Client Secret	Client secret that was generated when you registered the app in Google API Console. You can find the Google client secret in the downloaded OAuth credentials JSON file. For more information, see Set up the OAuth application on the Google Sheets API.
OAuth API Script	Script to customize the request and response. For example, OAuthGoogleSheetExport.
Default Grant Type	Grant type that was used to establish the token.
Authorization URL	URL that the OAuth application at Google provides to seek authorization to access the Google resource server. The URL format that you enter includes the tenant ID of your app: `https://accounts.google.com/oauth2/v2.0/{API version}/authorize`. You can find the Authorization URL in the downloaded OAuth credentials JSON file. For more information, see Set up the OAuth application on the Google Sheets API.
Token URL	URL to obtain the access token. The format that you enter for the URL is `{yourgoogleaccount}.com/oauth2/{API version}/token`.
Redirect URL	Redirect URL that includes the instance URL with the format `https://<your-instance>.service-now.com/oauth_redirect.do`.

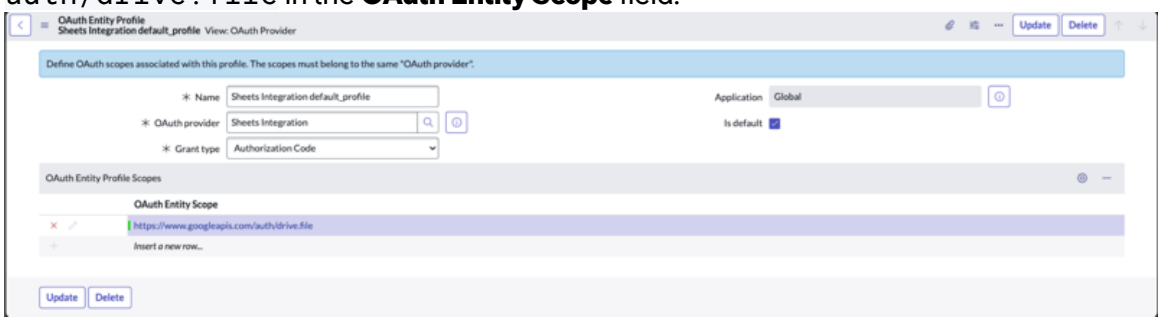
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Field	Description
	Update the <instanceURL> value with your instance URL.
Token Revocation URL	URL that is provided by the OAuth authorization server that enables a client application to request the revocation or cancellation of access tokens and refresh tokens that were previously issued. The format is https://{yourgoogleaccount}.com/{API version}/oauth2/revoke

5. Select **Submit**.
6. On the Application Registries page, search and select the application registry that you created.
7. In the OAuth Entity Scopes related list, enter `https://www.googleapis.com/auth/drive.file` in the **Name** and **OAuth scope** fields.



8. In the OAuth Entity Profiles related list, select **Sheets Integration default_profile**.
9. In the OAuth Entity Profile Scopes related list, enter `https://www.googleapis.com/auth/drive.file` in the **OAuth Entity Scope** field.



10. Select **Update**.

Configure ServiceNow connection and credential aliases for Google sheets

Configure connection and credential aliases to authenticate an integration between your ServiceNow instance and Google Drive.

Before you begin

Role required: admin

About this task

The connection and credential aliases record is used to manage the secure connection of your ServiceNow instance with Google Sheets. A connection alias tells the system how to connect to Google Sheets. It defines the endpoint URL of the Google Drive API and tells the system who is connecting. For example, it stores the authentication details, such as the OAuth token and API keys.

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Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.

   a. Select **New**.

   b. On the form, fill in the fields.

Connection & Credential Aliases form

Field	Description
Name	Name of the alias. An alias can only contain alphanumeric characters and underscores. For example, Sheets_Alias. During an upgrade, the tag in the credential record migrates to a Connection & Credential alias. If the credential tag contains special characters other than alphanumeric characters and underscores, it preserves the tag name after the upgrade. You can still use this migrated alias, but you can't update the alias until you change the name to meet the naming restrictions.
ID	Unique identifier for the Connections & Credentials alias, based on the format `scope_name.alias_name`. ▪ If the scope is Global, the ID is the alias name. For example, if you create a Sheets alias in the global scope, it sets the ID to `sheets`. ▪ If you create a workday alias in the HR app scope, it sets the ID to `x_hr_app.sheets`.
Parent Alias	Connection and credential alias record of the Google Drive.
Type	Type that is either Credential or Connection and Credential. The default is Connection and Credential.
Connection type	Name of the connection type, either Basic, HTTP, JDBC, JMS, or Kafka. The default is HTTP.
Support Multiple Active Connections	Option that indicates whether the alias supports multiple active connections. You can add connections by using the Connections [sys_connection] table. You can associate the connections to the alias by using the Connections related list.
Default Retry Policy	Retry policy for the alias. For more information, see Retry policy.

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Field	Description
Configuration Template	Configuration template to use to create a connection and credential record.

c. Select **Submit**.

A connection and credential alias record is created.

2. Create an OAuth 2.0 credential to use in the connection and credential alias record.

a. Navigate to **All** > **Connections & Credentials** > **Credentials**.

b. Select **New**.

c. From the list of credential types, select **OAuth 2.0 Credentials**.

d. On the form, fill in the fields.

OAuth 2.0 Credentials form

Field	Description
Name	Unique name of the credential to differentiate it from the default credentials that are provided by the application. For example, Sheet credentials.
Active	Option to activate the credential.
OAuth Entity Profile	Default OAuth entity profile that was generated when you performed the application registry in Create an application registry for Google Sheets on a ServiceNow instance.
Applies to	Option to specify if the credential record is applicable for all MID Servers, or a specific MID Server. If specific, add the MID Servers as necessary.
Order	Order (sequence) in which Discovery tries this credential as it attempts to log on to devices. The smaller the number means that the higher in the list this credential appears.

e. Select **Submit**.
The OAuth 2.0 credential record is created.

f. Open the OAuth 2.0 credential record from the Credentials list.

g. From the Integration Type list, select **Personal**.

3. Create a connection record for your alias.

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a. Navigate to **All** > **Connections & Credentials** > **Connections**.

b. Select **New**.

c. From the list of connection types, select **HTTP(s) Connection**.

d. On the form, fill in the fields.

HTTP(s) Connection form

Field	Description
Name	Name of the connection. This field must be unique on the table. For example, Sheets credentials.
Credential	Credential to use with this connection. For example, select the OAuth 2.0 credential record created in step 2.
Connection alias	Connection alias that resolves your connection and credentials at run time. Only one connection is active per connection alias at any one time.
Active	Option to make this connection active.
Domain	Domain that the action or activity runs in.
URL builder	Option to use the system to build a URL that is based on the inputs, such as host, port, and base path.
Connection URL	URL that the MID Server uses to connect to the specified weblink. If URL builder is not selected, enter the connection URL in this field. For example, `https://www.googleapis.com/upload/drive/v3/files?uploadType=multipart&fields=id`.
Mutual authentication	Option to enable authentication by using a protocol profile. **Note:** If the mutual authentication is selected, a connection URL is built: Protocol + :// + host:port +URL. If a mutual authentication isn't selected, a connection URL is built: Protocol profile + :// + host:port +URL. This field appears only when **URL builder** is selected.

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Field	Description
Use MID server	Option to define the fields in the Advanced MID Server Configuration section. If a successful connection doesn't occur during this time, the connection request times out. Leave this field empty to use the system default connection timeout value. **Note:** Avoid setting the **Connection Timeout** value to zero, because doing so may cause a stale connection.
Connection timeout	Number of seconds that the system waits for a successful host connection.

e. Select **Submit**.

The connection record is created.

4. Copy the sys_id of the alias record.

Note: This sys_id is required when setting up the **export to sheets alias** system property.

a. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.

b. From the Connection and Credentials Aliases list, select and open the alias that you created in step 1.

c. Right-click the header of the alias page and select **Copy sys_id**.

5. Configure the **export to sheets alias** system property.

a. In the navigation filter, enter `sys_properties.list`
The entire list of properties in the System Properties [sys_properties] table appears.

b. Select **New**.

c. On the form, fill in the fields.

System Property form

Field	Description
Name	Name of the property that you're creating. In this case, `glide.oauth.export.to.sheets.alias`.
Description	Brief, descriptive phrase that describes the function of the property.
Type	Data type. In this case, `string`.
Value	Value for the property. In this case, paste the sys_id that you copied from the alias record in step 4.

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d. Select **Submit.**

Note: If the **Ignore cache** check box is selected, the system flushes the server cache when the parameter is changed.

Result
The connection and credential alias record is configured to connect your ServiceNow instance with Google Sheets.

Roll back and delete recovery

With rollback contexts, you can roll back certain actions such as a patch upgrade, plugin activation, and background script executions, and you can recover record deletions and all related changes.

The roll back and delete recovery features are available on instances that use MySQL and MariaDB databases. Instances that use Oracle databases only support roll back. Instances that use SQL Server do not support roll back or delete recovery.

Roll back and delete recovery database support

Database type	Roll back	Delete recovery
MySQL	yes	yes
MariaDB	yes	yes
Oracle	yes	no

Deleted Records module

This module works on records in audited tables. Recovery of cascaded deleted records must be done within seven days of the record deletion. After seven days, only data records and references on tables that audit deletions can be recovered, which is the same functionality as prior releases.

To find this module, navigate to **System Definition** > **Deleted Records**.

Delete Recovery module

This module works for any deleted record. This recovery must be done within seven days of the record deletion.

To find this module, navigate to **Rollback & Recovery** > **Delete Recovery**.

Script Execution History module

This module works on scripts executed using the **Scripts - Background** module. This history only includes seven days of script executions.

To find this module, navigate to **Rollback & Recovery** > **Script Execution History**.

Rollback contexts

Rollback contexts contain everything necessary to roll back a software upgrade or plugin activation. They include deleted records, patch updates, Scripts-Background script executions,

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database actions, and plugin activations. A rollback context is created for each patch upgrade within a family, and each plugin activation, provided that the plugin supports rollback contexts.

To use rollback contexts, activate the Restore Deleted Records (com.snc.undelete) and Delete Recovery (com.glide.delete_recovery) plugins.

Rollbacks are typically performed on pre-production instances where functionality must be restored before you can find the root cause of a problem in the upgrade. Rolling back deletes data, which can often make it hard if not impossible to discover the problem that made the rollback necessary.

A rollback context is created when:

- `GlideRecord.delete()` or `GlideRecord.deleteMultiple()` delete records.
- There is a patch upgrade.
- You activate a plugin that supports rollback contexts.
- A script executes using the **Scripts-Background** module, and rollback was enabled by selecting the **Record for Rollback?** check box.

Rollbacks do not impact other database activities. If a database activity modifies a record that is part of a rollback context, the rollback does not affect that record.

Because rollback contexts contain a significant amount of data, rollback contexts are deleted after 10 days. Therefore, rollbacks must occur within 10 days of the latest upgrade or plugin activation. If you need to retain a rollback context for more than 10 days, you can do so by adding a system property. See Rollback context properties.

Note: Do not roll back a rollback context until checking with Customer Service and Support. A roll back deletes data and may remove evidence of the upgrade or activation issue preventing debugging of the problem.

To find this module, navigate to **Rollback & Recovery** > **Rollback Contexts**.

If any of the following operations occur during a rollback, a rollback context is not created:

- Tables or columns are dropped from the schema.

  Note: Index drops are okay.

- A table is truncated.
- A table or column is renamed.
- A column is re-parented or promoted.
- A column type changes.
- A column width is decreased.

The rollback process on Now Support does the following:

- Updates the reported WAR to the rolled-back version and the assigned WAR remains set to the version before the rollback.
- Sets the property *glide.war.no_upgrade* on the instance is set to the version before the rollback.
- Displays the message, "Desired war matches reverted war specified by property [*glide.war.no_upgrade*]. Upgrade script will NOT run".
- Changes the state to **Expired** and the rollback purges all stored data.

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Roll back patch upgrades or plugin activations

Use the **Rollback Contexts** module to roll back patch upgrades and plugin activations.

Before you begin

Role required: admin

Review this information and requirements before performing rollback:

- Rolling back is possible only between patches in the same software release. For example, Rolling back is possible from Orlando patch 2 to patch 1, but not from Orlando to New York.
- The rollback must be done within 10 days of the most recent upgrade or plugin activation. If you need to retain a rollback context for more than 10 days, you can do so by adding a system property. See Rollback context properties.
- You can only roll back to the previous version.

  For example, rolling back from patch 3 to patch 1 requires two rollbacks.
- You must have the Restore Deleted Records (com.snc.undelete) and Delete Recovery (com.glide.delete_recovery) plugins activated.
- You can only roll back one active instance at a time.

  Rolling back contexts on multiple nodes is not supported.
- A rollback deletes data and may remove evidence of an upgrade or activation record, which makes it difficult to debug the problem that made the rollback necessary.
- To roll back to a patch version before the Assigned WAR, submit a request for Customer Service and Support to do the rollback.

Procedure

1. Navigate to **All** > **Rollback & Recovery** > **Rollback Contexts**.
2. Select the context that you want to rollback.
3. Roll back by selecting the **Rollback** related link.
4. Confirm the rollback.
   An indicator appears showing the progress of the rollback. *`glide.war`* updates to the rolled-back version. The log shows the stages of the rollback process.
5. After the rollback is complete, log out of your instance and log back in again.
6. Open a new tab and see if the context state changed to **Rolled back**.
   If not, contact Customer Service and Support.

Use the Deleted Records module to restore a deleted record

You can recover deleted records that are in audited tables.

Before you begin

Role required: admin

About this task

The instance can track deletions on any table, and references on audited tables, with a few exceptions. Record deletions are not tracked in these circumstances:

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- Record deletions are not tracked on tables with the `no_audit_delete=true` dictionary attribute.
- Not all tables with a sys prefix track deletions by default. You can Enable auditing for a system table.
- References are restored only if the reference field is on an audited table and the Restore Deleted Record plugin is activated.
- References that use an **Image** field type are not restored.

Procedure

1. Navigate to **All** > **System Definition** > **Deleted Records**.
2. Open the deleted record that you want to restore.

   Note: You can only restore one deleted record and its associated references at a time.

3. Do one of the following to restore the record.

Option	Description
Undelete With Related	Recovers the record and all cascaded deletes and other database actions that resulted from the delete. This option appears when a rollback context is available for the delete.
Recover entire operation	If this record was deleted as part of another delete, all records from the parent delete are recovered including all cascaded deletes and other database actions that resulted from the parent delete. If this is the top level delete, then this is the same as **Undelete with Related**. This option appears when a rollback context is available for the delete.
Undelete Record	Recovers only this record. **Important:** The undelete operation performs an insert, which can trigger business rules. This might lead to additional inserts and updates on related records in other tables, potentially resulting in unexpected outcomes. For guidance on avoiding this behavior, contact Customer Service and Support.

   An instructions page appears, explaining the process and its limitations.

4. Click **Restore deleted record**.
   A Progress page shows the progress of the restore process, and shows a count of the references restored.

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Result
When the process completes, a Restore Summary itemizes the changes and provides links for viewing the restored record or returning to the deleted records list.

Use the Delete Recovery module to restore a deleted record

You can recover a deleted record and all related changes. The recovery must be done within seven days of the record being deleted.

Before you begin
Role required: admin

About this task

Procedure

1. Navigate to **All** > **Rollback & Recovery** > **Delete Recovery**.
2. Click the item from the **Delete Recoveries** list to be recovered.
   The **Delete Recovery** form is shown.
3. Under Related Links, click **Rollback...**.
4. In the **Rollback entire operation** form, enter `yes`, and click **OK**.
   A Progress page shows the progress of the restore process, and shows a count of the references restored.

Result
When the process completes, a **Restore Summary** itemizes the changes and provides links for viewing the restored record or returning to the **Delete Recoveries** list.

Use the Script Execution History module to roll back a Scripts-Background execution

You can roll back the database actions of a script executed using the Scripts-Background module.

Before you begin
Role required: admin

About this task
When you executed the script using the Scripts-Background module, the **Record for Rollback?** item must have been checked.

If you are still in the **Scripts-Background** module after executing a script, you can use the **Script execution history and recovery available here** link to get to the **Script Execution History** form.

Procedure

1. Navigate to **All** > **Rollback & Recovery** > **Script Execution History**.
2. Click the script execution to be rolled back.
3. In the **Related Links**, click **Rollback Script Execution**.

Rollback context properties

Change the default expiration period for different types of rollback context records.

Because rollback contexts contain a significant amount of data, they're deleted after 10 days by default. The Clean Expired Rollback Contexts scheduled job runs daily to delete expired records in the Rollback Context [sys_rollback_context] table. If you need to retain a rollback context for more than 10 days, you can do so by adding a system property.

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To add a system property, navigate to the System Properties [sys_properties] table and add a property for the type of rollback context record that you want to preserve. You can determine which property to add for a given rollback context by matching the property name to the Type column on the Rollback Context [sys_rollback_context] table.

Rollback context properties

Property	Description
The number of days to retain the rollback context for an app install `glide.rollback.expiration_days_app.install`	By default, you have 15 days to roll back an application installed from the ServiceNow® Store before the rollback context expires. You can extend the expiration period by updating this property. • Type: integer • Default value: 15
The number of days to retain the rollback context for a batch app install `glide.rollback.expiration_days_batch_app.install`	By default, you have 10 days to roll back apps installed using the Batch Installation feature before the rollback context expires. You can change the expiration period by adding this property and setting a new value. • Type: integer • Default value: 10
The number of days to retain the rollback context for demo data `glide.rollback.expiration_clean_demo_data`	By default, you have 10 days to roll back before the rollback context expires. You can change the expiration period by adding this property and setting a new value. • Type: integer • Default value: 10
The number of days to retain the rollback context for recorded delete operations `glide.rollback.expiration_days_delete`	By default, you have 10 days after a delete operation completes to roll back before the rollback context expires. You can change the expiration period by adding this property and setting a new value. • Type: integer • Default value: 10
The number of days to retain the rollback context created for validating Workflow Studio flow execution before and after an upgrade `glide.rollback.expiration_days_flow`	By default, you have 10 days to roll back before the rollback context expires. You can change the expiration period by adding this property and setting a new value. • Type: integer • Default value: 10

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Rollback context properties (continued)

Property	Description
The number of days to retain the rollback context for IRE changes recorded from CMDB Integration Studio. `glide.rollback.expiration_days_inst_preview`	By default, you have 10 days after IRE changes are recorded from CMDB Integration Studio to roll back before the rollback context expires. You can change the expiration period by adding this property and setting a new value. • Type: integer • Default value: 10
The number of days to retain rollback contexts in which the Type is set to Other. `glide.rollback.expiration_days_other`	By default, you have 10 days to roll back before the rollback context expires. You can change the expiration period by adding this property and setting a new value. • Type: integer • Default value: 10
The number of days to retain the rollback context for a plugin activation `glide.rollback.expiration_days_plugin`	By default, you have 15 days to roll back plugins activated in Application Manager before the rollback context expires. You can extend the expiration period by updating this property. • Type: integer • Default value: 15
The number of days to retain the rollback context for an anonymization job. `glide.rollback.expiration_days_redact`	By default, you have 10 days after data is redacted by a Data anonymization job to roll back before the rollback context expires. You can change the expiration period by adding this property and setting a new value. • Type: integer • Default value: 10
The number of days to retain the rollback context for a background script execution `glide.rollback.expiration_days_scripts_bg`	By default, you have 10 days to roll back script execution before the rollback context expires. The rollback context tracks all INSERT, DELETE, and UPDATE statements executed by the script and recovers the data by undoing the SQL statements. You can extend the expiration period by updating this property. • Type: integer • Default value: 10
The number of days to retain the rollback context for changes recorded during test executions	By default, you have 10 days after test execution to roll back before the rollback context expires. You can change the expiration

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Rollback context properties (continued)

Property	Description
`glide.rollback.expiration_days_test`	set or extend by adding this property and setting a new value. • Type: integer • Default value: 10
The number of days to retain the rollback context for an upgrade `glide.rollback.expiration_days_upgrade`	By default, you have 10 days after the latest upgrade to roll back the upgrade before the rollback context expires. You can change the expiration period by adding this property and setting a new value. • Type: integer • Default value: 10
The number of additional days to retain rollback contexts that are stuck, beyond the normal expiration period. `glide.rollback.stuck_expiration_days`	By default, rollback contexts that are stuck are retained for an additional 30 days beyond the normal expiration period. You can change this retention period by adding this property and setting a new value. The total retention period for stuck rollback contexts is calculated by adding the value of `glide.rollback.stuck_expiration_days` to the normal expiration period defined by `glide.rollback.expiration_days_delete`. By default, the normal expiration period is 10 days, so if `glide.rollback.stuck_expiration_days` is set to 30, stuck rollback contexts will be retained for a total of 40 days (10 + 30). The `glide.rollback.stuck_expiration_days` property is valid for all rollback types, not just for delete. • Type: integer • Default value: 30

Instance Clone

Clone copies data and metadata from one ServiceNow instance (source instance) to another ServiceNow instance (target instance).

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Watch this short video to see an overview of the Clone Admin Console.

Get started

Explore  Learn about Instance Clone.	Configure  Create custom clone profiles and register your instance for cloning.	Managing  Request, cancel, schedule, or modify clones.
Request a Clone  Request a clone to copy data from a production instance to a non-production instance.	Reference  Learn about Clone options when requesting a clone, various clone states, and clone terminology.	

Troubleshoot and get help

- Review frequently asked questions about Clone Admin Console in KB1425858: Clone Admin Console: Quick Start Guide & Instructions
- Ask questions and explore other resources for Instance Clone in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Instance Clone

Explore how to use a clone to copy everything in a database from one instance to another.

Instance Clone overview

Clone copies data and configuration from a source instance to a target instance, overwriting the target. After a clone, your environment closely resembles the source instance and allows you to safely test changes. Sub-production instances drift from production over time; clone resets that divergence.

Common use cases include:

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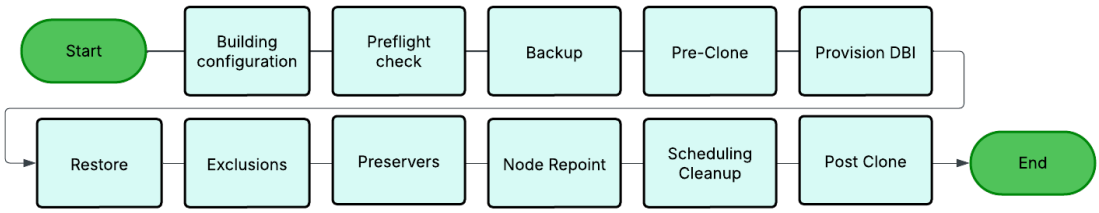
- Validating upgrades
- Testing new applications
- Testing new capabilities

Clone data is sourced from the most recent daily backup of the source instance.

For clone terminology and definitions, see Clone terminology.

Instance Clone workflow

Instance Clone workflow diagram



1. Clone build configuration: Basic definitions, configurations, and profile options are prepared. Data to be included, excluded, or preserved is verified.
2. Preflight checks: The clone checks the source and target instances to verify that they are in a healthy state before proceeding with the clone.
3. Backup: Uses the latest daily backup. If there were major recent changes, a new backup is created. You can also trigger a new backup manually by selecting **On-demand backup** in the **Clone Admin Console**.
4. Pre-Clone: Prepares space for the new database before restoring it.
5. Provision database instance (DBI): A new target instance is set up to receive the restored data.
6. Restore: The backup data is restored to the new target instance.
7. Exclusions: Tables marked for exclusion are deleted.
8. Preservers: Data is preserved from the old target (pre-clone instance) and is copied to the new target instance.
9. Node repoint: The system switches from the old target to the new clone without user disruption.
10. Scheduling scripts: Cleanup scripts run in the global scope. Cleanup scripts are defined on the source instance. Make any changes to them before the Restore phase starts so the changes apply to that clone request.
11. Post Clone: The post-clone phase sets up the target instance after the clone completes.

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12. Cleanup Scripts: Cleanup scripts run on the target instance after the Post Clone phase is Completed and the clone is fully complete. To view script status, go to the Clone Status page on the source instance with Multi-Instance View enabled, or select **View on target instance** from the same Clone Status page. For more information, see Monitor cleanup script execution.

Instance Clone users

User	Description	Applies to
Clone Administrator	Users with the *clone_admin* role can request, cancel, or schedule clones, and manage clone profiles.	Source
OAuth Administrator	Users with the *oauth_admin* role on the target instance perform the one-time OAuth setup required to register that instance for cloning. After OAuth setup is complete, users submitting clones to that target instance only require the *clone_admin* role. Reconfiguration is not required unless OAuth authorization is reset.	Target
SOAP user	Users with the *soap* role can perform all SOAP operations using basic authentication. The identity type for basic authentication is machine.	Source and target

Instance Clone benefits

Benefit	Feature
Tidy up data with exclusions and preservers for specific clone scenarios.	
Establish consistent clone outcomes with clone profiles and registered instances.	Configuration
Copy data from a production instance to a non-production instance or to copy data between non-production instances.	Request a clone

Instance Clone use cases

Clone to a different version

You can clone between instances that are on different family release versions. During a clone, the source version replaces the target version. For example, if you clone from Source (Zurich) to Target (Yokohama) the target will match the source after the clone and be on Zurich release.

Clone from a backup

The clone uses data from the most recent, daily backup of the source instance when cloning. Backups that are used for cloning are a maximum of 36 hours old. A clone from backup starts only at the date and time processing that it's scheduled to start.

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If the source and target instances are on different versions of the ServiceNow AI Platform, the target instance is modified to match the source instance version during this time.

When starting a clone from a backup, the Clone log displays the date and time the backup was taken. Periodic progress messages also appear in the Clone log at the bottom of the clone status page.

Clone over production instances

As long as the system property *glide.db.clone.allow_clone_target* is TRUE, an instance can serve as a clone target. Ensure the property *glide.db.clone.allow_clone_target* is set back to FALSE after a production instance has served as a clone target. This prevents accidental clones over production in the future.

Note: Beginning with the Australia release, users attempting to access the legacy Instance Clone page, *clone_instance.do*, are redirected instead to the Clone Admin Console. To view clone history for clones prior to the Australia release, view the legacy Clone History [clone_instance] table.

For more information about using Clone Admin Console instead of the legacy Instance Clone, see KB1425858: Clone Admin Console: Quick Start Guide & Instructions.

Clone Admin Console

The Clone Admin Console is the user interface where administrators can manage, request, and monitor their instance clones.

Clone Activity

The Clone Activity tab is the default view when you open the Clone Admin Console. This tab displays a table of clone requests sorted by most recent, showing:

- **CHG** — Change request number
- **Source Instance** — The instance being cloned from
- **Target Instance** — The instance being cloned to
- **State** — Clone status (WIP, Complete, Error, Canceled, etc.)
- **Scheduled Date/Time** — When the clone is scheduled to run
- **Started** — When the clone began
- **Completed** — When the clone finished
- **Duration** — How long the clone took
- **Profile Name** — The clone profile used

Use the search bar to locate a specific clone. Filter options enable you to locate clones based on their status. To view a list of statuses, see Clone states.

The **Request Clone** button in the upper right allows you to initiate a new clone request.

Instance Overview

The Instance Overview tab lists all your instances and the date each instance was last cloned. Unlike Clone Activity, which lists every clone request, Instance Overview shows each instance only once, with the last clone date in a column. Use this page to quickly identify stale environments and prioritize refreshes.

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Help

The Help tab provides access to Now Assist for Clone, links to clone-related knowledge base articles, and the installed version of the Clone Admin Console app. Now Assist for Clone is available starting with the Australia Patch 2 release. For more information, see Clone help resources.

Configuration

The Configuration tab consolidates all clone-related settings in a single menu, including:

- **Overview** — Summary of clone instances and clone profiles
- **Exclusions** — Tables not copied during a clone
- **Preservers** — Data protected from being overwritten on the target instance
- **Cleanup Scripts** — Automated post-clone tasks
- **Clone Profiles** — Reusable templates for clone settings
- **Clone Instances** — Registered instances and their URLs
- **Multi-Instance View** — Consolidated clone activity across linked instances

For more information, see Configuration.

Request a clone

The clone request page contains guidance and explanations for how the various clone settings affect your clone. You can use the scheduling calendar to help prevent timing conflicts with ServiceNow maintenance windows.

The **Request Clone** button allows you to initiate a new clone request.

To learn more about how to request a clone see Request a clone.

Configuration

Use the Configuration menu to access all clone-related settings, including exclusions, preservers, cleanup scripts, clone profiles, and clone instances.

In the Clone Admin Console, all clone-related settings are consolidated under a single Configuration menu.

Note: The Definitions tab has been deprecated and consolidated into the Configuration tab. If you are upgrading from an earlier version, use the Configuration menu instead.

Before you begin

- You can add external email addresses to receive clone notifications.
- Some default items can't be removed from the exclusions, preservers, or scripts list.

Overview page

The Overview page displays a summary of all the configuration options in your instance.

Exclusions

The Exclusions page lists the tables that aren't copied during an instance clone. When excluding a table, the clone automation truncates the entire table including its child tables. The clone

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process excludes (or removes) data from both the parent and the child tables. The child tables, however, aren't individually added to the list of excluded tables. Only the parent table is listed.

To view child tables of a table, you can go to the following link and input their table: *[instance].service-now.com/now/nav/ui/classic/params/target/generic_hierarchy_erd.do*.

By default, the system excludes tables for logging, auditing, notifications, workflow contexts, and license usage. To configure additional exclusions, see Exclude a table from cloning.

For information on guidelines when adding exclusions see General guidelines for excluding a table from cloning.

Preservers

The Preservers page displays a list of available data preservers, which are defined on the source instance. Preservers protect data on the target instance from being overwritten.

Preservers work differently compared to exclusions. When preserving a table, the clone automation doesn't automatically preserve the child tables. Therefore, the child tables must be individually added to the preserver list. To create a preserver see Create a clone preserver.

Note: Starting with RaptorDB, when you preserve a table, the clone automatically preserves the hierarchy and descendant tables. If you previously added child tables to preservers, they process normally. This automatic preservation applies only to RaptorDB instances.

Cleanup Scripts

The Cleanup Scripts page displays a list of all of your available scripts. Cleanup scripts automate post-clone tasks.

Set an order number on each script, to set the order that the active scripts run, with lower numbers having a higher priority. To run some scripts in parallel, you can assign the same order to them.

All cleanup scripts run in the global scope irrespective of the scope in which you have configured the cleanup script.

Post-clone cleanup scripts examples

Script	Description
Bad MID Server credentials after clone	Runs a script include called *BadMIDCredentialAfterClone* on a cloned instance to detect bad MID Server user credentials. This script include creates scheduled jobs that log MID Servers in the **Down** state to the MID Server Issue [ecc_agent_issue] table after an instance clone.
Clear scheduled job node association	Resets any scheduled jobs that were active on the source instance to the **Ready** state. This script also clears the value of the **System ID** and **Claimed by** fields on all scheduled jobs.
Configure Email Accounts	Migrates email accounts that existed on the source instance to the target instance if they aren't enabled there. This script also migrates the email properties to the target instance.
Disable emails	Disables email on the target instance. A default data preserver maintains other email settings from the target instance.

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Post-clone cleanup scripts examples (continued)

Script	Description
Install deactivated plugin	Enables the Domain Separation plugin for instances that use this feature.
Regenerate all text indexes	Rebuilds text indexes on the target instance after a clone. Text indexes aren't cloned from the source to the target instance.

Note: Verify that any custom scripts have error-handling logic. By default, if one script encounters an error, the rest of the ordered scripts don't execute. Starting with the Australia Patch 5 release, you can view a link to cleanup script status. Any changes to cleanup scripts, which are defined on the source, must happen before the Restore phase of a clone to be processed within that clone request.

To create a cleanup script see Create cleanup scripts.

Clone Profiles

Clone Profiles display all available profiles. Clone profiles are reusable templates for clone settings and can be saved and reused to achieve consistent outcomes with each of your clones. To learn more about Clone Profiles, see Create a custom clone profile.

The profile System Profile is available by default and can't be modified. Custom profiles use the default Exclusions, Preservers, and Scripts from the System Profile. When creating a custom profile, all existing custom exclusions and preservers are automatically added.

You can create as many custom clone profiles as you'd like and edit them as needed. To change the definitions of a clone profile, such as exclusions, preservers, or cleanup scripts, select the number under the definition and select the **Edit** button on the page.

Clone Instances

The Clone Instances page displays registered instances and their URLs. You can use instances added to this list as a clone source or clone target for your clones. To add your non-production instance to your clone instances list, select **New**.

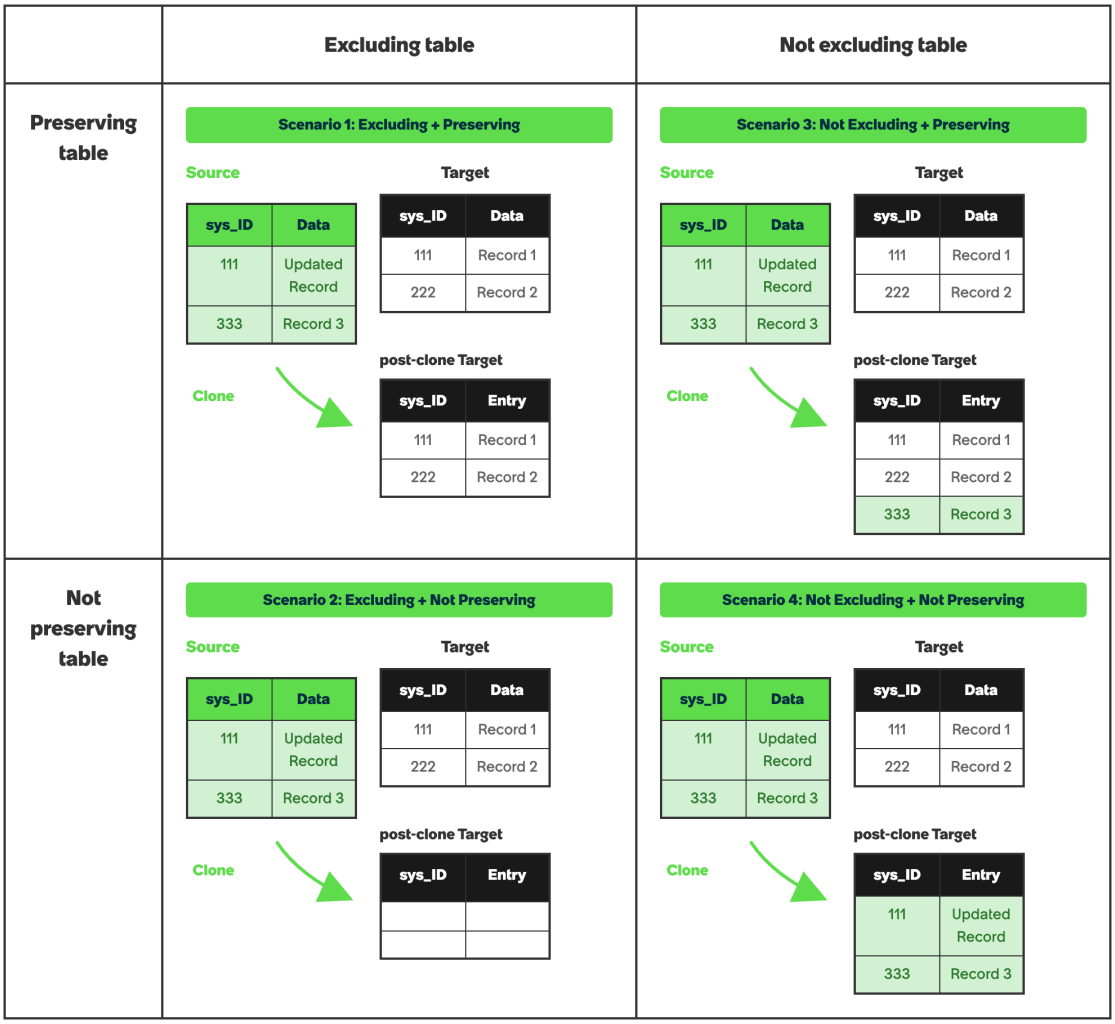
Multi-Instance View

The Multi-Instance View provides consolidated clone activity across linked instances. Multi-Instance View is included in Instance Clone.

Clarifying exclusions and preservers combinations

Clone exclusions and preservers are both useful for managing your data. The graphics help to identify the expected outcome of the following combinations of preservers and exclusion combinations. For more information, see the February 2025 Platform Fundamentals Academy session on Clone Admin Console.

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Exclusion and preserver combinations

Scenario	Result
Scenario 1: Excluding + Preserving	Records on the target instance remain the same.
Scenario 2: Excluding + Not preserving	Records from the source instance aren't copied over and records on the target instance are removed. The table is empty but usable after the clone.
Scenario 3: Not excluding + Preserving	Records on the target instance remain the same and records from the source instance are copied over.
Scenario 4: Not excluding + Not preserving	Records from the source instance replace records on the target instance.

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Important: During a clone, data from the source instances replaces data from the target instance. Therefore, any in-progress development work on the target instance is overwritten. For example: Work-in-progress update sets, scoped apps that only exist on the target instance but not on the source instance. If you have in-progress update sets, you must export them before the clone and re-import them after the clone is finished. Custom applications that aren't yet deployed to the source instance must be reinstalled after the clone is completed.

To learn more about clone and app development tips, see the Leveraging System Clones for Seamless Development and Deployment Whitepaper.

Multi-Instance View

Multi-Instance View enables you to monitor and manage clone operations across multiple linked instances from a single primary instance. Use it to view clone status, track refresh history, and view cleanup script status without logging into each instance separately.

Instance Clone Multi-Instance view

Use Instance Clone Multi-Instance View to manage clones centrally across multiple linked instances. Instead of logging into each instance individually, administrators submit clone requests, monitor status, and manage configurations from a primary instance.

Note: Connected instances require Australia Patch 2 or later on both the source and target instances.

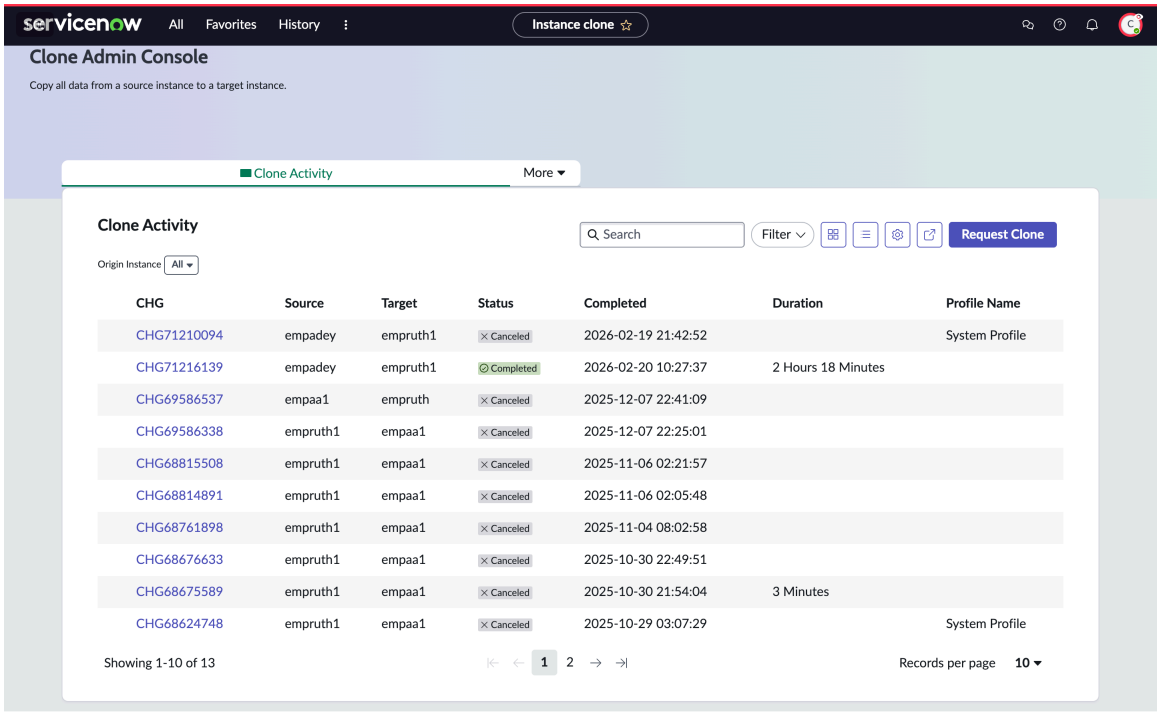
Some of the key benefits of using Multi-Instance View are:

- View all clone requests across instances on the Clone Admin Console
- See which instances were last cloned and how recently

Consider enabling Multi-Instance View if you need:

- Centralized visibility into clone status and history across all instances
- Quick identification of stale instances needing data refresh
- View cleanup script status without logging into each instance separately, starting with the Australia Patch 5 release, when Multi-Instance View is enabled on both instances.

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Note: Once the Multi-Instance View feature is set up, you can view clone records from other instances from the **Origin Instance** option on the Clone Activity page and the **Instance Overview** page.

Clone help resources

The Help page in the Clone Admin Console provides access to clone documentation, Now Assist, and app version management.

Why Clone

Instance Clone is the out-of-the-box workflow for copying production configuration, code, and data to non-production instances. This provides a safe environment to develop and test new capabilities or upgrades before deploying to production.

Learn more

The Help page includes the following curated links to clone resources:

- Clone Basics
- Clone Tips and Tricks
- Clone FAQs
- Product Documentation

Now Assist for Clone

Select the Now Assist icon in the top right corner of the page to ask clone questions and get answers on clone setup, configuration, and more. If the icon isn't visible, visit the Now Assist KB or contact your ServiceNow account team.

To use Now Assist for Clone, the following are required:

- Now Assist license activated on your instance
- Australia Patch 2 or later

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Important: If you purchase a Now Assist license after initially installing the Clone Admin Console, you must reinstall the Clone application from the store to enable the Clone FAQ Agent skill. This is a one-time step that loads the clone-specific skill into Now Assist.

Check for update

The Help page displays the current version of the Clone Admin Console app and whether it is up to date. Select **Check for updates** to check for a newer version. The page also shows the date and time of the last sync with the store.

Note: The **Check for updates** option applies only to the Clone Admin Console app. It doesn't check for or apply the family upgrade for the instance.

OAuth 2.0 authentication for clone targets

OAuth 2.0 authenticates clone requests to target instances without requiring a local admin account, enabling you to use your existing login credentials.

Why OAuth 2.0 replaces basic authentication

Previously, Instance Clone used basic authentication to confirm access to a target instance. This required maintaining a local admin account specifically for cloning and entering those credentials for each clone request.

The OAuth 2.0 Authorization Code Flow enhances security and convenience by providing the following benefits:

- No local admin account required - use your existing login credentials, including SSO.
- One-time target instance registration.
- Automatic token generation and expiration for each clone request.

How it works

The source instance acts as the OAuth client, and the target instance acts as the OAuth authorization server. Authentication happens once per target instance during setup and repeats only if the session expires or is revoked.

During setup, the target instance generates a Client ID that uniquely identifies the source instance as an authorized OAuth client. Administrators copy this Client ID and return it to the source instance to complete registration.

After setup is complete, Instance Clone uses a short-lived JSON Web Token (JWT) access token to authenticate each clone request to the target. The source instance obtains this token automatically before each clone operation.

The clone_admin role is required on the source instance to request clones. The oauth_admin role is required on the target instance during initial setup only.

Token lifecycle

The JWT access token has a short time-to-live (TTL) and expires automatically after each use. If a token expires, the system automatically redirects the user to reauthorize on the target instance from the Clone Admin Console before a clone can be requested.

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Basic Auth fallback

Basic Auth is available only as a fallback when the OAuth flow fails. Because of recent platform-wide authentication changes, using Basic Auth to authenticate the clone target requires that the target-instance user have:

- the clone_admin role
- the soap role
- identity_type set to machine on the user record

Warning: Users with **identity_type** = machine can no longer log in to the instance UI. This configuration supports Basic Auth for automated and integration traffic only. The **identity_type** field may not appear on the User form by default. If it isn't visible, add it temporarily using Form Layout.

One-time setup per target instance

OAuth setup is required once per target instance. No re-registration is required for routine clone requests. If a token expires, the system prompts you to select **Authorize** on the target instance before you can place a clone request.

For more information, see Set up OAuth authentication for a clone target.

Configuring Instance Clone

Register your instance for cloning and create a custom clone profile.

Configuration overview

1. Register an instance for cloning before requesting your clone.

   A clone target record specifies the instance URL and credentials used for cloning.

2. Create a custom clone profile.

   Clone profiles enable you to select the correct exclusions and preservers for your clone.

3. Create a clone preserver.

   Create clone preservers to protect data on the target instance from being overwritten.

4. Exclude a table from cloning.

   Exclude a table to create an empty but usable table on the target instance.

5. .

   Use cleanup scripts to automate post-clone steps or to modify data after your clone.

Register an instance for cloning

Register your target instance before requesting your clone. OAuth authentication is the recommended method and requires a one-time setup per target instance.

Before you begin
Role required: clone_admin

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Tip:

For OAuth-based registration (recommended), the target instance must run an OAuth-capable version of the Clone Admin Console. OAuth clone target authentication requires Australia Patch 5 or later on both the source and target instances. This registration method does not require admin credentials for each clone request.

About this task

You can register a target instance from the Clone Admin Console or during a clone request. Registration creates a connection profile that identifies the target instance for cloning.

Procedure

1. Navigate to **All** > **Clone Admin Console** > **Clone Home**.
2. Navigate to **Configuration** > **Clone instances**.
3. Select **New**.
4. In the **Target Instance** field, enter the target instance URL and select **Continue**.
   The system runs a version compatibility check to determine which authentication method to use.
5. Choose an authentication method:
   - **OAuth (recommended):** Select **Setup OAuth on Target** and follow the OAuth setup workflow. See Set up OAuth authentication for a clone target for detailed steps.
   - **Basic authentication (fallback):** If the target instance does not support OAuth, enter credentials for a user account with the clone_admin and soap roles. Ensure the user's identity_type is set to machine on the user record.
6. Select **Save** or **Add Target** (depending on authentication method).
   The target instance is registered and ready for clone operations.

Result

The target instance is configured and registered for cloning.

What to do next

To submit a clone request to the registered target, see Request a clone.

Register target instance (legacy)

A clone target record specifies the instance URL and credentials used for cloning.

Before you begin

Role required: clone_admin
If an error occurs while registering a target instance see Troubleshooting for registering target instance.

Procedure

1. Navigate to **All** > **Instance Clone** > **Clone Targets**.
2. Select **New**.
3. Enter the URL for the receiving instance (target).

   The system validates the instance enables clone targets and that High Availability Cloning is active.

4. Enter the basic authentication credentials for a user account with the admin role on the target instance.

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Note: To clone multiple targets from one source, you must raise separate clone requests for each target.

The system validates the user credentials have `clone_admin and soap` access to the target instance.

5. Select **Submit**.
   The system checks connectivity and validates the user credentials against the target instance.

Set up OAuth authentication for a clone target

Complete a one-time OAuth setup to register a target instance for cloning. This process generates a Client ID on the target instance and authorizes the connection from the source instance.

Before you begin

Both the source and target instances must be on Australia Patch 5 or later to use OAuth target authentication.

Roles required:

- Source instance: clone_admin
- Target instance: clone_admin and oauth_admin

Procedure

1. Navigate to **All** > **Clone Admin Console** > **Clone Home**.
2. Navigate to **Configuration** > **Clone instances**.
3. Select **New**.
4. In the **Target Instance** field, enter the target instance URL and select **Continue**.
   The system runs a version compatibility check.

   Trouble?

   If the target instance doesn't support OAuth authentication, the system falls back to basic authentication. The target-instance user must have:

   - the clone_admin role
   - the soap role
   - identity_type set to machine on the user record

   Warning:

   The **identity_type** field may not appear on the User form by default. If it isn't visible, add it temporarily using Form Layout.

   Users with identity_type = machine can no longer log in to the instance UI. This configuration supports Basic Auth for automated and integration traffic only.

   recommends using OAuth for cloning. For more information, see Troubleshooting for registering target instance.

5. Select **Setup OAuth on Target**.
   The target instance opens in a new browser tab.
6. On the OAuth setup page, select **Set up OAuth**.

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The page generates a Client ID.

Trouble?
If the Client ID is not generated, verify that you have the oauth_admin role on the target instance and that the page loaded completely before selecting **Set up OAuth**.

7. Copy the **Client ID**.
8. Return to the source instance browser tab.
9. In the **Client ID** field on the Add Clone Target form, paste the Client ID.
10. Select **Add Target**.
    The browser redirects to the target instance to complete authorization.
11. Select **Allow** to grant consent.
    If your session has expired, log in to the target instance before granting consent.
    The browser redirects to the source instance.

Trouble?
If the browser doesn't redirect to the source instance, return to the Clone Admin Console and select **Reset OAuth or Retry** to restart the authorization.

Result
The target instance is registered and authorized for clone requests.

What to do next
- To submit a clone request to the new target, see Request a clone.
- To reset or re-authorize OAuth for this target, see .

Reset OAuth for a clone target

Reset OAuth authentication for a clone target if you receive an authentication error on the clone request form.

Before you begin
The target instance must run an OAuth-capable version of the Clone Admin Console.

Roles required:

- Source instance: clone_admin
- Target instance: clone_admin and oauth_admin

About this task
If you receive an authentication error on the clone request form, the Clone Admin Console displays an Authenticate dialog with the option to reset OAuth. Resetting OAuth reauthorizes the target instance.

Procedure
1. In the Authenticate dialog, select **Reset OAuth**.
   The target instance opens in a new browser tab and displays the OAuth setup dialog.
2. Select **Set up OAuth**.
   The page generates a new client ID.

Trouble?
If the client ID is not generated, verify that you have the oauth_admin role on the target instance and that the page is loaded completely before selecting **Set up OAuth**.

3. Copy the client ID and return to the source instance browser tab.

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4. Paste the client ID in the **Client ID** field.
5. Select **Complete Setup**.
   The Authorization Required dialog is displayed.
6. Select **Proceed**.
   The browser redirects to the target instance to complete authorization.
7. Select **Allow** to grant consent.
   If your session has expired, log in to the target instance before granting consent.
   The browser redirects to the source instance to submit the clone request.

Result
The target instance is reauthorized.

What to do next
To submit a clone request to the reauthorized target, see Request a clone.

Create a custom clone profile

Clone profiles act as reusable clone templates to establish consistent clone outcomes. Clone profiles enable you to set up exclusions, preservers, and cleanup scripts for specific clone scenarios.

Before you begin
Role required: clone_admin or clone_profile_admin

Here are a few basics about clone profiles:

- Clone profiles can be duplicated via the clone admin console when opening any clone profile.
- The system profile is provided by default and can't be changed.
- You can choose to prepare different profiles for individual use cases. For example, a different profile for upgrades, dev testing, IT app testing, HR app testing and so on.

Procedure
1. Navigate to **All** > **Clone Admin Console** > **Home**.
2. Navigate to **Configuration** > **Clone Profiles**
3. Select **New**.
4. Fill in the new clone profile form.

Create a custom clone profile (legacy)

Clone profiles enable you to set up exclusions, preservers, and cleanup scripts for specific clone scenarios.

Before you begin
Role required: admin

About this task
If you leave the clone profile field empty when requesting a clone, the system uses the exclude tables, data preservers, and cleanup scripts configured under **Clone Admin Console** > **Clone Definition**.

Procedure
1. Navigate to **All** > **Clone Admin Console** > **Clone profiles**.
2. Select **New**.

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3. Complete in the form.
   For field information, see Clone options.
4. Select **Submit**.
   If you create a data preserver, exclusion, or cleanup script, it isn't automatically added to your clone profiles.
5. **Optional:** To add a preserver, exclusion, or cleanup script to a clone profile.
   a. Navigate to **Additional actions** > **Configure** > **Form Layout**.
   b. Add the preserver, exclusion, or cleanup script to the selected list.

Create a clone preserver

Create clone preservers to protect specific data on the target instance from being overwritten during a clone operation. Preservers allow you to retain existing target data while cloning source data for other tables.

Before you begin

Role required: `clone_admin`

Preserving large amounts of data can significantly increase your clone duration. When creating a preserver, use conditions to preserve only the data that you need. See General guidelines for excluding a table from cloning for optimization strategies.

Tip:

If you have custom applications, you must also manually preserve unpublished application content separately.

About this task

The **Preservers** tab displays a list of all available data preservers. Each preserver defines a table and optional conditions that protect specified data on the target instance from being overwritten during a clone.

Procedure

1. Navigate to **All** > **Clone Admin Console** > **Clone Home**.
2. Select **Configuration** from the secondary navigation bar.
3. On the **Preservers** page, select **New**.
4. Enter a descriptive label in the **Name** field to identify this preserver.

   Use a descriptive name that clearly identifies the table and its purpose. For example: "Firewall Devices CMDB" or "User Preferences Data". This name appears in the Preservers list for easy identification.

   Note: The data preserver must have a table selected before it can be submitted.

5. Select the **Table** to be preserved.
6. Select the **Theme** check box if the data being preserved is a UI property.
7. Define the data to be preserved using the **Condition builder**, and select **Save**.
   The preserver is created and saved. A success message confirms the creation.

Result

The clone preserver is now active and will protect the specified data from being overwritten during any future clone operations that target this instance.

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What to do next
To view all active preservers, return to the **Preservers** tab. To use this preserver in a clone request, it will be automatically applied based on your clone profile configuration.

Preserve data during an instance clone

Data preservers copy specified data to a target instance.

Before you begin
Database views can't be preserved.
Role required: clone_admin

About this task
Where to perform this task: You must define data preservers on the **source instance** before initiating a clone. The preserved data is extracted from the source instance and restored on the target instance after the clone completes.

Data preservers retain system settings and themes, such as instance-specific authentication settings from the source instance. Don't use data preservers to transfer large sets of data, such as user groups. If you must preserve table data such as users, groups, and roles, consider exporting the records to a file and importing it after the clone is complete.

Warning:

If you attempt to create a preserver on the target instance instead of the source instance, the configuration will not work as intended. No data will be preserved during the clone. Always verify you are working on the source instance before proceeding with these steps.

Procedure
1. On the source instance, navigate to **All** > **Clone Admin Console** > **Clone Definition** > **Preserve Data**.

   Tip:

   Verify you are on the source instance (the instance you are cloning FROM, not cloning TO). You can confirm this by checking the instance name in the top-right corner or in the URL.

   You are now on the Clone Data Preservers page on the source instance.
2. Select **New**.
3. Enter a descriptive **Name** for the preserver.
   Use a descriptive name that identifies the table and its purpose. For example, use "User Preferences" for the `sys_user_preference` table or "Firewall Devices CMDB" for a custom table. This name helps you identify the preserver in the list. The data preserver must have a table name or it can't be submitted.
4. Select the **Table** to be preserved.
   The data preserver must have a table selected or it can’t be submitted.
5. Select the **Theme** check box if the data being preserved is a UI property.
6. Define the data to be preserved using the Condition Builder.
   Use conditions to define records to preserve during a clone. For example, to preserve specific system properties, add conditions for each property name to preserve.

   Note: The condition to match regular expressions [match regex] isn't supported.

7. Select **Submit**.

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If you want to delete the data preserver later, make sure not to modify or delete the following data preserver records:

- Core Instance Properties
- Semaphores
- Email Accounts

Result
The data preserver is created on the source instance and will be applied to future clone operations. The preserved data will be retained and restored to the target instance after the clone completes.

What to do next
After creating data preservers on the source instance, you can now request a clone. See Request a clone for information on submitting a clone request. The configured preservers will be automatically applied based on your clone profile.

Exclude a table from cloning

Exclude a table to create an empty but usable table on the target instance.

Before you begin
Role required: clone_admin
For information on excluding a table from cloning, see General guidelines for excluding a table from cloning.

Procedure
1. Navigate to **All** > *Clone Admin Console* > **Clone Home**.
2. Select the **Configuration** tab.
3. Select **Exclusions**.
4. Select **New**.
5. Enter the table **Name**.

   Note: Entering a parent table results in the clone process also excluding its child tables. For example, excluding the task table would also exclude the Change, Incident, and Problem tables.

6. Select **Save**.

Exclude a table from cloning (legacy)

Exclude a table to create an empty but usable table on the target instance.

Before you begin
Role required: clone_admin

For information on excluding a table from cloning, see General guidelines for excluding a table from cloning.

About this task
Data is removed during the exclusion substage before the node repoint. The data is removed before the instance becomes available to users.

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Procedure

1. Navigate to **All** > **Clone Admin Console** > **Clone Definition** > **Exclude Tables**.
2. In the Clone Exclude Tables page, select **New**.
3. Enter the table name in the **Name** field.

   Note: Entering a parent table results in the clone process also excluding its child tables. For example, excluding the task table would also exclude the Change, Incident, and Problem tables.

4. Select **Submit**.

Create cleanup scripts

Use cleanup scripts to automate post-clone steps or to modify data after your clone.

Before you begin

Role required: admin

Verify that custom scripts have proper error handling to avoid issues. Without proper error handling, failing customized scripts can help prevent subsequent scripts from executing.

Note: After your clone completes, you can monitor the execution status of each cleanup script on the target instance. See Monitor cleanup script execution.

Procedure

1. Navigate to **All** > **Clone Admin Console** > **Clone Home**.
2. Select **Configuration** from the secondary navigation.
3. Select the **Cleanup scripts** tab.
4. Select **New**.
5. Enter a name for your script.
6. Select the order number for your script.
7. Check **Active** when your script is ready.
8. Enter your script in the **Script** field, and select **Save**.

Example: Disable emails

To create a cleanup script to disable emails, do the following.

- Select **New** on the cleanup scripts tab.
- Add the name `Disable emails`.
- Check **Active**.
- In the script field, add

```
gs.setProperty("glide.email.read.active",
 false);gs.setProperty("glide.email.smtp.active", false);
```

.

- Select **Update**.

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What to do next
After your clone completes, go to the target instance to monitor cleanup script execution and retry any failed scripts. See Monitor cleanup script execution.

Monitor cleanup script execution

Monitor the execution status of cleanup scripts after a clone and retry any scripts that encountered errors.

Before you begin
A clone must have completed before cleanup script execution data is available.

Both the source and target instances must be on Australia Patch 5 or later to use OAuth target authentication and view cleanup script status.

Role required: clone_admin

About this task
You can monitor cleanup script execution directly from the source instance using Multi-Instance View. This approach enables you to view cleanup script status without logging in to the target instance.

You can also view the execution status on the target instance.

Procedure
1. Enable Multi-Instance View on the source instance to view cleanup script execution across linked instances.
   For information about enabling Multi-Instance View, see Configuration.

   Alternatively, log in to the target instance and navigate to **Cleanup Script Execution**.
2. Navigate to the Clone Status page for the completed clone request.
   In the Clone Admin Console, select the clone request from the Clone Activity tab to open its Clone Status page.
3. Select **Show cleanup scripts** to expand the Post-clone Cleanup Scripts section.
   The Post-clone Cleanup Scripts section displays the status of cleanup scripts running on the target instance after the clone.
4. Select **View on target instance** to open the Cleanup Script Execution page on the target instance.
   The page displays a list of all cleanup scripts and their current execution state.
5. Review the **State** column for each script.
   For a description of each state, see Clone states.
6. If one or more scripts show a state of **Error**, select **Resume all remaining scripts** to re-run all failed scripts and continue with any remaining scripts.
   A confirmation modal displays: "This will re-run all failed scripts and continue with remaining scripts. After scripts start, they can't be canceled from the user interface."

   Trouble?
   If **Resume all remaining scripts** is not available, verify that at least one script has a state of **Error**.
7. Select **Resume all remaining scripts** in the confirmation modal to confirm.
   Failed scripts return to **Executing** state. The **Runs** column increments by 1 for each retried script.

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Result
Cleanup scripts resume execution. Monitor the **State** column to confirm scripts reach **Completed** state.

What to do next
To persist fixes for future clones, update the cleanup script on the source instance where it is defined. See .

Set up Multi-Instance View

Configure Multi-Instance View to see consolidated activity across all connected instances.

Before you begin
Role required: clone_admin on primary instance.

Procedure
1. Navigate to **All** > **Clone Admin Console** > **Clone Home** > **Configuration**.
2. Select **Multi-Instance View** link.
3. Enable the **Multi-Instance View** option to view consolidated activity across all connected instances

   Clear the option to disable the Multi-Instance View feature. Re-enabling Multi-Instance View feature will restore your previous settings without losing your configuration.

Request a clone

Request a clone to copy data from a production instance to a non-production instance or to copy data between non-production instances.

Before you begin
Role required: clone_admin

Note:

Configure a clone profile. See Create a custom clone profile.

For self-hosted customer instances that use an Oracle database, see https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB0563847 .

About this task
The ServiceNow AI Platform uses data from the most recent, daily backup of the source instance when cloning. Backups that are used for cloning are a maximum of 36 hours old. The initial preparation begins, including selecting the latest backup to use, only at the date and time processing is scheduled to start.

Procedure
1. Navigate to **All** > **Clone Admin Console** > **Request Clone**.
2. On the form, fill in the fields.

Clone request form

Field	Description
Source instance	The original database where data is copied from.
Target instance	The new location where the data is copied to.

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Field	Description
	Note: You can add an instance or select an existing instance without leaving the page.
Clone Profile	Apply a clone profile that you created previously. All exclusions, preservers, and scripts you added to the profile are applied to the clone request. If clone profile is left empty the system will pull in all available preservers, exclusions and cleanup scripts **Note:** If **default** is checked on the clone profile, the clone request loads this profile every time you open the clone request page.
Lock settings at the time of clone request	If you use a clone profile, this option locks the settings and options at the time of the clone request. Any subsequent changes to the clone profile, regardless of when the clone runs, don't affect the clone request.
Clone Scheduled Start time	The start time to begin cloning your instance. After you select a start time, the form displays the estimated duration and estimated completion time of the clone. See Schedule recurring clones. **Note:** You may schedule multiple clones to the same target instance as long as they are scheduled at least five days apart. If two clone requests for the same target fall within a five day window, the system will return an error to prevent overlap. If a time you need is unavailable, check for any scheduled maintenance, upgrades, or existing clone requests affecting the relevant instances.
○ Email updates about this clone ○ External email address	The email or emails to be notified of the clone process and clone completion.

3. Select the hyperlinked number under each item in the definitions section to review your exclusions, preservers, and cleanup scripts.



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4. Select the options to configure for your clone.

   Note: For information on all available options see Clone options. For information on general guidelines to expedite your clone request see General guidelines for optimizing your clone duration.

5. Select **Continue**.
6. Review your clone request summary.
   If other clone requests involve the same target instance within 30 days, they appear highlighted in yellow. Review these requests for potential conflicts before submitting.
   The Clone request summary page displays the estimated clone duration, based on the scheduled start time and the size of the data to be copied to the target instance. For a new source-target pair, the estimate may be higher than expected and becomes more accurate after additional clones between the same instances.
7. Select **Confirm and Submit Clone Request**.

Managing Instance Clone

You can use Instance Clone to request, cancel, schedule, or modify clones.

Cancel a clone

You can cancel a clone that is scheduled, requested, or in progress until the Node Repoint state. Canceling a clone retains the target instance as-is in its pre-clone state with its original data.

Before you begin

Role required: clone_admin

Procedure

1. Navigate to **All** > **Clone Admin Console** > **Clone Home**.
2. Select the tile of the clone that you must cancel.
3. Select the **Cancel** option on the page.
4. Select a reason for the cancellation.
5. Select **OK**.
   The system stops any current clone activities and sets the **State** to **Canceled**.

Cancel scheduled clones (legacy)

Scheduled clones can't be modified, you must cancel scheduled clones and resubmit the clone schedule.

Before you begin

Role required: clone_admin

Procedure

1. Select **Instance Clone** > **Active Clones** > **<one-of-your-clones>**.
2. In the **Related Links**, select **Cancel Clone**.
   Clones can only be canceled up to Node Repoint stage. The clone can be rolled back once it completes.
   The system stops any current cloning activities and sets the **State** to **Canceled**.

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Handling a large amount of in-progress update sets

Batch in-progress update sets before a clone to preserve active development work across source and target instances.

Before you begin

Role required: clone_admin

Procedure

1. On your target instance, which has the work in progress (WIP) update sets, filter to obtain a list view with all your WIP update sets.
2. In a separate window/tab, create an update set.
3. How to mass-update: Hold down the shift key + selecting the whole column with your mouse device.
4. Double select any of the fields in the selected column and enter the desired value to update all of them to that value.
5. Set the parent field on your list of WIP update sets to the new batch update set.
6. Update the parent update set to "Completed" and give it an identifiable name, such as `"CLNREQ_DATE"`.
7. Export the parent update set.
8. On your source instance, retrieve the update set.

   Important: Don't commit!

   The parent update set is added to the retrieved update sets on your source instance.
9. Wait 24 hours until your update set is captured by the daily backup.
   You can also select an on-demand backup on the Clone Admin Console.
10. Perform the clone as usual from your source instance to target instance.
    Because your parent update set has been retrieved in the backup. Your target instance will have your parent update set along with your dev work that is in flight after the clone.
11. On the target instance, set the parent update set back to work in progress, and unparent it.
    Removing the parent update set enables you to continue only importing and exporting your in-progress work.
12. On the source instance, the retrieved parent update set can be cleaned up or deleted.

Roll back a clone

Roll back a clone to remove the latest cloning updates on a cloning target if a mistake was made or an error has occurred.

Before you begin

Role required: clone_admin

You can only roll back the updates made with the last clone. Rollbacks must occur no more than seven days after the clone. If the instance is sharded, rollbacks must occur no more than two days after the clone.

Procedure

1. Navigate to **All** > *Clone Admin Console* > **Clone Home**.
2. Select the tile of the clone that you must roll back.
3. Select the **Rollback** option on the page.

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Schedule recurring clones

Schedule recurring clones to keep your cloned instances up to date.

Before you begin
Role required: clone_admin

About this task
Instead of manually cloning instances, you can schedule cloning that happens automatically. You create a cloning schedule in the same interface that you use to create a clone.

Note: The system limits the number of future clones you can schedule at once. The following are the maximum allowed scheduled clones by frequency:

- Every 4 weeks: 7 occurrences
- Every 2 weeks: 13 occurrences
- Weekly: 25 occurrences

Procedure

1. Select **Clone Admin Console** > **Request Clone**.
2. Select your source instance and target instance for the clone.
3. Select a clone profile.
4. Select the calendar icon ( ).
5. Select a time slot for your instance to be cloned.
6. Select **Schedule**.
7. In the clone frequency option, select the frequency for your clone.
8. Enter the total number of clones to occur.
9. Finish filling out the request form and select **Continue**.

View the clone history page (legacy)

You can view the status and history of any instance clone request.

Before you begin
Role required: clone_admin

About this task
The `clone_instance` table stores records for all previously and currently scheduled clones.

Procedure

1. Navigate to **All** > **System Clone (legacy)** > **Clone History (legacy)**.
   Clone history also displays the **State** for current and past clones. Clones in the **Draft** state don't appear on the clone history table. For more information see Clone states.

   The **System Clones** list opens. Requests submitted from the Clone Admin Console appear on the **Clone Home** page instead.
2. Select a clone ID to view its history.

View clone status (legacy)

View the status of a legacy clone.

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Before you begin
Role required: clone_admin

Procedure

1. Navigate to **All** > **Instance Clone** > **Live Clones** > **Active Clones**.
   The system displays the list of currently active clones.
2. Select a clone.
3. Under **Related Links**, select **Check Clone Status**.
   The system updates the **State** field and produces a log entry in the **Clone Log** that shows the status of the clone.

   If an error occurs, you might roll back clone and schedule recurring clones. For more information see Clone states.

Manage Multi-Instance View

Manage a consolidated view of clones across all your instances and clone status

Before you begin
Role required: clone_admin. Multi-Instance view is enabled.

Procedure

Navigate to **All** > **Clone Admin Console** > **Clone Home**.

Result
The Clone Activity section displays all instances in your Multi-Instance View configuration.

Filter and sort instances

Filter and sort the instance list to find specific instances and customize the display format.

Before you begin
Role required: clone_admin. Multi-Instance view is enabled.

Procedure

1. Filter instances by source using the **Origin Instance** list.
   Use the **Origin Instance** drop-down to view instances by their clone source.
2. Filter instances by status using the filter icon.
   Use the **filter** icon to view instances by their status.
3. Sort the instance list by selecting any column header.
   Default sort is Most Recent to show most recently cloned instances first.
4. Change the instance display format using the view icons.
   - Select the **grid** icon to view the instance list as a grid.
   - Select the **list** icon to view the instance list as a list. The list view allows customizing the columns displayed. Select the **gear** icon to configure the columns.

Result
The Instance List shows each instance with the following information:

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Instance list columns

Column	Description
CHG Number	Change request associated with the clone request
Source Instance	Which instance serves as source for the clone operation
Target Instance	Which instance is cloned to
State	The current status of the clone activity
Scheduled Date/Time	The scheduled timestamp of the clone activity
Clone start time	The starting timestamp of the clone activity
Estimated End Time	The estimated end timestamp for completing the clone activity
Duration (for completed actions)	The duration taken for the clone activity

Add an instance to Multi-Instance View

Manage Instance Clone operations across multiple linked instances.

Before you begin
Role required: clone_admin

Procedure

1. Navigate to **All** > **Clone Admin Console** > **Clone Home** > **Configuration**.
2. Select **Multi-Instance View** link.
3. Select **Add Instance** in the Instances list.
4. Select the instance from the drop-down of available instances linked to your account.
5. Select **Add**.
   The instance is now included in your centralized view. It will appear on your Clone Homepage with its status.
6. Select **Set Up Trust** to set up a trusted relationship between the instances.
7. Select **Done** to complete adding the instance.

Result
The instance is now included in your centralized view. It will appear on your Clone Homepage with its status.

Remove a connected instance from Multi-Instance View

Remove a connected instance from Multi-Instance View

Before you begin
Role required: clone_admin

Procedure

1. Navigate to **All** > **Clone Admin Console** > **Clone Home** > **Configuration**.
2. Select **Multi-Instance View** link.
3. In the **Connected Instances** section, click **Remove Trust** from the instance you want to remove from Multi-Instance View.

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Result
The instance is removed from your centralized view. This does not delete the instance itself; you can add it back later if needed.

Preserving data from target instances during clones

You can use data preservers to protect data on the target instance from being overwritten. If you have custom applications, you must also manually preserve unpublished application content.

Data preservers

Sometimes, it is necessary to preserve some data on an instance targeted for cloning. For example, if the target is a MID Server, you must not overwrite the MID Server [ecc_agent] table. Preserved data is reapplied to the target instance after exclusions are completed.

Warning: You must define data preservers on the source instance. Defining them on the target instance does not preserve the data.

Data preservers typically preserve system settings and themes, such as:

- Instance-specific authentication settings
- Bookmark [sys_ui_bookmark]
- Recent Selection [sys_ui_recent_selection]
- User Preference [sys_user_preference]

Note: A clone does not support preserving data from a database view.

Preserving a parent table also preserves all of its child tables. For clones between MariaDB instances, child tables aren't automatically preserved and must be manually added to the preserver list.

Don't use data preservers to transfer large sets of data, such as user groups. If you must preserve table data, such as users, groups, and roles, consider exporting the records to a file and importing them after cloning.

Data preservers for Multi-SSO

The system automatically creates the necessary data preservers for cloning when you activate Multiple Provider Single Sign-On integration.

Name	Table	Conditions
Certificate	X.509 Certificates [sys_certificate]	None
Core Instance Properties	System Property [sys_properties]	• [OR] [Name] [is one of] [glide.authenticate.external, glide.authenticate.external.logout_redirect] • [OR] [Name] [starts with] [com.snc.integration.saml_esig] • [OR] [Name] [is one of] [glide.smtp.port, glide.smtp.auth, glide.smtp.encryption] • [OR] [Name] [starts with] [glide.authenticate.multisso] • [OR] [Name] [is] [glide.authenticate.sso.redirect.idp]

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Name	Table	Conditions
		Note: The properties *glide.smtp.port*, *glide.smtp.auth*, and *glide.smtp.encryption* are deprecated.
Digest Properties	Digest Properties [digest_properties]	None
Identity Providers	Identity Providers [sso_properties]	None
SAML2 Update1 Properties	SAML2 Update1 Properties [saml2_update1_properties]	None

Note: Although you can modify these data preservers, it is good practice not to. The Digest Properties [digest_properties], Identity Providers [sso_properties], and SAML2 Update1 Properties [saml2_update1_properties] tables are required for multiple source, single sign-on (SSO) to function properly. If multiple source, single sign-on is disabled on the target instance, you can safely remove all three data preservers. Remove them at the same time, as the system terminates the clone with an error message when you attempt to clone with one or two of these tables being preserved.

Preservation of unpublished applications

You can't use data preservers to save unpublished applications. Instead, application developers must choose how they want to preserve unpublished applications.

The cloning process does not preserve version differences for applications in development. Instead, the system clone only copies the application version installed on the source instance onto the target instance. If the target instance had a development version of the same application, the application is editable after the clone, but maintains the version installed on the source instance. If the application was missing from the source instance, the cloning process deletes the application from the target instance.

Instance Clone reference

Reference topics provide information about clone options, clone states, and terminology.

Clone options

A reference topic that contains various configurations for your data when requesting a clone.

Clone options when requesting a clone

Field	Description
Lock settings for this clone request	If you use a clone profile, this option locks the settings and options at the time of the clone request. Any subsequent changes to the clone profile, regardless of when the clone runs, don’t affect the clone request. This option isn’t selected by default.
Amount of data copied from the Task table	Limits the number of days of historical data for the task table and its child tables (for example Incident, problem, and change tables). Options are Full or Last 90 days. The default is Full.

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Clone options when requesting a clone (continued)

Field	Description
	To reduce clone time, consider excluding large tables altogether. When excluding tables, your target instance has the same table schema and hierarchy (empty usable tables) as the source instance. The default setting is to clone all data from the task table and its child tables to the target instance.
Clone frequency	This option enables you to schedule recurring clones from your source to your target instance. It enables you to define the clone frequency and the maximum number of occurrences. By default, the clone frequency is set to None. • None • Weekly • Every 2 weeks • Every 4 weeks
Backup options	Specifies which backup the clone request uses. • Most recent: The clone uses the latest nightly backup, unless an upgrade or a major change to the instance occurred. • On-demand backup: The backup begins at your specified clone start time. Your clone will only begin after the backup completes, pushing back the time at which the cloning process can start.
Exclude tables specified in Exclusion List	Helps to prevent cloning records from tables on the source instance, which are listed under#**Clone Admin Console** > **Configuration** > **Exclude Tables**. If a table is on the Exclusion List, the clone excludes the records on the table as well as records on the child tables. When excluding tables, their table schema and hierarchy are still cloned to your target instance. As a result, your target instance will have empty but usable tables after the clone. **Note:** Default table exclusions are still excluded and aren't affected by this setting. Including tables containing auditing, license usage, logging, and notifications. If you need the data from your excluded tables, you can choose to disable this setting. The default setting is that tables specified in the Exclusion List are excluded from a clone.
Exclude audit and log data	Helps to prevent the cloning of audit and log records from the source instance. This exclusion creates empty but usable audit and log tables on the target instance. **Note:** If you exclude audit and log data from your clone, the activity stream for records doesn't match the source instance. The activity stream relies on the audit table to generate the history.

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Clone options when requesting a clone (continued)

Field	Description
	The default setting is that audit and log data are excluded from a clone.
Exclude attachment data	Helps to prevent the cloning of certain files from the sys_attachment table, such as: • Video files • Image files • Other large binary files **Note:** Default attachments and other system-relevant files (for example catalog item images, theme images, and icons) aren't affected by this setting. The following default attachments and other system-relevant files aren't affected by this setting and aren't excluded from a clone: • Table name values that start with ZZ_. • Table names: sys_certificate, sc_cat_item,sys_upgrade_manifest, ecc_agent_jar, ecc_agent_mib, sys_store_app, or invisible.sys_store_app. The default setting is to exclude attachment data.
Preserve theme	Preserves the theme and CSS elements on the target instance. As a result, your target instance will keep its theme, its look and feel after a clone. The default setting is to preserve the theme on the target instance.
No. of days of In-progress Global Update Sets to be preserved	Preserves the last 90 days of in-progress update sets in the global application scope. This option enables you to keep in-progress, global update sets created within the last 90 days on your target instance. **Note:** This option doesn't preserve your in-progress scoped update sets. Update sets that are older than 90 days aren't saved. Review and commit your update sets before cloning. The default isn't to preserve update sets.

Clone states

A reference topic displaying the various states of a clone.

Clone state	Description
Requested	The clone was requested and is awaiting approval.
Scheduled	The clone is ready to begin at the scheduled time and date.
Active	The clone is running.
Completed	The clone completed successfully.
Canceled	The request is canceled.

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Clone state	Description
Hold	The server rejected the clone request. The clone wasn't ready to proceed by the scheduled time or because additional clone requests were submitted before the first one completed.
Error	The clone encountered an error while running. Contact technical support for help resolving this issue.
Draft	The clone is scheduled to be created. This state never appears in the Clone History table.
Rollback requested	The clone is requested to roll back to a previous state.
Rollback failure	The request to roll back the clone has failed.
Rolling back	The clone is in the process of rolling back to a previous state.
Rolled back	The clone request to roll back to a previous state is complete.

Cleanup script execution states

After a clone completes, each cleanup script on the target instance displays one of the following states. The normal progression is: Ready to schedule → Scheduled → Executing → Completed, Error, or Not executed.

State	Description
Ready to schedule	The script is queued and will run when its turn comes. Shown before and during clone execution for scripts that have not yet started.
Scheduled	The script has been scheduled to run.
Executing	The script is actively running.
Completed	The script finished successfully.
Error	The script encountered an error. The error message is shown in the **Error message** column. See Monitor cleanup script execution to retry failed scripts.
Not executed	The script was intentionally skipped due to conditional logic. The reason is shown in the **Error message** column.

Note: If a script is retried after an error, the state returns to **Executing** and the **Runs** column increments by 1.

Clone terminology

Key terms and definitions used in instance clone documentation and the Clone Admin Console.

Terminology

Term	Description
Preflight Check	A stage in the clone process that verifies the source and target instances are in a healthy state before the clone proceeds.

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Terminology (continued)

Term	Description
Provision DBI	A stage in the clone process where a new target database instance (DBI) is set up to receive the restored data.
Source Instance	The original database where data is copied from.
Target Instance	The new location where the data is copied to.
Data Preservers	Specified data from the target instance that is retained on the target instance during the clone. Preservers are defined on the source instance.
Table Exclusions	Data that is not cloned to your target instance.
Client ID / OAuth	An authentication method used to preserve OAuth credentials on the target instance during a clone. The identity type for OAuth is human. The *oauth_admin* role is required to manage OAuth credentials preserved during a clone.
Cleanup Scripts	Automated steps that run after cloning, such as changing data or settings.
Clone Profiles	Reusable template for clone settings, exclusions, preservers, and scripts.
Multi-Instance View	A feature in the Clone Admin Console that enables administrators to monitor and manage clone operations across multiple linked instances from a single primary instance, without logging in to each instance separately.
Node Repoint	A stage in the clone process where the system switches traffic from the old target instance to the newly cloned instance. Node Repoint is a clone stage, not a clone state.
Clone Admin Console	The Clone Admin Console is the default user interface that enables you to manage and track the cloning process.
On-Demand Backup	With on-demand backup enabled, clone takes a fresh on-demand differential backup at the specified clone start time. Clone uses this backup during the restore phase of the clone.
Clone Chaining	You can divide your clone operation into 2 steps. **1.** Cloning from production to your test (non-production) environment. **2.** Cloning from test to all your other environments.

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Terminology (continued)

Term	Description
	You can save time if you're dealing with multiple instances and experience long clone durations. Using this strategy, you perform lengthy operations such as post-clone cleanup scripts or excluding Task data older than 90 days only once. The clones in step 2 have a lighter footprint and complete faster.

General guidelines for optimizing your clone duration

A reference topic that includes general guidelines to optimize your clone duration when requesting a clone.

Configuring additional settings for your clone request can significantly increase your clone completion time.

When creating a clone request, consider the following guidelines.

- Set the amount of data copied from the task table to `Full`. This option clones all data from the task table and its child tables to the target instance.

  Note: The `Last 90 days` option can increase duration, as it takes longer to remove records from the task table that are older than 90 days after restoration.

- Selecting Exclude Attachment Data on the clone request form can add to your clone duration.
- Don't preserve large amounts of data in your request. If you must preserve table data, such as users, groups, and roles, consider exporting the records to a file and importing them after cloning.
- Add conditions to the preservers configured for the clone request to only preserve the data that you need.
- Use clone chaining to split up your request, see Clone terminology.

Troubleshooting for registering target instance

A reference topic that includes troubleshooting to try to resolve errors that occur while registering a target instance.

When registering a target instance, consider the following guidelines.

Credentials error

Troubleshoot a credentials error that occurs while registering a target instance.

Condition

The credentials for the target instance are incorrect preventing the target instance from being registered.

Cause

Starting with Australia Patch 5, clone requests can redirect authentication requests to a single sign-on identity provider. This applies when both the source and target instances are on Australia Patch 5 or later.

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For instances on earlier releases, the target instance credentials must exist in the `sys_user` table. The credentials can be a user record or part of a Lightweight Directory Access Protocol (LDAP) integration.

Remedy

- Provide credentials for the target instance for a user with the admin role.
- If using OAuth authentication, verify that the OAuth configuration is correct and that the OAuth provider is accessible from both instances.

System property error

Troubleshoot a system property error that occurs while registering a target instance.

Condition

By default, `glide.db.clone.allow_clone_target` is enabled on instances whose name ends in Dev, Test, Stage, UAT, or QA. An error occurs if the property isn't set to `True`.

Note: If it's a production instance, set this property back to `False` to avoid accidental clones over production in future.

Cause

The `glide.db.clone.allow_clone_target` system property is set to `False`.

Remedy

Procedure

1. Navigate to **All** > **System properties** > **All properties**.
2. Search for `glide.db.clone.allow_clone_target` in the system properties list.
3. Select the property.
4. If the value is set to `False`, set the value to `True`.
5. Select **Update**.

IP authentication error

Troubleshoot a IP authentication error that occurs while registering a target instance

Condition

A failure to authenticate an IP address prevents the target instance from being registered.

Cause

The IP address for the target instance is outside of the IP range.

Remedy

If the target instance uses IP range based authentication, it must enable the IP range `10.0.0.0/10.255.255.255` to communicate on a local network. See IP range based authentication.

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General guidelines for excluding a table from cloning

A reference topic that includes general guidelines to exclude a table from cloning.

Workflow context data

Excluded workflow context data includes records stored in the wf_context table, and in related tables with names starting with a prefix of wf_. If workflow contexts were included, this process helps to prevent the occurrence of workflow timer syncing issues. Issues can occur due to the length of the cloning process.

Excluding child tables of the task table

When excluding child tables of the task table, which use the table per hierarchy extension model, child tables are excluded. You don't need to exclude the parent Task table together with the child table.

Using wildcards

You can use wildcards to exclude several tables from cloning with one entry. For example, sys_script.* excludes all tables starting with sys_script.

Note: The wildcard has to include the dot '.' before the asterisk.

Excluding or preserving related tables

To preserve or exclude related tables, you must preserve and exclude the following tables. If any of the tables are missed, the customer may not be able to log in to the instance after a clone.

- sys_user
- sys_user_role
- sys_user_group
- sys_user_grmember
- sys_group_has_role
- sys_user_role_contains
- customer_contact (if the Customer Service Management plugin is active)

Tables that can't be excluded

sys_db_object and sys_db_object.* can't be added to the exclusions.

ServiceNow AI Platform® forms, fields, and lists

Data collection is easy with the ServiceNow AI Platform. Customize your forms with personalization, templates, tailored UI, file attachments, and more.

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Form administration	Field administration	List administration
		
Configure forms and customize their functions to best suit your enterprise demands.	Create and maintain individual data items in your records on the ServiceNow AI Platform.	Control who views and uses data in your instance, and how they use it, with ServiceNow administrative options.

Form administration

Create and modify forms with a wide variety of tools on the ServiceNow AI Platform. Give users roles to configure forms with Form Personalization. Include supplemental info with Annotations, Attachments, and Formatters. Populate forms automatically with Form Templates, to add data based on configurable settings. Form UIs are fully customizable, with desired UI actions, UI policies, and more advanced form configuration options.

Field administration

Fine-tune every detail of your data collection. Field administration includes the ability to create individual pieces of data, modify them as needed. Parent-to-child field relationships and vice-versa are automatically maintained and updated as you make changes in your tables. Multiple Field types reference are available on the ServiceNow AI Platform, to tailor records on your instance as needed.

List administration

Give users controlled access to data with List administrative tools by ServiceNow. Delegate read-only or read-and-write privileges to users, and set up or modify UI controls for data in your lists.

ServiceNow AI Platform® form administration

Administrators can change the layout of forms and related lists. Administrators can also configure several settings that control form functionality.

You change aspects of a form such as showing or hiding fields, embedding lists, and adding sections and annotations. This video highlights form layout and design.

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Get started

Configure	Administer
	
Design and configure form layout.	Define how forms behave and create UI policies.

Configuring forms on the ServiceNow AI Platform®

Form configuration involves changing the form layout and the related list layout. The form layout changes what appears on the form and the related list layout changes which related lists appear at the bottom of the form.

Important: Try configuring your forms with Form Builder instead. Form Builder has all of the Form Designer and Form Layout options. It also has other robust features that help you configure each aspect of the form. For more information, see Accessing Form Builder.

Using the form designer

Administrators or users with the personalize_form role can use the form design feature to quickly create new or change existing form views.

Important: Starting with the Australia release, form designer is being prepared for future deprecation. Try configuring your forms with Form Builder instead. Form Builder has all of the Form Designer and Form Layout options. It also has other robust features that help you configure each aspect of the form. For more information, see Accessing Form Builder.

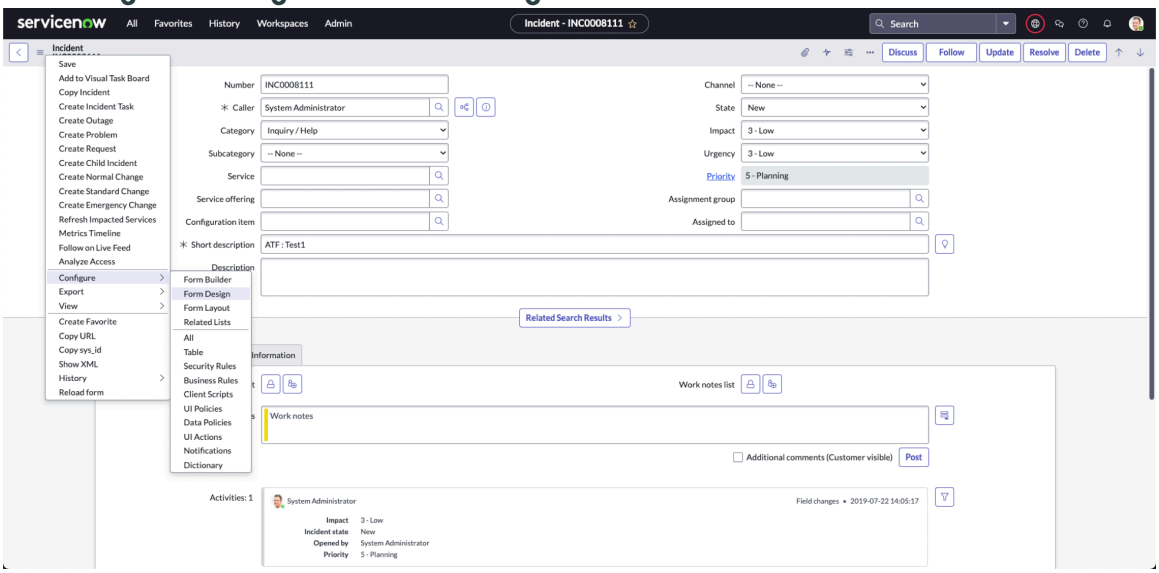
With form design, you can accomplish the same tasks that you can with form layout in a graphical tool called the form designer. You can also access field properties and add information from macros or previously scripted UI elements.

Form design is an alternative to configuring forms that combines several configuration options into one tool. It is available by default for new instances and requires Core UI . Administrators who upgrade from a previous version must activate the Form Designer (com.glide.ui.ng.fd) plugin to use the feature.

Access Form Designer by opening an existing form, selecting the Additional actions icon ( ), and then navigating to **Configure** > **Form Design**.

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Accessing Form Designer from an existing form



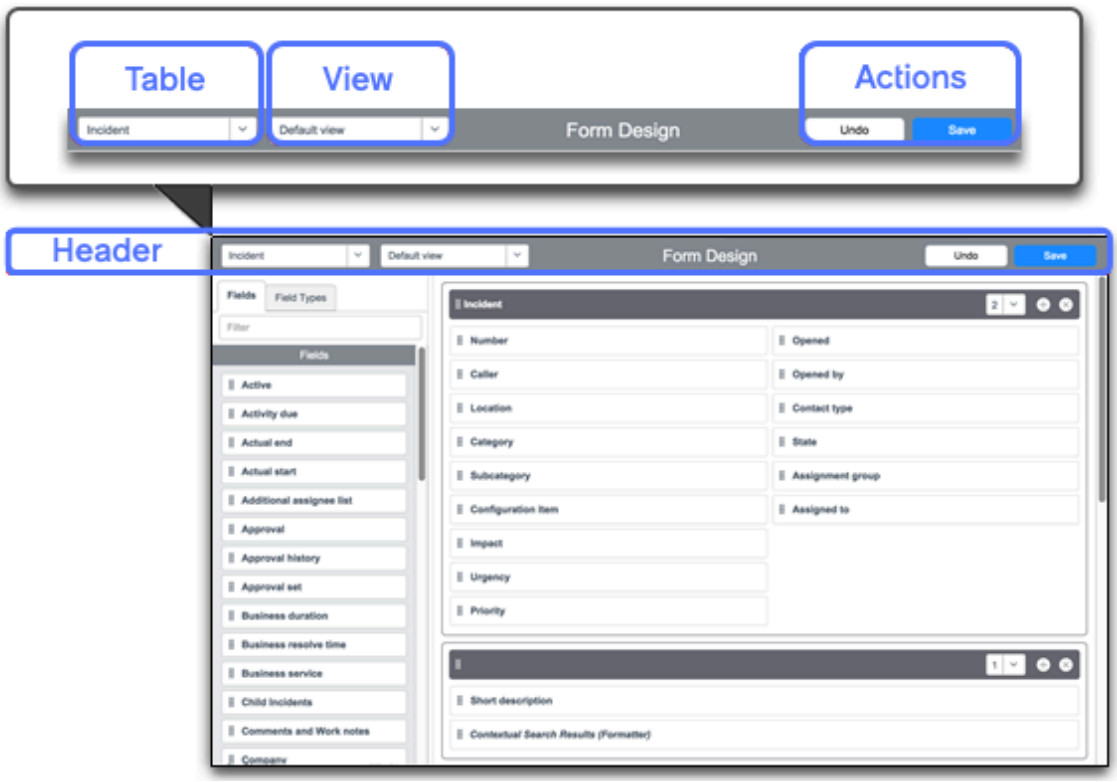
Parts of the UI form design interface



The page header

The page header displays the current table and view being designed. Each form is tied to a unique table and view combination. For example, there can only be one form for the incident table default view. Select a different view to modify different form layouts for a table.

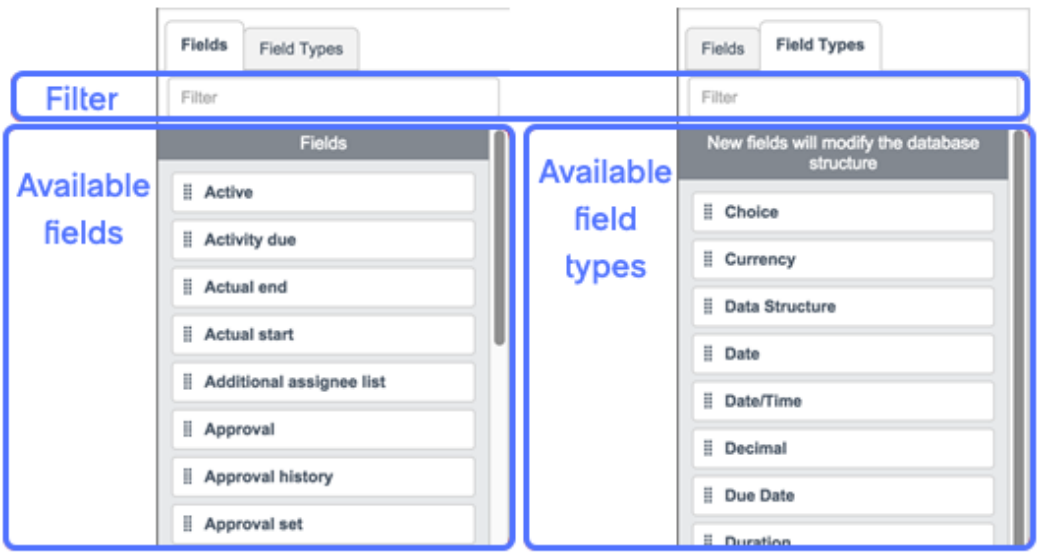
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The field navigator

The field navigator allows you to manage fields on the form. It contains the following elements:

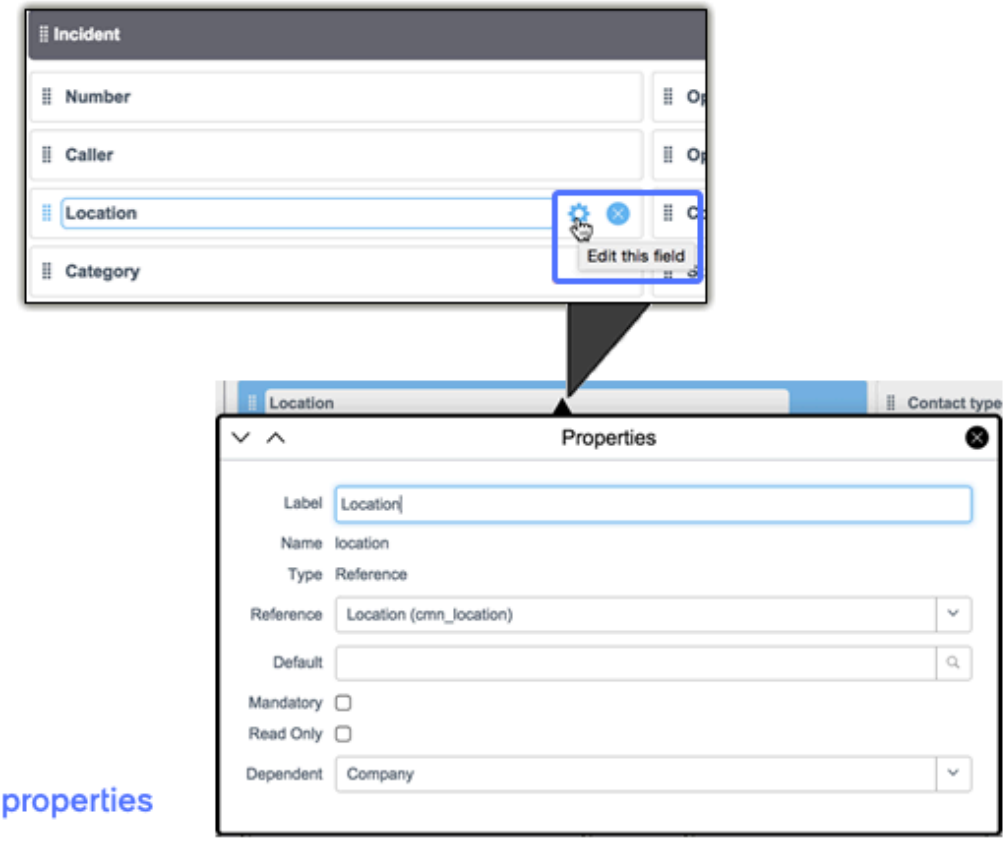
- **Filter**: Allows text search on the currently selected tab.
- **Fields**: Displays a list of existing fields you can add to the current form.
- **Field Types**: Displays a list of field types you can add to the current form. Adding a field type to the form layout creates fields in the selected table when the form layout is saved.



Field Navigator

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Field properties are accessed by clicking the gear icon that appears when you point to a field in the form layout.



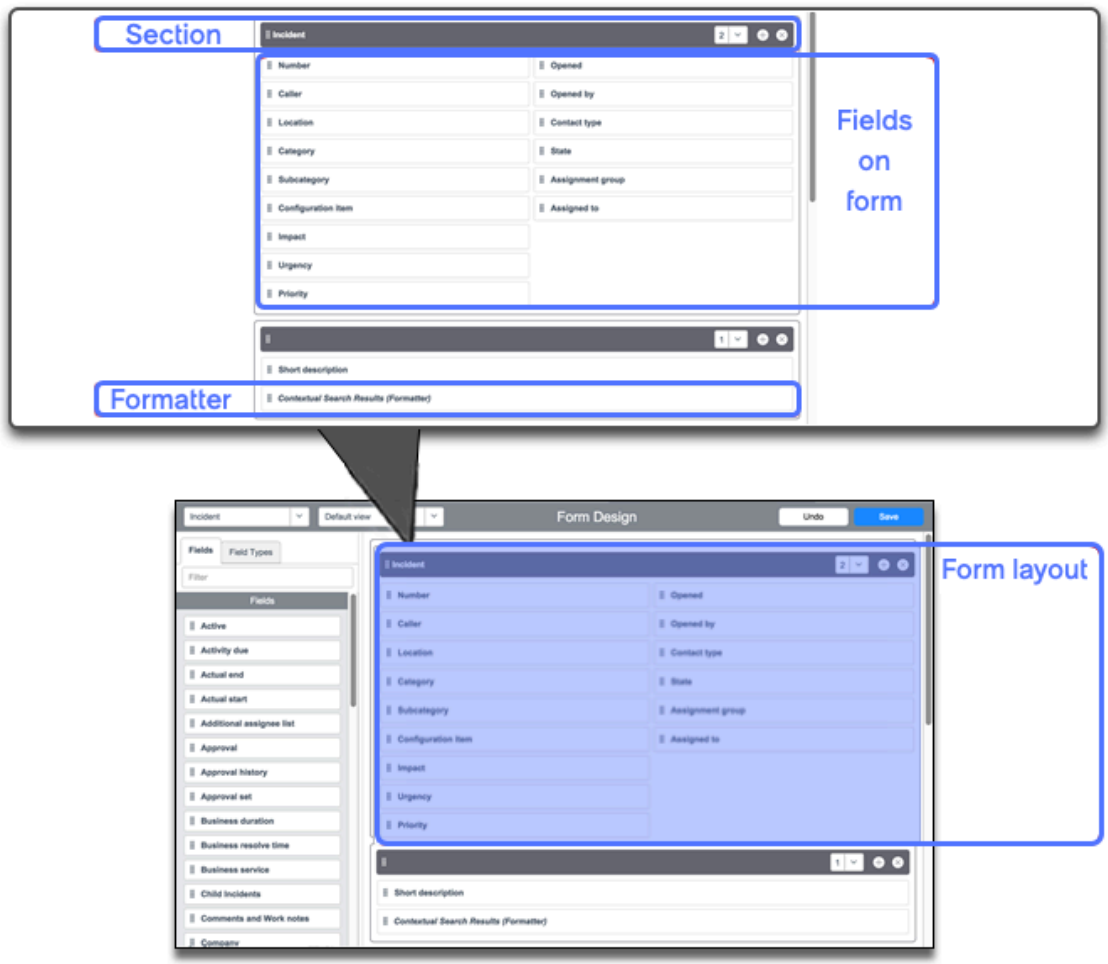
Field properties

Form layout

The form layout displays a separate cell for each field, section, annotation, UI element, and related list that is on the form. Each cell has an identifying label and a handle icon to aid in selecting and moving it. The location of the cell in the form layout represents its relative position on the form. Only fields visible on the form layout are displayed on a form.

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Form layout



Show or hide fields with the form designer

You can move fields to and from the form workspace to display the fields on the form.

Before you begin

Role required: personalize_form

About this task

Use the filter to quickly find fields in the field navigator.

Procedure

1. Navigate to the form designer.
2. From the list of fields in the **Field Navigator**, select the field you want to display from the list of available fields.
3. Drag the field to the form layout.
4. Drag the field to the location you want it to be on the form.
5. To remove a field from the form layout, select the field and click the **Remove this field** (X) button beside the field label.
6. Click **Save**.

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Add a form annotation with the form designer

Use annotations to provide instructions or additional information about fields on a form.

Before you begin
Role required: personalize_form

Procedure

1. Navigate to the form designer.
2. Click the **Field Types** tab.
3. Select the **Annotations** field type.
4. Drag the annotation to the appropriate location on the form.
5. Point to the **Annotations** field and click the gear icon to open Properties dialog box.
6. In the Properties dialog box, enter a value for **Annotation Text**.
   You can use HTML tags to format the annotation text.
7. Click **Save**.

Related topics

Administering form annotations

Add a new section with the form designer

Move sections to and from the form layout to display or remove the sections on the form.

Before you begin
Role required: personalize_form

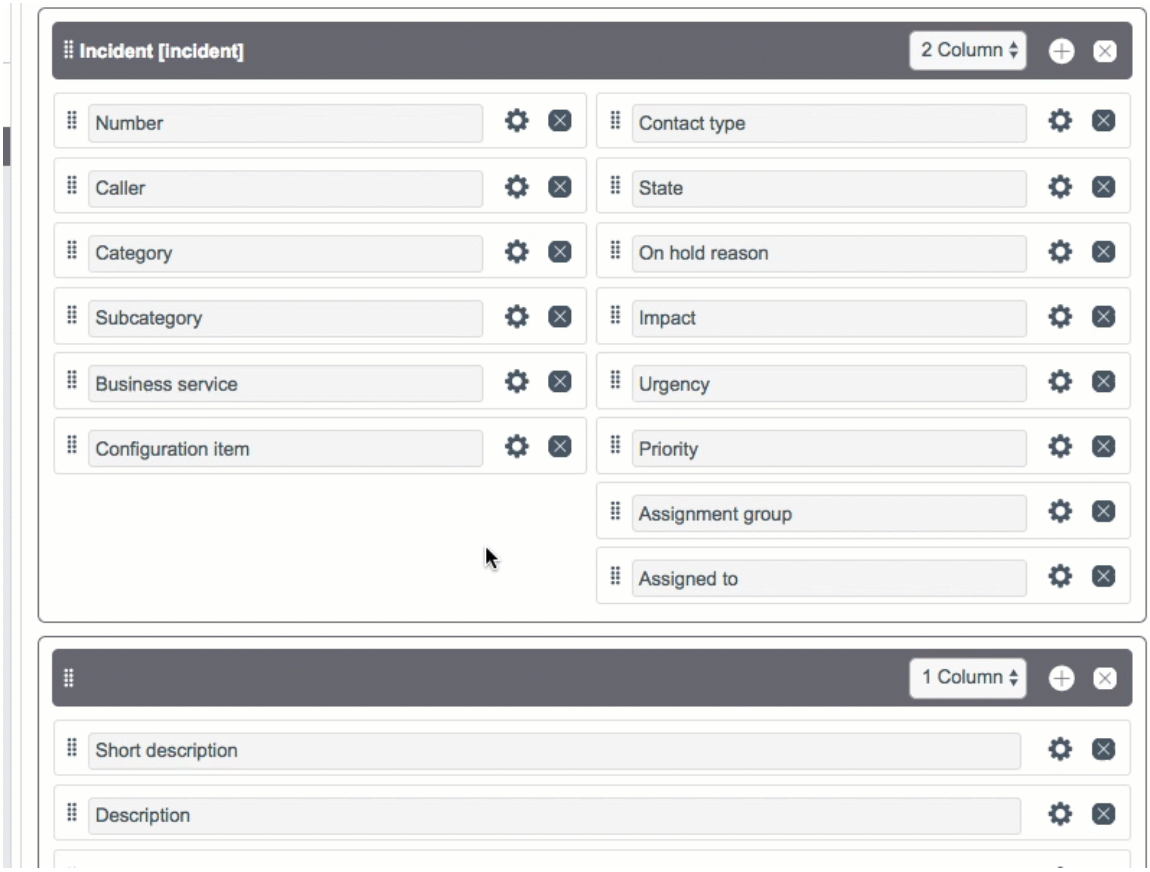
About this task
Sections can have a one- or two-column layout.
By default, the first section on a form is always a read-only section displaying the label of the table. You cannot remove this section.

Procedure

1. Navigate to the form designer.
2. Select an existing section.
3. Click the (+) button beside the section label to add a section.
4. Enter a label for the section.
5. Drag sections to reorder them.
   The label for the first section on the form designer is displayed as the form title.
6. To delete a section, click the (x) button beside the section label.
7. Click **Save**.

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The following GIF shows how you would use form designer to add and then delete a form section.



Add a formatter with the form designer

Use formatters to add information from macros or previously scripted UI elements to a form.

About this task

Formatters are used to add information from macros or previously scripted UI elements to a form.

Procedure

1. Navigate to the form designer.
2. Click the **Fields** tab.
3. In the filter, enter the string `Format`.
4. Select the formatter you want to add to the form.
5. Drag the formatter to the location you want it to be on the form.
6. Click **Save**.

Add a new field with the form designer

You can add a field to a form and the associated table.

Before you begin

Role required: personalize_form

About this task

Adding a field creates a dictionary entry for the new column in the current table. You can create a custom table and then use the form designer to add fields to the form.

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Use the filter to quickly find field types in the field navigator.

Procedure

1. Navigate to the form designer.
2. Click the **Field Types** tab.
3. Select the cell for the field type to create.
4. Drag the field type to the location you want it to be on the form.
5. Enter a label for the field.
6. **Optional:** Point to a field in the form design area and click the gear icon to access properties.
7. Click **Save**.

Related topics

Data dictionary tables

Configuring the form layout

Administrators or users with the personalize_form role can configure the form and related list layout.

Important: Try configuring your forms with Form Builder instead. Form Builder has all of the Form Designer and Form Layout options. It also has other robust features that help you configure each aspect of the form. For more information, see Accessing Form Builder.

Show or hide fields on a form

Configure form layout to change what appears on the form. You can perform tasks like changing what fields are visible, embedding lists, and adding sections and annotations.

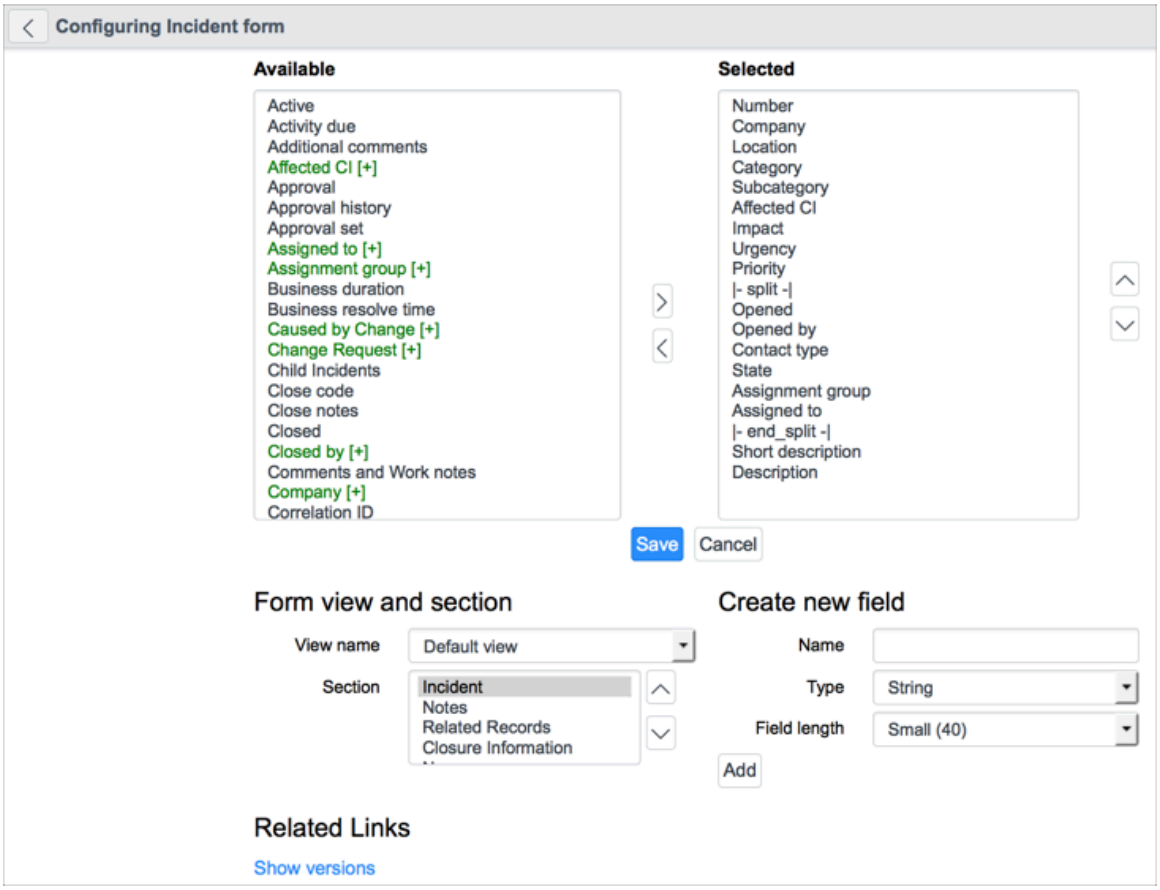
Before you begin

Role required: personalize_form

Procedure

1. Navigate to a form.
2. Select the form context menu icon ( ) and select **Configure** > **Form Layout**.
3. Move the fields that you want to be visible from the Available list to the Selected list, and reorder them as needed within the Selected list.
   Available items that appear in green followed by a plus (+) sign represent related tables. To access fields on these tables, use dot-walking.

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In Core UI, Form Layout is not responsible for the order of the Additional Comments and Work Notes fields. For more information on how to determine the order of these fields, see Customize activities.

4. Select **Save**.

> ⚠ **Warning:** Do not add the same field to more than one section of a form unless the field displays read-only data. Having two or more instances of an editable field can cause data loss and prevent the proper functioning of UI and data policies.

What to do next

Through form configuration, you can also add new fields to the form, which creates columns to the table that underlies the form. See Add and customize a field in a table for more information.

Add a related list to a form

You can configure related lists to appear on forms and in hierarchical lists.

Before you begin

Role required: personalize_form

About this task

Related lists display records in another table that have a relationship with the current record.

Procedure

1. Navigate to a form.
2. Select the form context menu icon ( ), and select **Configure** > **Related Lists**.

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3. Move the related list you want to display from the Available list to the Related list.
4. Select **Save**.
   Related lists appear at the bottom of the form.

Add an annotation to a form

Highlight form elements by displaying blocks of colored text or separators between form elements.

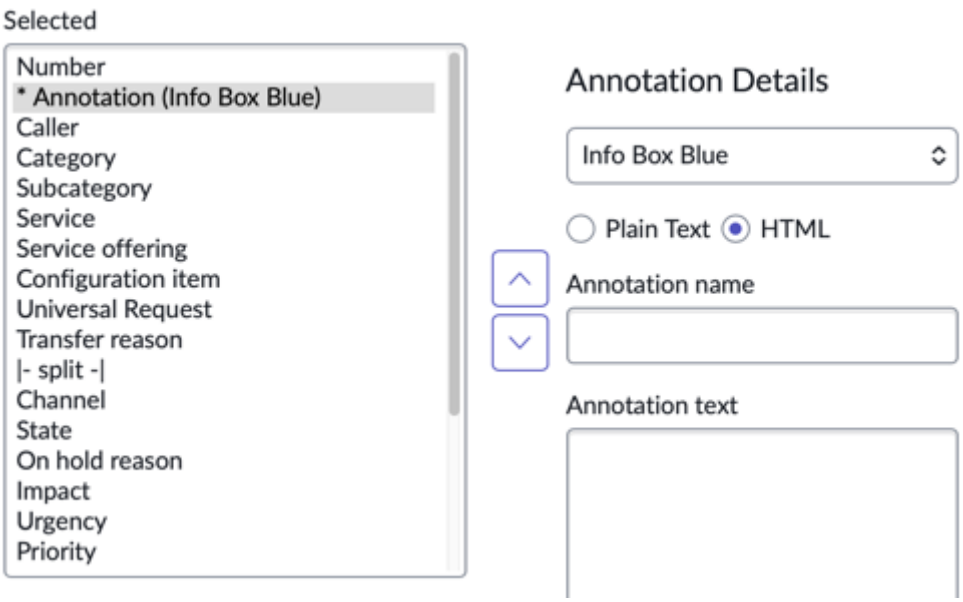
Before you begin

Role required: personalize_form

Procedure

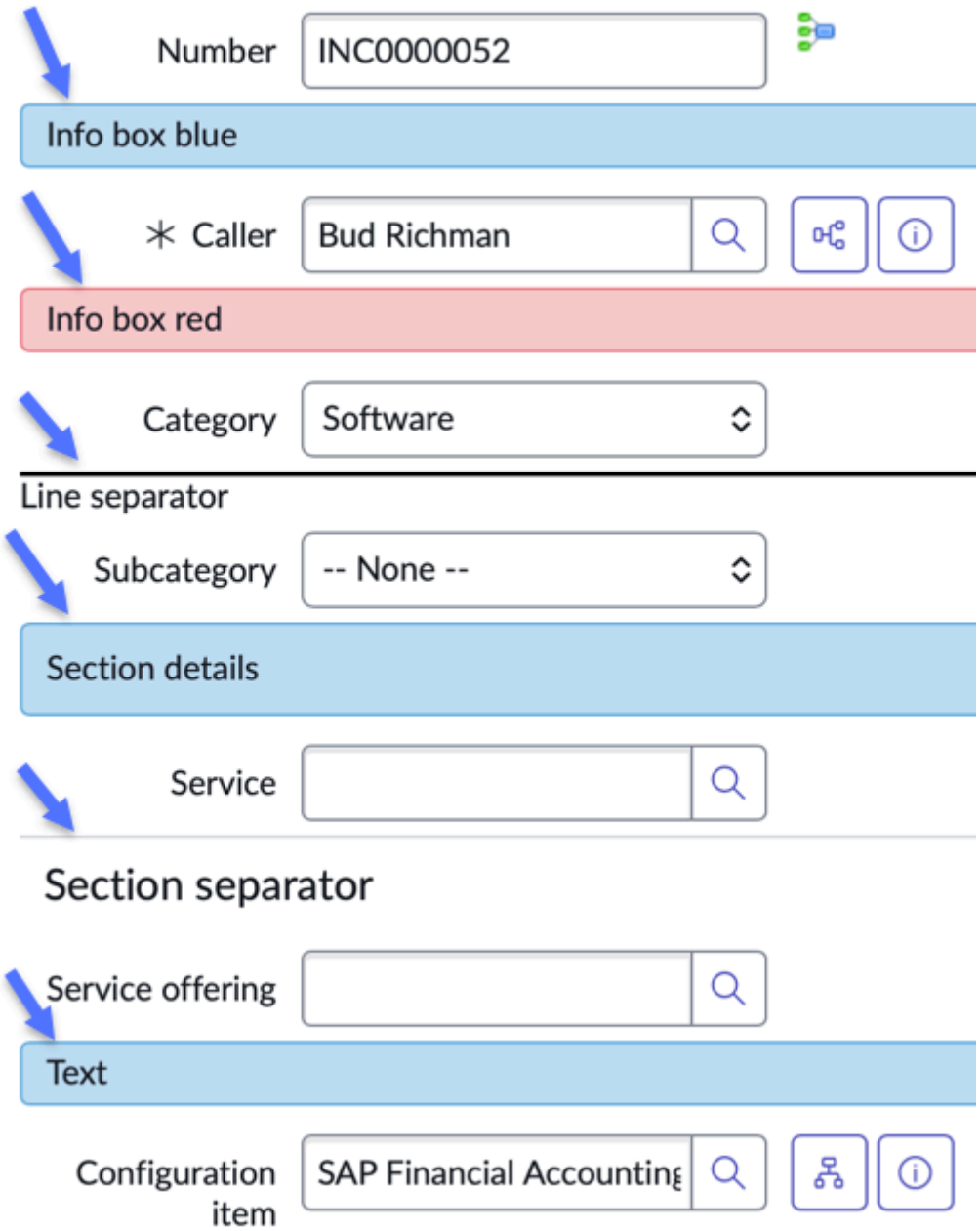
1. Navigate to a form.
2. Select the form context menu icon ( ) and select **Configure** > **Form Layout**.
3. Under **Form view and section**, select a section.
4. Move *** Annotation** from the Available list to the Selected list.

   The Annotation Details section displays.



5. In the Selected list, move the *** Annotation** item above the field you want to annotate.
6. In the Annotation Details section, select the type of annotation.
   The available types of annotations include **Info Box Blue**, **Info Box Red**, **Line Separator** (any text you add appears beneath the line), **Section Details**, **Section Separator**, and **Text**.

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7. Select either **Plain Text** or **HTML** for the data type, and enter the annotation in the text box.

   All valid HTML tags are supported.

   For example, select the **Text** annotation type, the **HTML** data type, and enter `<span style="color:red">Select the primary location:</span>`. The text appears red on the form.

8. Select **Save**.

Toggle annotations

Users can toggle annotations on a form in Core UI . The *glide.ui.show_annotations* user preference controls the visibility of annotations for each user.

Before you begin
Role required: none

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Procedure

1. Navigate to a form.
2. Select the more options icon (•••) to see the annotations icon.
   The icon is light gray and cannot be toggled when no annotations are available.

Related topics

User preferences

Create a form section

Create sections on forms to help group related fields together.

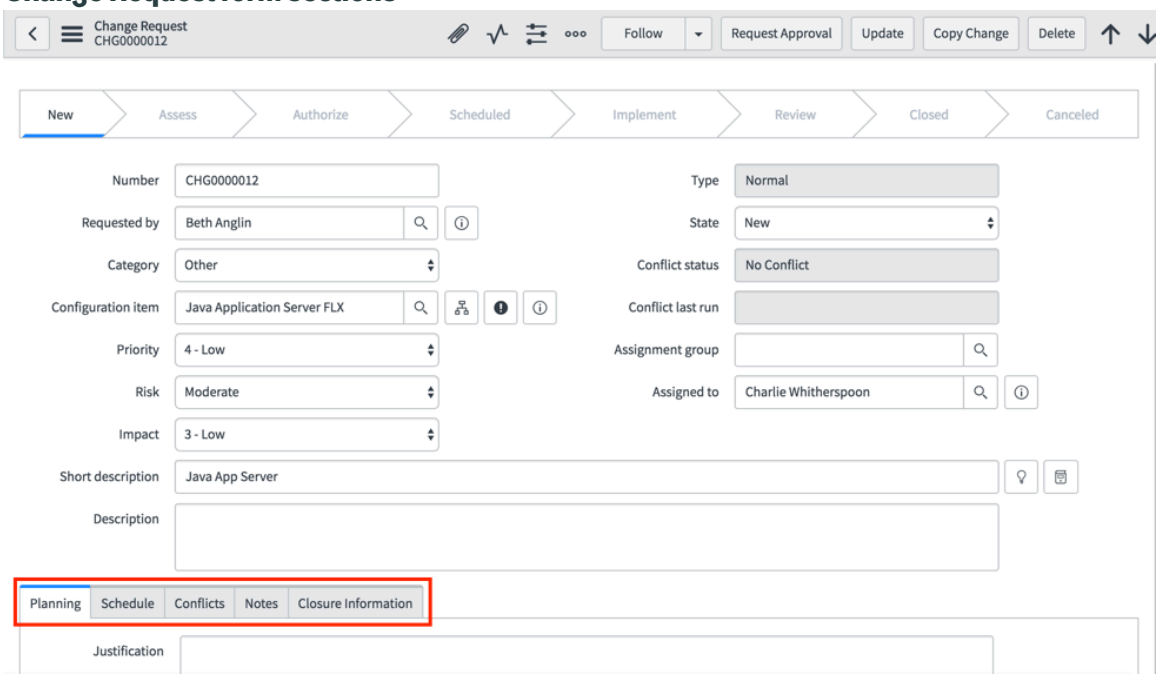
Before you begin

Role required: form_admin

About this task

Users can expand or collapse form sections to show or hide the fields they need. If you have tabs enabled, each form section appears on a separate tab. The default Change Request form is an example of a form with multiple sections as shown in the following image.

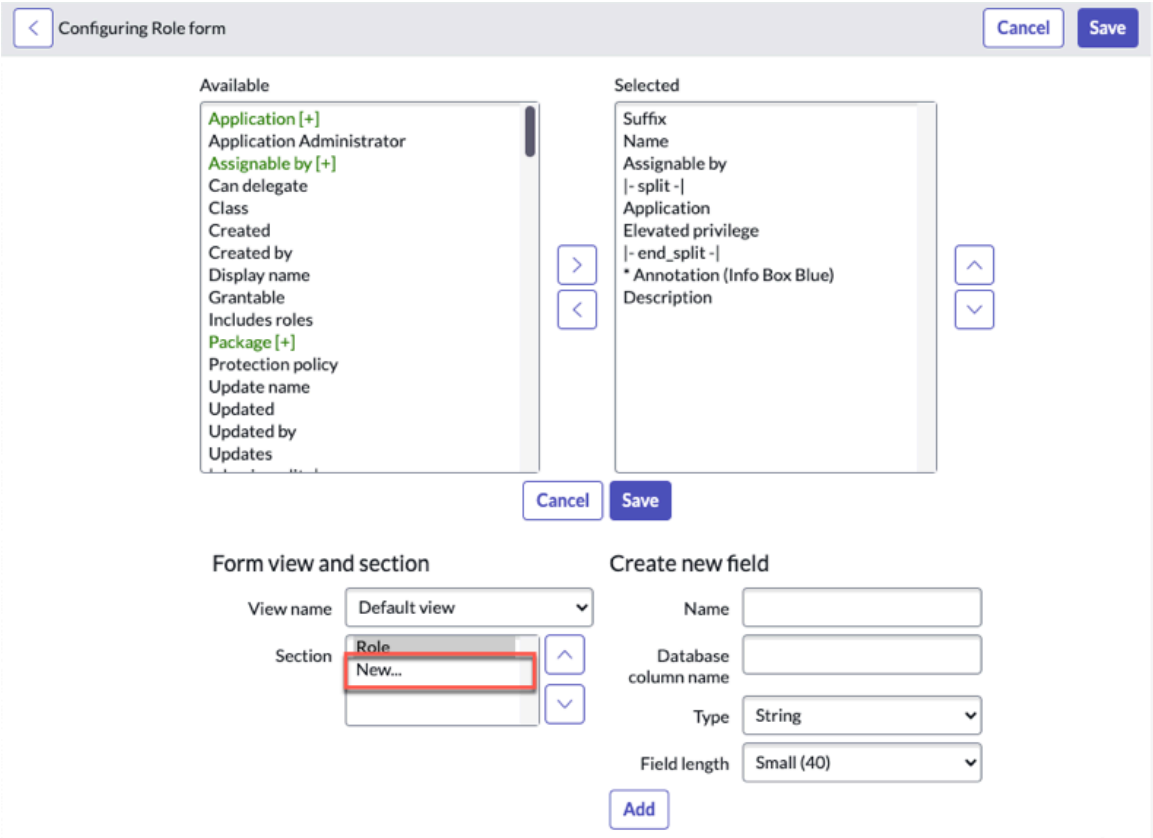
Change Request form sections



Procedure

1. Navigate to a form.
2. Select the form context menu icon ( ) and select **Configure** > **Form Layout**.
3. In the **Form view and section** area (below the Available list), select **New...** from the **Section** list.

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4. In the **Section caption** field, enter a title for the new section, and then select **OK**.
5. Select a form section name and use the up or down arrow to change the section order.

   Note: The caption for the first section on the form becomes the form title.

6. Add fields to the new section by moving fields from the Available list to the Selected list.
7. Select **Save**.
   The new section appears on the form with the fields you selected. If you do not add any fields to a section, the section stays empty.

   If you want to delete the form section later, do the following:

   a. Navigate to **System UI** > **Form Sections**.
   b. Filter for the table that contains the section you want to delete. For example, the Incident table. The name of the form section to be deleted is displayed in the **Caption** field.
   c. Select the check box beside the form section to delete, and then select **Delete** from the **Actions on selected rows** menu.
   d. Select **OK** to confirm the deletion.

Related topics

Configure items on forms or in lists using a slushbucket

Move form splits

Change the place where fields split on a form by moving the split section indicators.

Before you begin

Role required: admin

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Procedure

1. Navigate to a form.
2. Select the form context menu icon ( ) and select **Configure** > **Form Layout**.
3. Within the Selected list, move any of the following split section indicators using the up and down arrows:
   - **|- begin_split -|**
   - **|- split -|**
   - **|- end_split -|**
4. Select **Save**.

Display tabbed forms

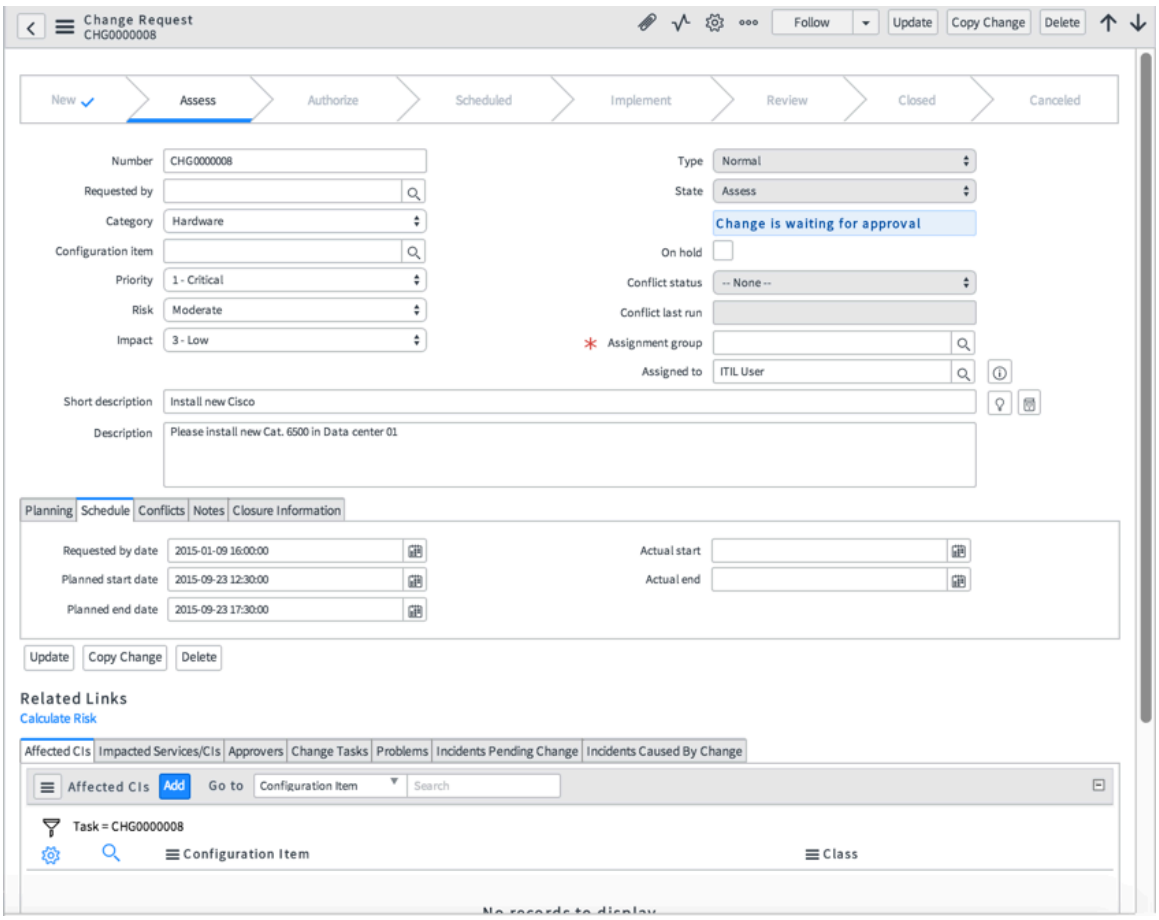
Tabbed forms offer a useful way to make forms and related lists take up less space by reducing the scrolling that must be done to navigate the form.

Before you begin

Role required: personalize_form

About this task

Tabbed forms



Form sections and related lists are tabbed separately, each with their own tab line. A user always sees the first form section. All sections after that can be tabbed.

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Tabbed forms are enabled by default for new instances. A system user preference with the name **tabbed.forms** specifies whether the tabbed interface is used by default for all users. Users can change this preference as described in this procedure.

Procedure

1. Select the **User Menu (** **)** > **Preferences** > **Display**
2. Adjust the **Organize form sections and related lists into tabs in classic forms** toggle switch to turn the preference on or off.
3. Close the dialog box.

Related topics

User preferences

Embed a list within a form

You can embed lists within a form. When a list is embedded in a form, any changes made to the contents of the list are saved when the form is saved.

Before you begin

Role required: personalize_form

About this task

This allows the embedded list to be treated just like another element on the form. In addition, users can create records in the list view. After a row is added to the list, double-click any cell in the list to edit its value. You can add the same lists to a form as embedded lists or as related lists, depending on the path selected in the form context menu.

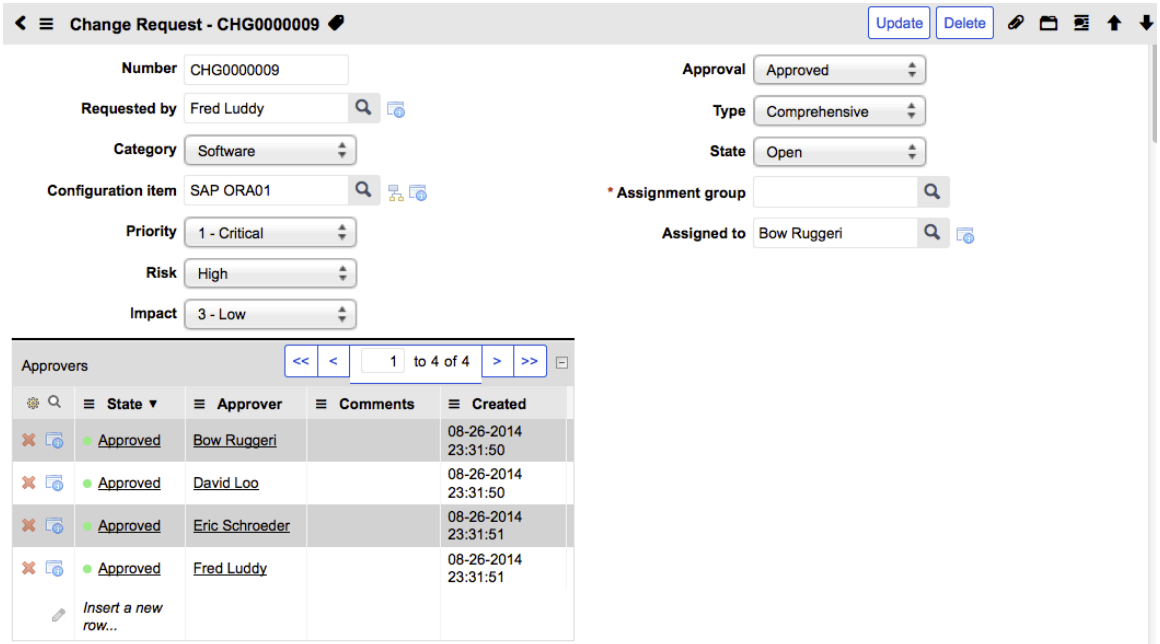
You can also modify embedded list controls, such as the name of the related list and the roles required to create records in the embedded list.

Procedure

1. Select a record from the list.
2. Right-click the form header and select **Configure** > **Form Layout**.
   The slushbucket shows the available fields and the lists that can be embedded in the form. Lists appear in red at the bottom of the **Available** list.
3. Select a list and move it to the **Selected** column.
4. Use the up and down arrow buttons to position the list in the form.
5. Click **Save**.

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Lists adjust to fit the frames of the adjacent fields.



Related topics

Configure list control settings for the list editor

Configure customer updates indicator

You can configure the indicator for customer updates, which are changes that update sets, scripts, service catalog items, and other configuration tables track.

Before you begin

Role required: admin

About this task

The customer updates indicator icon ( ) may appear on the header of forms that have customer updates. Clicking the customer updates indicator opens the update set records for the item.

You can configure this indicator to appear for all or for specific administrators using the *owned_by_indicator.form* user preference.

Procedure

1. Navigate to **All** > **User Administration** > **User Preferences**.
2. Perform one of the following actions.

Option	Description
Enable the indicator for all administrators	Set the *owned_by_indicator.form* preference to **true**.
Enable the indicator for an individual administrator	**a.** Make sure the *owned_by_indicator.form* system user preference is set to **false**. **b.** Create a user preference with the following values:

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Option	Description
	▪ **Name:** `owned_by_indicator.form` ▪ **User:** Select the administrator for which to enable the preference. ▪ **Value:** `true`

Add a chart to a form

Add a chart to a form to show your users graphical data related to the form. For example, you could show an incident SLA-related chart on the Incident form so your users can see how well service level agreements are being met.

Before you begin

Role required: personalize_form

About this task

Note: The following report types are not supported on forms: List, Pivot, Multilevel Pivot, Calendar, and Single Score.

Procedure

1. Navigate to **All** > **System UI** > **Forms**.
2. Select the form you want to configure.
3. Click the form context menu icon ( ) and select **Configure** > **Form Layout**.
4. Using the slushbucket, select *** Chart**.
5. Enter a **Label** in the chart details.
6. Click **Save** to return to the form.
7. Click **Configure chart**.
8. Select a chart in the **Report** field and configure other options as desired.
9. Click **Update**.

Administering forms on the ServiceNow AI Platform®

Administrators can configure several settings that control form functionality.

Form personalization

Control how users configure forms. You can also change the role that is necessary to configure a form and disable the form configurations that specific users already made.

See Administering form personalization for instructions.

Form annotations

Choose the types of annotations that are available on forms and save localized versions of form annotations.

See Administering form annotations for instructions.

Attachments

Control several aspects of form attachments, such as attachment size, allowed file extensions, and the roles that are allowed to attach files.

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See Administering attachments for instructions.

Formatters

Create and edit formatters, such as the activity formatter, which displays information on the form that is not a field in the record. You can also configure formatter settings such as the maximum number of formatter entries.

See Using formatters for more information.

Form templates

Create templates that automatically populate form fields based on settings you configure.

See Using form templates for more information.

UI actions

Add buttons, links, and context menu items on forms to the UI more interactive, customizable, and specific to user activities.

See Defining UI actions for more information.

UI policies

Configure the policies that dynamically change information on a form.

See Create a UI policy for more information.

Other advanced options

Configure advanced form features, such as form focus, form splits, and derived fields.

See Advanced form configuration for instructions.

Administering form personalization

Administrators can configure several aspects of form personalization, which allows users to customize the layout for any form view.

Administrators can manage this function using the following options.

- Activate or deactivate form personalization globally.
- Control user access to form personalization based on roles.
- Manage the personalized forms of users.

Note: Personalizing a form in this way modifies the form for you only. To make changes to a form that are visible to all users, you must configure the form.

Activate form personalization

Form personalization is activated for new instances. To activate form personalization for upgraded instances, an administrator must activate the Form Personalization (com.glide.ui.personalize_form) plugin.

Before you begin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Form Personalization (com.glide.ui.personalize_form) plugin using the filter criteria and search bar.

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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.

Change form personalization role requirements

By default, the itil role is required to personalize forms, but you can change this requirement with a system property.

Before you begin

Role required: admin

Procedure

1. Enter `sys_properties.list` in the navigation filter.
2. Locate the *`glide.ui.personalize_form.role`* property in the System Properties list.
3. In the **Value** field, specify the roles that can access form personalization.

Related topics

Personalize a form

Manage personalized forms

When a user personalizes a form, the system stores the customizations as a user preference record. You can view and manage the user preferences.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **User Preferences**.
2. Filter the list by **[Name] [contains] [personalize]**.
   There is a user preference for each form view each user personalizes. The name format combines the word personalize with the name of the table and the name of the view. For example, if a user personalizes the default view of the Asset [alm_asset] form, the user preference is called *`personalize_alm_asset_default`*.
3. Delete a user preference to remove the customizations for the user.

Related topics

Personalize a form

User preferences

Disable form personalization

If you do not want your users to customize forms, you can disable form personalization.

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Before you begin
Role required: admin

About this task
Activating the Personalize Forms plugin sets the *glide.ui.personalize_form* property to true. You can disable form personalization.

Procedure
1. Enter `sys_properties.list` in the navigation filter.
2. Locate the *glide.ui.personalize_form* property in the System Properties list.
3. Set the **Value** field to `false`.

Related topics
Personalize a form

Administering form annotations
Form annotations are additional pieces of information on a form, such as a line or paragraph of text. Use form annotations to provide on-screen instructions to your users.

Form annotations are enabled by default in the base system. To disable them, set the `glide.ui.form_annotations` system property to false.

Support multiple languages for a form annotation
You can store multiple translations of form annotation text.

Before you begin
Role required: admin

About this task
To support multiple languages, use message records to translate annotation text.

Procedure
1. Navigate to **All** > **System UI** > **Messages**.
2. Create a message record for each language you support.
3. On the Message form, set the **Key** field to a unique identifier for the annotation text.
   The annotation text is a good key. The key must be the same for each translation message for the annotation.
4. Select the appropriate **Language**.
5. In the **Message** field, enter the translated annotation text.
6. Edit the form annotation and reference the message key with a *gs.getMessage* call.
   For example, if the message key is **Message key text**, enter `${gs.getMessage("Message key text")}` in the form annotation.

Administer form annotation types
You can define the form annotation types to control their appearance.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System UI** > **Form Annotation Types**.
2. Set the **Active** field to **false** for any types you do not want to use.
3. Click **New** to add a type.

Administering attachments

Administrators can configure system properties for how files are uploaded and attached to records. Uploading, viewing, and deleting file attachments triggers a single event that can be used for notifications or in scripts.

Attachment tables

When you store an attachment to any table, a record is created in the Attachment [sys_attachment] table that contains attachment metadata. The file data is stored in the Attachment Document [sys_attachment_doc] table, in 4k chunks. For example, if you attach a 12k file called **My_attachment.pdf**, then there is an Attachment entry with three related Attachment Document entries.

To learn how to upload attachments to records, see Add and manage attachments.

Activity stream thumbnail scaling

The *glide.ui.activity_stream.scale_images* property scales large images down and creates thumbnails for the activity stream view of the images. This property is active by default. It applies to images retroactively, so any attachments included in an activity stream in the past also see the effects.

- Maximum dimensions for thumbnails using this property are 525 pixels width by 350 pixels height. The system favors the pixel height first, so you can end up with images that are wider than 525 pixels.
- Attaching image files over 5 MB can create an out of memory error and cause the instance to restart. An out of memory error and restart occur when the system generates the thumbnail when you attach a new image. The error and restart can also occur the first time you load existing images on a record.
- The administrator can add the *com.glide.attachment.max_get_size* system property to control the maximum image scaling dimensions.

Enter the following information into the [sys_properties.list] table:

Field	Description
Name	com.glide.attachment.max_get_size
Type	integer
Value	5242880

The value field represents the size in bytes.

- The base system value is 5242880 bytes (5 MB). You can change the value as necessary.
- With this property set, images that are larger than 5 MB are not scaled and the system creates a link instead. Images smaller than 5 MB are scaled down.

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Configure the max image size property for Activity Streams

When attaching an image in an Activity Stream, the system controls the maximum size of the image. Use the *com.glide.attachment.max_get_size* property to control the maximum image scaling dimensions.

Attachment events and logging

A script action or notification can process attachment events. Only one event is created when action is taken on a record with attachments, even when the record has multiple attachments. The following events are provided.

Only one event is created when action is taken on a record with attachments, even when the record has multiple attachments. The following events are provided.

Attachment events

Event	Description
attachment.read	An attachment has been read or downloaded.
attachment.uploaded	An attachment has been uploaded. If multiple attachments are uploaded to a record at one time, only one event is created.
attachment.deleted	An attachment has been deleted. This event is also triggered when the record containing the attachment is deleted. If a record is deleted that contains multiple attachments, a separate event is triggered for each attachment in the deleted record.
attachment.renamed	An attachment has been renamed.

Attachment logging

When an attachment is downloaded, the *attachment.read* event record is written, and you can do something with this event. For example, you can record when and by whom certain attachments are downloaded. For this functionality, **current** is a sys_attachment record, and the event record uses the following parameters:

- **parm1:** File name
- **parm2:** Table name

Debug attachment indexing

To change debugging options for attachment indexing, add these system properties.

- *glide.ts.index.attachment.debug*: When the value is set to **true**, enables log messages for exceptions that occur when indexing attachments (default is **false**).

  You can leave this property enabled during normal operations to capture stack trace information about any exceptions.

- *glide.ts.index.attachment.list_terms.debug*: When the value is set to **true**, logs all indexed terms when an attachment is indexed (default is **false**).

  [Recommended] For optimal performance, set this property to **false** during normal operations. Only enable this property when you are actively debugging an issue.

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Note: To learn more about the properties that affect attachments processing, see Attachments (instance security hardening) in Instance Security Hardening Settings.

Configure attachment system properties

You can disable the drag-and-drop feature. (Users can still upload attachments by browsing to the file.) You can also limit the attachment file size, restrict who can upload attachments, and restrict what file extensions can be uploaded.

Before you begin

Role required: admin

Note: To learn more about the properties that affect attachments processing, see Attachments (instance security hardening) in Instance Security Hardening Settings.

Procedure

1. To disable the drag-and-drop features, navigate to **System Properties** > **UI Properties**.
2. Clear the check box for the **Allow attachment drag and drop in supported HTML5 browsers** property.
3. Click **Save**.

Limit attachment file size

You can specify the maximum size allowable for attachments to avoid issues with the user's active session on the instance. The maximum attachment size for email attachments is configured separately.

Before you begin

Role required: Admin.

About this task

Note: The maximum attachment size for email attachments is configured separately.

Procedure

1. Navigate to **All** > **System Properties** > **Security**.
2. Enter a value in the **Maximum file attachment size in megabytes** property.
   The system only allows attachment sizes up to 1 GB. By default, this field is blank. If you leave this field blank, the system uses the default maximum limit of 1 GB.
3. Click **Save**.

Require a role to attach files

You can restrict who can upload attachments.

Before you begin

Role required: Admin.

Procedure

1. Navigate to **All** > **System Properties** > **Security**.
2. In the **Attachment limits and behavior** section, locate the **List of roles (comma-separated) that can create attachments** property (*`glide.attachment.role`*).
3. Enter one or more roles separated by commas.

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Only roles listed in this property are able to upload attachments to a record. If no roles are entered, then all roles can upload attachments.

4. Click **Save**.

Restrict attachment file extensions

The *glide.attachment.extensions* property restricts the file extensions that users can upload as attachments.

Before you begin
Role required: Admin.

About this task
Restrict attachment file extensions to prevent users from uploading invalid file types and file types that may be more likely than others to contain viruses or malware.

Note: This property does not restrict attachments based on the actual file type, only based on the extension. To enable MIME type validation, which validates that the MIME type of a file matches the file extension and can block attachments that do not pass this validation, see .

Procedure

1. Navigate to **All** > **System Properties** > **Security**.
2. In the **Attachment limits and behavior** section, locate the **List of file extensions (comma-separated) that can be attached to documents via the attachment dialog** property.
3. Enter the file extensions and click **Save**.
   If no extensions are specified, then all extensions are allowed. However, if any extensions are specified, all unlisted extensions are restricted. Listed extensions should not include the dot (.) prefix or spaces after commas. For example, enter `xls,xlsx,doc,docx`.

Disable attachments on a table

You can prevent users from adding attachments to records on a specific table.

Before you begin
Role required: admin

Procedure

1. Open a record in the table.
2. Right-click the form header and select **Configure** > **Dictionary**.
3. In the list of dictionary entries, select the first record in the list (the record with no **Column name** entry).
4. Add `no_attachment` to the **Attributes** field, separated by commas from any existing attributes.
   See Altering tables and fields using dictionary attributes for more information.

Index attachments on a table

You can enable attachment indexing for a table so text searches can return matches from the record and its file attachments.

Before you begin
Role required: admin

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About this task

By default, attachment indexing is enabled for the Knowledge Base. You can enable attachment indexing for other tables. Enabling attachment indexing causes the platform to reindex the selected table, its parent table, and any children of the parent table. For large tables, such as the Task table, reindexing can take several hours and slows down the system until complete. Reindexing is best performed during non-peak times.

Procedure

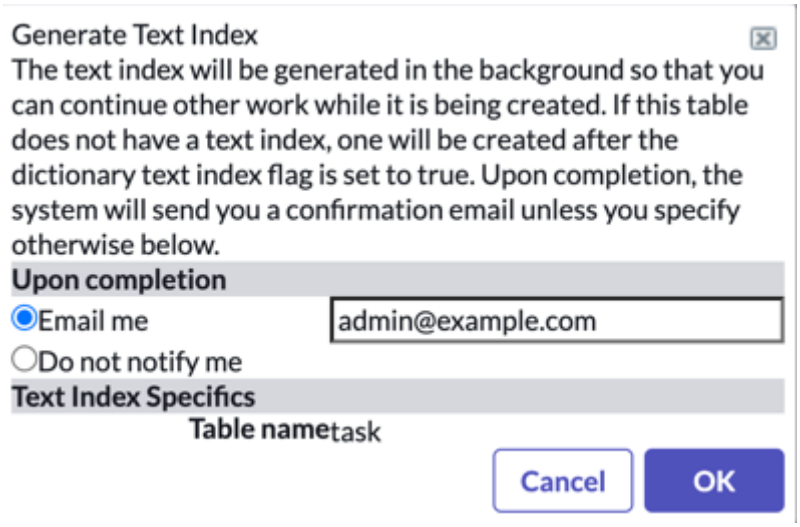
1. Navigate to **All** > **System Definition** > **Text Index Configurations**.
2. Edit the record for the table that you want to enable attachment indexing for.
3. In the Text Index Table Attribute Maps related list, select **New**.
4. On the Text Index Table Attribute Map form, fill in the fields.

Field	Value
Table	<table name>
Attribute name	Attachment index
Value	true

> **Note:** The attachment index attribute only applies to the tables on which you explicitly add it. It does not cascade to child tables. For example, enabling indexing of attachments on the Task table does not enable indexing of attachments on the Incident table. Not all file types are supported for attachment indexing. For a list of supported file types, see Zing can include attachments in search results.

5. Select **Submit**.
   A message appears indicating that the attachment index attribute change will not take effect until you reindex the selected table.
6. Dismiss the reindexing message by selecting **OK**.
7. On the Text Index Configuration form, select the **Generate Text Index** related link.
8. In the confirmation window, perform one of these two steps:
   - To receive an email notification from the system when text indexing for the table is complete, enter your email address and select **OK**.
   - If you do not want to receive an email notification, select **Do not notify me**, then select **OK**.

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9. Dismiss the confirmation message by selecting **OK**.

Result

The system begins text indexing for the table. When it is complete, attachments can be searched on that table.

Hide the attachment [view] link

Users can open an attachment by clicking either the file name or the **[view]** link. The **[view]** link opens the file from within the browser, which executes JavaScript code as part of the attachment. You can hide the **[view]** link. Users can still view attachments by clicking the file name.

Before you begin

Role required: Admin.

Procedure

1. Add the *glide.ui.disable_attachment_view* and *glide.ui.attachment_popup* properties.
   For instructions on adding properties to the platform, see Add a system property.
2. For the *glide.ui.disable_attachment_view* property, set the **Type** to **true/false** and set the **Value** to **true**.
3. For the *glide.ui.attachment_popup* property, set the **Type** to **true/false** and set the **Value** to **false**.
4. To return to the default behavior (enable the link), set the *glide.ui.attachment_popup* property **Value** to **true**.

Configure attachment icons

Configure the icon that appears beside an attachment of a particular file type.

Before you begin

Role required: admin

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Procedure

1. Determine the path of the image file or upload a new image.

   To view the images available for attachment icons, navigate to `https://<instance-name>.service-now.com/image_picker.do` in your browser. Hover over the icons to see their paths in the tooltips.

   You can also store your own icons and use them as attachment icons. See Storing images in the database.

2. Navigate to **System UI** > **Attachment Icon Rules**.
3. Open an existing rule or select **New** to create a new rule.
4. Enter the rule details.

Field	Description
Select icon by	Select **MIME Type** or **File Extension**. **Note:** If a file type has an icon specified by **MIME Type** and a different icon specified by **File Extension**, the **MIME Type** icon takes precedence.
MIME type	If **Select icon by** is **MIME Type**, enter the MIME type and subtype to associate with the icon, separated by a slash (example: `application/pdf`).
File extension	If **Select icon by** is **FIle Extension**, enter the file extension to associate with the icon beginning with the period (example: `.pdf`).
Icon	Enter the path to the icon image file (example: `images/icons/attach_pdf.gifx`)

5. Click **Submit** or **Update**.

Using formatters

A formatter is a form element used to display information that is not a field in the record. Add formatters to a form by configuring the form.

Examples of formatters in the base platform

Formatter	Description
Activity formatter	Displays the list of activities, or history, on a task form. For an example of an activity formatter, see Activity formatter.
Process flow formatter	Displays the different stages in a linear process flow across the top of a record. For an example of a process flow formatter, see Process flow formatter.

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Examples of formatters in the base platform (continued)

Formatter	Description
Parent breadcrumbs formatter	Provides breadcrumbs to show the parent or parents of the current task. For an example of a parent breadcrumbs formatter, see Parent breadcrumbs formatter.
Approval summarizer formatter	Displays dynamic summary information about the request being approved. For an example of an approval summarizer formatter, see Approval summarizer formatter.
CI relations formatter	Displays on the CI form a toolbar for viewing the relationships between the current CI and related CIs. For an example of CI relations formatter icons, see CI relations formatter.

Note: Formatter elements cannot be exported to PDF. When exporting PDF data from a form, any formatter elements added to the form are not displayed in the PDF output.

To create a custom formatter, create a UI macro to define content for the formatter, then create a formatter that refers to the UI macro. You can then add the formatter to a form.

Create a UI macro for a formatter

Create a UI macro to define the content that the formatter displays.

Before you begin

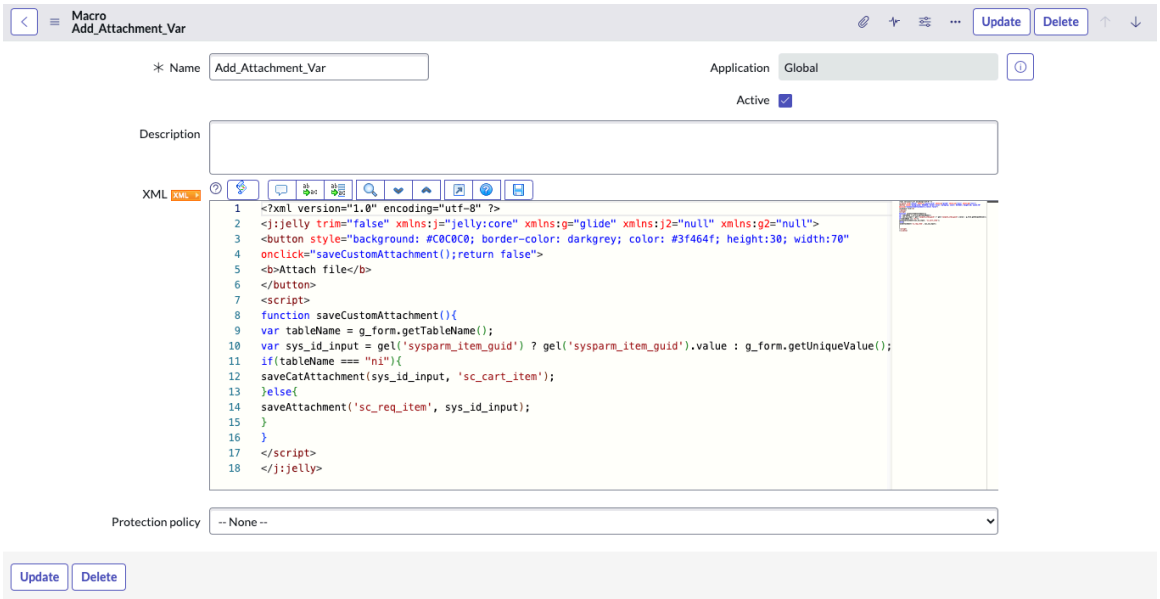
This functionality requires knowledge of Jelly script.
Role required: ui_macro_admin

Procedure

1. Navigate to **All** > **System UI** > **UI Macros**.
2. Click **New**.
3. Complete the form.
4. In the **XML** script field, enter Jelly script to define the content to be displayed by the formatter.

Note: The UI Macro for the formatter represents a row in the UI. It must begin and end with `<TR></TR>` tags.

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This Jelly script is reproduced below in plain text that you can copy into the Macro form as a basis for your macro script.

```
<?xml version="1.0" encoding="utf-8" ?>
<j:jelly trim="false" xmlns:j="jelly:core" xmlns:g="glide"
 xmlns:j2="null" xmlns:g2="null">
<button style="background: #C0C0C0; border-color: darkgrey;
 color: #3f464f; height:30; width:70"
onclick="saveCustomAttachment();return false">
<b>Attach file</b>
</button>
<script>
function saveCustomAttachment(){
var tableName = g_form.getTableName();
var sys_id_input = gel('sysparm_item_guid') ?
 gel('sysparm_item_guid').value : g_form.getUniqueValue();
if(tableName === "ni"){
saveCatAttachment(sys_id_input, 'sc_cart_item');
}else{
saveAttachment('sc_req_item', sys_id_input);
}
}
</script>
</j:jelly>
```

5. Click **Submit**.

Related topics

Jelly tags

Create a formatter and add it to a form

Create the formatter after creating the UI macro that defines the content.

Before you begin

Role required: ui_macro_admin

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About this task

With the UI macro in place, create the formatter that references it, and add it to the form.

Procedure

1. Navigate to **All** > **System UI** > **Formatters**.
2. Click **New**.
3. In the **Name** field, enter a descriptive name for the formatter.
4. In the **Formatter** field, enter the name of the UI macro with `.xml` appended to it.
5. In the **Table** field, select the table in which the formatter will be used.
6. In the **Type** field, select **Formatter**.
7. Click **Submit**.
8. To add the formatter to a form, configure the form design and add the formatter.
   The formatter appears on the form according to your selections.

Activity formatter

The activity formatter provides an easy way to track items not saved with a field in the record, for example, journal fields like comments and work notes.

The activity formatter is enabled by default on the Task [task] table and other tables that extend the Task table, such as the Incident [incident] table. It is also enabled on the Approvals [sysapproval_approver] table.

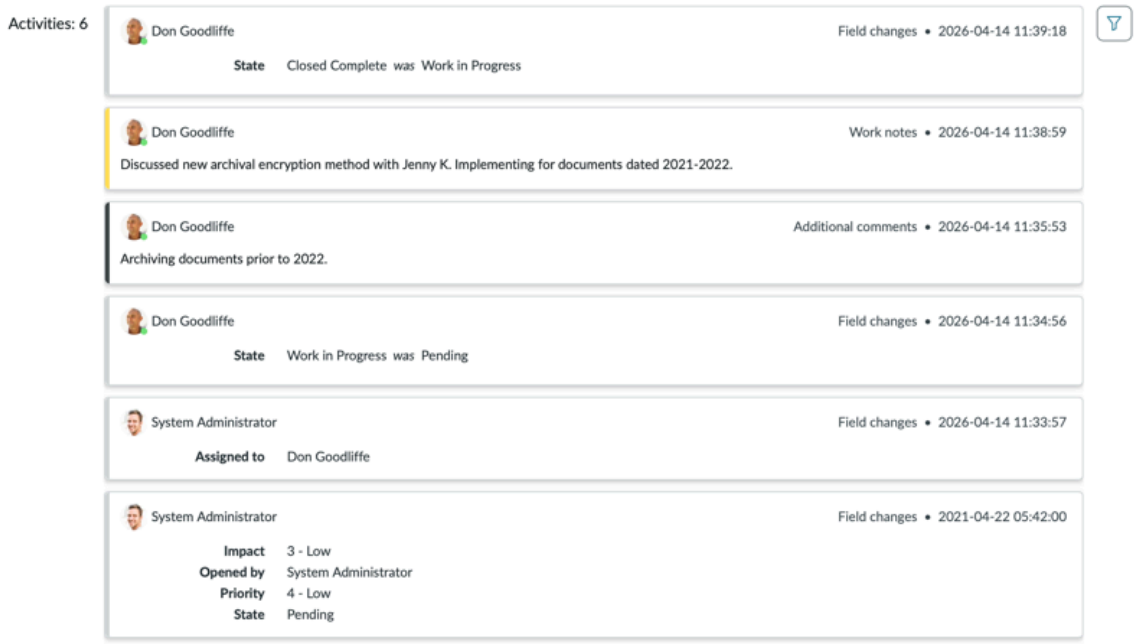
You can filter the content that appears on the activity formatter and participate in the record feeds on the record. You can create an activity formatter for any form and configure properties that control what fields appear in the formatter. The number next to activities indicates the number of entries in the record feed. The number updates when users use the filter.

Activity type and a time stamp display in the top of each entry.

In Core UI, the activity formatter shows updates in real time so you can see the latest information without refreshing the form. User presence enables you to see when other users are entering comments.

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Core UI activity formatter



Related topics

User presence

Create an activity formatter

You can create an activity formatter for any audited table.

Before you begin

Role required: ui_macro_admin

Procedure

1. Navigate to **All** > **System UI** > **Formatters**.
2. Click **New**.
3. Enter a name for the formatter, such as `Activities (task)`.
4. Select a **Table**.
5. Enter `activity.xml` in the **Formatter** field.
6. Leave the **Type** as **Formatter**.
7. Click **Submit**.

Result

Note: You can create more than one activity formatter for a table, however, the system does not allow you to add more than one activity formatter to a form.

What to do next

Add the new activity formatter to forms as needed.

Add the activity formatter to a form

Add an activity formatter to any form to track journal fields on the form.

Before you begin

Role required: personalize_form

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Procedure

1. Verify that the table associated with the form is audited.
2. Configure the form layout to add **Activities (filtered)**.

> **Note:** In Core UI, you cannot place another field in between a journal field and the activities formatter. The Activity Stream is built to keep journal fields stacked on top of the activity formatter.
>
> Field styles are not applied to comments and work notes fields used with the activity formatter. Styles for these fields can be set using the `glide.ui.activity_stream.style.comments` and `glide.ui.activity_stream.style.work_notes` system properties located on the sys_properties table.

Enable the Live Feed-Activity toggle

Enable the Live Feed-Activity toggle, which allows users to switch between the activity feed and the document feed for a record.

Before you begin

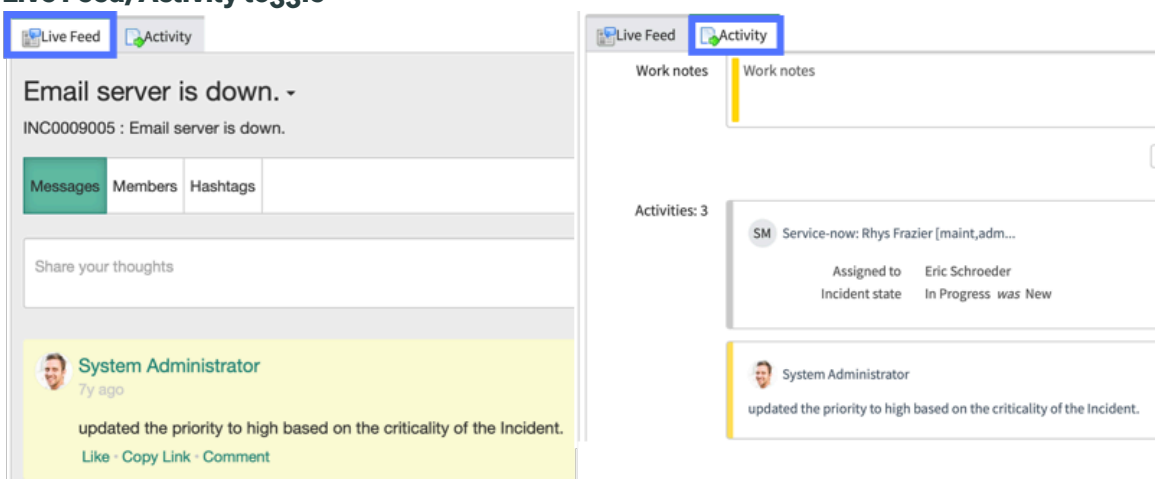
The Live Feed-Activity toggle is only supported in the Core UI. To enable it, the system property *`glide.ui.polaris.experience`* must be set to "false."

Role required: admin.

About this task

Use live feed to interact with other users on a record by posting messages and adding attachments to the feed. Use the activity formatter to see an overall summary of activity for the record.

Live Feed/Activity toggle



Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Find the *`glide.ui.show_live_feed_activity`* property and set it to "true."

Result

Form activity formatters include a Live Feed-Activity toggle.

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Customize activities

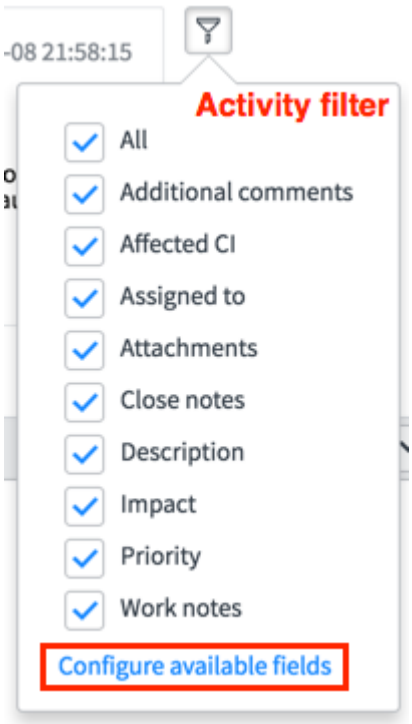
You can customize which fields appear in the activity formatter. You can add or remove fields from the list of activities that users can select when they open the activity filter.

Before you begin

Role required: personalize_form and personalize_list

About this task

Customize the fields that appear in the activity filter



Procedure

1. Select the activity filter icon ( ).
2. At the bottom of the list, select **Configure available fields**.
3. In the slushbucket, select the desired fields in the **Available** column and move them to the **Selected** column.
   The activities appear in alphabetical order, regardless of the order in the **Selected** column.

   Note: In Core UI, **Configure available fields** is responsible for the order of the Additional Comments and Work Notes fields.

4. Select **Save** to add them to the activity formatter and the filter.

What to do next

Administrators can also modify the system property **Incident activity formatter fields**(*glide.ui.incident_activity.fields*). Access this property through **System Properties** > **UI Properties**. The system automatically synchronizes the values in the system property and the selections you made.

Configure roles for viewing emails in the activity formatter

The system property *glide.ui.activity.email_roles* enables you to control which roles can see emails in the activity formatter.

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Before you begin
Role required: admin

About this task
In the activity formatter, users see activity only for fields they have permission to read. For example, self-service users might see the activity formatter on the self-service view of the Incident form, but they do not see work notes, unless security rules have been customized to allow this.

If the **Emails-autogenerated** or **Emails-correspondence** field is included in the activities list, all users see all emails. No determination is made whether an end user, for example, should see an email containing work notes. Configure this property to restrict this capability to specified roles.

Note: Email does not appear as an activity until it is sent. If email properties are not configured for outbound delivery, the message can be found by navigating to **System Mailboxes** > **Outbox**.

Procedure
1. Navigate to **System Properties** > **UI Properties**.
2. Locate the property labeled **List of roles (comma separated) that can view emails in the Activity Formatter when "Emails-autogenerated" or "Emails-correspondence" are included.**
3. Add roles to the property, separated by commas.
   These are the only roles that can see email in the activity formatter. All other roles are prevented from seeing email. If no roles are listed, all users can see email. The itil role is on the list by default.
4. Click **Save**.

Configure the max activity size property

Use the glide.max_activity_size property to increase the amount of content that can be visible in the Activity Formatter.

Before you begin
Role required: admin

About this task
The default size for an activity is 100 * 1024, which causes large amounts of content to be hidden in the Activity Formatter. You can change the default value by adding the glide.max_activity_size property.

Procedure
1. Type `sys_properties.list` in the Application Navigator.
2. Select **New** and enter the following values.

Field	Description
Name	glide.max_activity_size
Type	integer
Value	102400

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Field	Description
	Use this field to increase the number of content allowed in the Activity Formatter. This value should be in bytes, for example 100 * 1024, or 102400.

Enable the email reply button for the activity formatter in Core UI

The *glide.ui16.emailStreamResponseActions* system property determines whether a user can reply to email using the email reply button in the activity stream in Core UI.

Before you begin
Role required: admin

Procedure

1. In the navigation filter, type `sys_properties.list`.
2. Add the following system property.
   For more information on adding a system property, see Add a system property.

Field	Description
Name	*glide.ui16.emailStreamResponseActions*
Description	Add the email reply button to the activity stream.
Type	true | false
Value	Set the value to **true**. The default value if this property is not configured is false.

3. Select **Submit**.

Configure activity formatter colors

Use the glide.ui.activity_stream.style.comments and glide.ui.activity_stream.style.work_notes properties to change the color-coding in the Activity Formatter.

Before you begin
Role required: admin

Procedure

1. In the navigation filter, enter `sys_properties.list`.
2. Add a system property for the **Additional comments** field.

   a. Select **New**.

   b. Enter the following values.

Field	Description
Name	`glide.ui.activity_stream.style.comments`

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Field	Description
Type	string

c. Select **Submit**.

3. Change the color of the **Additional comments** field.

a. In the System Properties list, select the glide.ui.activity_stream.style.comments record.

b. Enter the color that you want to use.
For example, enter `LightGreen`. The default value is transparent.

c. Select **Update**.

4. Add a system property for the **Work notes** field.

a. Select **New**.

b. Enter the following values.

Field	Description
Name	`glide.ui.activity_stream.style.work_notes`
Type	string

5. Change the color of the **Work notes** field.

a. In the System Properties list, select the glide.ui.activity_stream.style.work_notes record.

b. Enter the color that you want to use.
For example, enter `Blue`. The default value is gold.

c. Select **Update**.

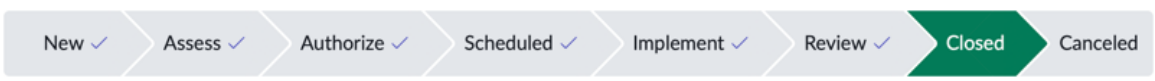
Process flow formatter

The process flow formatter provides a graphical summary of the stages in a process. The formatter is typically shown at the top of forms that are part of a process.

Each record on the Flow Formatter [sys_process_flow] table represents a process stage and can have a different condition applied to it. When specified conditions are fulfilled, the formatter highlights the current stage and places a check mark next to all previous stages.

These examples show a workflow in Core UI interface.

Core UI process flow for a change request



When any formatter stages are defined for a table, they appear on the form associated with that table in the order specified, assuming the formatter has been added to the form.

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Activate the process flow formatter

You can activate the Process Flow Formatter plugin.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

Create a process flow formatter

You can create a process flow formatter stage.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System UI** > **Process Flow**.
2. Click **New**.
3. Complete the form, as appropriate.

Field	Description
Table	Select a table for this process flow formatter.
Name	Enter a name to identify the formatter.
Label	Enter the name to be displayed in the form configuration slushbucket.
Active	Select the check box to ensure that the formatter stage is active. When the check box is cleared, the formatter stage does not appear in the flow display.
Order	Enter a number to indicate where in the process flow the formatter will be displayed. Formatters are arranged with the lowest number on the left and the highest number on the right.

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Field	Description
Condition	Use the condition builder to set the conditions under which the formatter is highlighted as current. Any field available in the condition builder, such as SLA or Impact, can be used to trigger a process flow stage.
Description	Describe the process flow formatter. This description does not appear on the actual formatter.

4. Repeat as necessary for each stage.

Parent breadcrumbs formatter

The parent breadcrumbs formatter on the Task table provides breadcrumbs that show the parent or parents of the current task. This formatter can be used also on any table that extends Task.

Before you begin

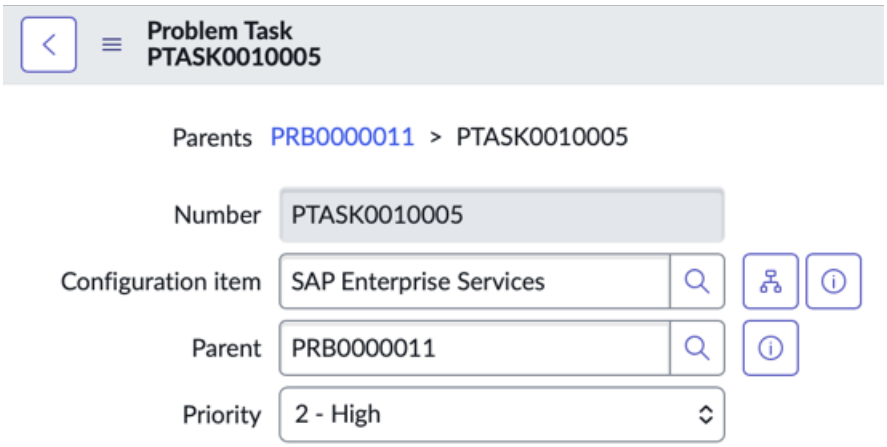
Role required: personalize_form

About this task

To add the parent breadcrumbs formatter to a form, configure the form and add **Parent Breadcrumbs** to the desired location. The breadcrumbs show only six levels of parents. If more levels exist, the breadcrumbs display an ellipsis ("...").

The **Parent** reference field also has to contain a value for the breadcrumbs to appear. You may need to configure the form to contain the **Parent** field as well.

Breadcrumbs



Customize the parent breadcrumbs formatter

You can customize the parent breadcrumbs formatter to control what breadcrumbs appear.

Before you begin

Role required: ui_macro_admin

Procedure

1. Navigate to **All** > **System UI** > **Formatters**.
2. Select **Parent Breadcrumbs**.
3. Click **View UI Macro for this Formatter** to view or modify the underlying formatter.

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By default, the breadcrumb uses the default display field, **gr.getDisplayValue(),** as the link in the breadcrumb. To customize this, add the following line, replacing the **fieldName** parameter with the desired field name (not the field label):

```
pc.setLabelField("fieldName")
```

If a user points to a breadcrumb, the short description for that record appears as a hint by default. To display alternate hints for the breadcrumb, add the following line, replacing the **fieldName** parameter with the desired field name (not the field label):

```
pc.setTitleField("fieldName")
```

Be sure to add these lines in the proper location, as shown in the following example:

```
//parent crumb functions - script include
var pc = new ParentCrumbs(now_GR);
pc.setLabelField("short_description");

//override the default display field to be used for label
pc.setTitleField("number");

//override default short_description hover text
var crumbs = pc.getCrumbs();
```



Use the parent breadcrumbs formatter on non-Task tables

The parent breadcrumbs formatter can be used on non-Task tables as long as the table has a reference to itself through a field called **parent**.

Before you begin

Role required: ui_macro_admin

About this task

To make the formatter available for a different table, duplicate the formatter used by the Task table:

Procedure

1. Navigate to **All** > **System UI** > **Formatters**.
2. Select **Parent Breadcrumbs**.
3. Set the **Table** field to the appropriate table.
4. Right-click the form header and choose **Insert**.
5. Add the new formatter to the appropriate form.

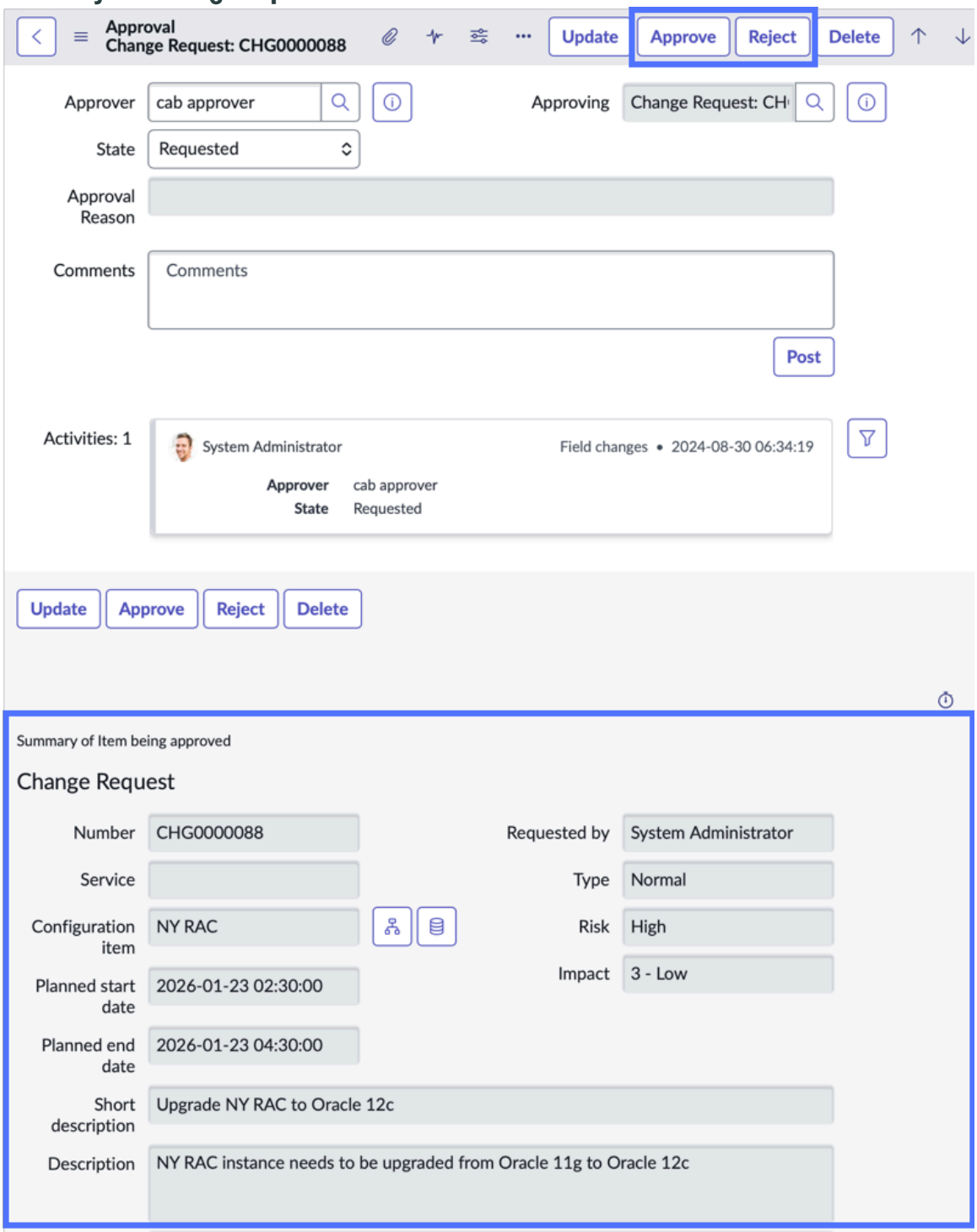
Approval summarizer formatter

The approval summarizer formatter creates the summary at the bottom of an approval form.

The approval summarizer displays full information for the record used to request approval.

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Summary of a change request



The **Reject** button allows the approver to deny one or more requested items in a multi-item request, before approving the overall request. If a requested item is denied, the workflow for that item never starts. The approver can then choose to **Accept** the item.

Note: When the overall request is approved, you must ensure this **Reject** button is hidden. If this button is used after request approval, the requested item workflow is canceled, leaving the stage in an inconsistent state. Similarly, the **Accept** button on requested items should only appear before the overall request is approved or rejected.

Related topics

Using formatters

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Override a formatter with macros

The system uses formatters to handle complex rendering of specific form elements.

Before you begin

Role required: ui_macro_admin

About this task

Examples of form elements rendered by formatters in the base platform are:

- Activity formatter: Displays the list of activities, or history, on a task form.
- Process flow formatter: Displays the different stages in a linear process flow across the top of a record.
- Task parent breadcrumbs formatter: Provides breadcrumbs to show the parent or parents of the current task.
- Approval summarizer formatter: Displays dynamic summary information about the element being approved.

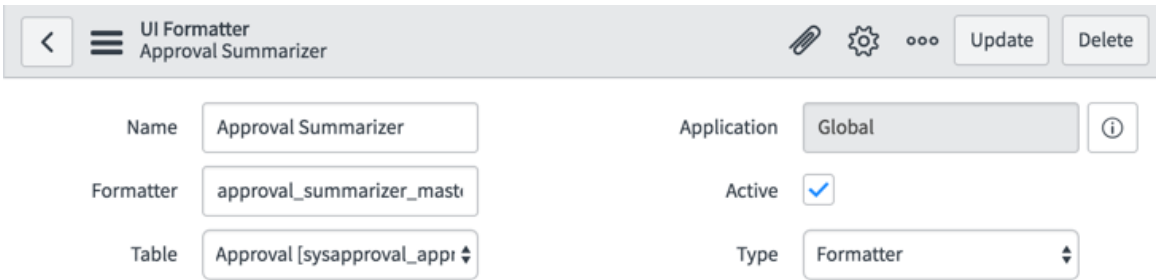
A UI macro can override formatters provided in the base system.

Procedure

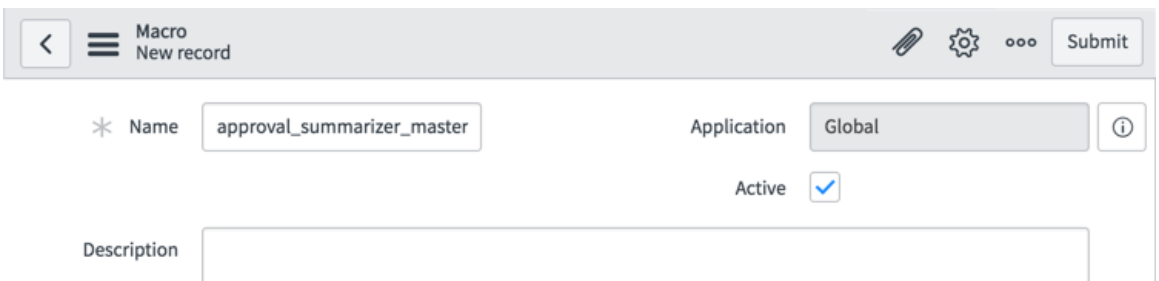
1. Navigate to **All** > **System UI** > **UI Macros**.
2. Click **New**.
3. In the **Name** field, enter the same name as the formatter you want to override, but omit the .xml extension.
4. Complete the remaining fields on the form.
5. Click **Submit**.

Example:

This example shows the form that defines the existing approval summarizer formatter:



Here is the form for the UI macro that overrides the approval summarizer formatter:



Limit the number of activity stream entries

You can set a system property to limit the number of entries allowed in an activity stream.

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Before you begin
Role required: admin

Procedure

1. Enter `sys_properties.list` in the Navigation filter.
2. Search for the property *`glide.history.max_entries`*.
3. Edit the **Value** property to set the maximum number of entries that users can view in an activity stream.

Note: New entries do not count towards the max number until the form is refreshed.

Option	Description
Name	glide.history.max_entries
Description	Maximum number of entries allowed to display in an activity stream. The default number is 250. New entries do not count towards the max number until the form is refreshed.
Type	integer
Default value	250

Using form templates

Templates simplify the process of submitting new records by populating fields automatically.

To use a template, populate the most-used fields for a specific table, save it as a template, and then make the template accessible to your users. Users can manually apply a template when creating records, or an administrator can define scripts to apply templates automatically.

Create templates for the forms that you use frequently, such as incident, problem, and change. There is no limit to the number of templates that you can create or access, but having many templates for each form makes the templates more complex to manage.

You can create table-level access controls to restrict template creation. When applied, a user creating a new record from a template must satisfy the save_as_template access control for every field modified by the template.

Automatically applied templates

You can make a template that automatically applies to new, user-created records on a specific table. To create this kind of template, set the template name to match the name of the table to which the template applies.

For example, imagine you want to apply a template automatically when a user creates a record on the Windows Server [cmdb_ci_win_server] table. Set the **Name** field to **cmdb_ci_win_server** and the **Table** field to **Windows Server [cmdb_ci_win_server]** on the Template form.

Automatic templates are always global. They do not honor the **User** and **Groups** fields on the Template form. Automatic templates do not apply to records created by the system, such as those records generated by business rules, UI actions, or workflows.

Related topics

Hide the template bar for a table

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Create a template using the Template form

Create a template record for any table to populate certain fields automatically.

Before you begin

Role required: template_editor_global or admin

About this task

https://player.vimeo.com/video/1162317177?h=489f4b73c5&badge=0&autopause=0&player_id=0&app_id=58479%22

Templates enable users to more quickly and uniformly complete records.

Procedure

1. Navigate to **All** > **System Definition** > **Templates**.
2. Select **New**.
3. On the form, fill in the fields.

Template form

Field	Description
Name	Name of this template. **Note:** The template name can't match an existing table name.
Table	Table that this template applies to. Select **Global** to make the template available for use with all tables. **Note:** The table list shows only the tables and database views that are in the same scope as the template.
Active	Option for making the template available for use. A template must be active to be used.
User	User who can configure and apply the template. If you define a user, no other users can see the template unless you select the **Global** option.
Groups	Group whose members can configure and apply the template. If you define a group, no other groups can see the template unless you select the **Global** option.
Global	Option to enable any user who can access the templates to view and apply this template.
Short description	Description of the template. **Note:** Adding content to this field doesn't add that content to the **Short description** field of the forms that use this template.
Template	Content that automatically populates records that are based on this template. Select a field from the specified table in the left column and then enter the data to populate automatically in the right column.

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Field	Description
	Note: Even though you can select dot-walked fields in the template, they don't apply to fields that are on the form.
Link element	Template that links a child table with the template for the parent table. In the template for the child table, set the value to the field that references the parent table. After you set the value, the child template is explicitly linked to the parent table. **Note:** This field doesn't appear by default. Configure the template form to add the field.

4. Select **Submit**.

Create templates for related task records

Administrators can create a template for a Task table record that also creates one or more related records in the child Task table.

Before you begin

Role required: admin

About this task

Administrators must understand the parent-child relationships between Task tables. For example, the Change Task table is a child of the Change table and the Incident Task table is a child of the Incident table.

Note: Child templates can only be applied automatically if you first apply the parent template from a module.

Procedure

1. From the parent Task table template, configure the form layout to add these fields.
   - **Next Related Child Template**
   - **Next Related Template**
   - **Link element**
2. Create a template for the parent Task table.
   For example, create this template for the Change table.

Sample Change template

Field	Value
Name	Add server to network
Table	Change [change_request]
Short description	Set up a server on the network
Template	○ [Short description][Set up server on the network] ○ [Category][Hardware] ○ [Assignment group][Hardware]

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3. Create a template for the first related task.
   For example, create this template for the Change Task table.

First sample Change Task template

Field	Value
Name	Order server
Table	Change Task [change_task]
Short description	Order server hardware
Template	○ [Short description][Order server hardware] ○ [Assignment group][Hardware]
Link element	Change request

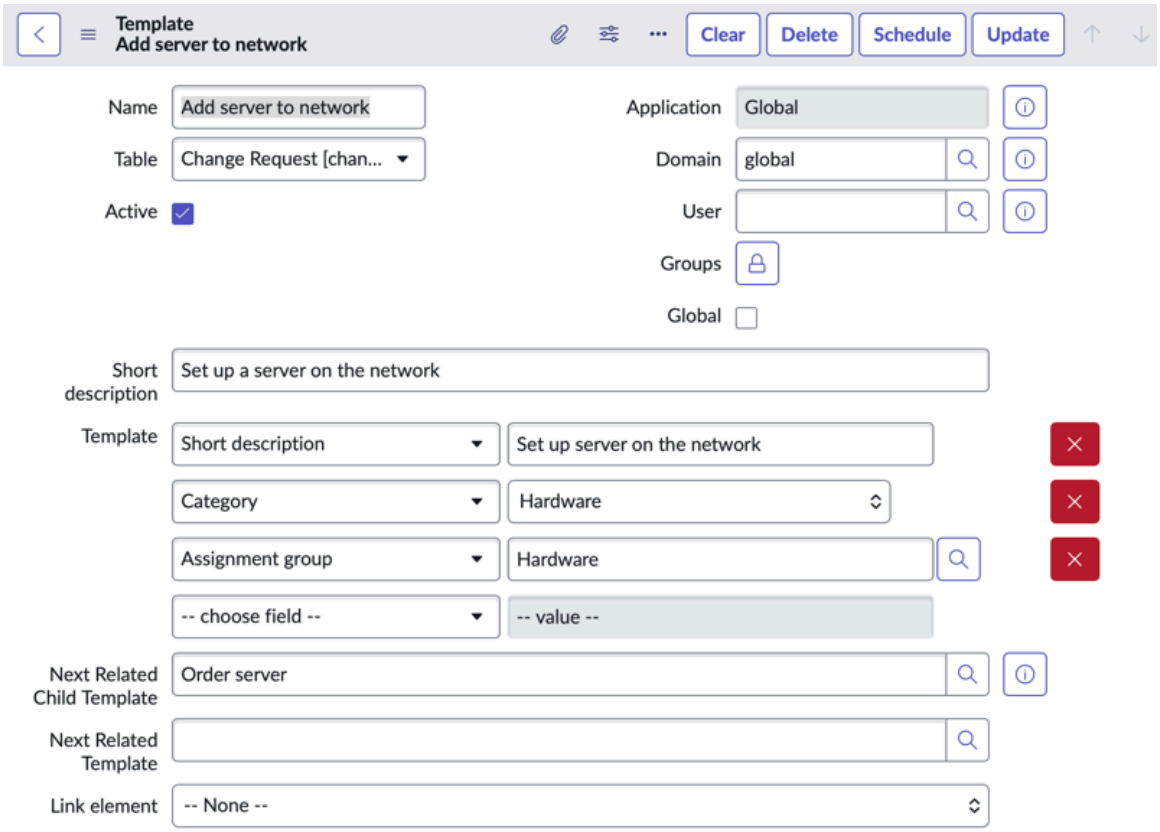
4. Create a template for each additional related task.
   For example, create one additional template for the Change Task table.

Second sample Change Task template

Field	Value
Name	Install server on network
Table	Change Task [change_task]
Short description	Install server on network
Template	○ [Short description][Install server on network] ○ [Assignment group][Hardware]
Link element	Change request

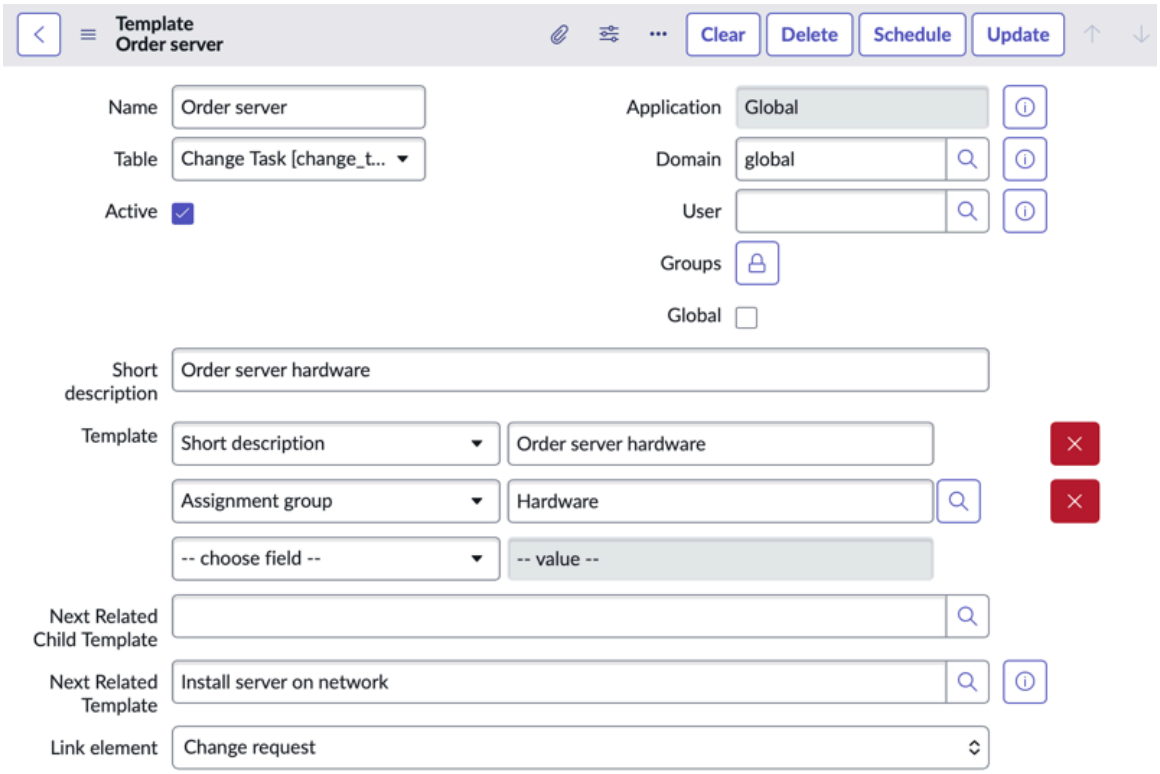
5. From the parent Task table template, set **Next Related Child Template** to the first related child task.
   For example, in the Add server to network template, select `Order server` in the **Next Related Child Template** field.

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6. For each child related task, set **Next Related Template** to the next related task template. For example, in the Order server template, select `Install server on network` in the **Next Related Template** field.

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Note: The last related task template does not have a value for **Next Related Template**. For example, the **Install server on network** template does not have a value in **Next Related Template**.

What to do next

Create a module for the parent Task table template so that child templates can be applied to related task records. For example, create a module for **Add server to network**.

Create a template by saving a form

Save a populated form as a template.

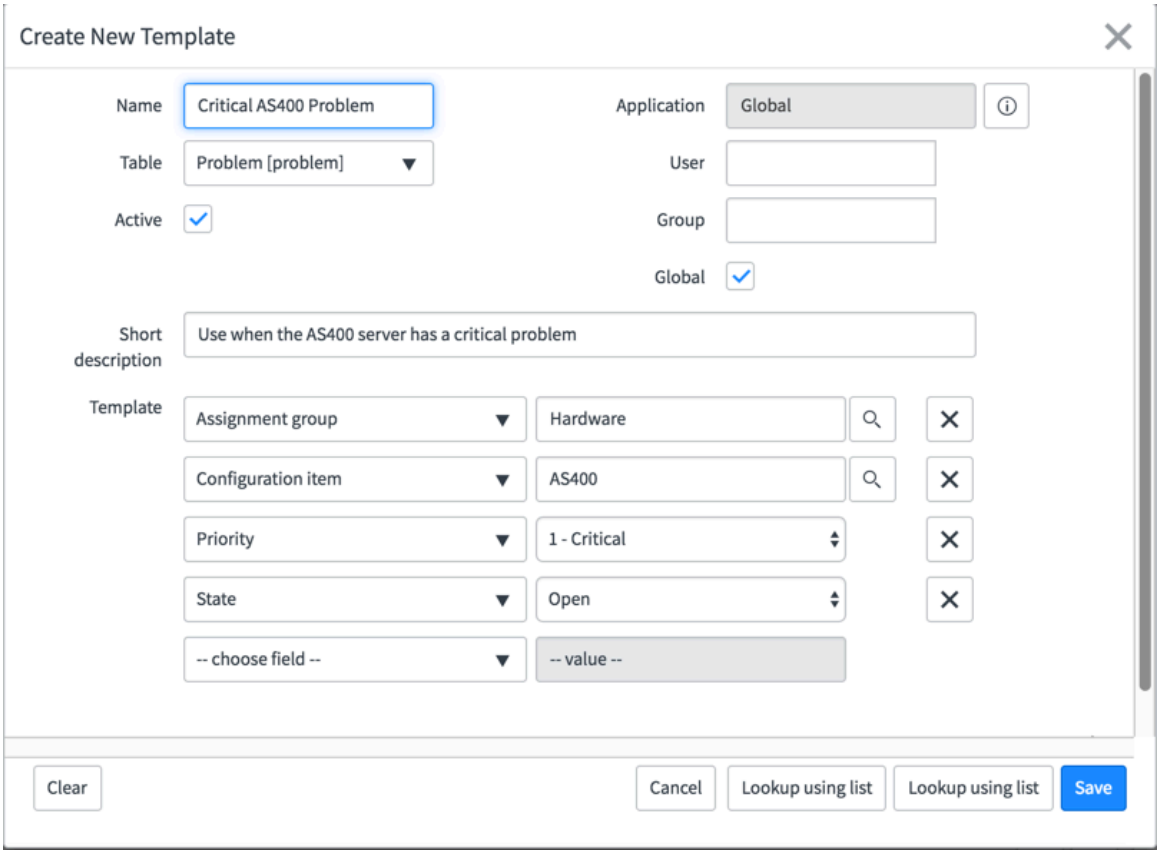
Before you begin

Toggle the template bar so it is visible on forms.
Role required: admin

Procedure

1. Navigate to a form.
2. Complete the form as it should appear when a user applies the template.
3. In the template bar, click the plus icon (+).

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4. Enter a descriptive name to make it easy for a user to select the correct template.
5. Make any additional changes as needed.
6. Click **Save**.

Related topics

ACL rule types

Schedule record creation from a template

You can create and schedule a scheduled job to create records based on a template. For example, you can regularly create a populated task record to perform a weekly backup.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Templates**.
2. Select a template record.
3. Click **Schedule**.
   The Scheduled Entity Generation form appears.
4. In the **Run** choice list, select how frequently to create a record.
5. Complete the schedule information.
6. Click **Submit**.

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Create a module for a template

You can create a module to open a form with pre-populated template data.

Before you begin

Role required: admin

About this task

Child templates are only applied if the parent template is applied from a module. Child templates are not applied by applying a template to a new form.

Procedure

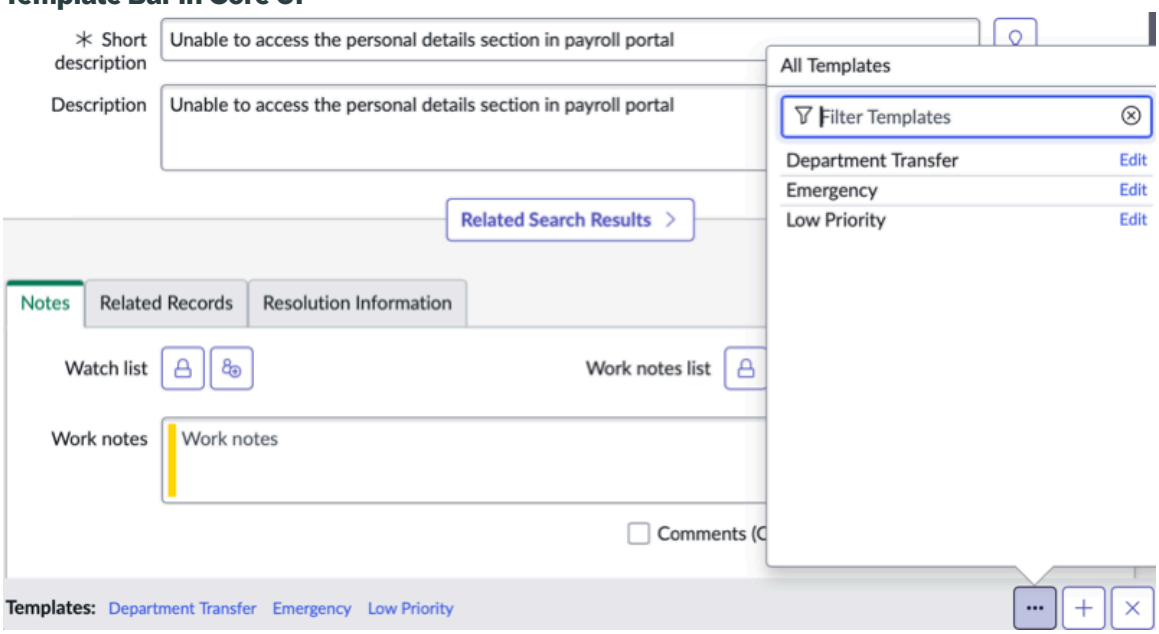
1. Point to the application menu, such as **Self-Service**, and select the edit application (pencil) icon.
2. In the **Modules** related list, select **New**.
3. Fill in the **Title** and **Order** fields as appropriate.
4. In the **Link Type** field, select **URL (from Arguments)**.
5. In the **Arguments** field, enter `<table_name>.do?sys_id=-1&sysparm_template=<template_name>`
   The `<table_name>` is the name of the table you selected for the table field, for example `incident`. The `<template_name>` is the name of the template you want to use to pre-populate the form, for example `Incident_call_type`.
6. Select **Submit**.
7. Refresh the application navigator to view the new module.

Template bar

Use the template bar to apply, edit, and create templates.

When toggled, the template bar appears at the bottom of the form. Select a template title to apply the template to the form. Use the buttons at the bottom-right to add, edit, and access the complete list of templates.

Template Bar in Core UI



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Template Bar Elements

Element	Description
Templates	Available templates appear in blue text on the template bar. Click a template to apply it to the form.
All Templates button (...)	Toggles the All Templates window.
Create New Template button (+)	Displays the Create New Template window.
All Templates popup	This window displays when the **All Templates** button is selected. The window displays a filterable list of all available templates. Click the **Edit** button to the left of any template to edit that template.
Disable Template Bar button (×)	Disables the template bar. To display the bar, see Toggle the template bar

For non-admins, see KB0711956 for more information on enabling the Edit button.

Toggle the template bar

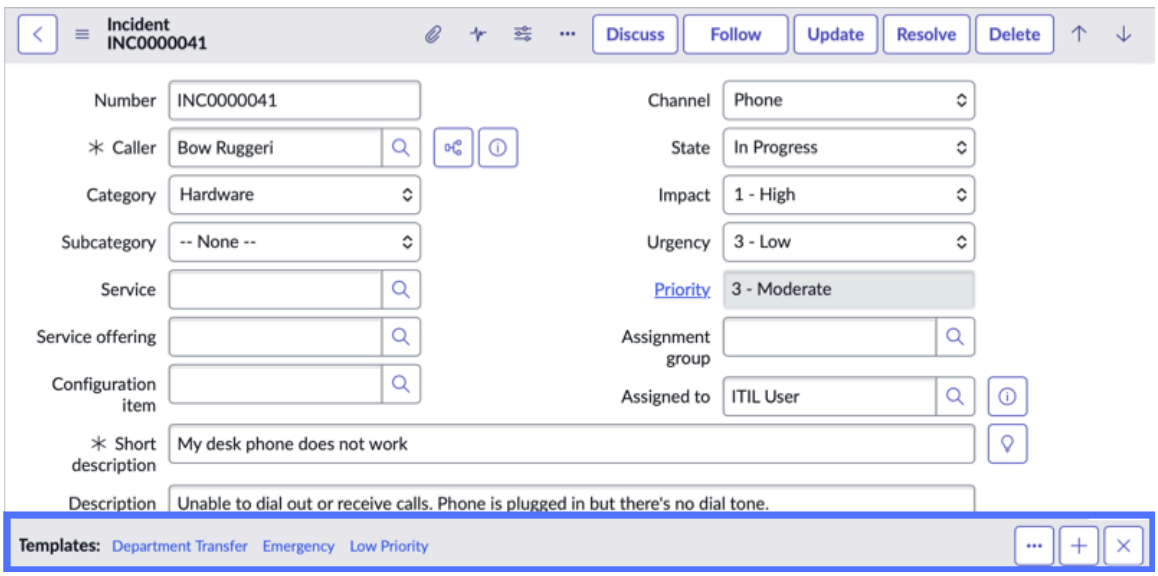
The template bar appears at the bottom of forms. It provides shortcuts to apply, edit, and create templates.

Before you begin

Role required: none

About this task

You can toggle the template bar, which hides or shows it for all forms. The template bar is shown by default.



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Procedure

1. Navigate to a form.
2. Click the more options icon (⋯) in the form header.
3. Select **Toggle Template Bar**.

Scripted templates

You can apply an active template to a record using JavaScript.

Apply a template to current

To apply a template, use the *applyTemplate* method.

```
current.applyTemplate("<templatename>");
```

Apply a template to a GlideRecord

To apply the template to a record other than current, change current to a GlideRecord variable. When using a GlideRecord variable, you may need to initialize it after declaring the variable.

```
var rec1 = new GlideRecord("incident");
rec1.initialize();
rec1.applyTemplate("my_incident_template");
```

Apply a template from a UI action

The following script demonstrates a possible customization to the *Create Change* UI action on the Problem form. After you add this script to the UI action, a user can select the UI action to create a change record with information from both the problem record and the change template.

```
var change = new GlideRecord("change_request");
change.initialize();
change.short_description = current.short_description;
change.description = current.u_details;
change.cmdb_ci = current.u_service;
change.priority = current.priority;
change.requested_by = current.caller_id;
change.assignment_group.setDisplayValue('Change & Release');
change.u_status = 'New';
change.parent = current.number;
change.applyTemplate("standard_rfc");
current.rfc = change.insert();
current.comments = 'Change ' + change.number + ' created.';

var mySysID = current.update();

gs.addInfoMessage("Change " + change.number + " created");
action.setRedirectURL(change);
action.setReturnURL(current);
```

Script a template with child templates

When using *applyTemplate* with a template that has one or more child templates, the system creates the parent record before applying the child templates. This behavior ensures that any references or dot-walked fields from the child record to the parent have a valid target.

For example, if a template for the Change Request table has a child template for the Change Task table, applying the Change Request template inserts a Change Request record into the

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database. It assigns this record as the Change request for the Change Task record, then applies the child template to the Change Task record.

Apply a template using a sys_id instead of a name

To apply a template using a sys_id, use the following method.

```
GlideTemplate.get(template.sys_id).apply(GlideRecord)
```

Defining UI actions

UI actions include the buttons, links, and context menu items on forms and lists. Configure UI actions to make the UI more interactive, customized, and specific to user activities.

Administrators and users with the ui_action_admin role can define UI actions.

UI action controls

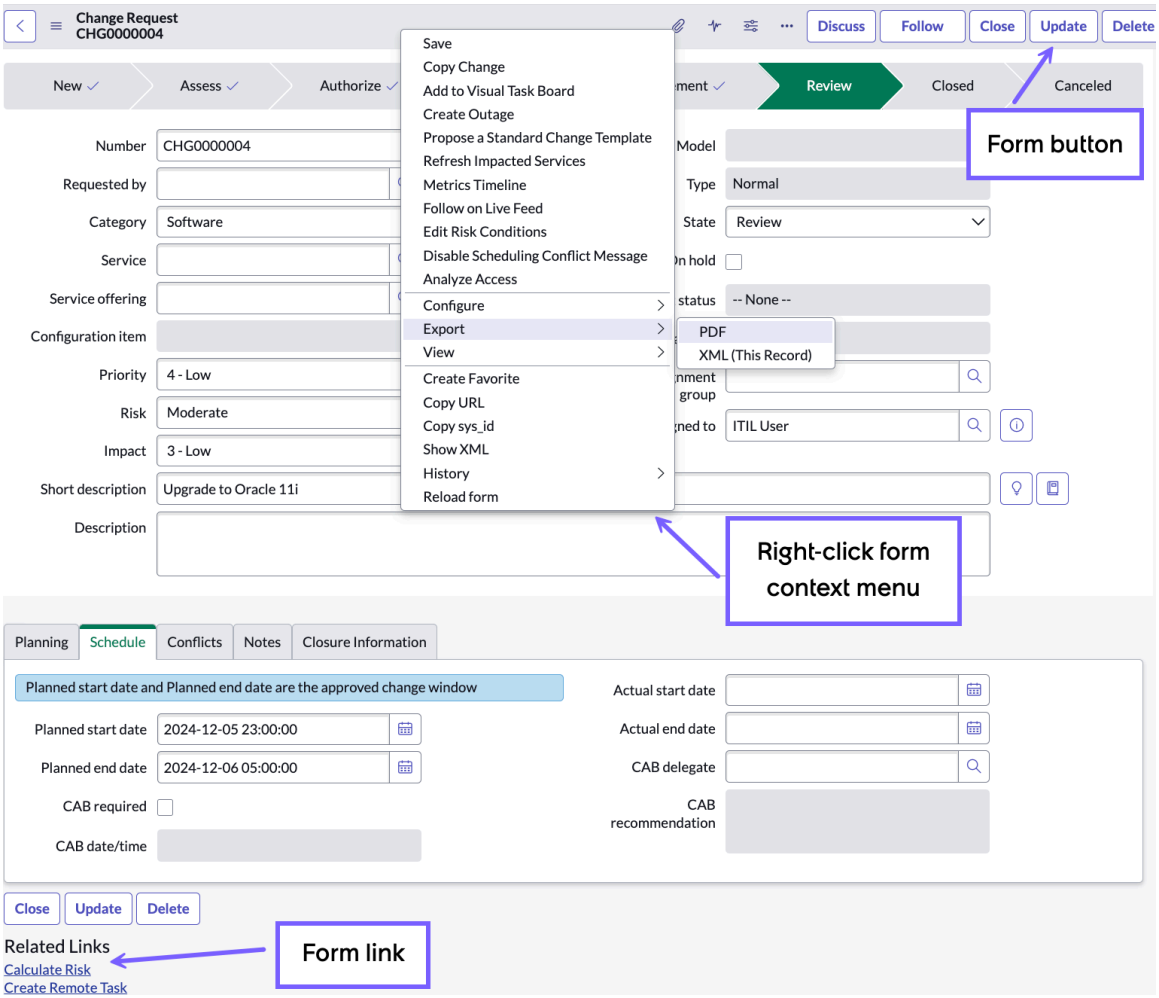
You can create a UI action to provide any of these controls:

- A button on a form.
- A context menu item on a form that appears when you open the form context menu or right-click the form header.
- A related link in a form.
- A button in the banner on top of a list.
- A button at the bottom of a list.
- A context menu item on a list that appears when you open the list context menu or right-click the list header.
- A menu item for the action choice list at the bottom of a list.
- A related link at the bottom of a list.

Note: To hide or restrict the **New** or **Edit** UI action on the related list, use list control.

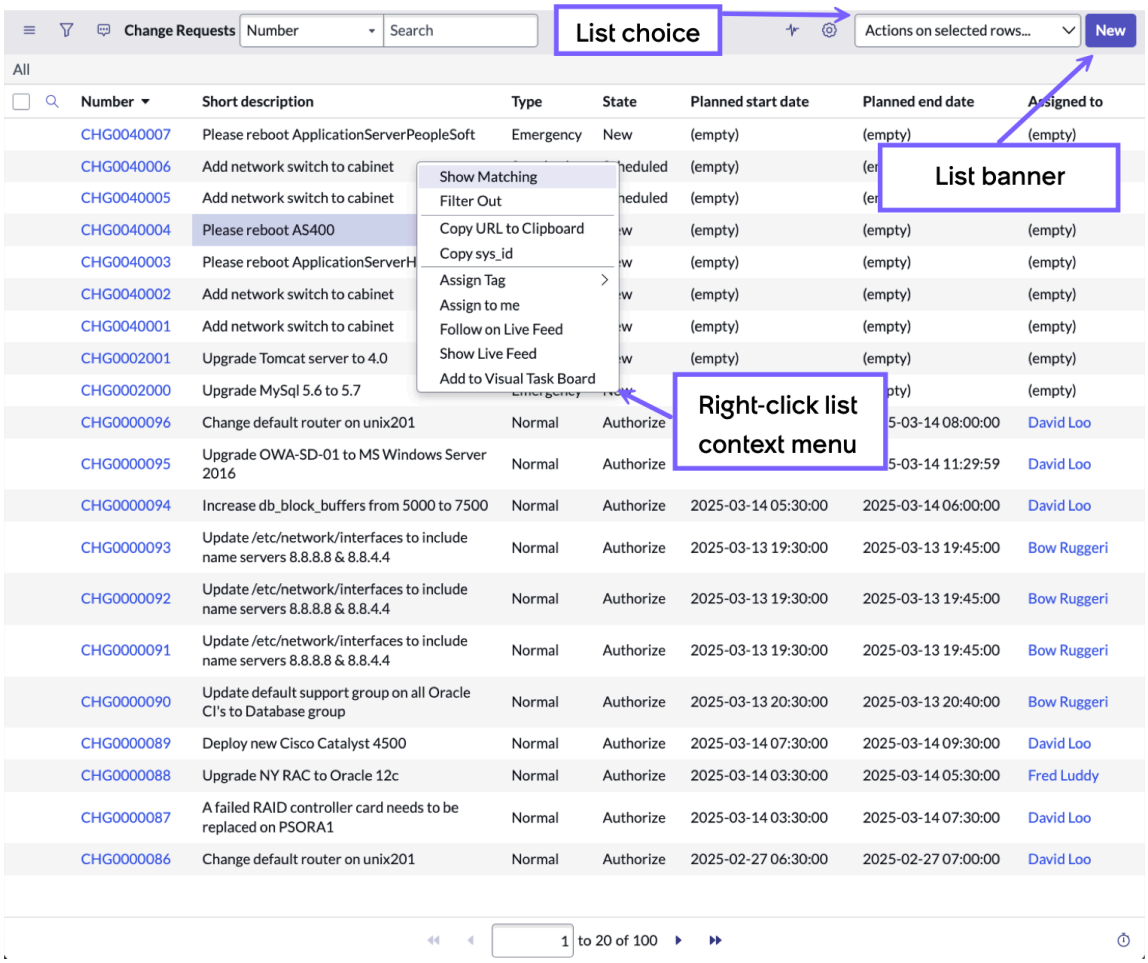
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Form UI actions



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List UI actions



Number	Short description	Type	State	Planned start date	Planned end date	Assigned to
CHG0040007	Please reboot ApplicationServerPeopleSoft	Emergency	New	(empty)	(empty)	(empty)
CHG0040006	Add network switch to cabinet			(empty)		(empty)
CHG0040005	Add network switch to cabinet			(empty)		(empty)
CHG0040004	Please reboot AS400			(empty)	(empty)	(empty)
CHG0040003	Please reboot ApplicationServerH			(empty)	(empty)	(empty)
CHG0040002	Add network switch to cabinet			(empty)	(empty)	(empty)
CHG0040001	Add network switch to cabinet			(empty)	(empty)	(empty)
CHG0002001	Upgrade Tomcat server to 4.0			(empty)	(empty)	(empty)
CHG0002000	Upgrade MySql 5.6 to 5.7					(empty)
CHG0000096	Change default router on unix201	Normal	Authorize		5-03-14 08:00:00	David Loo
CHG0000095	Upgrade OWA-SD-01 to MS Windows Server 2016	Normal	Authorize		5-03-14 11:29:59	David Loo
CHG0000094	Increase db_block_buffers from 5000 to 7500	Normal	Authorize	2025-03-14 05:30:00	2025-03-14 06:00:00	David Loo
CHG0000093	Update /etc/network/interfaces to include name servers 8.8.8.8 & 8.8.4.4	Normal	Authorize	2025-03-13 19:30:00	2025-03-13 19:45:00	Bow Ruggeri
CHG0000092	Update /etc/network/interfaces to include name servers 8.8.8.8 & 8.8.4.4	Normal	Authorize	2025-03-13 19:30:00	2025-03-13 19:45:00	Bow Ruggeri
CHG0000091	Update /etc/network/interfaces to include name servers 8.8.8.8 & 8.8.4.4	Normal	Authorize	2025-03-13 19:30:00	2025-03-13 19:45:00	Bow Ruggeri
CHG0000090	Update default support group on all Oracle CI's to Database group	Normal	Authorize	2025-03-13 20:30:00	2025-03-13 20:40:00	Bow Ruggeri
CHG0000089	Deploy new Cisco Catalyst 4500	Normal	Authorize	2025-03-14 07:30:00	2025-03-14 09:30:00	David Loo
CHG0000088	Upgrade NY RAC to Oracle 12c	Normal	Authorize	2025-03-14 03:30:00	2025-03-14 05:30:00	Fred Luddy
CHG0000087	A failed RAID controller card needs to be replaced on PSORA1	Normal	Authorize	2025-03-14 03:30:00	2025-03-14 07:30:00	David Loo
CHG0000086	Change default router on unix201	Normal	Authorize	2025-02-27 06:30:00	2025-02-27 07:00:00	David Loo

Create a UI action

You can create a new UI action or edit an existing one.

Before you begin

Role required: ui_action_admin or admin

About this task

You can add UI actions to tables and database views that are in the same scope as the UI action and tables that allow UI actions from another application scope to run on them.

Procedure

1. Navigate to **All** > **System Definition** > **UI Actions**.
2. Click **New** or open an existing record.
3. Define the UI action by completing the fields.
   You may need to configure the form to see all the fields.

UI action fields

Field	Description
Name	The text that appears on the button, link, or context menu item.

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Field	Description
	Note: If the Action name and Name fields are both exactly the same in two different UI actions, they will be de-duplicated at runtime to prevent users from seeing two of the same actions.
Table	The table on which the UI action is available. By default, the UI action also appears on tables that extend the selected table (for example, Task actions appear on the Incident table). Select **Global** to make the action available on all tables.
Order	The order in which the UI action appears. The order applies to buttons from left to right and to menu actions from top to bottom.
Action name	A unique name to use when referencing the UI action in scripts. **Note:** If the Action name and Name fields are both exactly the same in two different UI actions, they will be de-duplicated at runtime to prevent users from seeing two of the same actions.
Active	An option to enable the UI action when selected. To disable a UI action, clear the check box.
Show insert	An option to show a button on new records that have not been inserted.
Show update	An option to show a button on existing records.
Client	An option for the UI action to execute its script in the user's browser, not on the server. When enabled, the **Onclick** field appears above the Condition field.
Form button	An option to put a button on a form.
Form context menu	An option to put an item in a form context menu (right-click the form header).
Form link	An option to put a link in the Related Links section of a form.
Form style	○ Primary—Colors the UI Action blue. ○ Destructive—Colors the UI Action red. ○ Unstyled—Does not color the UI Action.
List banner button	An option to put a button in the banner of a list. **Note:** List banner buttons are not intended to support record-specific conditions, so only the first row is considered when the condition is evaluated to determine whether the button will show for the list. Do not use record-specific conditions (e.g., current.getValue('state') === 'closed') in list banner button UI Actions.
List bottom button	An option to put a button at the bottom of a list. **Note:** List bottom buttons show regardless of condition and are evaluated per record on execution.

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Field	Description
List context menu	An option to put an item in a list field context menu (right-click a cell in a list).
List choice	An option to put an item in the action choice list at the bottom of a list. **Note:** List bottom buttons, like list choice actions, show regardless of condition and are evaluated per record on execution.
List link	An option to put a link in the Related Links section at the bottom of a list.
List style	○ Primary—Colors the UI Action blue. ○ Destructive—Colors the UI Action red. ○ Unstyled—Does not color the UI Action.
Overrides	A UI action that this UI action overrides.
Messages	Text strings that the UI action can use as a key to look up a localized message alternative from the Message [sys_ui_message] table. Each message key is on a separate line in the Messages field. The instance looks for a localized message string anytime the UI action makes a getMessage(msg) call where the msg string matches a key in the Messages field.
Comments	Descriptive content regarding this UI action.
Hint	The text that appears when a user points to the UI action control.
Onclick	The name of the JavaScript function to run when the UI action is executed. The function is defined in the **Script** field.
Condition	A JavaScript conditional statement that restricts when a UI action appears. Conditions always run on the server. **Note:** ○ The current object is not available for conditions on a list context menu. If the **List context menu** option is selected, any use of *`current`* on these actions is ignored. ○ You can reference the parent record for the UI action conditions on a related list button. For example, to disable the **New** and **Edit** buttons on the Affected CIs related list for closed changes, copy the global m2m UI actions to the task_ci table and add a condition of *`parent.active`*. ○ If you leave one of the fields empty that you specify in your condition statement, that condition defaults to **true**.
Script	The script to run when the UI action is executed. Function names must be unique.
Workspace	
Workspace Form Button	An option to make the UI action appear on the list of UI actions in a workspace.
Workspace Form Menu	An option to make the UI action appear as a list item in the menu associated with UI actions in a workspace.

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Field	Description
Format for Configurable Workspace	An option to use the UI action in a Configurable Workspace. If cleared, the UI action applies in Legacy Workspaces.
Workspace Client Script	A script to run when the UI action is executed in workspaces.
Requires role	
Role	The roles required for the UI action to apply. Users must have at least one of the roles for the UI action to apply.
Related lists on the form view	
UI Action Visibility	The views of the form that the UI action applies to. Use this option to restrict the UI action to form views that you specify. A UI action is available for the specified view according to the following rules: **a.** If there are no visibility rules, the action appears on all views. **b.** Any exclude rule on a given view means that the action does not appear on that view. **c.** If there is at least one include rule, then the action appears only on views that are specifically included.
Versions	All versions of the UI action. Use this list to compare versions or to revert to a previous version.

4. Click **Submit** or **Update**.

Note: If the UI action is enabled to run on the client side, wrap it in a function. Otherwise, the contents of the **Script** field runs when the page loads.

Example:
As part of a UI action script, you can redirect a user to a URL. For example, you might add links to a form or open a new record after it is created from a UI action. To redirect a user to a URL from a UI action, use this syntax in the **Script** field to define the redirect link:

```
action.setRedirectURL ( '');
```

To direct a user to a record, use this syntax, where *new_record* is the variable name for the GlideRecord:

```
action.setRedirectURL (new_record );
```

Override a UI action for an extended table

You can override or remove a UI action for a table that is extended from another table.

Before you begin
Role required: ui_action_admin or admin

Note: This is not applicable to domain separated instances.

About this task
When a UI action is defined for the Task table, it applies to all tasks, including incidents, changes, problems, and any other tables that extend the Task table. Similarly, a global UI action applies to every table. However, you can override a UI action for a specific table. This example demonstrates how to override or remove a UI action on the Task [task] table for only the Incident [incident] table.

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Procedure

1. Complete the following steps to override a UI action on the Task table for just the Incident table.

   a. Create a UI action on the Incident table with the same **Action name**.
   If the **Action name** is not defined, update both the new UI action and the UI action to be overridden with the same **Action name**.

   b. Enter a script that is specific to the Incident table.

2. Complete the following steps to remove a UI action on the Task table for the Incident table.

   a. Navigate to the UI action definition for the Task table.

   b. Add the condition `current.getRecordClassName() !='incident'`.

Using UI policies

UI policies dynamically change the behavior of information on a form and control custom process flows for tasks.

For example, you can use UI policies to make the number field on a form read-only, make the short description field mandatory, and hide other fields. Basic UI policies do not require any scripting, however for more advanced actions, use the **Run scripts** option.

You can also use client scripts to perform all of these actions, but for faster load times use UI policies when possible.

Create a UI policy

Create a UI policy to define custom process flows for tasks.

https://player.vimeo.com/video/1206601204?h=7327a4c7ee&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Role required: ui_policy_admin

About this task
A UI policy condition evaluates all fields even if they are not visible on the form. This function removes the requirement that a field must be on a form for it to be evaluated.

Note:

- Policies carried over from versions prior to Fuji are evaluated differently. Fields that previously were not evaluated are evaluated.
- UI policies are not supported on search screens.
- UI Policies also apply to forms and lists displayed within Content Management System application.

Procedure

1. Navigate to **All** > **System UI** > **UI Policies**.
2. Click **New**.
   The UI Policy [Advanced view] form opens
3. To change the view, in **Related Links** click **Default view**.
4. Complete the form, as appropriate.

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You may need to configure the form to see all the fields.

UI policy fields

Field	Description
Table	The table for the form to be modified.
Active	The active status of the UI policy. Only active UI policies are applied.
Short description	Short summary of the UI policy.
Order [Advanced view]	The processing sequence, from the lowest to highest number. If two policies conflict, the UI policy with the higher number executes. For inherited UI policies, the extended (child) table's UI policies are executed first. Then the base table UI policies are executed; both from lowest to highest specified value.
When to Apply	
Conditions	The conditions which, if fulfilled, cause the UI policy to be applied. Conditions are built with the condition builder. To set conditions using a script, use a client script instead. Conditions are only rechecked if a user manually changes a field on a form. If the change is made by a UI action, context menu action, or through the list editor, it is not evaluated.
Global [Advanced view]	Option for specifying whether the UI policy applies to all form views. If this check box is cleared, the UI policy is view-specific. By default, the Global UI policy applies to all form views. However, a UI policy can be specific to a view. For example, you can define a UI policy for only the itil view of a form. Use the **View** field to accomplish this.
View [Advanced view]	Option for indicating which form view the UI policy applies to. This field is visible only if **Global** is not selected. If Global is not selected and the View field is left blank, the script applies the default view. For more information on form views, see View management.
Reverse if false [Advanced view]	Option for specifying that the UI policy action is undone when the conditions of its UI policy evaluate to false. In other words, when the conditions are true, the specified actions are taken and when they are false, the actions are undone.
On load [Advanced view]	Option for specifying that the UI policy behavior should be performed OnLoad as well as when the form changes. You can check or clear the **On load** check box in a UI policy to control whether it runs every time a form is loaded when the conditions are satisfied. In this example, an administrator does not want an incident to enter the **Awaiting user info** state unless the user provides an explanation to the customer. The administrator creates a UI policy with the following settings.

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Field	Description
	○ In the When to Apply section, adds the condition **[State] [is] [Awaiting user info]** and clears the **On load** check box. This condition means that the UI policy applies only when the state is changed to **Awaiting user info**. ○ In the **UI Policy Actions** related list, creates a record that makes the **Additional comments** field mandatory when the condition is met.
Inherit [Advanced view]	Option for specifying whether extended tables inherit this UI policy. When a child table has an inherited UI policy from its parent table, the UI policy on the child table always runs first. This event is true regardless of the **Order** of the UI policies. Consider the following example: ○ A child table has a UI policy with **Order** value **500** that shows the **Urgency** field when its conditions are met. ○ Its parent table has a UI policy with the same conditions that hides the **Urgency** field. The parent table UI policy has **Order** value **100**. ○ Although the parent table **Order** field has a lower value, the child UI policy runs first and then the parent UI policy runs. When the conditions are met, the **Urgency** field is hidden.
Script	
Run scripts [Advanced view]	Option for specifying whether advanced behavior can be scripted for both true and false conditions.
Execute if true [Advanced view]	A script that executes when the conditions of the UI policy are fulfilled. ○ This field is available only if **Run scripts** is selected. ○ This feature is not available outside the scope or in global scope.
Execute if false [Advanced view]	A script that executes if the conditions of the UI policy are not fulfilled and the **Reverse if false** option is selected. ○ This field is available only if **Run scripts** is selected. ○ This feature is not available outside the scope or in global scope.
Other fields	
Run scripts in UI type	The UI type for this UI policy: Desktop, Mobile / Service Portal, or Both.
Related List: UI Policy Actions	
Table	[read-only] Field the UI policy action applies to.
Field name	Field on the selected table to which the UI policy performs an action if true. **Note:** If the specified field is not found on the form, the UI policy performs the action on the variable with the same name.
Mandatory	Choice list for specifying how the UI policy affects the mandatory state of the field. Choices are:

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Field	Description
	○ Leave alone ○ True ○ False
Visible	Choice list for specifying how the UI policy affects the visible state of the field. Choices are: ○ Leave alone ○ True ○ False
Read only	Choice list for specifying how the UI policy affects the read-only state of the field. Choices are: ○ Leave alone ○ True ○ False
Related Links	
Default view or Advanced view	Changes the form view to the default or advanced view. The fields change based on the view.

5. Click **Submit**.

Related topics

Client scripts

Example: creating a UI policy

Create a UI policy to implement controls in the Incident form when the state changes to **Resolved**.

Before you begin

Role required: ui_policy_admin

About this task

This example demonstrates how to implement the following controls.

- Make a **Close Notes** field mandatory.
- Hide the **Opened by** field.
- Make the **Priority**, **Severity**, and **Urgency** fields read-only.
- Run a client script that displays an alert message.

Procedure

1. Navigate to **All** > **System UI** > **UI Policies**.
2. Click **New**.
3. Supply the following information.

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New UI policy

Name	Input
Table	Incident
Conditions	[Incident state] [is] [Resolved]
Reverse if false	Select this check box. If the incident state is not **Resolved**, the UI policy is reversed.
On load	Select this check box to perform the actions when the form is loaded or when the condition changes.

4. Right-click the form header and select **Save** from the context menu.
   The **UI Policy Actions** related list appears.
5. In the related list, click **New**.
6. Provide the following information.

New UI policy actions

Name	Input
Field name	Close notes. This UI action makes the Close notes field mandatory.
Mandatory	True
Visible	Leave alone
Read Only	Leave alone

7. Click **Submit**.
8. Repeat the process to create UI policy actions to hide the **Opened by** field, and to make the **Priority**, **Severity**, and **Urgency** fields read-only.

Client scripts for UI policies

Any scripts you create for UI policies run on the client side.

You can use different options in the UI Policy form to control when and how the UI policy is applied. These options include client scripts, OnLoad execution, and view-specific UI policies. Administrators can use the UI Policy form to create client scripts that run *onChange* when the UI policy conditions are met (**Execute if true**) or not met (**Execute if false**).To display these scripting fields in the UI Policy form, in the Script section, select the **Run scripts** check box.

For example, to display an alert to the user when the incident **State** field changes to **Resolved**, create the following script in the **Execute if true** field.

```
function onCondition(){
alert('You changed the "Incident state" to Resolved. Please
 enter your comments in the "Close notes" field.');
}
```

Service catalog UI policies control the behavior of catalog item forms. Service catalog UI policies can be applied to a catalog item or a variable set. For more information about using UI policies for service catalog items, see Service catalog UI policy

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Advanced form configuration

Administrators can configure advanced form features, such as form focus, form splits, and derived fields.

- Allow insert options on task records to let users insert a new task record, such as an incident or change request, from the task record they are currently viewing.
- Turn off focusing on the first writable field of a form if you want to prevent the cursor from hopping to the first writable field on a form.
- Deactivate form submission with the Enter key if you want users to be able to press the Enter key for reasons other than submitting the form.
- Enable multiple form splits, which organizes the fields into multiple columns, if you want to design forms with more than the default two column layout.
- Define required fields to prevent users from removing them when they configure the form.

Allow insert options on task records

The **Insert** and **Insert and Stay** options are disabled by default for task records such as incidents and change requests. You can set a system property to show these options for task records.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Locate the property **Allow the use of the "Insert" and "Insert and Stay" options on task derived tables** (*glide.ui.task.insert*).
3. Select the check box to enable or clear the check box to disable (default) the options for tasks.
4. Click **Save**.

Turn off focusing on the first writable field of a form

Switch the focus on a form to the first element on the page instead of the first writable field to make the form more accessible to users who use screen readers.

Before you begin
Role required: admin

About this task
By default, forms set focus on the first writable field on the form. With first-field focus turned off, the form focuses on the first element on the page instead. Focusing on the first element, instead of the first writable element, helps orient users who use screen readers so they can find all the elements on a form.

Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Set the property *glide.ui.focus_first_element* to **false**.

Hide the template bar for a table

Administrators can hide the template bar for a table by creating a system property.

Before you begin
Role required: admin

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About this task
Creating a table-specific property and setting it to false prevents users from displaying the template bar on a record for the specified table.

Procedure
1. Navigate to `sys_properties.list`.
2. Add a system property with the following settings.

Property	Value
Name	glide.ui.show_template_bar.<TABLENAME>
Type	true | false
Value	false

3. Click **Submit**.

Deactivate form submission with the Enter key

By default, when you press the `Enter` key in a simple one-line text field, a choice list, or a Boolean field, the form is submitted.

Before you begin
Role required: admin

About this task
You can use a system preference to deactivate this feature if you do not want the `Enter` key to submit the form.

Procedure
1. From the left navigation pane, select **User Administration** > **User Preferences**.
2. Select the **enter_submits_form** preference.
3. Set the value to **false**.
4. Click **Update**.
   The change does not take effect until user preferences are reloaded either at login or when a session is created.

Enable multiple form splits

Form splits enable you to organize fields on a form into columns. Administrators must add a property to enable form splits.

Before you begin
Role required: admin

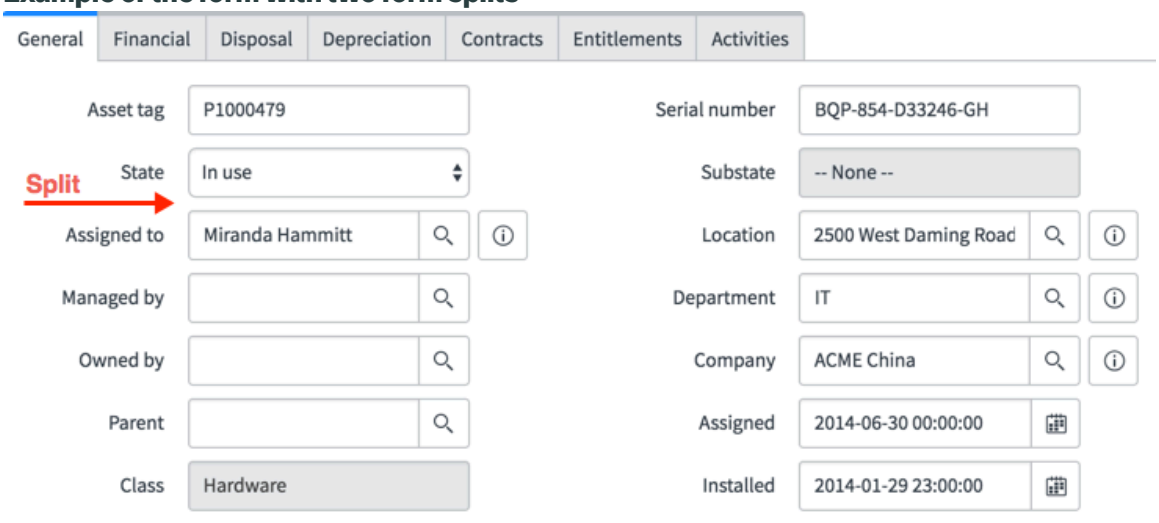
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About this task

Configuration of two form splits

```
|- begin_split -|
Asset tag
State
|- split -|
Serial number
Substate
|- end_split -|
|- begin_split -|
Assigned to
Stockroom
Reserved for
Managed by
Owned by
Parent
Class
|- split -|
Location
Department
Company
Assigned
Installed
|- end_split -|
Comments
```

Example of the form with two form splits



When you organize fields in this manner and the user is viewing the form on a small mobile device, the fields within the first split are listed before the fields in the second split. In this example, the **Asset tag**, **State**, **Serial number**, and **Substate** field are listed before any of the fields below them. You can also create elements that span the form at the top of the form.

Procedure

1. Enter `sys_properties.list` in the Navigation filter.
   The entire list of properties in the System Properties [sys_properties] table appears.

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2. If the property does not exist, click **New**.
3. Enter the following information.

Option	Description
Name	glide.ui.form_multiple_splits
Description	Enable multiple form splits
Type	true | false
Value	true

4. Click the form context menu icon and select **Save**.
   The **Categories** related list appears.
5. Click **Edit** and move **UI** to the **Categories List**.
6. Click **Save**.
   The System Property form reopens and the new property appears in the UI Properties page.

Define required fields

You can specify which form fields are required in forms. This action prevents users with the personalize_form role from removing the field by configuring the form layout.

Before you begin

Role required: admin
The Required Form Fields plugin must be active.

About this task

If present on a form, only an administrator can remove required fields. When you configure a form, required fields appear in a gray color and have a tooltip indicating they are required. Required fields are defined in the Required Form Fields [sys_ui_element_required] table.

The expected (although not the only) use case for this feature is as part of a delegated administration scheme. For example, you can grant branch offices the rights to modify forms by granting the personalize_form role, but not allow them to remove certain fields which are critical to overall business processing.

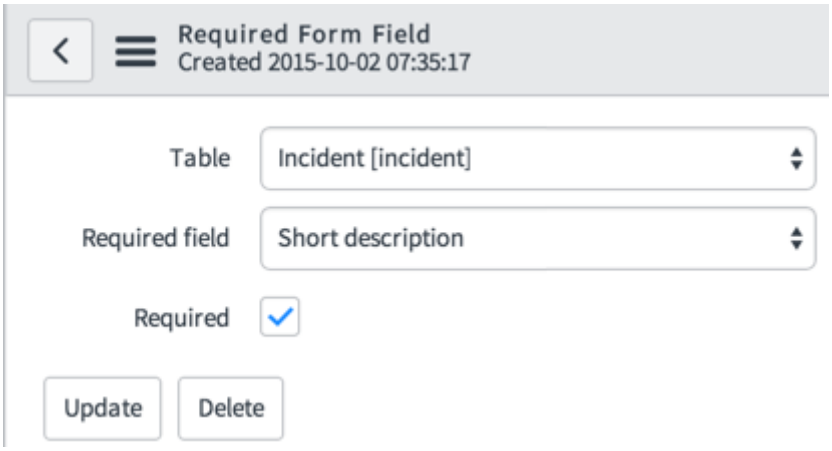
Procedure

1. Navigate to `sys_properties.list`.
2. Locate the property named *`glide.ui.form.enforce_required_fields`* and make sure it is set to true.
3. Navigate to **System UI** > **Required Form Fields**.
4. Click **New**.
5. Select the table and field, and then select the **Required** check box.

Example

The following example sets the **Short description** field on the Incident form to be required.

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If you decide later that you do not want to make the field required, clear the **Required** checkbox. This action is preferable to deleting the record.

6. Click **Submit**.

Result

If the table specified has extension tables, then the Required Form Field record applies to forms of all extended tables. For example, if an administrator specifies that the **Short description** field is required for the Task table, then this configuration applies to the Incident form, Change Request form, Problem form, and so on.

An extended table can override the Required Form Field rule of its base table. For example, if the **Short description** field is required for the Task table, but not required for the Incident table, it is required for all Task tables except Incident.

Control the label type for derived fields

You can configure the type of label that appears for derived fields.

Before you begin

Role required: admin

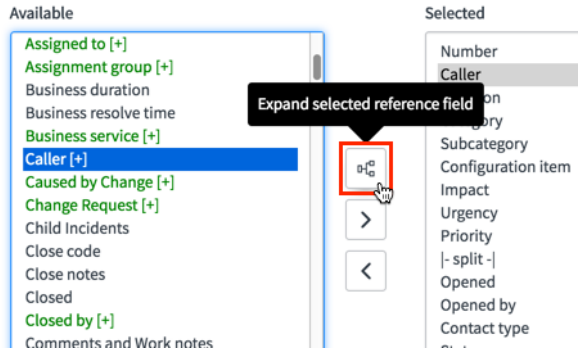
About this task

An example would be displaying the email address for the caller when looking at an incident record. The email address is not stored in the Incident table, but is obtained by following the caller reference from the incident to the User table. You control the label type by setting a system property. For example, the field label for an incident email address can be either of the following strings.

- **Caller Email**, which represents the complete label to uniquely identify this field as the email from the caller user record. If you display the email address for the person the ticket is assigned to, its label would be **Assigned to Email**.
- **Email** which is the label for the target field. This label is not unique on the form if, for example, you are also displaying the email address of the person assigned to the incident. However, usually the placement of the field on the form makes it clear what the field represents.

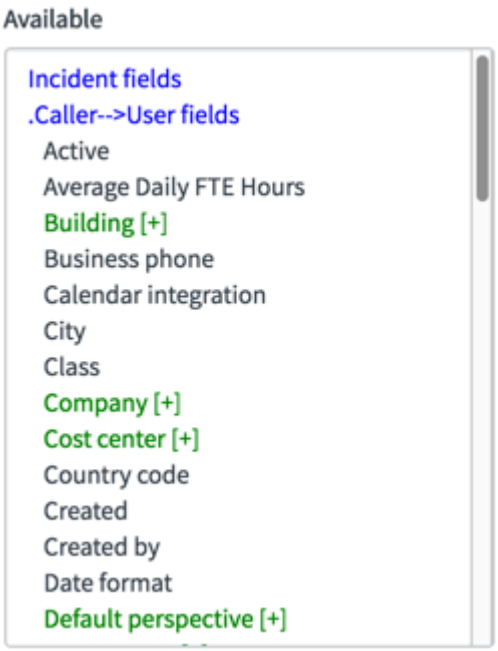
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Available table fields



Choose the **Caller** field and click the expander icon.

Caller fields



Select the available fields associated with the **Calle** field.

Procedure

1. Navigate to **All** > **System Properties** > **System**.
2. Locate the **Use short labels for all fields. For example, if a form contains the caller's email address, use the "Email" label rather than the full label of "Caller Email"** (*glide.short.labels*) property.
   The default value is **true**, meaning that the short label is displayed in all forms.
3. If you want to display the complete label in forms, clear the check box.
4. Click **Save**.

ServiceNow AI Platform® field administration

The individual pieces of data in a record are called fields. You enter data in fields on the form or by using the list editor. Administrators can create new or modify existing fields.

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Get started

Explore  Learn about fields on the ServiceNow AI Platform.	Customize  Add and customize fields in a table.
Administer  Administer data normalization and policy in your fields.	Reference  Information about supported field types.

Exploring field administration

You can enter data in fields by using the list editor or by using a form. In form view, fields appear as fields in the form, and in list view they appear as columns of data in the table. Administrators can create new fields or change the type of existing fields.

Field administration considerations

- If you edit a field on a child table that is present on the parent table, it's also changed in the parent table and all other child tables.
- Kanji characters aren't currently supported. If a table column identifier is created using Kanji characters, it's ignored in any update or insert operation from a form.
- When you create a custom field, use one of the supported field types described in Field types reference. Other field types, such as User Input, are for internal use only and aren't supported for custom fields.
- The Field Name and Table Name field types have a built-in dependency relationship. For example, Field Name fields don't exist independently; they require a Table Name field. Also, Field Name fields always contain a value, which is sys_id by default. You can't set the value for a Field Name field to None, even if you apply the attribute allow_null=true.
- If you need to change the data type for a field, create a new column using the new data type, copy the data from the old column to the new column via a background script, and then rename the original column label.

Customizing fields on the ServiceNow AI Platform®

Administrators can add and customize fields in a table, as well as make fields mandatory, highlight list fields, specify default values, and assign record numbering.

Add and customize a field in a table

Administrators can add new fields to a table to store and display data.

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Before you begin
Role required: admin

About this task
Note: Certain ServiceNow AI Platform subscriptions include custom table entitlements. You can create custom tables for any purpose, up to the entitlement limit in the subscription. To learn more about how your usage administrator maps the custom tables that you create to subscriptions, see Map custom tables to a product subscription in Subscription Management.

Be aware of these database limitations:

- The system can only have a maximum of 1000 columns per table. Although 1000 columns is a specified limit, this limit doesn't mean you can physically have 1000 columns within a table. The number of columns within a table is defined by the database used in the ServiceNow datacenter, not by the ServiceNow AI Platform.
- Every table, regardless of storage engine, has a maximum row size of 65,535 bytes. Storage engines may place additional constraints on this limit, reducing the effective maximum row size.
- The system can't have more than 10 medium-length or longer **String** fields to a single table. Attempting to save a large number of characters in 11 or more String fields can result in the following error: Syntax Error or Access Rule Violation detected by database [Row size too large (> `8126`)].
- When you create fields, the u_ prefix is automatically added to the column name. If the column label that you enter contains leading numeric characters, they are replaced by the u_ prefix.

For more information on database limitations and general questions on tables in your ServiceNow instance, see KB0749585.

Procedure
1. Navigate to any form.
2. Right-click the form header and select **Configure** > **Form Layout**.
3. In the **Create new field** section, fill in the following fields

Option	Description
Name	Enter the name of the field as you want it to appear on forms and lists.
Type	Select a field type.
Field length	Select a field length. This field is visible only for certain field types.

4. Click **Add**.
5. Use the slushbucket to place the field in the desired location on the form.
6. Click **Save**.
   The field now appears on the form in the designated location.

Make a field mandatory

Fields can be marked as mandatory, meaning they must contain a value before the record can be saved. Mandatory fields are marked with a field status indicator before the label.

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Before you begin
Role required: personalize_dictionary

About this task
A mandatory field that is pre-populated by the platform with default data, such as a value from a client script, does not display the indicator. If you delete this value from the field, however, the indicator appears. The color of the indicator depends on the field state.

Using a dictionary entry to make a field mandatory does not work when using web services or background scripts. You can use a data policy instead. For more information on data policies, see Data policy.

Procedure
1. Right-click the field's label in the form and select **Configure Dictionary**.
2. In the **Dictionary** form, select the **Mandatory** check box.
3. Click **Update**.

   The next time the form is opened, a field status indicator appears next to the field label, indicating that a value is mandatory. If the mandatory field is pre-populated for any reason, the mandatory field indicator does not appear.

   Mandatory fields are global. The field is marked as mandatory everywhere it appears in a form.

   Making a **True/False** mandatory will have no effect. **True/False** fields are always considered to have a value. A selected check box has a value of true and an unselected check box has a value of false. Either of these values satisfies the requirement of a mandatory field.

   A form can be saved with an empty mandatory field if that field is a reference field, and if the parent field is also blank. However, if the mandatory reference field shows a value from the parent field, then the form cannot be saved if this value is deleted. If the value in the referenced field is changed, the value for that field is changed everywhere it appears.
4. **Optional:** Use *`dictionary override>override mandatory`* to make a field that is mandatory only in the child table and not the parent table.

Related topics
Set a CI field to be mandatory

Define a dictionary override

Change the field label or hint

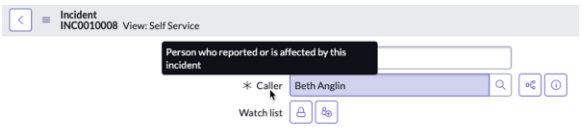
You can change a field's label or the text that appears as a hint when you point your mouse device to the field.

Before you begin
Role required: personalize_dictionary

Procedure
1. Navigate to the form the field appears on.
2. Select and hold (or right-click) the field label and select **Configure Label**.
3. Update the form.

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Changing the Field Label or Hint

Field	Description
Table	The table the label appears on.
Label	The label that the field displays. You can enter up to 80 characters for the label, but not all databases support this many characters. The recommended maximum is 30 or fewer characters. HTML in field labels isn't supported.
Plural	The plural version of the field label.
Element	The dictionary name of the field.
Help	Helpful text stored in the record.
Hint	A short description of the field that displays when a user hovers over it. HTML in field hints isn't supported, but line breaks are allowed. 
URL	A URL link that displays on the label if this field isn't empty.
URL target	This field should be left empty, as it's no longer used.

4. Select **Update**.

Related topics

Add help to a field label on a form

Delete a field from a table

You can delete custom fields that you created. Custom fields begin with **u_**. It is recommended that you remove the field from forms and lists instead of deleting it.

Before you begin

Role required: admin

About this task

You cannot delete base system fields. In addition, any missing base system fields are recreated when the instance is upgraded.

Procedure

1. Navigate to a form that contains a custom field to delete.
2. Right-click the field label and select **Configure Dictionary**.
3. Click **Delete Column** in the form header, and then click **OK**.
4. To delete multiple custom fields, complete the following steps.

   a. Navigate to **System Definition** > **Dictionary**.

   b. Locate the custom fields to delete.

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Example
For example, search for column names that start with `u_`.

c. Check the boxes next to the fields to delete and select **Delete** from the action list below the list.
A confirmation dialog opens and reminds you that this may result in deletion of related records. If there are dependencies for the selected fields, they are listed.

d. To proceed, click **Delete**.

Highlight list fields

Color fields in lists to call an agent's attention to them.

Before you begin

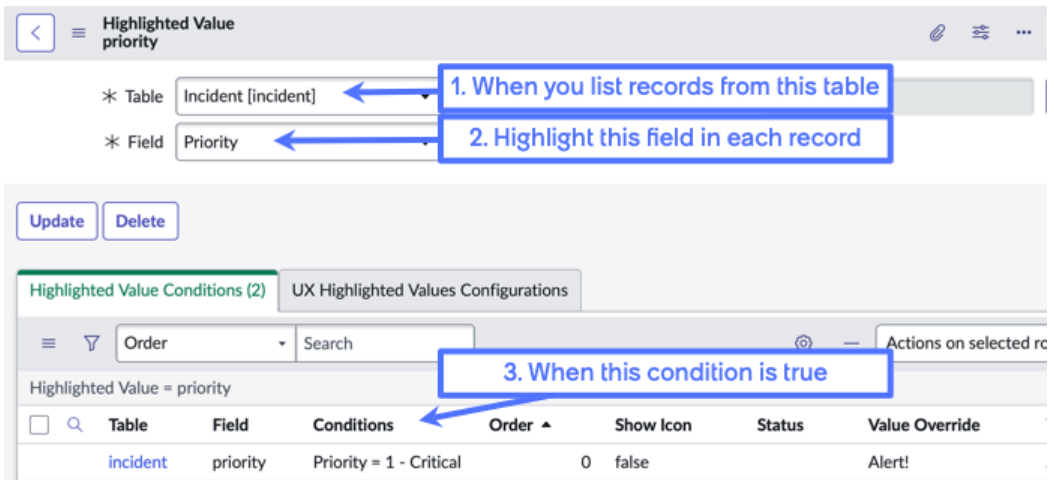
Role required: admin

About this task

Highlighted fields in lists appear colored and optionally, have a leading bullet.

Number	Opened	Short description	Caller	Priority ▲	Category	State
INC0000002	2018-01-11 15:07:12	Network file shares access issue	Fred Luddy	1 - Critical	Network	On Hold
INC0000051	2018-03-29 13:48:32	Manager can't access SAP Controlling application	Joe Employee	1 - Critical	Software	In Progress

The set up involves specifying the fields that gets highlighted and the conditions that trigger the highlighting.



You cannot highlight the following field types:

- Reference
- URL
- Document IDs

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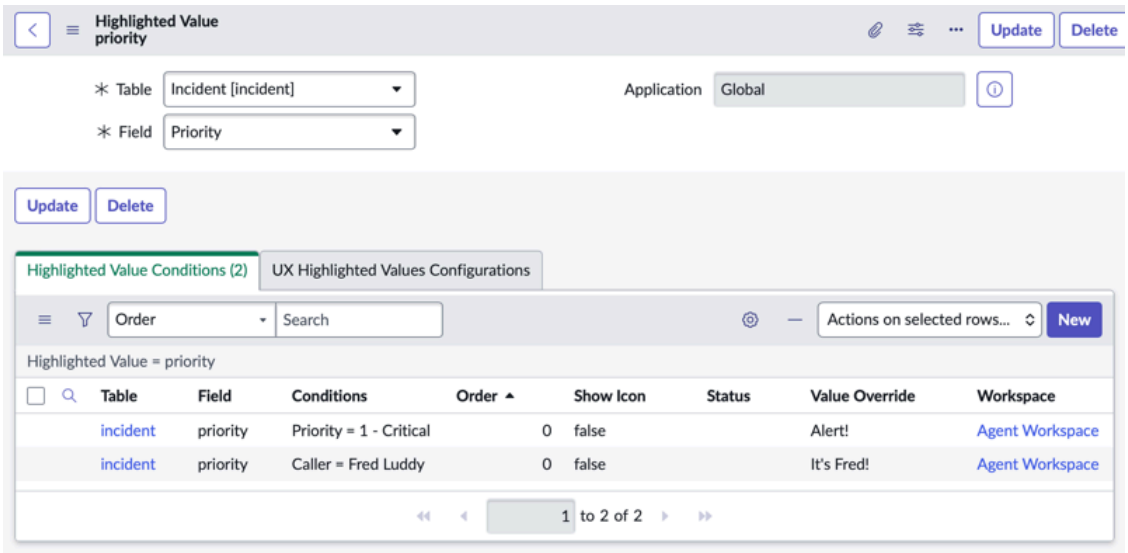
Procedure

1. Navigate to **All** > **Workspace Experience** > **Administration** > **Highlighted Values** and click **New**.
2. On the form, fill in the fields.

Highlighted Value

Field	Definition
Table	Name of the table that contains the fields you want to highlight.
Field	Name of the field you want to highlight if the triggering conditions are met.
Application	Scope of applications this highlighting pertains to.
Workspace	The workspace this highlighting applies to.

The **Field** value can be unrelated to the condition that triggers the highlighting. In the following example, if the **Caller** is Fred Luddy, Workspace highlights the **Priority** field, not the **Caller** field.



3. Right-click the header and click **Save**.
   You've specified the field where the highlights appear. Now, it's time to specify the conditions that trigger the highlighting.
4. In **Highlighted Value Conditions**, click **New**.
5. In the Highlighted Value Condition form, fill in the fields.

Field	Description
Conditions	Conditions that trigger the highlighting. The condition can be different from the field that gets highlighted. For example, you might highlight the **Priority** field in a record if the **Caller** in that record is Fred Luddy. A simpler example is highlighting the **Priority** field if the priority value is **critical**.
Status	The highlighting color.

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Field	Description
Show Icon	Toggle to display (selected) or hide the leading bullet when highlighting.
Value Override	Text that replaces the field values from the table. If you don't supply a **Value Override**, Workspace highlights the field value from the table. If you supply a value, Workspace replaces the field value with your text and highlights that.
Application	Scope of applications this highlighting pertains to.
Order	The order in which to evaluate the conditions. When you have multiple conditions for highlighting the same field, they are evaluated in order from lowest to highest. If any of the conditions are True, Workspace highlights the field.

6. Click **Submit**.

   In the following example, the highlighting was triggered on the **Priority** field because the priority value was critical.

Number	Opened	Short description	Caller	Priority ▲	Category	State
INC0000002	2018-01-11 15:07:12	Network file shares access issue	Fred Luddy	1 - Critical	Network	On Hold
INC0000051	2018-03-29 13:48:32	Manager can't access SAP Controlling application	Joe Employee	1 - Critical	Software	In Progress

7. **Optional:** Click **New** on the **Highlighted Value Conditions** Related List and create another condition for highlighting the same field.
   For example, highlight the **Priority** field associated with the Incident table when the **Priority** value is "critical," or when the **Caller** value is "Fred Luddy." The conditions are ranked according to the **Order** value. Workspace evaluates the lowest value first.

Conditions	Order ▲	Show Icon	Status	Value Override
Priority = 1 - Critical	30	true	Critical	Alert!
Caller = Fred Luddy	50	true	Critical	It's Fred!

8. **Optional:** Remove all highlighting from a filtered list that would otherwise have highlighting. When setting up highlighting for a table, all filtered lists associated with the table display highlighted fields unless you disable highlighting for specific, filtered lists.

   a. Navigate to `sys_aw_list.list`.

   b. In the **Name** column, enter the name of the table with highlighted fields, for example, Incident.
   All filtered lists associated with the table appear.

   c. Click the filtered list you want to remove highlighting from.

   d. On the Workspace List form, if Global is the current application, click **here** in **To edit this record click here.**

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e. Select the **Ignore Highlight in List**check box and click **Update**.
Now, regardless of the conditions, Workspace will not highlight any fields in the specified filtered list. This option does not work, however, for filtered lists in **My Lists**, which are the filtered lists agents create.

Modify string field length

You can modify the maximum character limit for a string field.

Before you begin
Role required: personalize_dictionary

About this task
The URL type field hides the Max Length field on the Dictionary form by default. Browsers support URL length up to 2,083 characters. The URL field is a String field.

Procedure

1. Navigate to a form that contains the field that you want to modify.
2. Right-click the field label in the form and select **Configure Dictionary**.
3. Change the **Max length** field to the desired length.

   Note: You can change between string-based data types as long as length changes do not cause any data loss from truncation. For example, you can change from a MEDIUM database type to a VARCHAR(100) database type if none of the existing data is greater than 100.

4. Click **Update**.
   The system cancels any length change that results in data loss due to truncation.

Related topics

Field types reference

Specify a default field value

A default value populates a value in a field when a new record is created.

Before you begin
Role required: personalize_dictionary

About this task
The default value populates the field on the blank form for a new record, and also subsequently when the new record is submitted if the field is empty. Default values can be specified as either a constant or generated through script.

Procedure

1. Right-click the field's label in the form and select **Configure Dictionary**.
2. Enter the default value in the **Default value** field.

   To set a constant value, type it into the **Default value** text box field. To assign a default value using a more complex formula, use JavaScript to output a default value.

   Note: The default value should be the underlying value that would be present in the field, not the label. For example, in a choice list field, use the **value** of the choice as the default value, not the choice's name.

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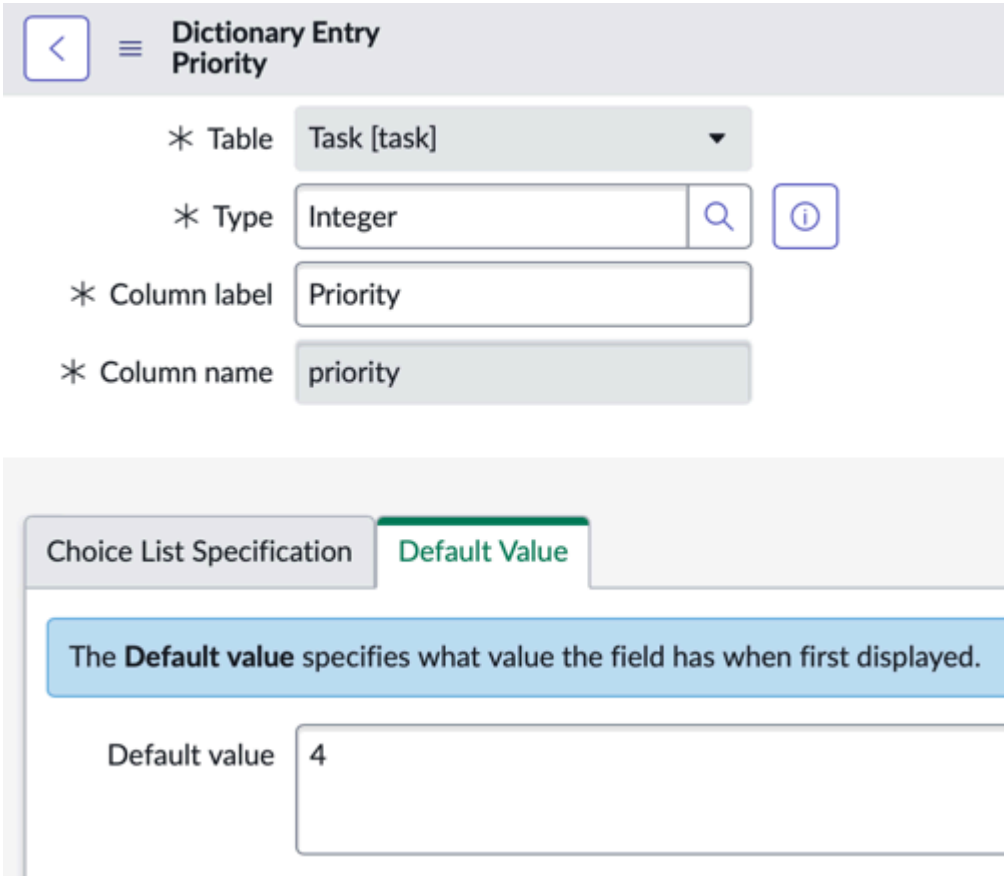
Default field value examples

Review the following examples about specifying default field values.

Example: Constant default values

Here is an example that sets a default value for the **Priority** field.

Default value constant



Example: Javascript default values

To view out-of-box examples of JavaScript default values, navigate to **System Definition** > **Dictionary** and enter this filter: **[Default value] [starts with] [javascript]**. Open some of the records and view the default value javascript entries.

Example: Set a default value for assignment_group

The following example sets a default value in a [sys_user_group] reference field by getting the ID from the name of a group.

```
javascript:GetIDValue('sys_user_group', 'Development');
```

Example: Set a default value for assigned_to if user has the itil role

This example for the Task [task] table describes how to configure the default value for the [assigned_to] user equal to the current user id if the user has a role of itil.

- Column label: **Assigned to**
- Column name: **[assigned_to]**
- Reference Specification section

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- Reference: **User** [sys_user]
- Reference qual condition: **[Roles] [is] [itil]**

- Default value script:

```
javascript:if (gs.hasRole("itil"))current.assigned_to =
 gs.getUserID();
```

Example: Set a default value for a duration field

To set a default value for a duration field, use the following in the **Default value** field of the duration field's dictionary entry:

```
javascript:current.duration_field.setDisplayValue('3 04:30:14');
```

Avoid hard-coding a particular date-time. If the system date-time format changes, the value becomes invalid. Instead, select the **Use dynamic default** check box and assign a dynamic filter option. For more information on dynamic filters, see Create a dynamic filter option .

Make a field dependent

A choice or reference field can be declared dependent on another field on the same table to limit the values available to select based on the value of the dependent field.

Before you begin

Role required: personalize_dictionary or admin

About this task

If a required dependency does not function as expected, as might happen if there is a many-to-many relationship between the fields, consider using reference qualifiers to accomplish the goal.

Note:

- Fields cannot be made dependent on derived fields.
- When you create a dependency between reference fields (similar to assignment group and assigned to), you must add `_group` to the name of the field on which the other is dependent on to get the expected behavior. See KB0998861: Dependent field does not work as expected on task "Assigned to" field for more information.

Procedure

1. Navigate to a form that contains the field that you want to make dependent on another field.

   Example
   For example, to configure a field in the Incident [incident] table, navigate to **All** > **Incident** > **All** and select **New**.
2. Right-click the field label in the form and select **Configure** > **Dictionary**.
3. From the Dependent field tab, select **Use dependent field** and select the name of the field that this field will depend on.

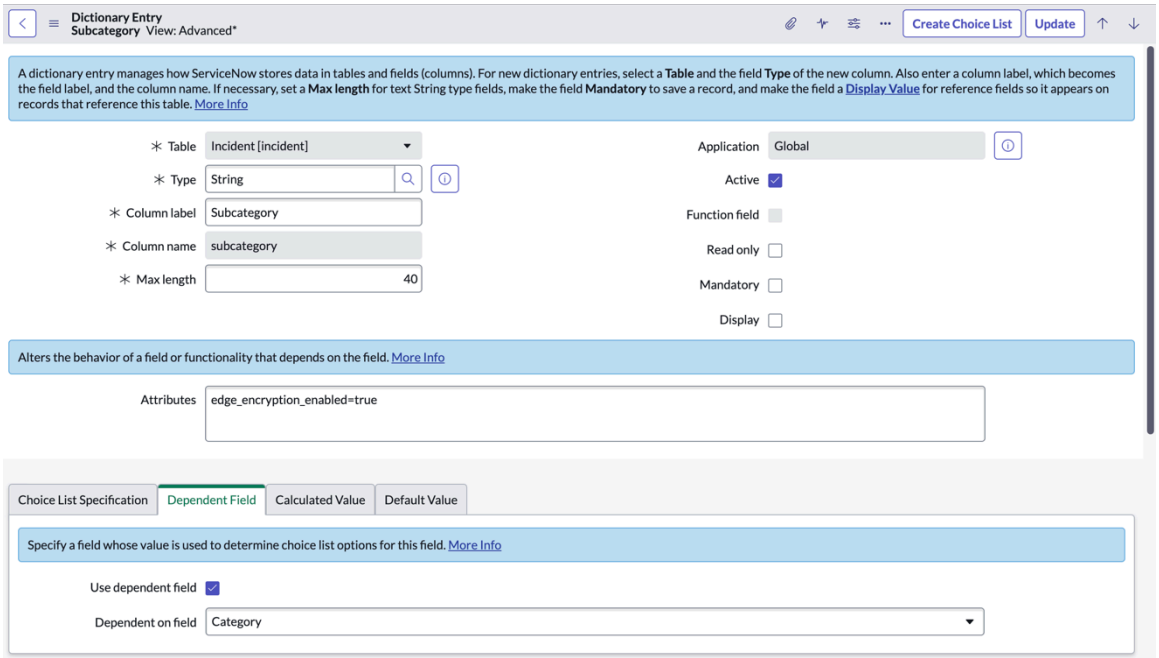
   Note: For some field types, you may only need to enter the name of a field in the same table on which the field depends.

4. Select **Update**.

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Example: Dependent field

In the example below, the Subcategory field is made dependent upon the Category field. On an incident form, the value selected for the Category field determines which options appear for the Subcategory field.



Related topics

Reference qualifiers

Require unique values for a field

The system allows you to require that a field's values be unique. When this is done, the system will not let two records have the same value for that field.

Before you begin

Role required: personalize_dictionary

About this task

By default, fields are created without this constraint. A field can have unique values only if there aren't already duplicate values in the database for that field. The system doesn't allow you to make a field unique while there are duplicate values in the table.

The system also doesn't allow you to add a unique index if a non-unique index already exists. In this scenario, you can't select the **Unique** check box on the form; instead, the system directs you to the **Tables & Columns** module, so you can drop the non-unique index, and then create the unique index.

Procedure

1. Verify that no records in the table for the field have values, or that they all have the same value.
2. Right-click the field label in the form and select **Configure Dictionary**.
3. Configure the form to add the **Unique** field if it does not already appear.
4. Select the **Unique** check box.
5. **Update**.

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Related topics

Configuring the form layout

Define field styles

Field styles enable you to declare individual CSS styles for a field in a list or form.

Before you begin

Role required: personalize_styles or admin

About this task

The CSS lets you change the following attributes of a field.

- Change the color.
- Change the font attributes (bold, italics, underline).
- Change the padding and alignment of text.

You can define field styles for tables and database views in the same scope as the field style. You can also define field styles for other tables that have at least one field in the same scope. Field styles defined for a table don't apply to database views that include the table. Create separate field styles for database views.

Note: Field styles aren't applied to comments and work notes fields used with the activity formatter. Background color for these fields can be set using the *glide.ui.activity_stream.style.comments* and *glide.ui.activity_stream.style.work_notes* system properties located in the sys_properties table.

Procedure

1. Navigate to the list of styles for the field in one of the following ways.
   - Right-click the field label on the form and select **Configure Styles**.
   - Navigate to **System UI** > **Field Styles**, and locate the field to apply a style (admin only).
2. Select **New**, or select the style to modify.
3. Complete the form.

Field	Description
Table	Table that contains the field. **Note:** The list shows only tables and database views that meet the scope protections for field styles.
Field name	The field to which the style applies.
Value	The exact value or script-based-condition required to apply the style. **Note:** Leave the **Value** field empty to apply field styles to UI16 forms. Specify a value in the **Value** field to apply field styles to UI16 lists. Field styles aren't supported for Workspaces.
Style	The CSS style to apply.

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Field	Description

	For example, to make the background of the Incident Category fields red in record lists, with a 24-px font size and white text color, enter the following code.
	`background-color:red;`
	`font-size:24px;`
	`color:white;`

You can use a script-based-condition with the syntax `javascript:<script>` in the **Value** field to determine whether the system should apply a style to a field in the list. If the evaluated script returns true, the system applies the style to the list item.

The script has access to the *current* script object, which enables you to build conditions based on the field values of the current record. For example, this script checks for overdue items based on a field value:

```
javascript:gs.dateDiff(gs.now(),
current.u_datefield.getDisplayValue(), true) < 0
```

Note: In this example, `current.u_datefield` refers to the name of a custom date field.

The system only supports one `javascript:<script>` entry in a **Value** field. If you want to enter multiple JavaScript conditions, consolidate the conditions into one statement. For example, instead of this invalid entry:

```
javascript: current.state == "Completed" javascript:
 current.error_tables > 0
```

Consolidate the conditions into one statement such as:

```
javascript: current.state == "Completed" &&
 current.error_tables > 0
```

4. **Optional:** To add alternative text for a style, configure the form to add the alternative text field. For styles like the VIP style icon, you can add alternative text so that screen readers can differentiate between the style and the text.
5. Select **Submit** or **Update**.

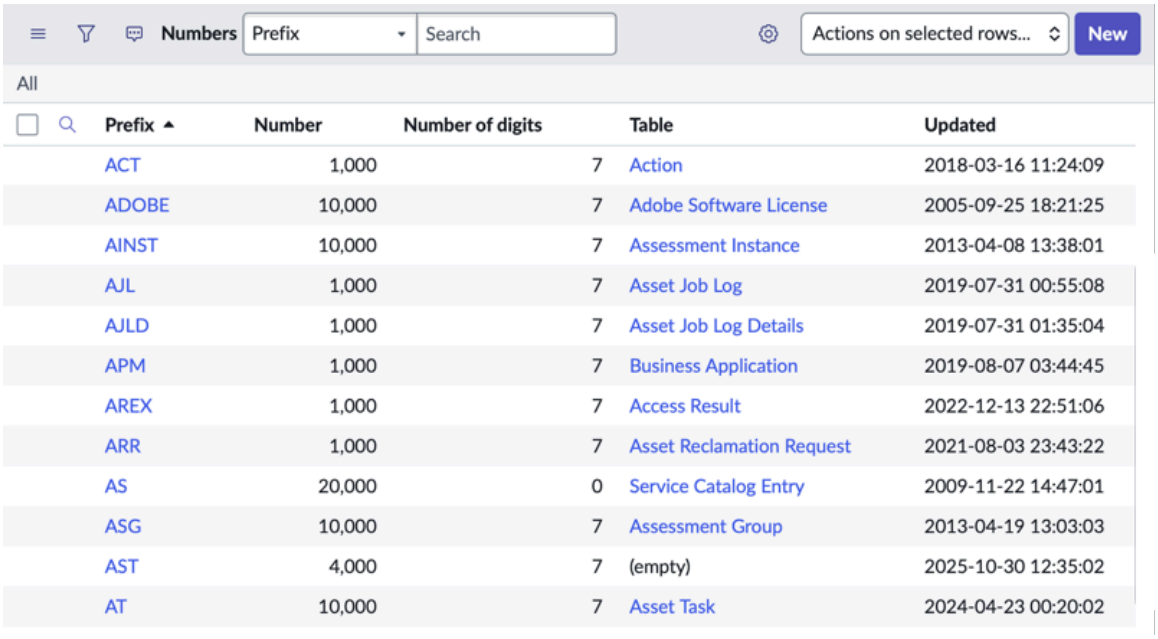
Record numbering

In the base system, several tables are numbered, including Incident, Problem, Change Request, and Knowledge. You can also use these numbers anywhere that script is present, for example to generate watermarks for emails. Records in tables can be numbered automatically.

Administrators can manage record numbering by navigating to **System Definition** > **Number Maintenance**. The current number format for a table, including the prefix (such as **INC** for incidents or **CHG** for changes), is stored in a record on the Number [sys_number] table.

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Number table



Prefix	Number	Number of digits	Table	Updated
ACT	1,000	7	Action	2018-03-16 11:24:09
ADOBE	10,000	7	Adobe Software License	2005-09-25 18:21:25
AINST	10,000	7	Assessment Instance	2013-04-08 13:38:01
AJL	1,000	7	Asset Job Log	2019-07-31 00:55:08
AJLD	1,000	7	Asset Job Log Details	2019-07-31 01:35:04
APM	1,000	7	Business Application	2019-08-07 03:44:45
AREX	1,000	7	Access Result	2022-12-13 22:51:06
ARR	1,000	7	Asset Reclamation Request	2021-08-03 23:43:22
AS	20,000	0	Service Catalog Entry	2009-11-22 14:47:01
ASG	10,000	7	Assessment Group	2013-04-19 13:03:03
AST	4,000	7	(empty)	2025-10-30 12:35:02
AT	10,000	7	Asset Task	2024-04-23 00:20:02

You can renumber auto-incremented tables that extend the task table or manage numbering with a database field named **Number this field**.

Note: If you reset numbering in Number Maintenance, it only renumbers new records. It leaves the numbering as-is for existing records in system tables.

Add auto-numbering records in a table

You can define one number format per table in the system.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Number Maintenance**.
2. Select a table name to view the number record for that table, or click **New**.
3. Define the number format by completing the fields (see table).
4. Select **Submit** or **Update**.

   If an auto-numbered field does not already exist, a new field is automatically created on the table with the following values:

   - Label: Number
   - Name: u_number
   - Default value:

```
javascript:getNextObjNumberPadded();
```

Note: This script renumbers records when the **Number of digits** is updated. To use a script that does not renumber records when the **Number of digits** is updated, open the dictionary entry for the **Number** field and enter the following script in the **Default value** field.

```
javascript:getNextObjNumber();
```

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Auto-numbering records in a table

Field	Description
Table	Select a table.
Prefix	Enter a prefix for every number in the table (for example, **INC** for Incident).
Number	Enter the base number for this table (default value is 1000). Record numbers are automatically incremented, and the next number is maintained in the Counter [sys_number_counter] table. If you set the base number to a value higher than the current counter, the next record number uses the new base number. Otherwise the next record number uses the current counter. The counter does not reset to a base number lower than itself. To see the current counter, click the **Show Counter** related link.
Number of digits	Enter the minimum number of digits to use after the prefix (default value is 7). ○ Leading zeros are added to auto-numbers, if necessary. For example, **INC0001001** contains three leading zeros. ○ The number of digits can exceed the minimum length. For example, if **Number of digits** is **2** and more than 99 records are created on the table, the numbers continue past 100 (such as **INC101**). ⚠ **Warning:** Changing this field may update all number values for existing records on a table. Take care when changing this field on a production instance.

When moving some applications these records may not be automatically included. Take care to ensure that all necessary records are present when moving applications.

Note: To change the default values for new number formats, change the **Default value** field on the system dictionary record for the **Number** or **Number of digits** field. These fields are on the Number table.

Related topics

System dictionary

Prepare to left-pad number fields in custom tables

Before you configure left padding of number fields on a custom table or a table that does not extend the task table, you must prepare business rules and script includes.

Before you begin

Role required: admin

Procedure

1. Duplicate the base system business rule named *Pad Numbers*: Click **Insert and Stay**. If **Insert and Stay** is not available on your instance, create a new business rule and manually copy all field values from Pad Numbers.
2. Give the business rule a new name and change the script field to read as follows:

```
padCurrentCategory();
function padCurrentCategory() {
var target = new GlideRecord(current.category+"");
```

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```
if (!target.isValidField("u_number") ||
 target.isValidField("number")) return;
var nm = new UNumberManager();
nm.padTableNumbers(current.category, current.maximum_digits);
};
```

3. Save the changes.
4. Duplicate the base system script include named *NumberManager*.
5. Change the following two lines as indicated:

```
105: currentNumber = records.u_number.toString();
117: records.u_number = prefix + currentNumber;
```

6. Name the new script include `UNumberManager` and save your changes.
   You can now continue with the process of configuring left-padding and renumbering records.

Configure left padding of a system number in a table

You can configure the left padding of the system numbers on a table. For example, pad the **Number** field on an Incident, Problem, or Change Request.

Before you begin

If you are configuring numbers on a custom table or a table that does not extend the task table, then, before performing the following procedure, you must prepare business rules and script includes. For more information, see Prepare to left-pad number fields in custom tables.

Role required: admin

Procedure

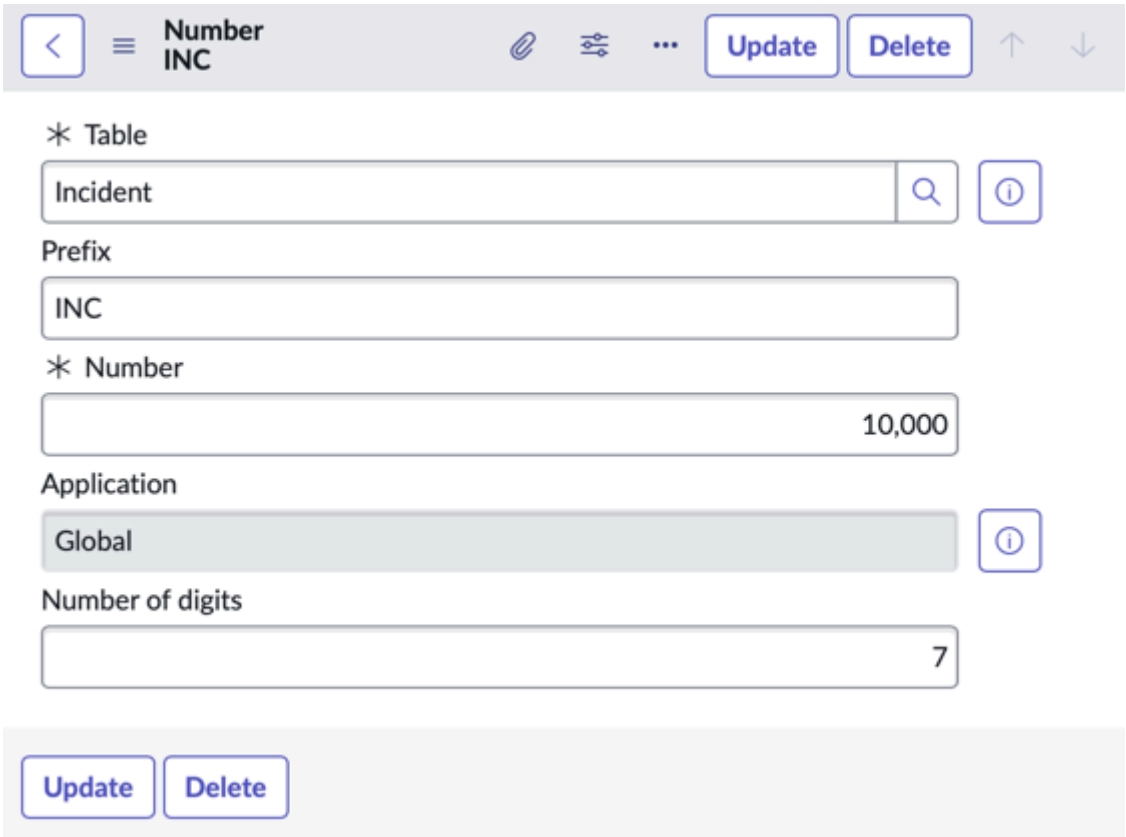
1. Navigate to the form, then right-click the **Number** field and select **Configure Dictionary**.
2. Enter the following script in the **Default value** field and click **Update**.

```
javascript:getNextObjNumberPadded();
```

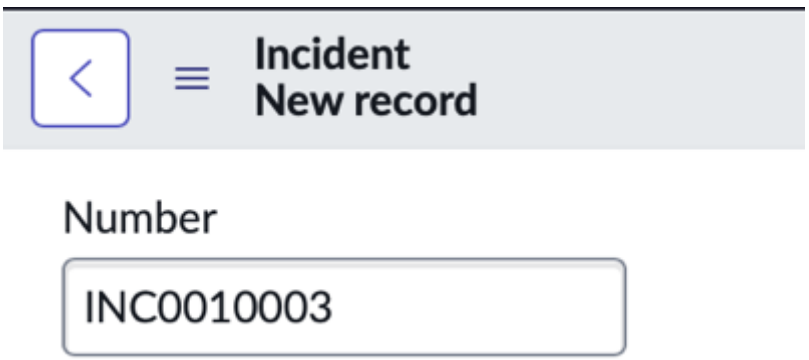
3. Navigate to **System Definition** > **Number Maintenance**.
4. Open the table record.
5. Enter a value in the **Number of digits** field.
6. Click **Update**.

   Number padding is applied to both existing and new records.

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The result of the configuration in the image is an Incident number that is left padded.



Prevent numbering gaps

By default, numbers are generated every time a new record is created.

Before you begin

Role required: admin

About this task

When records are created but not saved, a gap in the numbering is created. You can prevent these numbering gaps by generating numbers only when records are saved.

Procedure

1. Navigate to **All** > **System Properties** > **System**.
2. Set the property **Assign a task number only upon insert (prevents unused numbers)**, `glide.itil.assign.number.on.insert`, to **true**.

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Note: If an insert is aborted, it still consumes a new task number, leading to gaps in the sequence.

3. Click **Save**.

Enforcing unique numbering

Although duplicate numbers are rare, numbering does not enforce uniqueness, by default.

To enforce uniqueness, you can:

- Create a before business rule on insert only to check for duplicate values and replace duplicates with the next available number.
- Enable a unique index on the table. For more information, see Create a table index.

Note: While unique indexes ensure data integrity they also prevent any insert involving a duplicate number. This may cause unexpected errors during data entry.

Sample business rule

This sample script can be used as part of a before business rule on insert only to check for duplicate numbers and replace them with the next available number. The following script references a script created in Configure left padding of a system number in a table.

```
var curNum = current.number + '';

if(curNum) {

  var recordClass = current.getRecordClassName();
  var now_GR = new GlideRecord(recordClass);
  now_GR.addQuery('number', curNum);
  now_GR.setLimit(1);
  now_GR.query();

  if(now_GR.getRowCount() > 0) {
    var newNum = getNextObjNumberPadded();
    gs.addInfoMessage("The number " + current.number + " was already used
by another " +
     recordClass + ". The " + recordClass + " number has been changed to " +
 newNum);
    current.number = newNum;
  }
}
```

Related topics

Business rules

Administering field data on the ServiceNow AI Platform®

Use normalization, data policies, data lookup, and dynamic schema to maintain the integrity of your data on the ServiceNow AI Platform.

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Administration overview

- Field normalization and transformation

  Field Normalization includes normalization and transformation, which are two different ways to alter field values for increased data integrity and reduced duplication.

- Data policy

  Data policies enable you to enforce data consistency by setting mandatory and read-only states for fields.

- Data lookup and record matching support

  The data lookup and record matching feature enables administrators to define rules that automatically set one or more field values when certain conditions are met.

- Dynamic Schema

  Define a hierarchy of categories, groups, and attributes and enable users to select groups of attributes on a record.

Field normalization and transformation

Field Normalization includes normalization and transformation, which are two different ways to alter field values for increased data integrity and reduced duplication.

Normalization

Normalization searches for variations of the same field value and converts them into a single preferred value. By consolidating multiple variations of the same value into a single simple recognizable value, the system eliminates duplicate records and provides better search results. When a process or a user enters a value in a normalized field, the system determines whether to replace it with a normal value. Normalization also automatically adjusts queries to return normalized results and normalizes values in scripts.

While normalization is available for every field in the platform, it works best for descriptive values such as names or standard units of measurement. For example, you might create normalization rules to:

- Set the CPU type of a computer CI to a standard model name such as Xeon.
- Set the suffix used for the names of corporations to a standard format such as ServiceNow, Inc..

Transformation

Transformation converts raw field input values into standardized values that are more meaningful to an organization. Administrators control when transformation happens by defining rules and conditions for specific fields. For example, you might create transformation rules to:

- Remove suffixes from user names such as Jr. and II.
- Round computer CI RAM sizes to the nearest whole number such as rounding 4112 MB to 4000 MB.

Transform records make up the rules that define how a field transformation is executed. Order values determine the order in which each rule is evaluated. A check box on each transform enables an administrator to determine where processing stops when a rule evaluates to true.

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Enabling normalization and transformation by field type

Field type records specify which data types are available for normalization and transformation. By default, the system supports normalization and transformation for these field types.

Field type	Use to normalize	Use to transform
Decimal	false	true
Float	false	true
Integer	false	true
Numeric	false	true
String	true	true
URL	true	true

A field type entry applies to all fields whose dictionary entry data type matches the field type entry. Administrators can create additional field type records for other data types as needed.

Warning: Avoid creating field type records for fields that store a Sys ID value such as a reference field, field name field, or a table name field. Directly altering a Sys ID value is more likely to produce data corruption and broken references than to produce meaningful standard values. Instead, normalize or transform the display value associated with the Sys ID. For example, normalize the user name instead of the Sys ID of a specific user.

Identifying normalized fields

The system displays the normalization icon on fields with an associated normalization or transformation record. Users with the normalizer role can click the icon to access the associated normalization or transformation record. Users without the normalizer role instead see a help page. Administrators can configure who sees the normalization icon with a preference called *`Restrict to roles`*.

Activate Field Normalization

Activate the Field Normalization [com.snc.field_normalization] plugin to install demo data and activate related plugins if they are not already active.

Before you begin
Role required: admin.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

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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.

Related topics

List of plugins (Brazil)

Installed with field normalization

Several components are installed with Field Normalization.

The following preferences (**Field Normalization** > **Administration** > **Preferences**) control features for normalization and transformation:

Field Normalization preferences

Preference	Description
Enable field normalization	This preference enables or disables the Field Normalization functionality, including transformations.
Enable field normalization auditing	This preference enables or disables auditing of field normalization tables.
Logging	Select the maximum level of logging detail desired. For example, select Error to log only errors and Information to log errors, warnings, and information.
Decoration URL	Enter the URL for the help/information link associated with the Field Normalization decoration. This link opens the page presented to users who do not have rights to see the normalization or transformation record. The default link opens a ServiceNow Wiki page with a general explanation of Field Normalization. The purpose of this page is to explain to normal users why a field value they entered was changed automatically.
Restrict decorations to roles	Use this preference to define the user roles that can view the reference icon (decoration) adjacent to a normalized field. This decoration displays transformation and normalization records to users with the normalizer role. For all other users, it opens the URL specified in the Decoration URL preference. If this preference does not specify any roles, then all roles can see the decoration.

Field Normalization business rules

The following business rules were created for this plugin:

- Ensure Rules Application Job
- Ensure Transform Application Job
- Ensure Rules and Alias Jobs
- Ensure Transform Application Job
- Ensure Decoration Attribute
- Cleanup on field or table change
- Prevent duplicates in class hierarchy

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- Handle potential duplicates
- Run job
- Ensure Pending Value Collection Job
- Ensure name changer job
- Flush forms when activating

Field Normalization script includes

Name	Description
FieldNormalizationAjax	Provides AJAX services for the Field Normalization plugin.
FNEnsureJob	Ensures that a job record exists for a particular extant data job target.
FNExtantDataJobChoices	Generates a list of tables for use in document_id field of the fn_extant_data_normalization table.
FNExtantDataJobUtil	Determines whether an extant data job is allowed to run.
FNFields	Returns valid fields for normalization.
FNTransformChooserUtil	Provides support for the fn_transform_chooser UI page.
Position	Finds a position within a given string.
Round	Rounds numbers with various rounding modes and intervals.

Field Normalization UI pages

Name	Description
aliases	Creates the slushbucket with pending values for choosing aliases for a normal value.
fn_transform_chooser	Displays available transforms. Invoked by the New button on the fn_transform related list.

Field Normalization roles

Role	Description
normalizer	Person authorized to manage field normalization and transformation.
normalization_tester	Person authorized to create test records for normalizations and transformations. Only records opened by users with this role are available for testing normalization and transformation rules in Test mode.

Related topics

Enable auditing for a table

Normalizer [normalizer]

Manage field normalization and transformation.

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Contains Roles

The Normalizer [normalizer] role contains the Normalization Tester [normalization_tester] role.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Normalization Tester [normalization_tester]

Create test records for normalizations and transformations. Only records opened by users with this role are available for testing normalization and transformation rules in Test mode.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Enable a field type for normalization or transformation

Create or modify a normalization field type record to enable a specific field data type for use with normalization or transformation.

About this task

To normalize or transform a value in a reference field, apply the processing to the field in the target table.

Procedure

1. Navigate to **All** > **Field Normalization** > **Administration** > **Normalization Field Types**.
2. Select **New** in the record list.
3. Enter a **Name** for the field type that clearly describes the type in the dictionary.
   This value is for reference only and is not used in any processing. For example, you might enter **IP Address** for the field type of `ip_address`.
4. Enter the **Type** from the dictionary.
5. Select the appropriate check box to use this field type to normalize or transform fields.
   In the base system, only the **String** field type is used for normalization.
6. Select and hold (or right-click) in the header bar and select **Save** from the choice list.
   The **Transform Categories** related list appears.

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7. If this field type is being used for transforms, select **Edit** to associate an existing Transform Category with this field type.

   Note: If you create a custom field type that is used for normalizations only, a link to a transform category is not necessary.

   The relationship of a field type to a category, and the category to a list of transformation definitions, is completely configurable.

   The String field type is associated with the Text Transform Category, which contains these transform definitions. Any of these associations are configurable.

Create a raw field

A raw field is a custom field created by an administrator to show the original (raw) input in a field on a form after it has been normalized or transformed.

Before you begin

Role required: admin

Procedure

1. In the form containing the field that is being normalized or transformed, select and hold (or right-click) in the header bar.
2. Select **Personalize** > **Form Layout**.
3. Complete the Create new field form at the bottom of the page, and then select **Add**.
   - **Name**: Type the field label. In this case, use Raw + <field label>.
   - **Type**: Select a data type from the list for this field.
   - **Field length**: Select the character limit for this field. The default is 40.
4. Move the new field adjacent to the normalized field using the direction arrows.
5. Select **Save**.

Normalization and transformation data jobs

The system uses data jobs to change field values during normalization and transformation.

Administrators must manually start data jobs that apply field changes. All transformation records open in Test mode by default, which blocks administrators from running manual data jobs that apply changes to existing data. Most data jobs have a roll back option to revert changes after the job completes. By default, the system provides these data jobs.

Note:

If the Field Normalization plugin is active, the normalization engine executes on insert of records into a table according to normalization rules. To learn more about this plugin, see Activate Field Normalization.

If the Field Normalization plugin is not active, a data job runs to normalize the values. The data job saves the previous values in the rolled back fields to revert them if necessary.

Name	Used for	Description
Pending value collection	Normalization	The system runs this job to collect field values that will change during the next field normalization run. The system

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Name	Used for	Description
		runs this job whenever you insert or update a field normalization record. Since this data job does not change any field values, there is no roll back option.
Normal value change	Normalization	Run this job to rerun field normalization and update field values when you change a normal value. The system creates this job whenever you change a normal value. Roll back the data job to revert the normalized fields to the previous normal value.
Alias application	Normalization	Run this job to normalize all field values that match an alias. The system creates this job whenever you create or update an alias. Roll back the data job to revert normalized fields to their previous values.
Rule application	Normalization	Run this job to normalize all field values that match a rule. The system creates this job whenever you create or update a rule. Roll back the data job to revert normalized fields to their previous values.
Coalesce too normal	Normalization	Run this job to normalize the reference field values by replacing references to multiple duplicate records with one reference to a normalized record. The system creates this job whenever you change a normal value that applies to a reference field. Roll back the data job to restore the duplicate records as valid options. The rollback does not restore references to the previous records.
Transform application	Transformation	Run this job to transform all field values that match the transformation conditions. You cannot start this job while the Transformation record is in **Test** mode. The system creates this job whenever you create or update a transformation record. Roll back the data job to revert transformed fields to their previous values.

Run a single data job

Running the data job/jobs is the fourth step in transforming a field. This topic explains how to run a single data job.

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Procedure

1. Start the Transform application data job to apply the transform to all the appropriate records in the database.
2. Open the Transformation record and switch the **Mode** to **Active**.
3. Select the **Data Jobs** Related List.
4. Run the data job using one of the following methods.

   - In the list of data jobs, select the check box of the jobs you want to run, and then select **Start** from the **Actions** menu.

   - Click the link in the Created column to open the data job, and then click the **Start** Related Link.

   The **State** of the jobs turns to **Queued** as it runs and to **Completed** when it finishes successfully.

Run multiple data jobs

Running the data job/jobs is the fourth step in transforming a field. This topic explains how to run data jobs for multiple field transformations.

Procedure

1. Start the Transform application data job to apply the transform to all the appropriate records in the database.
2. Navigate to **Field Normalization** > **Data Jobs** > **All**.
3. Select the check boxes for the jobs you want to start.

   Note: These jobs must have the **Mode** set to **Active**.

4. Select **Start** from the **Actions** menu.

   Note: The platform only runs data jobs from Active transformations. The Action menu indicates the number of Active data jobs that can run. For example, the menu might display Start (3 of 4).

Rollback a data job

Use rollback to revert changes made by a normalization or transformation data job.

Before you begin
Role required: admin or normalizer

About this task
You can only rollback completed data jobs.

Procedure

1. Navigate to **Field Normalization** > **Data Jobs** > **All**.
2. Select the completed data job to rollback.
   The system displays the data normalization job record.

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3. From **Related Links**, select **Rollback**.
   The values in the **Pending Values** Related List are removed and the data job **State** indicates that it was rolled back.

Normal values

A normal value replaces similar but ambiguous field values with one standard value.

Field value variations

Records values can come from multiple sources such as:

- Automated entries made by Discovery.
- Automated entries made by importing records from external systems or files.
- Manual entries made by users.

Each of these sources may describe the same field value in several different forms. For example, the **CPU Type** field on a computer CI form might display any of the following similar values:

- **E3350 (Intel) 4.5.2234**
- **Intel Xeon 5.4.554**
- **Xeon L3350**
- **L3350**

Without normalization, these variant field values results in:

- Duplicate CPU types
- Poor search results
- Complex queries and conditions to apply business logic

Creating a normal value record solves these issues by consolidating on one standard value such as `Xeon`.

Identifying variations with aliases and rules

Each Normal value record specifies how to identify variations of a normal value using a combination of aliases and rules.

Aliases

Aliases are known variations of an input value that normalization converts to the normal value. Use aliases when there is a short list of variant values.

For example, you could create a normal value `Xeon` that has these aliases.

- **E3350 (Intel) 4.5.2234**
- **Intel Xeon 5.4.554**
- **Xeon L3350**
- **L3350**

Whenever a normalization data job or normalized query sees a field value matching an alias, it automatically replaces the field value with the normal value. Normalization data jobs and queries process aliases before rules.

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Note: Aliases are logically equivalent to rules using the **[is]** operator in a condition where **[Field name][is][Alias value]**. For example, the sample aliases are equivalent to these rules: **[CPU Type][is][E3350 (Intel) 4.5.2234] OR [CPU Type][is][Intel Xeon 5.4.554] OR [CPU Type][is][Xeon L3350] OR [CPU Type][is][L3350]**

Rules

Rules specify the conditions under which normalization replaces an input value with the normal value. Use rules when there are a large number of possible variant values, or when you must create complex conditions.

For example, the normal value `Xeon` could have this rule.

[CPU Type][matches regex][.*\bxeon\b.*]

Whenever a normalization data job or normalized query sees a field value matching a rule, it automatically replaces the field value with the normal value. Normalization data jobs and queries process rules after aliases.

Rules and aliases can be combined to normalize a field. Make sure to test your normalization methods before applying them to all the existing records in the database.

Normalized queries

An administrator can configure normalization to apply to queries issued against normalized fields in lists. Select the **Normalize query** check box on the Normalization form to enable this functionality. In a list containing normalized values, Filters and breadcrumbs using the original (raw) value for the normalized field in the query condition.

The filtered list returns records with the normal value substituted for the raw value. However, the breadcrumbs for the filter display the original query conditions.

Scripting and normalization

Scripts that update or insert records into the database (GlideRecord) are normalized automatically when field normalization is applied. For example, if a script to insert a CI record contains a CPU type of **Xeon L3350**, the script is normalized to insert the CI with a CPU type of **Xeon** instead. Scripts that query the database for normalized field values (using the conditions of equals or not equals) can be configured to return the normal value (such as **Xeon**) rather than the original (raw) value.

Related topics

GlideRecord

Create the normalization record

Regardless of the normalization method selected, all field normalization requires a list of existing variants and a normal value that is configured to replace these variants in forms and in queries.

About this task

Normalize a field by selecting aliases for a normal field value or by creating rules that use condition statements to match field variants with a normal value.

Note: Users must have the normalizer role to create and manage normalization records.

Special Cases

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- Reference fields cannot be normalized. To normalize values appearing in reference fields, normalize the field in the target table. Examples of this would be normalized values for the **Name** fields in the Company [core_company] and Location [cmn_location] tables, which are referenced by other tables in the platform. The normalized names are available to all fields that reference these tables.
- Fields in a choice list can be normalized if they are of a type **string**.

Procedure

1. Activate the Field Normalization plugin.
2. Navigate to **Field Normalization** > **Configurations** > **Normalizations**.
3. Click **New**.
4. Create a normalization record.

Normalization record fields

Field	Input value
Name	Unique name for this normalization record. This value is for reference only and is not used in any processing.
Table	Select the ServiceNow table for the field being normalized.
Field	Select the field to normalize.
Mode	The three available modes are Off, Test, and Active. All normalization records are created in the test mode by default. If you are planning to select aliases for your normal values, change the Mode to Active. If you intend to normalize the field using rules, be sure to leave this record in the Test mode. To disable this normalization, switch the mode to Off.
Normalize query	Select this check box to apply the field value normalized by this record to all queries involving this field. Queries formed with the raw (original) field value return records displaying the normal value. Queries issued by a script using the conditions equals or not equals return normalized values. See Normalized Queries for details.
Coalesce each normal	Select this check box to normalize reference field values. This option resets all references to records containing an alias field value to the record using the normal value. See Coalesce Normal Values for details.
Raw field	Select the field to use to display the original (non-normalized) input values on a form in which a field value has been normalized. For the selection to appear in the drop-down list, add a custom field to the form for the table selected. For instructions on adding a field for raw data, see Creating a Raw Field.

After the normalization record is submitted, the platform runs the Pending value collection job in the **Data Jobs** related list automatically to gather all the current values (Pending Values) for the field being normalized.

Click the **Pending Values** related list to view values for the normalized field that have been entered manually, imported into the platform, or created by Discovery.

Create a normal value

A normal value is a simplified, generic value for a field that replaces all the possible variants of that value that exist in the database.

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Before you begin
Role required: admin or normalizer

About this task
Normal values should be clear and unambiguous.

After the platform runs the data job, the **Pending Values** related list on the Data normalization jobs form is populated with all the unique values for the field in the database. Examine the values in the list and decide which normalizing method is best for the existing data. For example, define an alias for a small pool of values and a rule for a large pool of values..

Procedure

1. Navigate to **All** > **Field Normalization** > **Normalizations**.
2. Open the appropriate normalization record.
3. Click the **Normal Values** related list.
4. Click **New**.
5. In the Normal Value form, create normal values for the variants in the **Pending Values** related list.
   Pending values are used to replace the variants configured as aliases.

Create aliases

Aliases are the variants of a field value in the instance that will be replaced by the normal value.

Before you begin
Role required: admin or normalizer

About this task
The list of potential aliases is the contents of the **Pending Values** related list. After creating a normal value, assign aliases to this value if the pool of pending values is small. A normalized field can have a combination of aliases and rules.

Procedure

1. Navigate to **All** > **Field Normalization** > **Configurations** > **Normalizations**.
2. Open a normalization record.
3. Click the **Normal Values** related list.
4. Select one of the values.
5. In the normal value record, click the **Aliases** related link.
6. Select aliases for this normal value from the available (pending) values that appear in the slushbucket, and then click **OK**.

   The aliases for this normal value now appear in the **Aliases** related list.

What to do next
Apply the aliases by running the associated data jobs.

Apply aliases

After testing, aliases can be normalized in all new records or in existing records when they are updated.

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About this task

Each time an alias is created for a normal value, a data job is created. The alias is not applied to values in the entire database until its data job is started manually. Run each job separately or run the jobs together to apply all aliases at once.

Procedure

1. In a normalization record, ensure that the Mode is set to **Active**.

   Data jobs cannot run in the **Test** mode.

2. Click the **Normal value** related list.
3. Select a value from list.
4. In the Normal Value record, select the **Data Jobs** related list.

   A data job is listed for each alias configured for this normal value.

5. Run the extant data jobs to replace the aliases with the normal value in all existing records in the database.
   a. Select the check box next to a job, and then select **Start** from the Actions menu.
   b. To run all data jobs at once, select all the check boxes, and then select the **Start** action.
   c. Refresh the list to check the progress of the data jobs to ensure that they complete normally.

Create rules

The use of rules to normalize a field is intended for large lists of variant field values.

About this task

Always test your rules before applying them to all the existing records in the database. Prior to creating the rule, make sure to generate the list of Pending Values and create a normal value for the field. A normalized field can have a combination of aliases and rules.

Procedure

1. In a Normalization record, open the **Normal Values** related list.
2. Open a Normal Value record.
3. Open the **Rules** related list in the Normal Value form, and then click **New**.

   The Field Normalization Rule form provides the following fields:

Field normalization rule fields

Field	Description
Name	Unique name for this rule. For example, this name might be Xeon CPU Type.
Order	Order in which this rule should be evaluated. The platform parses the rules in the order configured until it finds one that evaluates to true.
Active	Enables or disables this rule. By default, new rules are active (true)
Make alias	If this check box is selected, and the rule evaluates to true, the rule makes an alias automatically from a pending value. If this check box is not selected, and the rule evaluates to true, the platform automatically changes the value for the named field in the record to the normal value, but does not create an alias.

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Field	Description
Case sensitive	All pending values for the named field must match the case of the same value in a rule to be normalized.
Rule	Use the ServiceNow rule builder to construct the rules for normalizing fields. Rules automate the transformation of large numbers of pending field values into aliases.

4. Create a set of rules to incorporate all the possible variants of the pending values.

   For this example, the rules might be:

   - **Intel Xeon**: CPU type matches pattern *Intel*Xeon*. This rule normalizes all variants in which **Intel** precedes **Xeon**, including **Intel Xeon**, **Intel(R) Xeon(TM) CPU 2.80GHz**, and **Intel(R) Xeon(TM) CPU 3.00GHz**.
   - **Xeon**: CPU type contains Xeon
   - **L3350**: CPU type contains L3350
   - **E3350**: CPU type contains E3350

   For every rule that is created, the platform generates a **Rule applier** data job. In the testing mode, the **Start** controls are not available, and the job cannot be run until the mode is changed to **Active**.

5. Test all the rules before making the normalization record **Active**.

   Testing Rules

   Note: Users must have the normalization_tester role to create test records.

   Field normalization records are created in the **Test** mode by default, enabling administrators to test normalization rules thoroughly before applying them to the existing records in the database. In the testing mode, the **Start** controls are not available for the **Rule applier** data job. The job can be run only when testing is complete and the **Mode** has been changed to **Active**. In the testing mode, only records that have been created or updated by a user with the normalization_tester role are normalized. The normalizer and normalization_tester roles can be combined for a single user or granted separately.

Coalesce records on a normal value

Coalescence enables an administrator to redirect references to multiple records containing variants of the same field value to point to a single record, based on a normal value.

Before you begin
Role required: admin

About this task
An example of this is the Company table that might have multiple variants of a company name, such as Hewlett-Packard, Hewlett-Packard, Inc., Hewlett-Packard Incorporated, HP, and so on. Potentially, thousands of records might reference each of these duplicate company records. Using the variants of the Hewlett-Packard name as aliases, coalescence unifies all these references into a single record that normalizes the **Name** field in the Company record to a normal value such as **HP**.

Note: Coalescing normal values changes the record values permanently. If a rollback is performed, records will be returned to the table, but the normalized values will not be rolled back to the original variants.

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When the references are fixed, all table fields directly corresponding to sys_dictionary get fixed. The secondary references are not fixed. If you have filter conditions that has the old, pre coelesced company names, they aren't fixed either.

Procedure

1. Navigate to **All** > **Field Normalization** > **Configuration** > **Normalizations**
2. Select a normalization record.
3. Enable **Coalesce each normal**.
   The system adds the **Coalesce to** field to the Normal Value form.
4. Create one or more normal value records for this normalization record.
   Create related aliases and rules as needed.
5. For each normal value record, set **Coalesce to** by selecting the record that contains the normal value.

   Example
   For example, suppose your Company table contains several variations of the name ServiceNow. When you create the Normal Value record, you select the Company record for ServiceNow, Inc.. During normalization, the system updates any references to variant records to instead refer to the normal record.
   The system updates any references to records that match aliases and rules to instead point to the normal record. The system also deletes the duplicate records from the table.
6. Start all the **Alias application** data jobs to replace the aliases with the normal value in existing records in the database.
   The system starts the **Coalesce to normal** data jobs for each alias.

Transforms

Transforms update field values by applying a transformation definition to the field contents such as replace text, change case, or round value.

Transform definitions

Transform definitions define the transformation actions available for a given field type. Administrators select a definition when they transform a field, and then provide the definition with the specific parameters that are applied to the transformation. For example, a definition can round up an integer or insert a value at a defined position in a string.

The system provides a number of definitions that are designed to meet the needs of most organizations, but administrators can create new definitions as needed. Transform definitions can be associated with existing Transform Categories or to new categories.

Transform categories

Transform categories are used to group the transform definitions together appropriately to present to users when creating new field transforms. You can create new categories for existing definitions or change the default associations of categories to definitions.

Transform categories are associated with normalization field types to present the correct definition option list for the field being transformed. The base system provides two transform categories: Text and Numeric.

Text

Definitions in the Text category transform string type field values. Included in the Text category are:

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- Left
- Right
- Constant
- Trim
- Prefix
- Suffix
- Change Case
- Delete
- Insert
- Substring
- Replace

Numeric

Definitions in the Numeric category arithmetically manipulate integer type field values. Included in the Numeric category are:

- Limit
- Round
- Constant

Transformation testing mode

Transformation is a powerful tool that can cause data issues if used incautiously. Test all transformations before committing the changes to the CMDB.

All transformation records open in **Test** mode by default, which blocks administrators from running manual data jobs that apply changes to existing data. Only users with the normalization_tester role can transform data when a record is in the **Test** mode. This is limited to new records opened by the tester or records in which the transformed field is updated by the tester.

To apply transformations to the CMDB after testing, change the mode to **Active** in the transformation record and run the appropriate data job. For information on testing transforms, see Test a transform.

Transform a field

Transform the contents of field using a set of rules and conditions.

Before you begin

Role required: admin or normalizer

Procedure

1. Create a transformation record.
2. Create one or more related transform records.
3. Test the transform.
4. Runs data jobs.

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What to do next

If you want to also show what the original (raw) input value was prior to transformation, create a raw field to store this value.

Create a transformation record

Creating a transformation record is the first step in transforming a field.

Procedure

1. Activate the Field Normalization plugin.
2. Navigate to **Field Normalization** > **Configurations** > **Transformations**.
3. Click **New**.
4. Create a transformation record.

Transformation record fields

Field	Description
Name	Unique name for this transformation record. This value is for reference only and is not used in any processing.
Table	Select the ServiceNow table containing the field being transformed. It is important to understand the table hierarchy when setting up a field transform. For example, if you configure transformation for a field in the Computer [cmdb_ci_computer] table, that field will be transformed for all workstation machines, Windows servers, Linux servers, and UNIX servers.
Field	Select the field to transform. The list presented contains only those field types (integer and string) from the table selected that can be transformed. **Note:** The sys_user record that initiates the transform process must have its date format set to the default format of "yyyy-MM-dd." Any other date format causes an error during transformation. This problem is only specific to transforming **TO TARGET** fields of type Date/Time. This problem is not an issue if the target field type is of type String or if the field mapping for the date field is changed to the same date format as the transformation process.
Mode	The three available modes are **Off**, **Test**, and **Active**. All transformation records are created in the test mode by default. Do not change the mode until you have thoroughly tested the transformation. When testing is complete,

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Field	Description
	change the mode to **Active**. To disable this transformation, switch the mode to **Off**.
Normalize query	Select this check box to apply the field value transformed by this record to all queries involving this field. Queries issued with the raw (original) field value will be edited to use the transformation value.
Raw field	Select the field to use to display the original input (non-normalized) values on a form in which a field value has been normalized. For the selection to appear in the drop-down list, add a custom field to the form for the table selected. For instructions on adding a field for raw data, see Create a raw field.

5. Click **Submit**.

   The **Transforms** and **Data Jobs** Related Lists appear on the form.

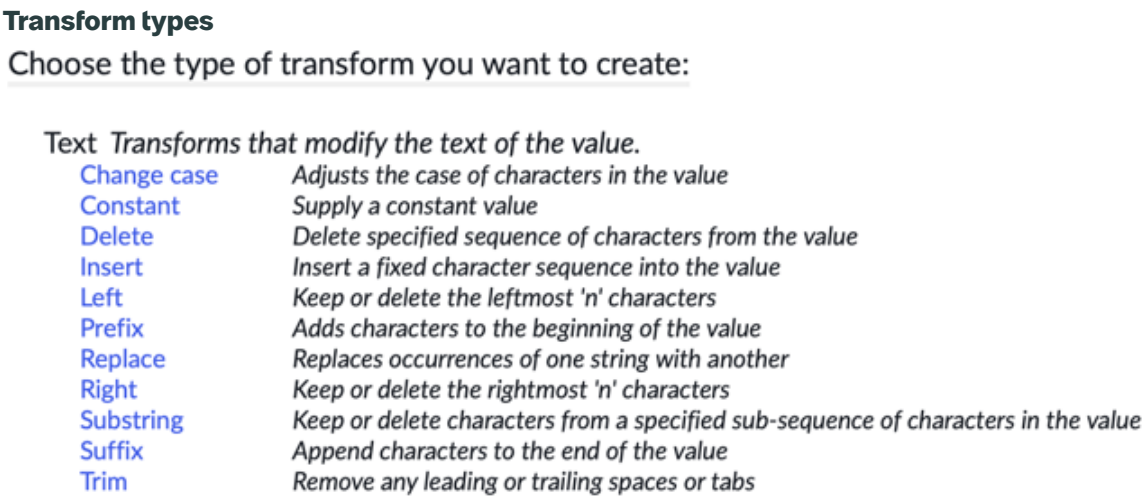
Create one or more related transform records

Each related transform record performs a specific transformation type such as adding characters to the beginning of the value or replacing one string for another. You may need to create multiple related transform records to generate a preferred output field value.

Procedure

1. In the Transformation record, select the **Transforms** Related List.
2. Click **New**.

   A selection list of transform types appears, displaying only those transformations appropriate for the field type selected.



3. Select a transform type and provide the appropriate parameters.
4. Select an **Order** number for this transform.

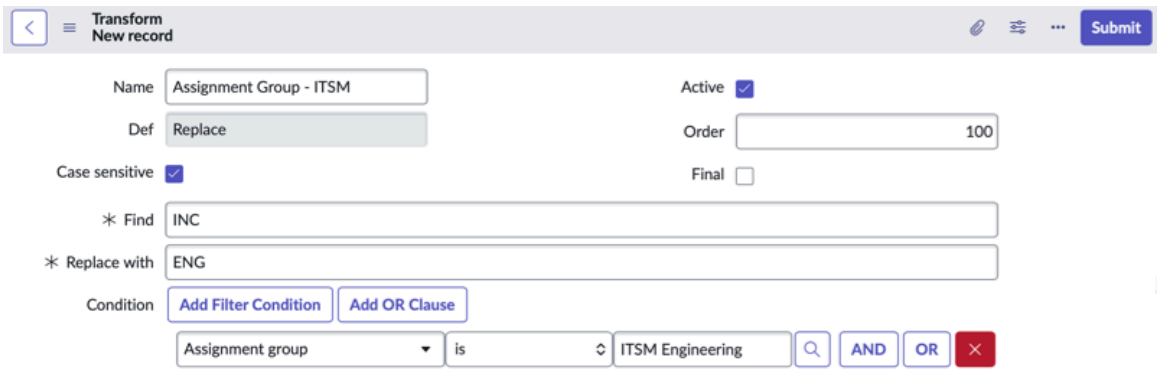
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Note: The conditions for the transforms are executed according to the order numbers assigned.

5. Select the **Final** check box to stop processing with this transform if the condition evaluates to true.
6. Select the **Case sensitive** check box to force case sensitivity in the condition statement.

   The following transform example replaces the *INC* at the beginning of an incident number with the string *ENG* if the assignment group is *ITSM Engineering*.

Transformation record



7. Click **Submit**.

   The new Transform appears in the Related List of the Transformation record.

   When the Transform is created, a Transformation application data job is also created. This data job applies this transform to appropriate records in the entire database and should not be run until testing is complete.

8. **Optional:** Repeat steps 2 through 8 until the output value meets your desired criteria.

Test a transform

Verify the transform changes the field value as desired before applying them to existing records in the database.

About this task

Note: Users must have the normalization_tester role to create test records.

New transformation records open in the **Test** mode by default, enabling administrators to test transforms thoroughly before applying them to the existing records in the database. In the test mode, the **Start** controls are not available for the **Transform application** data job. There are two methods, listed below, for testing transforms before committing the transformations to existing data.

Procedure

- Manually create or update test records.

  In the test mode, only records that have been created or updated by a user with the normalization_tester role are transformed. Grant the normalizer and normalization_tester roles to the same user or grant them to separate users.

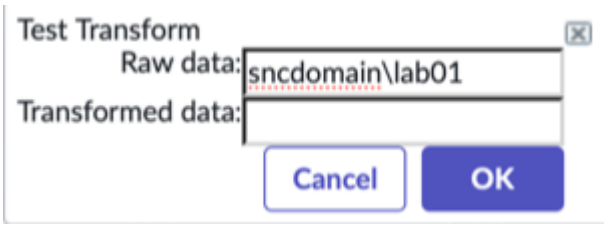
- Use the Test transforms utility to enter a raw value and see the resulting transformed value.

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This feature enables a normalization tester to transform field values on the fly without opening or updating records. This utility tests all the transforms configured for this field.

1. Open a Transformation record.
2. Click the **Test transforms** Related Link.

   A dialog box appears for testing field values.
3. Enter a value to transform in the **Raw data** field.



4. Click **OK**.

   The platform transforms the raw value in the **Transformed data** field.



5. Enter new raw data to test other transforms.
6. Click **Cancel** to end the test.
7. When testing is complete, change the **Mode** to **Active** and run the data job.

Default transform definitions

The system offers default transform definitions for fields containing text, text numeric, and numeric values.

Transform Definitions

Transform Type	Category	Description	Parameters
Change case	Text	Changes the case of the characters in the field value.	*Mode*: Select one of the following modes: • *Upper*: Converts the value to all upper case characters • *Lower*: Converts the value to all lower case characters • *Proper*: Converts the value to title case, with the first character in

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Transform Definitions (continued)

Transform Type	Category	Description	Parameters
			each string in upper case, and the remaining characters of the string in lower case. • *Formal*: Converts the value to a string in which only the first letter of the first word is in upper case.
Constant	Text Numeric	Converts the value in this field to a constant.	*Constant*: The constant with which to replace the value in this field.
Delete	Text	Delete a specified sequence of characters from a field value.	• *Starting position*: Specifies the first character in a sequence of characters to delete from a string. See the discussion of position modes at the beginning of this section for details. • *Ending position*: Specifies the final character in a sequence of characters to delete from a string. See the discussion of position modes at the beginning of this section for details.
Insert	Text	Insert a fixed character sequence into a field value.	• *Position*: The character position at which to insert the new value. See the discussion of position modes at the beginning of this section for details. • *Insert*: The value to insert into this field.
Left	Text	Deletes or keeps a specified number of characters from the left side of this field value.	• *Position*: Specifies the number of characters to keep or delete from the left side of the value. See the discussion of position modes at the beginning of this section for details. • *Mode*: Select the mode for this transform: *Keep* or *Delete*.
Prefix	Text	Adds characters to the beginning of a field value.	*Prefix*: Defines the characters to add to the beginning of the transformed field value.

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Transform Definitions (continued)

Transform Type	Category	Description	Parameters
Replace	Text	Replaces occurrences of one string with another string. The special characters backslash (\) and dollar sign ($) in the replacement string can cause the transform to be different than if the replacement string were being treated as a literal replacement string. Use a regular expression to replace a string or parts of a string.	• *Find*: Enter the string or regular expression to replace. • *Replace with*: Enter the replacement string.
Right	Text	Retains or deletes a specified number of characters from the right side of a field value.	• *Position*: The number of characters to delete or keep from the right side of this transformed field. See the discussion of position modes at the beginning of this section for details. • *Mode*: Select the mode for this transform: *Keep* or *Delete*.
Round	Numeric	Rounds integers to a configured rounding interval using specific criteria. The interval must be appropriate to the value being transformed, such as an interval of 12 for a value expressed in dozens or 0.01 for decimal values expressed in hundredths.	• *Interval*: Select the rounding interval that is appropriate to the units of the field value. For example. an interval of 256 is appropriate for expressing RAM values in megabytes, but does not work for Disk space expressed in gigabytes. The rounding interval for the examples below is 1 • *Mode*: Criteria for applying the rounding interval. ○ *Half up*: Always round up a value that is exactly half way between two intervals. For example, 3.5 is always rounded up to 4, and -3.5 is always rounded up to -3.

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Transform Definitions (continued)

Transform Type	Category	Description	Parameters
			○ *Half down*: Always round down a value that is exactly half way between two intervals. For example, 3.5 is always rounded down to 3, and -3.5 is always rounded down to -4. ○ *Half away from zero*: Always round an integer that is half way between the specified interval away from zero. For example, 3.5 is always rounded to 4, and -3.5 is always rounded to -4. ○ *Half toward zero*: Always round an integer that is half way between the specified interval toward zero. For example, 3.5 is always rounded to 3, and -3.5 is always rounded to -3. ○ *Half to even*: Always round an integer that is half way between the specified interval to the nearest interval whose least significant digit is even. For example, 3.5 is always rounded to 4, and 4.5 is always rounded to 4. ○ *Half to odd*: Always round an integer that is half way between the specified interval to the nearest interval whose least significant digit is odd. For example, 3.5 is always rounded to 3, and 4.5 is always rounded to 5. ○ *Up*: Always round an integer up by the specified rounding interval. For example, 3.4 is always rounded to 4 by a rounding interval of 1.0. ○ *Down*: Always round an integer down by the specified rounding interval. For example, 4.6 is always rounded to 4 by a rounding interval of 1.0. ○ *Away from zero*: Always round an integer away from zero by the specified rounding interval. For example, 3.3 is

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Transform Definitions (continued)

Transform Type	Category	Description	Parameters
			always rounded to 4, and -3.3 is always rounded to -4 by a rounding interval of 1.0. ○ *Toward zero*: Always round an integer toward zero by the specified rounding interval. For example, 3.3 is always rounded to 3, and -3.3 is always rounded to -3 by a rounding interval of 1.0.
Substring	Text	Keep or delete characters from a specified sub-sequence of characters in the field value.	• *Starting position*: Specifies the first character in a sub-sequence of characters within the value. See the discussion of position modes at the beginning of this section for details. • *Ending position*: Specifies the final character in a sub-sequence of characters within the value. See the discussion of position modes at the beginning of this section for details. • *Mode*: Select whether to *Delete* the sub-sequence selected or *Keep* only those characters defined.
Suffix	Text	Appends characters to the end of a field value.	*Suffix*: Defines the suffix to add to the end of the field value.
Trim	Text Numeric	Removes blank spaces from the field value.	No parameters

Create a transform definition

The following example describes the procedure for creating a new transform definition. In this example, we create a definition that transforms a number field to an odd or even integer. The transform category is **Numeric** and the normalization field type is **Integer**.

Procedure

1. Navigate to **All** > **Field Normalization** > **Administration** > **Transform Definitions**.
2. Click **New** in the record list.
3. Enter a name for this definition.

Note: In this example, we enter `Odd/Even`.

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4. Enter a brief description of the action, such as, `Transforms an integer to an odd or even value`.

   This information appears in the definition choice list when a user selects a new transform.

5. Right-click in the header bar and select **Save** in the context menu.

   Two Related Lists appear in the form.

   - Transform Categories: Click **Edit** and select **Numeric** as the category to which this definition belongs. Currently, field transformation supports two categories: **Numeric** and **Text**. The **Integer** normalization field type is already associated with this category.
   - Transform Variables: Define any variables required by this transform definition to perform an action on a field value. Variables are not necessary if a script can perform the action alone.

Create a transform variable for a transform definition

Transform variables enable an administrator to apply the same definition to different fields in different ways.

About this task

Transform variables contain values used by a script to perform a field transformation. Scripts and variables can be created in either order, but the script must use the transform variables. Transform variables are populated with values when a user configures a transform type.

Procedure

1. In the Transform Definition record, click **New** in the **Transform Variables** Related List.
2. Complete the form.
   Important considerations for completing a form:
   - The Column name is an entry in the fn_transform_var table for this variable. This becomes the variable in the script, in the form of variables.<variable name>. For example, `odd_even`.
   - The value in the Label field appears as the variable field label in the Transform form. For example, `Odd/Even`.
   - The field Type defines the field type of the variable value. Because the values for the variables used are **even** and **odd**, this is a type of string.
   - The Order of the variables controls the order in which they are displayed in lists and records.
   - This variable has a choice list with two options: **Even** and **Odd**. Select **Dropdown without - None** as the format for the list in the Choice field and define a Default value of **even** when the list is displayed.
   - Create a Hint that becomes a tooltip for the variable in the Transform record.
3. Right-click in the header bar and select **Save** from the context menu.

   The **Variables Choice List** Related List appears.

4. Click **New** in the Variables Choice List and define the list options.
5. Create records for **Even** and **Odd**.

   Note: The **Element** value is the same as the **Column** name in both selections for the choice list.

6. Save the choice list variables and return to the transform definition form to create the script.

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Create a script for a transform definition

Create the script at any time during the configuration of a definition.

About this task

The script can perform a transform action without using a variable, but the action of the definition will be the same for all fields. Variables create more flexibility for the definition, enabling an administrator to use the same definition in different ways in different places. If a variable is defined, the script must reference the variable using the correct format.

There are three arguments in the script:

- Variables: Contains the variables using the format variables.<variable name>.
- Value: Contains the un-transformed value
- Parameters: Special objects that set debug messages.

All position parameters (such as Starting position and Ending position) have three modes that apply to all the transform types that use this variable.

Position parameters

Positive positions	If the position is expressed as a positive integer, the platform calculates the starting position beginning from the left side of the field value. For example, in the string ABCDE, a position of 3 places the starting point of the action after C.
Negative positions	If the position is expressed as a negative integer, the platform calculates the position beginning from the right side of the field value. For example, in the string ABCDE, a position of -3 places the starting point of the action before C.
Regex	If the position value starts with /regex/, everything after that is a regular expression that is used to calculate the starting position. For example, in the string ABCDE, a position of /regex/B.*D places the starting point of the action after C (B and all the characters between B and D).

Procedure

1. Open the **Odd/Even** record in the Transform Definitions module.
2. Enter the following script to pass values with the odd_even variable.

```
function(variables, value, parameters) {
 var odd = ('odd' == variables.odd_even);
 var val = value - 0;
 var val_odd = ((val & 1) == 1);
 if (odd != val_odd)
  val++;
 return '' + val;
 }
```

   The script references the variable in the form variables.odd_even.

3. Update the record to complete the configuration.

   The Odd/Even transform definition is now ready to use in a field transformation.

Create a transform category

Create a transform category to group the transform definitions together.

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Procedure

1. Navigate to **All** > **Field Normalization** > **Administration** > **Transform Categories**.
2. Click **New** in the **Transform Categories Related List**.
3. Enter the **Name** of this category and a description.
4. Select an **Order** for this category and save the record.
   The order determines the display order of categories in lists and forms. Two Related lists appear:

   - **Field Types**: Click **Edit** to select an existing field type for this category or click **New** to create a new field type. The normalization field types provided are:
     - Decimal
     - Float
     - Integer
     - Numeric
     - String
     - URL
   - **Transform Definitions**: Click **Edit** to select the transform definitions that are included in this category.

Regular expressions and patterns in field normalization rules

Field Transformation definitions support the use of regular expressions (referred to in the platform as **regex**) and pattern matching for determining the position of characters in a string.

After identifying the target characters, field transformation can replace or delete the identified characters or insert other characters at that position.

Regex

Regular expressions can be used in transform parameters and in condition statements to determine which characters in a field value are transformed.

Regular expressions used as parameters to locate characters in transformed field values must begin with `/regex/`. Everything after that is a regular expression that is used to calculate character position.

Example

The computer names in an organization's Windows network are expressed as domain\machine name, such as **development\devlab01**. The network administrator wants to simplify these names by removing the domain name and backslash. He creates a transformation record for the Computer [cmdb_ci_computer] table and selects the **Name** field to transform.

The network contains several domains, and each domain contains numerous computers. The only character common to each name is the backslash. To delete the domain name, the administrator decides to use a regular expression to replace the entire raw value in the field with the characters that appear after the backslash (the actual machine name). He creates a new Transform using **Replace** as the Transform Type and enters the following values:

- Find:**/regex/.*\\(.*)**
- Replace with:**$1**

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The regular expression **.*\\(.*)** represents the entire raw value in the **Name** field - in this example **development\devlab01**. The first part of the expression, **.***, represents everything before the backslash (the **development** domain name). The backslash by itself is the escape character in regular expressions and requires special syntax to retain its function in the computer name. The administrator must escape it by using another backslash (\\ means \). The part of the expression after the backslash, **(.*)**, represents the computer name (**devlab01**) and is grouped within parentheses for reference. The value in the **Replace with** field, **$1**, references this group and replaces the entire raw value of the field with the contents of the group, **devlab01**.

The administrator clicks **Test transforms** in the transformation record and enters `development\devlab01` in the **Raw data** field. He then clicks **OK** to apply the transform to the test value. The transform replaces **development\devlab01** with **devlab01**.

When the transforms for this field are tested successfully, the administrator changes the **Mode** in the transformation record to **Active** and runs the Transformation application data job to apply this transformation to existing records in the database.

Pattern matching

Pattern matching in Field Normalization uses special characters differently from regular expressions to create patterns that the platform recognizes when transforming field values.

Pattern matching can be used only in condition statements. When using pattern matching characters in a condition statement, make sure to select the **matches pattern** operator.

Use the following special characters to create patterns for searches.

- The asterisk in a search string (*) matches any number (including zero) of any character.
- The question mark (?) in a search string matches one of any character.
- Everything else in a search string matches itself.

Examples

- **the story** matches **the story** but not **that story**.
- ***story** matches **the story** and **that story**, but not **that story is the best**.
- **st?ry** matches **story** and **stxry**, but not **my story** or **stairy**.
- ***b?gus*** matches **bogus**, **my bogus story**, and **His bagus machine**, but not **my bgus story** or **my baigus story**.

Domain separation and Field Normalization

Domain separation is unsupported in Field Normalization. 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

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Data policy

Data policies enable you to enforce data consistency by setting mandatory and read-only states for fields.

Data policies are similar to UI policies, but UI policies only apply to data entered on a form through the standard browser. Data policies can apply rules to all data entered into the system, including data brought in through import sets or web services and data entered through the mobile UI.

For example, suppose that you are configuring a web service that allows users from outside the platform to update problems on the ServiceNow instance. Since these problems are not updated through the instance UI, they are not subject to the UI policies on the problem form. To ensure that the **Close notes** field is completed before a problem is marked **Closed/Resolved**, you can create a data policy that applies to server-side imports. Data that does not comply with this data policy produces an error. You can also apply the policy on the browser by selecting the **Use as UI Policy on client** check box in the data policy record.

Since UI policies can also manage the visibility of fields on a form, you may want to augment UI policies with data policies rather than replace them.

By default, data policies are applied to all GlideRecord operations including those used in Scripted REST APIs, and the REST Table API. You can opt out of applying the data policy to:

- Target records of SOAP web services
- Import sets
- Client-side UI policies

The admin role is required to edit data policies.

Note: Defining a data policy enforces the policy when a record is submitted from the UI. This behavior cannot be changed.

Installed with data policy

Data policy includes several components that are installed on the instance.

Tables

Table label	Table name
Data Policy	sys_data_policy2
Data Policy Rule	sys_data_policy_rule

Data Policy Module

The **System Policy** > **Data Policies** module displays a list of all data polices and where they apply.

Roles

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

Data Policy Administrator [data_policy_admin]

Access and maintain data policies to specific users. Grant this role access to the System Policy application

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Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Create a data policy

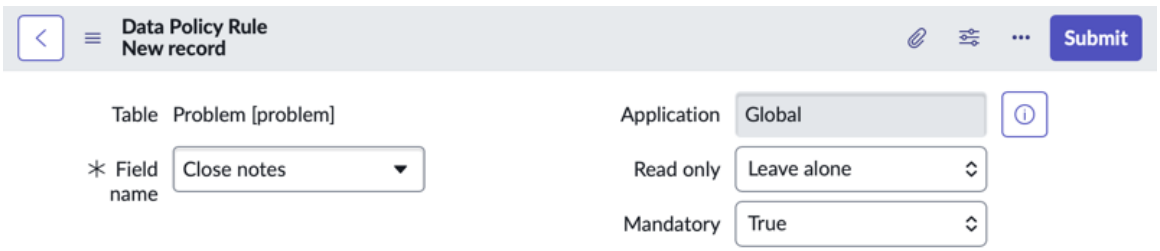
You can create a new data policy to define data rules for a table.

About this task

Create data policies to enforce consistency. You can create data policies only for tables and database views that are in the same scope as the data policy and for other tables that have at least one field in the same scope as the data policy. For tables that are in a different scope from the data policy record, you can create data policy rules only for fields in the same scope as the data policy and you cannot make a field mandatory.

Procedure

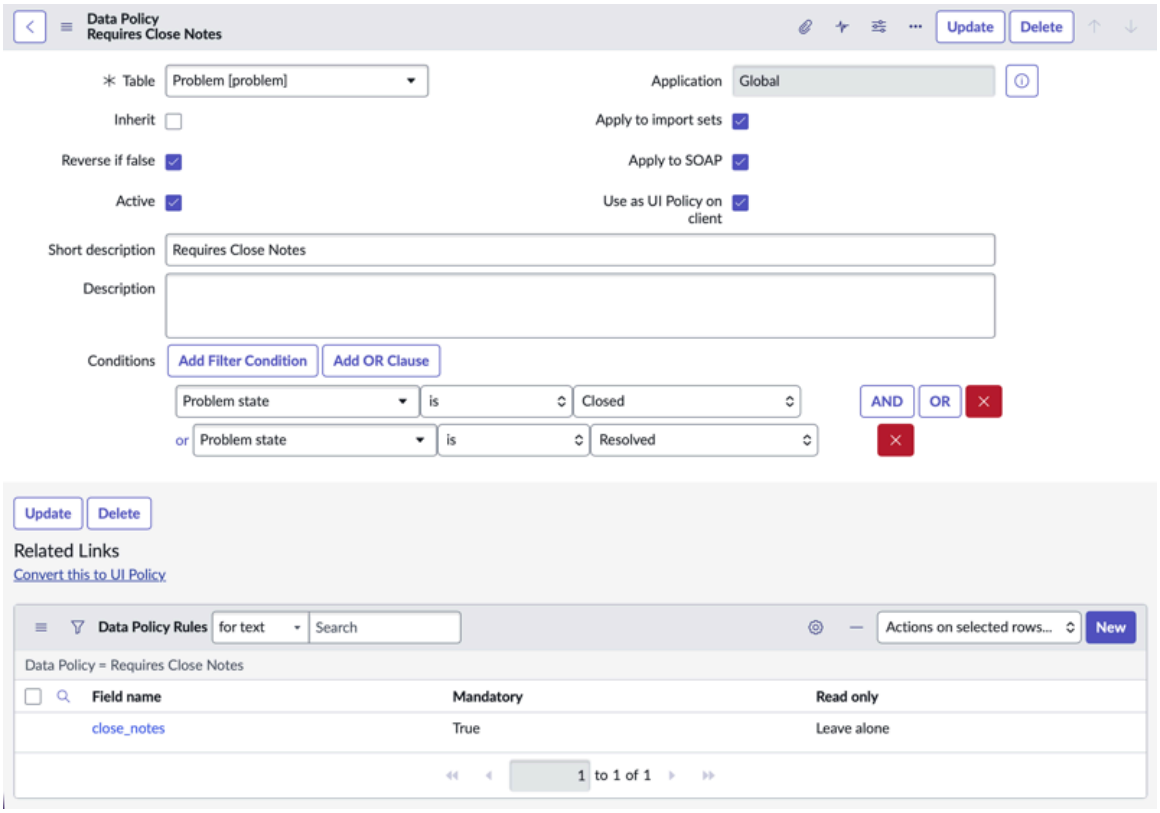
1. Navigate to **Data Policies** by completing one of the following actions.
   - Navigate to **System Policy** > **Rules** > **Data Policies**.
   - From any form header, right-click the header bar and select **Configure** > **Data Policies**.
   - In List v2, open any column context menu and select **Configure** > **Data Policies**.
   - In List v3, open the list title menu and select **Configure** > **Data Policies**.
2. Click **New**.
3. Select any options for the data policy.
4. Create the condition that must exist for the platform to apply this policy.
   For example, your conditions might include **[Problem state] [is] [Closed/Resolved]**
5. Right-click the header and select **Save**.
   The **Data Policy Rules** related list appears.
6. Click **New** in the related list and create the record that identifies the field and the policy to apply.



   It is possible to have multiple rules on a single field, but it is not recommended.

7. Click **Submit**.

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8. **Optional:** Add more rules by repeating steps 6 and 7.

Data policy fields

These fields appear on the Data Policy form and related forms.

Data policy fields

Field	Description
Table	The table to which this policy applies. **Note:** The list shows only tables and database views that are in the same scope as the data policy.
Application	Application that contains this data policy.
Inherit	If selected, applies this data policy to tables that extend the specified table. For example, incident, problem, and change tables all extend the task table, therefore selecting Inherit on a data policy defined for task would apply the data policy to them as well.
Reverse if false	If selected, the data policy action is reversed when the conditions evaluate to false. For example, when the conditions are true, then actions are taken and when they change to false, the actions are reversed.
Active	If selected, the data policy is used.
Short description	A short description that identifies the policy.
Description	A detailed description of the policy.

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Data policy fields (continued)

Field	Description
Apply to import sets	If selected, the data policy applies to data brought into the system from import sets. This option also applies to web service import sets.
Apply to SOAP	If selected, the data policy applies to data brought into the system from a SOAP web service. Scripted SOAP web services are not affected. This field does not affect data policy interaction with REST web services.
Use as UI Policy on client	If selected, enforces the data policy on the UI using the UI policy engine.

Data policy rule fields

Field	Description
Table	The table on which the data policy action applies.
Field name	The field from the specified table to which the data policy will apply.
Read Only	How the data policy affects the read only state of the field. Choices are: • Leave alone • True • False
Mandatory	How the data policy affects the mandatory state of the field. Choices are: • Leave alone • True • False **Note:** For tables that are in a different scope than the data policy record, you cannot make a field mandatory.

Convert a UI policy to a data policy

To make a UI policy the default setting, convert the UI policy to a data policy.

Before you begin

Role required: ui_policy_admin

About this task

You can also apply a UI policy to import sets or to data imported by SOAP web services when you convert it to a data policy. Converting a UI policy to a data policy deactivates the UI policy. To retain the policy in the UI, ensure that the **Use as UI Policy on client** check box is selected on the data policy record.

For a UI policy to be eligible for conversion to a data policy, the following conditions must be met on the UI Policy form.

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- The **Run scripts** check box must be cleared.
- The **Global** check box must be selected.
- None of the UI policy actions can have **Visible** set to **True** or set to **False**. **Visible** must be set to **Leave Alone**.

Procedure

1. Navigate to **All** > **System UI** > **UI Policies**.
2. Open an existing UI policy.
3. Under **Related Links**, click **Convert this to Data Policy**.
   A new data policy record is created.
4. Edit the fields on the data policy record as necessary.

Related topics

Data policy

Convert a data policy to a UI policy

Convert a data policy to a UI policy if a data policy already exists but needs to apply only to records created or updated in the browser.

Before you begin

Role required: admin

About this task

Converting deactivates the data policy. The new UI policy is applied only at the UI layer only and not to import sets or data imported from SOAP web services.

Note: An alternative to converting from a data policy to a UI policy is to select the **Use as UI Policy on client** checkbox on the data policy record. This field extends the data policy to the UI. The main difference between converting and using the **Use as UI Policy on client** checkbox is that converting provides the Visible field on the UI policy record. Use the **Visible** field to select how the UI policy affects the visible state of the field.

Procedure

1. Navigate to **All** > **System Policy** > **Rules** > **Data Policies** and click an existing data policy.
2. Under **Related Links**, click **Convert this to UI Policy**.

   A new UI policy record appears.

3. Edit the fields on the UI policy record as necessary.
   For details about the fields, see Create a UI Policy.

Data policy debugging

Debug messages can help administrators identify and resolve data policy problems.

Debug messages can help you identify and resolve data policy problems. To view data policy debugging messages at the bottom of the screen, navigate to **System Diagnostics** > **Session Debug** > **Debug Data Policies**.

Data lookup and record matching support

The data lookup and record matching feature enables administrators to define rules that automatically set one or more field values when certain conditions are met.

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Data lookup rules allow administrators to specify the conditions and fields where they want data lookups to occur. For example, on Incident forms, there are priority lookup rules for the sample data that automatically set the incident **Priority** based on the incident **Impact** and **Urgency** values.

Note: Activating the Data Lookup and Record Matching Support plugin replaces the *calculatePriority* business rule with a priority data lookup definition, but does not transfer any custom logic. If you manually activate the plugin, you must recreate any custom business logic that uses the priority lookup rules.

The following codes will be removed by manually activating the *com.glide.data_lookup* plugin:

- sys_script_18105ab0c61122750127a49c9055d29f
- sys_script_client_2bbac34da9fe1561000d89c04779a30c
- sys_script_client_2bc0bf4fa9fe15610019c5c8a8461647
- sys_script_client_ac0081210f030000b12e6903cfe012ac
- ys_script_d1b7d4af4655e7c2001be4c18b99215a
- sys_script_include_9e1904840a0a0b7d00d5ee8d0e2d89ef

Create custom data lookups

Creating custom data lookups involves adding a lookup value, creating the definition, and activating data lookup.

Create a custom data lookup table

Create a custom table to store lookup data.

The custom table must extend the Data Lookup Matcher Rules `[dl_matcher]` table. For example, this custom lookup table stores information about VIP callers and incident assignments.

Custom data lookup table

Field	Sample value
Label	VIP Caller Lookup
Table name	u_vip_caller_lookup
Extends base table	dl_matcher
Create new module	True
Add module to menu	System Policy

Add a data lookup value to the data lookup table

The columns of a data lookup table contain both matcher and setter field data.

Before you begin

Role required: admin

About this task

Each data lookup is a query that searches for a row containing values that match the matcher fields. The data lookup then returns the value listed in the setter fields. For example, this Priority

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Data Lookup [dl_u_priority] table lists the combinations of impact and urgency (matcher fields) that produce a particular priority value (setter field).

Lookup table

Matcher fields		Setter field
Impact	Urgency	Priority
1 - High	1 - High	1 - Critical
1 - High	2 - Medium	2 - High
1 - High	3 - Low	3 - Moderate
2 - Medium	1 - High	2 - High
2 - Medium	2 - Medium	3 - Moderate
2 - Medium	3 - Low	4 - Low
3 - Low	1 - High	3 - Moderate
3 - Low	2 - Medium	4 - Low
3 - Low	3 - Low	5 - Planning

Procedure

1. In the navigation filter, enter the name of the new custom lookup table.
   For example, `u_vip_caller_lookup.list`.
2. Configure the list and create new fields.

   For this example, create the new fields in the following table.

   New fields

Name	Type	Field length or Table to reference
Caller	Reference	User [sys_user]
Priority	Integer	
Assignment Group	Reference	Group [sys_user_group]

   For more information, see Configuring lists on the ServiceNow AI Platform.
3. From the table list, select **New** and enter appropriate matcher and setter field values.

   For example:

   New matcher and setter field values

Matcher field	Setter fields	
Caller	Priority	Assignment Group
Beth Anglin	2	VIP Issues
Fred Luddy	1	VIP Issues

Note: Each row in a data lookup table must be unique.

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Create a data lookup definition record

Data lookup requires a definition record that specifies how to set one or more field values when specified conditions are met.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Policy** > **Rules** > **Data Lookup Definitions**.
2. Select **New**.
3. Select **Data Lookup Rule**.
4. Complete the Data Lookup Rule form using the following table.

Data lookup definitions fields

Field	Description
Name	Enter a unique name to identify the definition record.
Source Table	Select the table containing the fields you want to automatically update with lookup values. Data Lookup Definitions are not inherited by extension tables. For example, a Data Lookup Definition on the Task table cannot match values on the Incident table.
Matcher Table	Select the table containing the lookup values. This table should always start with a u_ prefix. This table can be any table within the current scope containing the lookup values. **Note:** The list shows only tables and database views that are in the same scope as the catalog data lookup definition.
Active	Select this check box to run this data lookup rule. Clear the check box to ignore this data lookup rule.
Run on form change	Select this check box to automatically look up values whenever a user or onChange client script changes a field value on a source table form. **Note:** This does not include changes automatically made by other data lookup rules, such as the Priority Lookup Rules.
Run on insert	Select this check box to automatically look up values whenever a user creates a new record.
Run on update	Select this check box to automatically look up values whenever a user saves or updates a record.

5. Select and hold (or right-click) the form header and select **Save**.
6. From the **Matcher Field Definitions** related list, click **New**.
7. Complete the Matcher Field Definitions using the following table.

A data lookup only occurs on fields with matcher field definitions. The data lookup uses the values of the source table fields to look up one or more values from the matcher table. Note that data lookup does not work with **Journal** type fields.

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Matcher field definitions fields

Field	Description
Data Lookup	Displays the name of the parent data lookup definition record.
Source table field	Select the field from the source table that contains the data to match.
Matcher table field	Select the field from the matcher table that contains the data to match. This table can be any table within the current scope containing the lookup values.
Exact lookup match	Select this check box to require the matcher table to contain a matching row for every possible combination of values (including empty values). Clearing this check box means that any empty values in the matcher table match any value. For example, suppose the Priority field is empty in the matcher table. When this check box is selected, there is a match only when the Priority value is empty in the source table row. When this check box is cleared, the empty matcher field value matches any value in the source table field. **Note:** If the lookup does not require an exact match, matcher table rows containing empty values are treated as wild cards, matching all values.

8. Select **Submit**.
9. From the **Setter Field Definitions** related list, click **New**.
10. Complete the Setter Field Definitions form using the following table.

Setter field definitions fields

Field	Description
Data Lookup	Displays the name of the parent data lookup definitions record.
Source table field	Select the field from the source table that the data lookup updates.
Matcher table field	Select the field from the matcher table that provides the new value for the update.
Always replace	Select this check box to replace any existing value with a value from the data lookup. Clear this check box to ignore the update if the field has an existing value.

11. Select **Submit**.
12. Select **Update**.

Create a data lookup module

You can create a module for data lookup so it appears in the instance application navigator.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Definition** > **Application Menus**, then select an application to add the module to.
2. In the Modules related list, select **New**.
3. Configure a module for the data lookup table you created using the following properties.

Module properties

Property	Required value
Table	Select the data lookup table you created in Step 2. For example u_vip_caller_lookup.
Link type	List of Records

4. Select **Submit**.

Troubleshooting data lookup

If the custom data lookup definition rules are not behaving as expected, check for certain conditions.

- Verify that the data lookup definition is set to run on the appropriate events.
- Verify that the matcher field is not read-only. Because users cannot change read-only fields, user interactions cannot trigger an on form change event for read-only fields.
- Verify a client script is not changing a field value. Client scripts can trigger *`Run on form change`* events even on read-only fields.
- Verify that the data in the matcher table is correct.
- If the lookup requires an exact match, verify that there is a matcher table row for each possible combination (including blank values). The lookup fails if cannot find a matching value.
- Verify that you have not created a recursive rule, such as:

  If Field A = 1, then Field B =2. If Field B = 2, then Field A = 2.

Dynamic Schema

Define a hierarchy of categories and enable users to describe a record using one or more attributes.

Key benefits

- Organize and define metadata in a flexible schema instead of adding new columns to a table.
- Capture data dynamically using different attributes per record.
- Define a structured framework of dynamic categories and dynamic attributes.
- Define dynamic categories and dynamic attributes once and reuse them across multiple tables using dynamic namespaces.

Dynamic Schema elements

Dynamic Schema is composed of the following elements.

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Dynamic attributes

Name-value pairs that describe a record. You can either formally define dynamic attributes or create them on the fly as transient attributes in a dynamic attribute store field.

Dynamic categories

Containers for organizing dynamic attributes. A dynamic category can inherit dynamic attributes from its parent category.

Dynamic attribute store

A field type for storing one or more dynamic attributes and their values. When you create a dynamic store field, a dynamic namespace is automatically created and associated with that store field.

After creating a store field, you can start storing values for attributes without defining them, or you can specify attribute definitions in the dynamic namespace to take advantage of additional functionality.

Dynamic namespace

A scoped collection of dynamic attributes and dynamic categories. Each dynamic attribute store field automatically receives its own dynamic namespace or you can configure multiple dynamic attribute store fields that share a dynamic namespace.

Implementation options

You have flexibility when deciding how to implement Dynamic Schema.

- You can add attributes directly to a dynamic attribute store field without creating formal definitions first. These attributes are considered transient and are treated as having string values in scripts and queries. You can provide a definition for the attribute and modify its type at any time. Modifying the type of an attribute doesn't affect the stored data but changes how the system interacts with that data. See Working with attributes transiently.
- You can take advantage of additional platform support and reuse for attributes by defining them in a dynamic namespace. Defining a dynamic attribute record enables you to specify its type, set choice options, organize it into dynamic categories and more. See Working with Dynamic Schema.
- You can create a dynamic namespace independently. You can add dynamic attributes and dynamic categories to that namespace, and then associate that namespace with one or more dynamic attribute store fields. This enables you to reuse attributes across multiple store fields. See Create a dynamic namespace.

Use cases

- Capture attribute-value pairs that describe products sold in a large department store by defining a dynamic schema for your products. Store the attributes and their data in a dynamic attribute store field.

  For example, assume you have a custom Products table that stores records for different types of products like televisions, sunscreens, pillows, and shirts. You can create dynamic attributes for each type of product (like screen type, UPC, color, or size). You can organize the dynamic attributes into dynamic categories (like Electronics, Health and Beauty, Home Goods, and Clothing). Users can add records to your Products table and capture different attributes in each product record.

- Describe a record by capturing one or more transient attributes, with values stored as string objects in a dynamic attribute store field. You can also capture transient attributes on a record

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by adding a dynamic attribute store field to a table and populating the field with string data using the *GlideRecord* API.

- Filter Workspace lists using dynamic schema elements in the condition builder. For example, you can define dynamic categories and attributes for product offerings and use them to search for transactions using the condition builder in the Sales Order Management Workspace.

APIs

Dynamic Schema also provides global APIs that enable you to access and manage dynamic attributes in your tables using JavaScripts. The following lists the APIs and methods that support dynamic attributes.

- GlideAggregate - Global

  The following *GlideAggregate* methods support the usage of dynamic attributes:

  - addAggregate()
  - addHaving()
  - getDynamicAttributeValue()
  - getDynamicAttributeDisplayValue()
  - getValue()
  - groupBy()
  - orderBy()
  - orderByAggregate()
- GlideDynamicAttributeStore - Global
- GlideElementDynamicAttributeStore - Global
- GlideDynamicNamespace - Global
- GlideRecord - Global

  The following *GlideRecord* methods support dynamic attributes:

  - addQuery()
  - getDisplayValue()
  - getDynamicAttribute()
  - getDynamicAttributeDisplayValue()
  - getDynamicAttributeValue()
  - getValue()
  - orderBy()
  - orderByDesc()
  - setDisplayValue()
  - setDynamicAttributeDisplayValue()
  - setDynamicAttributeValue()
  - setDynamicAttributeValues()
  - setValue()

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Working with attributes transiently

Start adding attributes and values to records without formally defining a full schema.

Implementing Dynamic Schema is a flexible process. To get started, you can simply add attributes and values to a dynamic attribute store field, which helps describe your records without the need for additional table columns. You can add more attributes as needed and start querying and working with them right away.

Getting started

Implement attributes transiently using the following process.

1. Create a dynamic attribute store field

   Get started by creating a dynamic attribute store field for storing attributes on a record.

2. Add transient attributes to a record

   After creating the dynamic attribute store field, describe your records by using transient attributes and string values.

Additional implementation options

When you add attributes to a store field without formally defining them as dynamic attribute records, Dynamic Schema is functional, but limited.

- Transient attribute values are saved as strings, which limits querying and sorting options.
- Transient attributes aren't organized into logical categories.
- Transient attributes don't support choice sets, which give you control over attribute values and where they can be used.

Instead, you can specify additional data types, organize attributes into categories, create dynamic choice sets, and reuse attributes in multiple store fields by formally defining your attributes in a dynamic namespace. When you're ready to take advantage of these capabilities, see Working with Dynamic Schema.

Create a dynamic attribute store field

Create a dynamic attribute store field for storing transient attributes on a record.

Before you begin

Role required: admin

About this task

You can create a dynamic attribute store field to store one or more transient attributes that describe a record. When you create a dynamic attribute store field, the following schema changes occur automatically.

- A dynamic namespace is automatically created and associated with the dynamic attribute store field. The namespace associated with a store field can be modified at any time.
- A dynamic category reference field is automatically added to the same table. You can store any dynamic attribute that you want in the store field, but the dynamic category reference field can help users determine which attributes to store.

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Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the table that you want to use for storing attributes.
3. In the Columns related list, select **New**.
4. In the Type field, select **Dynamic Attribute Store**.
5. Complete the form by entering a Column label.
6. Select **Submit**.

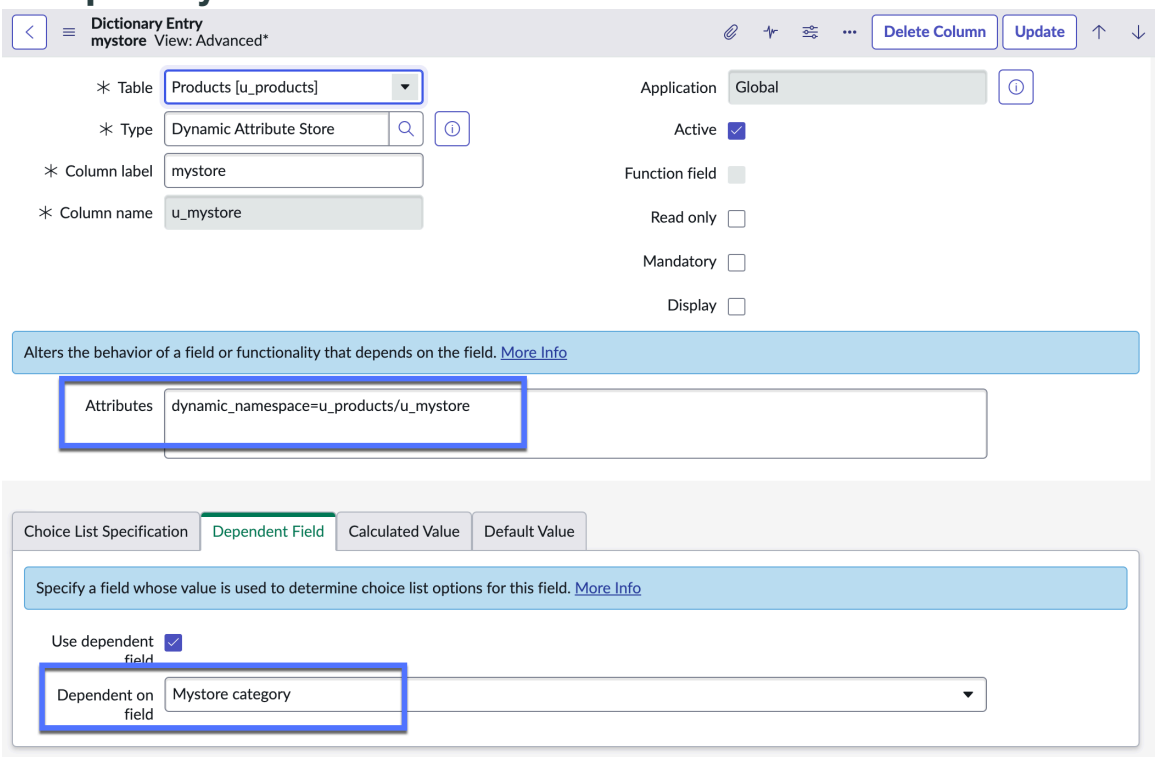
Result

- A dynamic attribute store field is added to the table. An associated dynamic namespace is created with the following naming format:

```
<table_name>/<dynamic_attribute_store_column_name>
```

- A dynamic category reference field is added to the table. A dependency relationship is established between the category reference field and the dynamic attribute store field.

Example: A dynamic attribute store field is added to the Products table



What to do next

Populate the dynamic attribute store field with one or more attributes. See Add transient attributes to a record.

Add transient attributes to a record

Store transient attributes and their values on a record.

Before you begin

Role required: none

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To add attributes to a dynamic attribute store field, you must have write access to the table where the store field is located.

About this task

After creating a dynamic attribute store field on a table, you can immediately start adding attributes to a record without having to define a dynamic attribute record for each attribute. Attributes without a definition are considered transient and are treated as having values of type string when used in scripts and queries.

Procedure

1. Navigate to the table that holds your dynamic attribute store field.
2. Create a record by selecting **New**.
3. Add one or more attributes directly on the form using JSON or via the API.

Option	Description
Enter JSON on the form	**a.** In the category reference field, select the dynamic category that contains the dynamic attributes that you want to use. **b.** Enter one or more attributes and their values. For example: `"screen_resolution":"2160p", "screen_size":"75","screen_type":"OLED"`
Call setValue()	Call *setValue()* in the *GlideRecord* API and send data to the dynamic attribute store field.For example: `var gr = new GlideRecord('products'); gr.setValue('television_specs->screen_resolution', '2160p'); gr.setValue('television_specs->screen_size', '75'); gr.setValue('television_specs->screen_type', 'OLED'); gr.insert();`

Result

One or more transient attributes are added to the store field, with each value stored as a string. Users can query or search for records using the values captured in the dynamic attribute store field. For example:

```
var gr = new GlideRecord('products');
gr.addQuery('television_specs->screen_type', 'OLED');
gr.query();
```

What to do next

Decide whether to create formal definitions for each attribute. Providing a formal definition makes the attribute non-transient and allows you to modify its behavior. To provide this definition, navigate to the dynamic namespace record the store field is configured with and create a dynamic attribute record using the name of the attribute you wish to modify. See Create a dynamic attribute.

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Note that modifying the definition of an attribute doesn't modify any data stored for that attribute. Rather, it simply modifies how the system interacts with that data. For example, attributes defined as strings sort differently than when defined as integers.

Sorting age values as strings:

```
11
19
2
25
3
```

Sorting age values as integers:

```
2
3
11
19
25
```

Any saved data that might be invalid for its defined type is treated as having a nil value appropriate for the type. For example, storing a value of "dog" for an attribute, and then formally defining it as an integer will effectively use 0 in all queries and calculations that attribute is used in, even though the data stored for the attribute remains as “dog".

Working with Dynamic Schema

Extend Dynamic Schema capabilities by defining dynamic attributes and dynamic categories in a dynamic namespace.

After planning your metadata strategy, you can start building out your schema by creating dynamic attribute records in the dynamic namespace. Formally defining attributes provides several key benefits.

- Ensure data integrity, optimize queries, and improve sorting by defining dynamic attributes with appropriate types. For example, you can define attributes as strings, integers, or dates to enforce type-specific behavior.
- Organize dynamic attributes and enable inheritance by adding them to dynamic categories. For example, you can define dynamic attributes in a parent category, and automatically access them in child categories that inherit those attributes.
- Define a fixed set of values for an attribute by creating a dynamic choice set. For example, you can control which values are available in an attribute, which categories or namespaces they appear in, and override the values in specific cases.
- Reuse dynamic attributes across multiple dynamic attribute store fields. For example, you can define a dynamic attribute in a dynamic namespace, and then use that attribute in any store field that belongs to that namespace.

Implementing Dynamic Schema

Implement Dynamic Schema using the following process.

1. Create a dynamic attribute store field

   Get started by creating a dynamic attribute field for storing your dynamic attributes.

2. Create a dynamic attribute

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Define one or more dynamic attributes in the dynamic namespace that's associated with the dynamic store field.

3. Create a dynamic category

   Define one or more dynamic categories in the dynamic namespace.

4. Include dynamic attributes in a dynamic category

   Organize your dynamic attributes using the dynamic categories that you defined.

5. Create a dynamic choice set

   Define a fixed set of choices for an attribute and create choice overrides as needed.

6. Add dynamic attributes to a record

   Populate the dynamic attribute store field using the `GlideRecord setValue()` method or by entering attributes and values as JSON.

Create a dynamic attribute store field

Store dynamic attributes on a record using a dynamic attribute store field.

Before you begin

Role required: admin

About this task

You can create a dynamic attribute store field to store one or more dynamic attributes that describe a record. When you create a dynamic attribute store field, the following schema changes occur automatically.

- A dynamic namespace is automatically created and associated with the dynamic attribute store field. Dynamic attributes, dynamic categories and other items defined in the dynamic namespace become available to the store field. You may modify the namespace of a store field at any time without affecting data stored for that field. The system will begin interacting with that data using definitions provided by the new namespace.
- A dynamic category reference field is automatically added to the same table and associated with the store field. This category reference field provides additional metadata for the store field to guide users when deciding which attributes to add.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the table that you want to use for storing dynamic attributes.
3. In the Columns related list, select **New**.
4. In the Type field, select **Dynamic Attribute Store**.
5. Complete the form by providing a Column label.
6. Select **Submit**.

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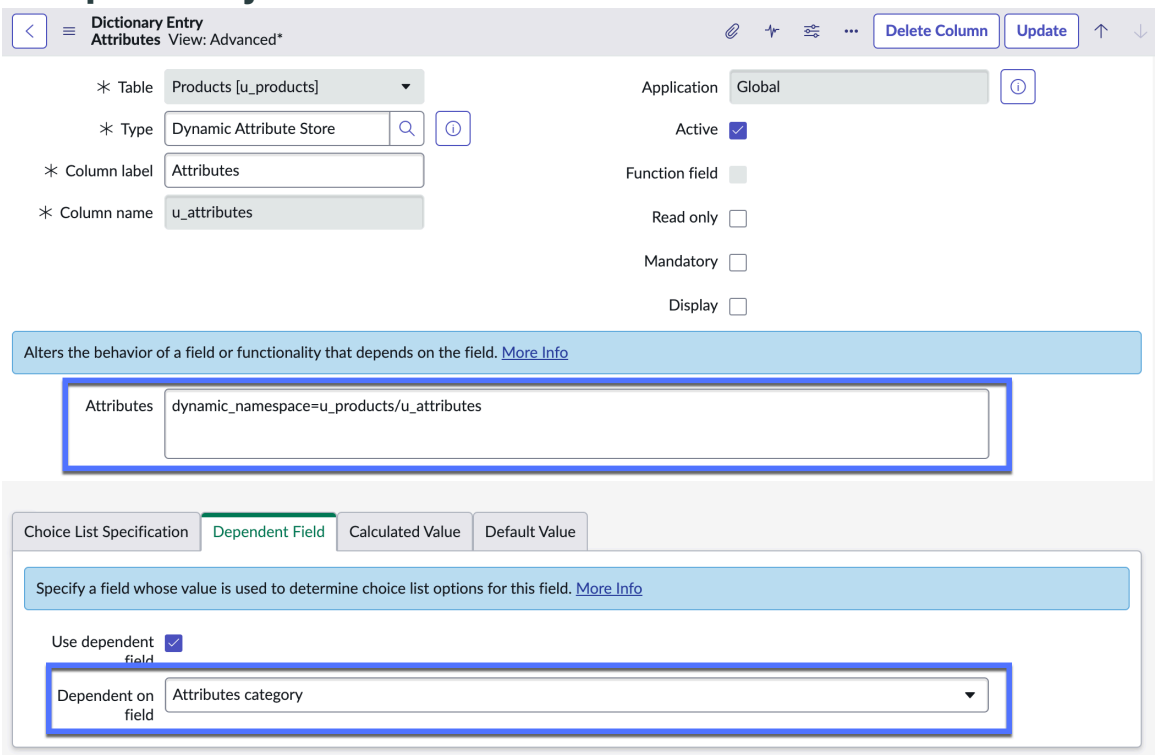
Result

- A dynamic attribute store field is added to the table. An associated dynamic namespace is created with the following naming format:

```
<table_name>/<dynamic_attribute_store_column_name>
```

- A dynamic category reference field is added to the table. A dependency relationship is established between the category reference field and the dynamic attribute store field.

Example: New dynamic store field on the Products table



What to do next

Develop your dynamic schema by creating dynamic attributes and dynamic categories. You can build out the schema using either of the following methods:

- Add dynamic attributes and dynamic categories to the dynamic namespace that's currently associated with the store field you created. Refer to the following topics:
  - Create a dynamic attribute
  - Create a dynamic category
- Add dynamic attributes and dynamic categories to a new dynamic namespace and then associate that namespace with the store field that you created. Refer to the following topics:
  - Create a dynamic namespace
  - Associate a dynamic attribute store with a different namespace

Create a dynamic attribute

Define one or more dynamic attributes that describe a record.

Before you begin

You can define each of the dynamic attributes that describe your records in a dynamic namespace that's associated with a dynamic attribute store field. You can create a dynamic namespace the following ways:

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- Create a dynamic attribute store field. When you create a dynamic attribute store field, a dynamic namespace is automatically created and associated with the store field. See Create a dynamic attribute store field.
- Create a dynamic namespace manually. See Create a dynamic namespace.

Role required: dynamic_schema_writer

Procedure

1. Navigate to **All** > **Dynamic Schema** > **Dynamic Namespaces**.
2. Select the dynamic namespace that you want to update.
3. In the Dynamic Attributes related list, select **New**.
4. On the form, fill in the fields.

Dynamic Attribute form

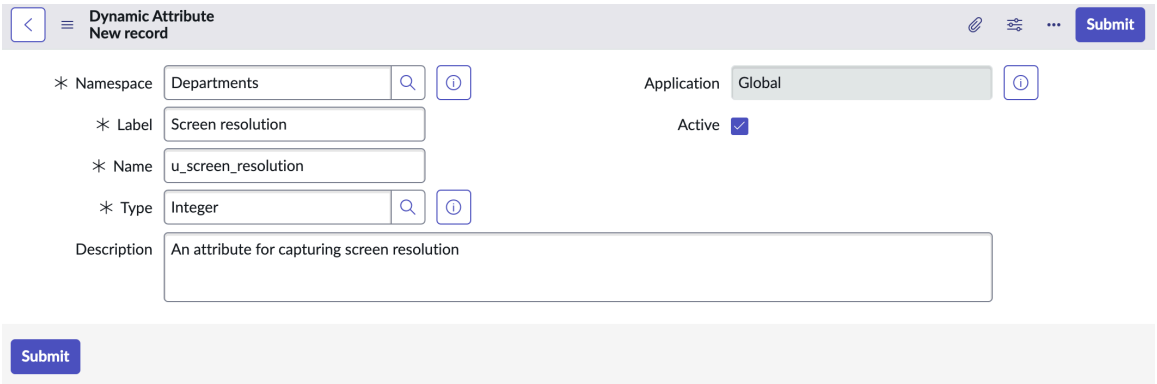
Field	Description
Namespace	Dynamic namespace that contains this attribute.
Label	Label used for displaying the dynamic attribute.
Name	Internal name for the dynamic attribute.
Type	Data type of the attribute. ○ To define the attribute using a choice set, select String. ○ To define the attribute as a reference to a record in another table, select Reference. Defining the attribute as a reference maintains accuracy by automatically reflecting changes from the linked record. This simplifies maintenance when related information changes. For example, a Covered Vehicle attribute in a policy record can reference a vehicle in the Vehicle table so updates to vehicle details appear in the policy without manual edits.
Choice Set	Fixed set of values defined in a choice set. For example, if you created a choice set for Colors with choices for red, green, and blue, you can select the Colors choice set to limit the attribute's values to the color choices defined in the choice set. See Create a dynamic choice set. This option only appears when you select String in the **Type** field.
Description	A brief summary of what the attribute stores.

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Field	Description
Active	Option to activate the dynamic attribute.

5. Select **Submit**.

Example: Add a dynamic attribute for screen resolution



What to do next

Add more dynamic attributes to the dynamic namespace as needed. For example, when defining metadata for products in the Electronics category, you might add dynamic attributes that describe screen size, screen type, and watts.

Create a dynamic category

Create a container for organizing dynamic attributes.

Before you begin

Role required: dynamic_schema_writer

About this task

After defining your dynamic attributes, you can organize them into categories.

Dynamic categories inherit the dynamic attributes of their extended hierarchy. For example, a Televisions category could inherit the volts, amps, and watts attributes associated with its parent category, Electronics.

Procedure

1. Navigate to **All** > **Dynamic Schema** > **Dynamic Namespaces**.
2. In the Dynamic Categories related list, select **New**.
3. On the form, fill in the fields.

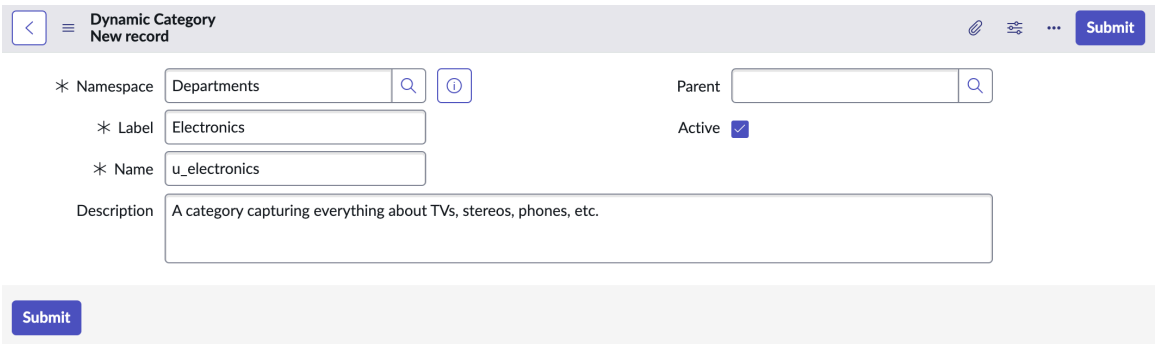
Dynamic Category form

Field	Description
Namespace	Namespace to which the dynamic category belongs.
Label	Label used for displaying the dynamic category.
Name	Internal name for the dynamic category.

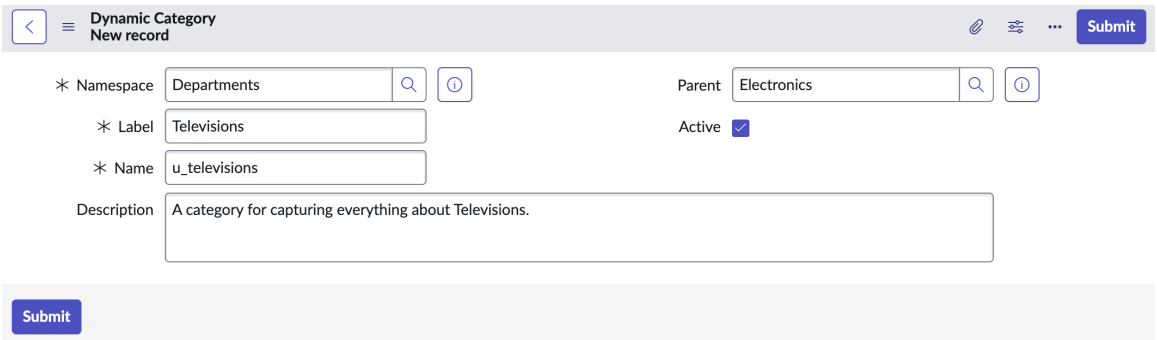
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Field	Description
Description	A brief summary of what the category contains.
Parent	Parent category from which this category extends.
Active	Option to activate the dynamic category.

Example: Create a dynamic category for capturing everything about electronics



Example: Create a dynamic category called Televisions that extends from the Electronics dynamic category



What to do next

Add more dynamic categories as needed. For example, you might add parent categories for store departments like Health and Beauty, Automotive, and Sporting Goods and child categories for Body Soap, Shampoo, Motor Oil, and Fishing Poles.

If you determine that you need dynamic attributes for multiple products in different dynamic categories, you can define the dynamic attributes in a broader, parent dynamic category. When you add attributes to a parent, they're automatically inherited by a child category.

For example, you might need attributes for capturing Volts, Amps, and Watts in a product record. You can add these attributes to the Electronics category. When you create the Televisions category and select Electronics as the parent category, the Volts, Amps, and Watts attributes are automatically inherited by the Televisions category.

Include dynamic attributes in a dynamic category

Categorize specific dynamic attributes by relating a dynamic attribute to a dynamic category.

Before you begin

Role required: dynamic_schema_writer

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About this task

After creating dynamic attributes, you can build out your taxonomy by including the dynamic attributes in a dynamic category.

Procedure

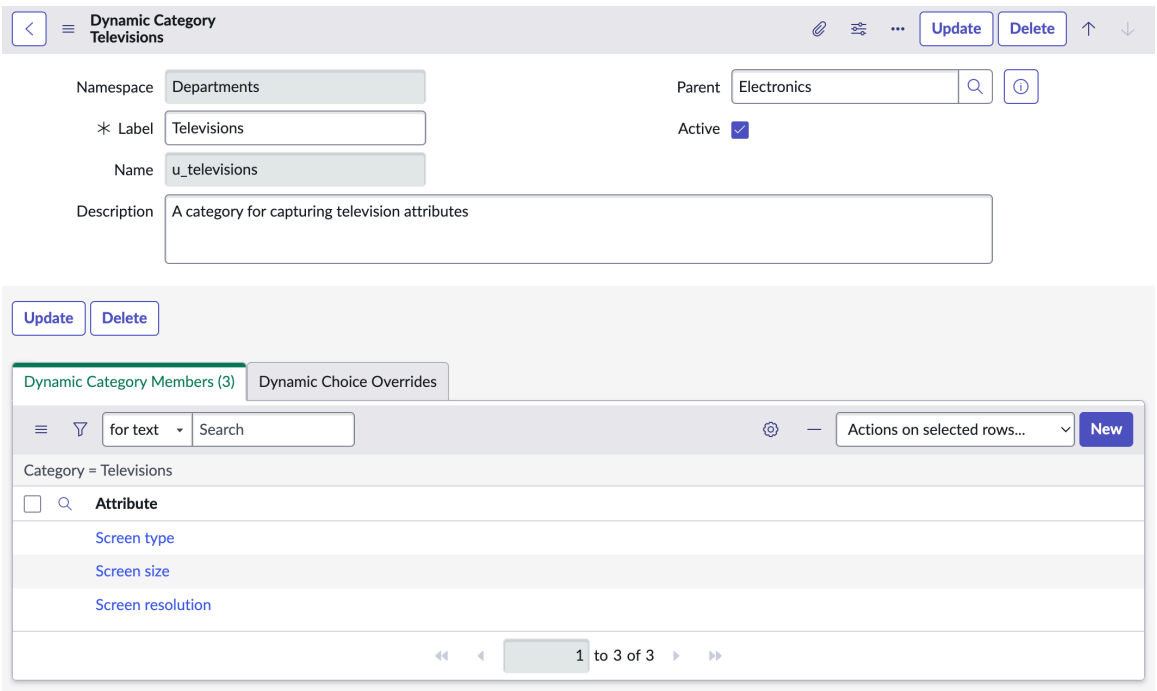
1. Navigate to **All** > **Dynamic Schema** > **Dynamic Categories**.
2. Select a dynamic category that you want to update.
3. In the Dynamic Category Members related list, select **New**.
4. On the form, fill in the fields.

Dynamic Category Attribute Member form

Field	Description
Category	Category that contains the dynamic attribute.
Attribute	Dynamic attribute to associate with the dynamic category.

5. Select **Submit**.

Example: Dynamic attributes added to a dynamic category



What to do next

Add more dynamic attributes to the dynamic category as needed.

Create a dynamic choice set

Define a fixed set of values for an attribute.

Before you begin

Role required: dynamic_schema_writer

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About this task

For some dynamic attributes, you might want to limit the possible values that are accepted. You can define a choice set that holds a fixed set of choices, and then create a dynamic attribute whose values are limited to the choices defined in the choice set.

Dynamic choice sets aren't associated with a specific namespace. After you define a dynamic choice set, you can use it in any dynamic namespace.

For example, you can define a choice set for colors, with red, blue, and green as the choices. You can select this choice set in the bike_color dynamic attribute in one namespace and use it again in the paint_color dynamic attribute in a different namespace.

Procedure

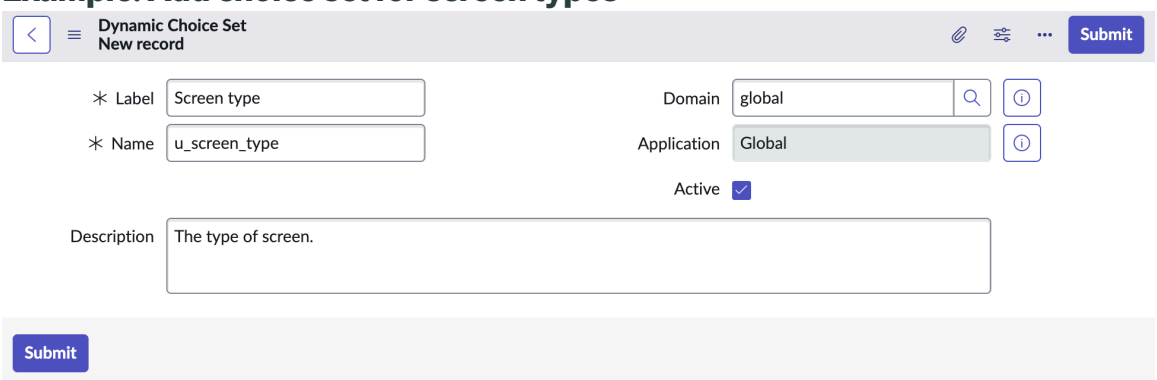
1. Navigate to **All** > **Dynamic Schema** > **Dynamic Choice Sets**.
2. Select **New**.
3. On the form, fill in the fields.

Dynamic Choice Set Form

Field	Description
Label	Label used for displaying the dynamic choice set.
Name	Internal name for the dynamic choice set.
Description	A brief summary of what the choice set stores.
Active	Option to activate the dynamic choice set.

4. Select **Submit**.

Example: Add choice set for screen types



What to do next

Add choices to a dynamic choice set

Add choices to a dynamic choice set

Build out a dynamic choice set by defining the choices that belong to it.

Before you begin

Role required: dynamic_schema_writer

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Procedure

1. Navigate to **All** > **Dynamic Schema** > **Dynamic Choice Sets**.
2. Select the dynamic choice set that you want to update.
3. In the Dynamic Choices related list, select **New**.
4. On the form, fill in the fields.

Dynamic Choice form

Field	Description
Choice Set	The dynamic choice set that contains this choice.
Label	Label used for displaying the dynamic choice.
Value	Internal name for the dynamic choice.
Order	Value that determines the choice's order in a list.
Active	Option to activate the choice in the dynamic choice set.

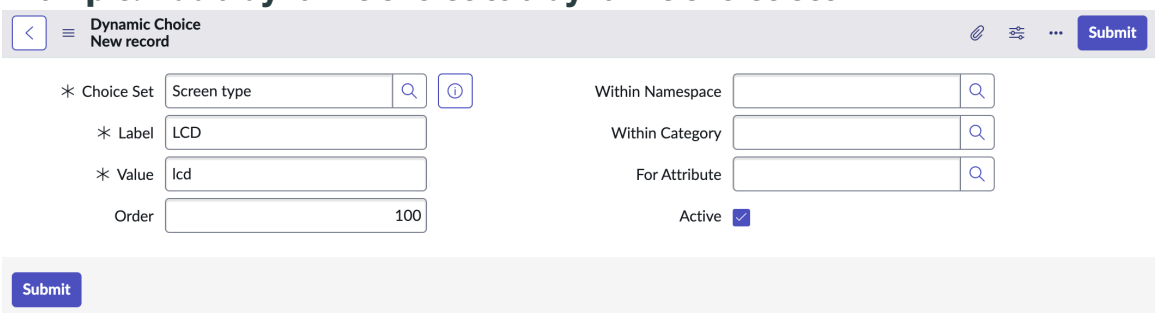
5. **Optional:** Limit the availability of the choice that you want to add.
   - Restrict the choice to a specific namespace by selecting that namespace in **Within Namespace**.
   - Restrict the choice to attributes in a specific category by selecting a namespace in **Within Namespace** and the category in **Within Category**.
   - Restrict the choice to one attribute in a namespace by selecting the namespace in **Within Namespace** and selecting the attribute in **For attribute**.

   The choice is only available in the dynamic attribute store field that belongs to the namespace you selected in **Within Namespace**. Further restrictions might apply if you selected a category or a specific attribute.
6. Select **Submit**.

Result

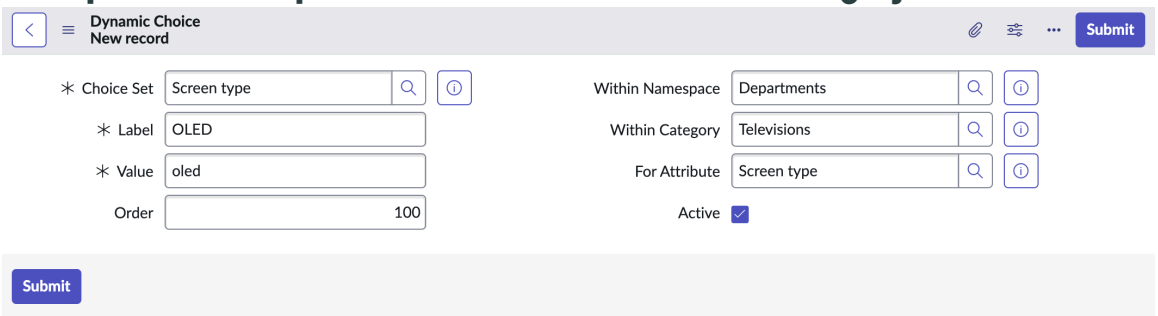
A dynamic choice is added to the dynamic choice set.

Example: Add a dynamic choice to a dynamic choice set

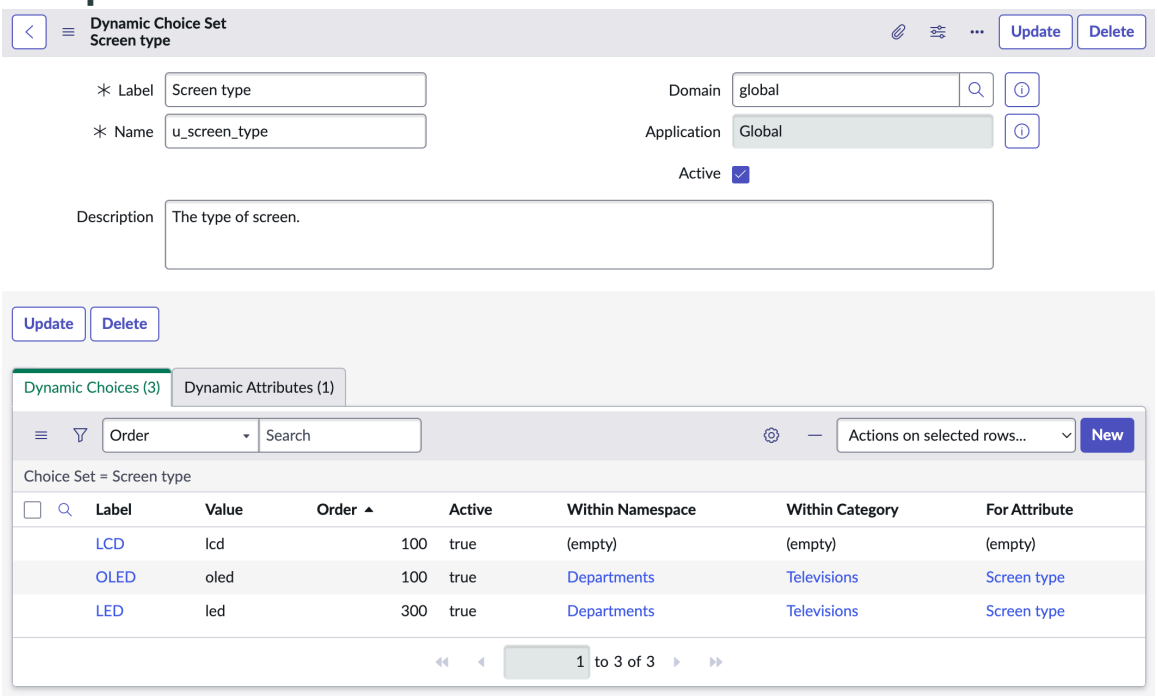


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Example: Define a specific choice in the Televisions category



Example: Choices defined in choice set



What to do next

Add more choices as needed. Create a dynamic attribute whose values are derived from the dynamic choice set.

Override a dynamic choice

Make a choice appear differently in a specific dynamic namespace by creating a dynamic choice override.

Before you begin

Role required: dynamic_schema_writer

Procedure

1. Navigate to **All** > **Dynamic Schema** > **Dynamic Namespaces**.
2. Select the dynamic namespace that you want to update.
3. In the Dynamic Choice Overrides related list, select **New**.
4. On the form, fill in the fields.

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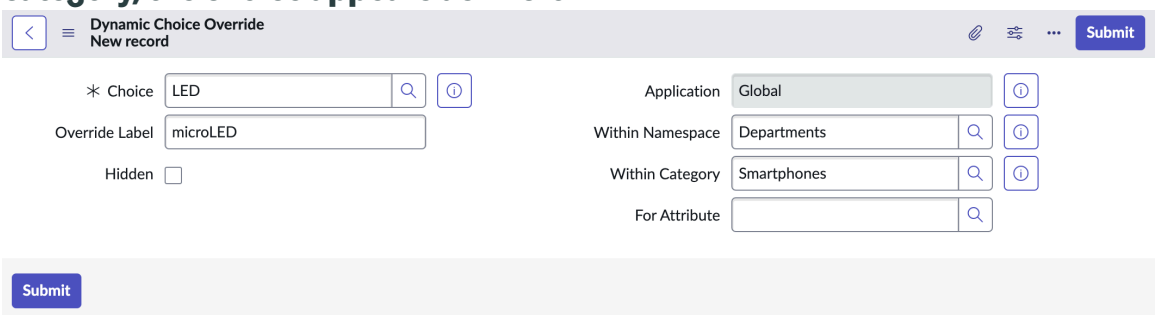
Dynamic Choice Override form

Field	Description
Choice	The choice that you want to override.
Override Label	Optional label to use instead of the original choice label.
Hidden	Option to hide the choice.

5. **Optional:** Define where the choice override applies in your dynamic schema.
   - Restrict the override to a specific namespace by selecting that namespace in **Within Namespace**.
   - Restrict the override to attributes in a specific category by selecting a namespace in **Within Namespace** and the category in **Within Category**.
   - Restrict the override to one attribute in a namespace by selecting the namespace in **Within Namespace** and selecting the attribute in **For attribute**.
6. Select **Submit**.

Result
The choice is overridden in the dynamic namespace that you selected in **Within Namespace**. Further restrictions might apply if you selected a category or a specific attribute.

Example: An override is defined for the LED choice. In the Smartphones category, the choice appears as microLED



Add dynamic attributes to a record

Store dynamic attributes and their values on a record.

Before you begin
Role required: none

To add attributes to a dynamic attribute store field, you must have write access to the table where the store field is located.

About this task
Once you create a dynamic attribute store field and set up the dynamic categories and dynamic attributes for its namespace, you can use one or more of the dynamic attributes to describe your records.

Procedure

1. Navigate to the table that holds your dynamic attribute store field.
2. Create a record by selecting **New**.

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3. **Optional:** In the category reference field, select the dynamic category that contains the dynamic attributes that you want to use.
4. Capture one or more dynamic attributes in the dynamic attribute store field by entering JSON or using the API.

Option	Description
Enter JSON	Enter one or more attributes and values in the dynamic store field. For example: `{ "watts: 50" , "screen_size": "75", "screen_type" : "OLED" }`
Use the API	Call *`setValue()`* in the *`GlideRecord`* API and send data to the dynamic attribute store field. For example: `var gr = new GlideRecord('products'); gr.setValue('televisions->watts', '50'); gr.setValue('televisions->screen_size', '75'); gr.setValue('televisions->screen_type, 'OLED'); gr.insert();`

Result

One or more dynamic attributes and their values are stored in the record. Users can query for records that have some value for an attribute. For example:

```
var gr = new GlideRecord('products');
gr.addQuery('televisions->screen_type', 'OLED');
gr.query();
```

Create a dynamic namespace

Define categories and attributes once and reuse them across multiple tables and dynamic attribute store fields.

Before you begin

Role required: dynamic_schema_writer

About this task

All dynamic categories and dynamic attributes belong to a dynamic namespace that you can associate with one or more dynamic attribute store fields.

A dynamic namespace is automatically created when you create a dynamic attribute store field. However, you can also create a dynamic namespace manually, and then associate it with one or more store fields. You might create a dynamic namespace this way in the following scenarios:

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- You created a dynamic attribute store field for storing transient attributes, which automatically created an associated namespace, but now you want to associate the store field with a different namespace that contains a different set of dynamic categories and dynamic attributes.
- You created multiple dynamic attribute store fields on one or more tables, and you want them all to share the dynamic categories and dynamic attributes that you defined in a new namespace.

Note that changing the namespace associated with a dynamic attribute store field doesn't modify any saved data in the store field, but can affect how the system interacts with that data.

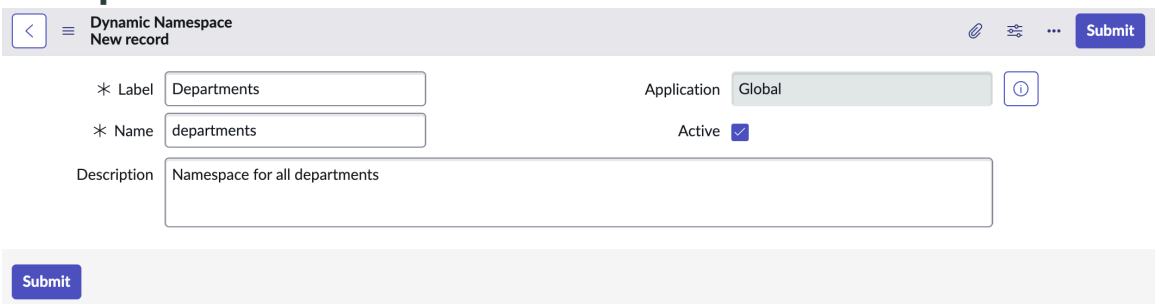
Procedure

1. Navigate to **All** > **Dynamic Schema** > **Dynamic Namespaces**.
2. Select **New**.
3. On the form, fill in the fields.

Dynamic Namespace form

Field	Description
Label	Label used for displaying the dynamic namespace.
Name	Internal name for the dynamic namespace.
Description	A brief summary of what the namespace contains.
Active	Option to activate the dynamic namespace.

Example: Create a dynamic namespace for capturing everything about products in a department store



What to do next

- Create a dynamic attribute
- Create a dynamic category
- Include dynamic attributes in a dynamic category
- Create a dynamic choice set
- Associate a dynamic attribute store with a different namespace

Associate a dynamic attribute store with a different namespace

Use a different set of dynamic attributes in a dynamic attribute store field by changing its associated namespace.

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Before you begin
Role required: dynamic_schema_writer

About this task
You can reuse the dynamic attributes and dynamic categories that you define in a dynamic namespace across multiple store fields by updating the namespace specified in the store field's dictionary record.

Changing the namespace associated with a store field can modify the type of an attribute that's captured in the store field. Modifying the type of an attribute doesn't affect any data stored for it, but can change how the system interacts with that data.

Procedure
1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the table that contains your dynamic attribute store field.
3. In the Columns related list, select the dynamic attribute store column that you want to update.
4. In the Attributes field, enter the name of the dynamic namespace that you want to use after the equals sign.

   For example, change:

   `dynamic_namespace=u_products/u_attributes`

   To:

   `dynamic_namespace=departments`
5. Select **Update**.

Result
All the dynamic attributes and dynamic categories that belong to the dynamic namespace that you entered are available to the dynamic attribute store field.

What to do next
Associate the dynamic namespace with other dynamic attribute store fields by updating the Attributes field in the dictionary entry in each store field.

After each update, delete the dynamic namespace record that was automatically created for the dynamic attribute store field.

Field types reference

These field types are available to administrators when creating fields or changing the type of existing fields.

Field types

Field type	Platform name	Supported in configurable workspace	Description
approval_rules	Approval Rules	No	
audio	Audio	No	Audio field for uploading and embedding `.mp3` or `.ogg` audio files.
auto_increment	Auto Increment	Yes	

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
auto_number	Auto Number	Yes	
boolean	True/False	Yes	True/False field that holds a true or false value, typically displayed as a check box.
bootstrap_color	Bootstrap Color	No	
breakdown_element	Breakdown Element	No	
calendar_date_time	Calendar Date and Time	No	
catalogue_preview	Catalog Preview	No	
char	Char	Yes	
choice	Choice	Yes	Choice field that restricts values to a list of options, which is ideal for fields with a limited set of valid entries. For example, a priority field or a category field.
collection	Collection	No	Collection field type that applies any changes made to the assigned field also to the entire table For example, changes such as attributes or the **Read only** check box that are applied to a table entry with this field type are applied to the table rather than a specific field. This entry is automatically created when a table is created. There shouldn't be more than one entry for a table of this type.
color	Color	No	String field that accepts CSS color declarations,including hex or RGB notation, and displays a preview. For more information on CSS color declarations, go to the Mozilla developer web docs. See the "<color>" article. https://developer.mozilla.org/en-US/docs/Web/CSS/color_value.
color_display	Color Display	No	
composite_field	Composite Field	Yes	

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
composite_name	Composite Name	No	
compressed	Compressed	No	Compressed field that stores large binary data in a compressed format, reducing database storage requirements. It's used for files like images or documents, automatically compressing and decompressing data to optimize performance. This field type helps maintain efficient storage and database performance, especially when handling large volumes of data.
condition_string	Condition String	Yes	Text field that accepts a plain JavaScript condition statement that is validated automatically for correctness before an update.
conditions	Conditions	Yes	Field that adds the condition builder to a form. You must specify a dependent field that references the table name.
counter	Counter	No	
css	CSS	Yes	
currency	Currency	Yes	Decimal field with four digits after the decimal point. When displayed on a form, a **Currency** field also includes an additional list of choices for selecting the currency type. If there isn't a default value for the field, then empty **Currency** fields use the reference currency. Adding a value causes the field to use the session currency of the active user. See Change default currency decimal places for how to use two fraction digits. **Note:** After you assign this field type to a field, you can't change it to the **FX Currency** field type.
currency2	FX Currency	Yes	

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
data_array	Data Array	No	
data_object	Data Object	No	
data_structure	Data Structure	No	Data structure field where you can select one of the following data structures and enter values to organize particular information in the record: • String • Boolean • Integer • Decimal • Object • Array
date	Other date	Yes	Field used to store date and time values without requiring a time zone. Unlike glide_date_time, which is converted to UTC in the database, this field retains the date and time exactly as entered, without any conversion.
datetime	Date/Time	Yes	
day_of_week	Day of Week	No	
days_of_weeks	Days of Week	Yes	
decimal	Decimal	Yes	Number field with up to two digits after the decimal points. For example, 12.34.
document_id	Document ID	Yes	Document ID field that references a record on a table.
documentation_field	Documentation Field	Yes	Documentation field used by admins to add the label during table or field creation.
domain_id	Domain ID	Yes	Domain ID field that contains a reference to the domain.
domain_path	Domain Path	Yes	String field that contains a domain path, which is a series of three-character codes separated by a slash delimiter that uniquely identifies a domain. For more information on domain paths, see Domain

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
			Separation- Advanced Concepts and Configurations [KB0716268] article in the Now Support Knowledge Base.
due_date	Due Date	Yes	Date field that stores a date and time.
email	Email	Yes	
email_script	Email Script	Yes	Field used to create dynamic email templates. It provides the ability to use field name notation (`${fieldname}`) to represent the dynamic value of variable. This field is a combination of text area and variable picker.
expression	Expression	No	
external_names	External Names	No	
field_list	Field List	Yes	
field_name	Field Name	Yes	Reference field for a field name in the table that is selected in a **Table Name** field type. Make this field dependent on the **Table Name** field.
file_attachment	File Attachment	Yes	File attachment field that can hold one file. All file types are supported.
float	Floating Point Number	Yes	Floating Point Number fields use a default scale of 7, and the maximum length can't be set below 7 to ensure values can be stored and displayed correctly.
formula	Formula	No	
geo_point	Geo Point	No	Geo point field for holding longitude and latitude coordinates.
glide_action_list	Action List	No	
glide_date	Date	Yes	
glide_date_time	Date/Time	Yes	
glide_duration	Duration	Yes	
glide_list	List	Yes	
glide_precise_time	Precise Time	No	
glide_time	Time	Yes	
glide_utc_time	UTC Time	Yes	

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
glide_var	Var	No	
glyphicon	Glyph Icon	No	
graphql_schema	GraphQL Schema	No	
GUID	Sys ID (GUID)	Yes	
html	HTML	Yes	String field with a built-in HTML editor. It supports formatted text with rich text editor and is useful for descriptions that need enhanced readability.
html_script	HTML script	Yes	HTML script field that provides the ability to add variables in the form of field name notation (`${fieldname}`) via a variable picker within the HTML editor. This field is used to create rich text content that also has dynamic values.
html_template	HTML template	No	
icon	Icon	No	String field that provides the user access to an icon picker in a form. By default, the favorites icon set is used.
image	Image	No	Image field used for uploading and embedding images.
index_name	Index Name	No	
insert_timestamp	Insert Timestamp	No	
int	Int	Yes	
integer	Integer	Yes	Number field with zero decimal points. **Note:** To search for an integer, input `=` followed by the integer in the search bar. For example, if you want to search for an Order of 100, input `=100`.
integer_date	Integer date	Yes	The int field type is used to store alphanumeric values similar to string field type.
integer_time	Integer time	Yes	Field used to store time values, similar to glide_time, but with a few key differences:

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
			• The glide_time field stores the time as a fully formatted string (e.g., 1970-01-01 16:04:32), whereas the integer_time field stores it as a 6-digit string in a 24-hour format (e.g., 160432). • glide_time supports time zones, meaning the displayed value changes based on the user's time zone settings. In contrast, integer_time does not support time zone adjustments and always displays the same time regardless of the user's location.
internal_type	Internal Type	No	
ip_addr	IP Address (Validated IPV4, IPV6)	Yes	
ip_address	IP address	Yes	Variable character field that stores IPv4 and IPv6 addresses. See IP address field type for more information.
journal	Journal	No	Journal field that accepts text entries and displays previous entries with a user name and timestamp.
journal_input	Journal Input	Yes	Journal input field that accepts text entries but doesn't display previous entries.
journal_list	Journal List	No	Journal list field that displays the contents of journal fields. You must specify the journal fields as the dependent fields. If a journal list field depends on more than one journal field, the entries are displayed chronologically.
json	JSON	Yes	
json_translations	JSON Translations	No	
language	Language	No	
long	Long	Yes	Long field that stores large whole numbers, which can be useful for high-value data. This field handles

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
			values that exceed standard integer limits, which is essential in high-volume contexts like serial numbers or counting operations. This field ensures that numeric data is stored accurately without overflow.
longint	Longint	Yes	Longint field that stores large whole numbers, which can be useful for high-value data. This field handles values that exceed standard integer limits, which is essential in high-volume contexts like serial numbers or counting operations. This field ensures that numeric data is stored accurately without overflow.
mask_code	Mask code	No	
metric_absolute	Metric Absolute	No	
metric_counter	Metric Counter	No	
metric_derive	Metric Derive	No	
metric_gauge	Metric Gauge	No	
mid_config	Mid Config	No	
month_of_year	Month of Year	No	
multi_small	Multi Small	Yes	Text area field that stores shorter texts like short descriptions and notes.
multi_two_lines	Two Line Text Area	Yes	
name_values	Name-Value Pairs	No	Name-value pairs field that maps text values. Each mapping is one-to-one, but a single **Name-Value Pairs** field can contain multiple mappings. Each mapping must use a unique name, and the name can't be empty. For example, you can use a **Name-Value Pairs** field to hold header information for a web service request. In this example, the name of each mapping is the header such as `Content-Type` and the value is the header value, such as `Application/json`. For information on scripting **Name-Value**

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
			Pairs fields, see Name-value pairs field type.
nds_icon	NDS Icon	No	
nl_task_int1	NL Task Int1	No	
order_index	Order Index	Yes	Order index field that defines the display order of records in lists or hierarchies. By assigning a numeric value to each record, it enables admins to control the visual sequence, which is helpful for logically organizing tasks, categories, or items. This field type helps improve user experience by making the interface intuitive and orderly.
password	Password (1 Way Encrypted)	Yes	Text field that stores passwords with one-way encryption. One-way encryption stores the password as a secure hash value that can't be decrypted.
password2	Password (2 Way Encrypted)	Yes	Text field that stores passwords with two-way encryption. Two-way encryption stores the password as a secure encrypted value that can be decrypted programmatically within the instance. You can use Password 2 encryption with form variables. To encrypt text fields on forms, see Password2 encryption with KMF. The length for password2 field values must be at least 255 characters.
percent_complete	Percent Complete	Yes	Decimal field that renders a percent complete bar in lists. You can convert any existing **Decimal** field to a **Percent Complete** field.
ph_number	Phone Number	Yes	
phone_number	Phone Number (Unused)	Yes	
phone_number_e164	Phone number (E164)	Yes	String field that provides E164-compliant formatting and validation for telephone numbers.
price	Price	Yes	Currency field that enables control over conversions and display. See Price fields for more information.

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
properties	Properties	No	
radio	Radio	Yes	Radio field that displays mutually exclusive options as radio buttons, letting users select only one choice. It's suitable for simple, definitive decisions, like priority level or yes/no responses. This field type helps improve usability by presenting clear options for single-selection inputs. As of the Zurich release, radio buttons can be displayed both horizontally and vertically in the form view.
records	Records	No	
reference	Reference	Yes	Query field that displays records from another table, which is crucial for relational data structures.
reference_name	Reference Name	No	
related_tags	Related Tags	Yes	Field used to categorize and organize records by assigning tags. In the record page, The tags are editable using the option on the form and the same tags get reflected on the related_tags field type in a read only mode.
reminder_field_name	Reminder Field Name	No	
repeat_count	Repeat Count	No	
repeat_type	Repeat Type	No	
replication_payload	Replication Payload	No	
schedule_date_time	Schedule Date/Time	No	
schedule_interval_count	Schedule Interval Count	No	
script	Script	Yes	Text field that accepts JavaScript code input and provides controls, such as syntax checking and formatting. It also provides a list of fields and server APIs. You must specify a dependent field that

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
			references the table name for the list of fields.
script_client	Script Client	No	
script_plain	Script (Plain)	Yes	Text field that accepts JavaScript code input and provides controls, such as syntax checking and formatting.
script_server	Script Server	No	
short_field_name	Short Field Name	No	
short_table_name	Short Table Name	Yes	Text field that stores a compact version of a table name, often used for efficiency in system configurations, URLs, or logs. It helps map the full table names to shorter identifiers, mainly for internal system use rather than direct user interaction.
simple_name_values	Name-Value Pairs	Yes	
slushbucket	Slushbucket	Yes	
snapshot_template_value	Snapshot Template Value	No	
source_id	Source ID	No	
source_name	Source Name	No	
source_table	Source Table	No	
string	String	Yes	String field that holds a string of characters. Strings of up to 255 characters appear in a single-line text box. Anything 256 characters or over appears as a multi-line text box. **Note:** The database may translate the value that you provide in the **Max length** field to the closest matching database field type. For example, a max string length of 80 maps to the nearest database field type of VARCHAR(100).

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
			For Oracle instances, users aren't able to increase the max length of a string field to a value greater than 4000 through the application UI. Changes greater than 4000 require the CLOB data type in Oracle. If you require a field to be larger than 4000 characters, log an incident to request the change.
string_boolean	String Boolean	No	
string_full_utf8	String (Full UTF-8)	Yes	String field that contains UTF-8 character encoding. This field type is restricted to the same maximum length that can be defined within the application UI as the String data type. Emojis are supported in the String (Full UTF-8) field type.
structure	Structure	No	
sys_class_name	System Class Name	Yes	System field that holds the table name.
sys_class_path	System Class Path	No	
sysevent_name	System Event Name	No	
sysrule_field_name	System Rule Field Name	No	
table_name	Table Name	Yes	String field that lets you select a table. If you use the **Field Name** field type, add this field type and make the **Field Name** field dependent on the **Table Name** field. If you're in a scoped application, you can view only the tables of that scope.
template_value	Template Value	Yes	
time	Time	No	Time field that stores a time in the database as a **Date/Time** field, but only the time part of this field is used.

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
			Note: This field stores the date as 1970-01-01, which doesn't fall within the dates for Daylight Savings Time (DST). As a result, the time isn't adjusted automatically for DST. If a custom feature uses time as a start time, the feature must adjust for DST, if necessary.
timer	Timer	Yes	
translated	Translated	No	
translated_field	Translated Field	Yes	
translated_html	Translated HTML	Yes	HTML text field that displays translations based on the user's language.
translated_text	Translated Text	Yes	Text field that displays translations based on the user's language.
tree_code	Tree Code	No	
tree_path	Tree Path	No	
url	URL	Yes	String field that is a selectable URL field when locked. When configuring, there's an option to allow/disallow links with or without HTTPS. **Note:** In the mobile UI, this field appears as a multi-line text field. The field saves as a single line with the line breaks removed.
user_image	Image	Yes	
user_input	User Input	Yes	User input field that captures input provided by users, typically in the context of workflows, surveys, or other interactive processes. This field enables users to enter text, select options, or provide other types of input that can then be processed or stored for further use. The data collected through **User Input** fields is often used to guide decision-making in workflows or

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Field types (continued)

Field type	Platform name	Supported in configurable workspace	Description
			to gather information for reporting and analysis. It's a flexible field type that can be customized to fit various use cases where user interaction is required.
user_roles	User Roles	Yes	
variable_conditions	Variable Conditions	No	
variable_template_value	Variable Template Value	No	
variables	Variables	No	
version	Version	Yes	
video	Video	No	Video field for uploading and embedding video.
week_of_month	Week of Month	No	
wide_text	Wide Text	Yes	
wiki_text	Wiki	Yes	String field with a built-in wiki text editor that accepts a simplified version of standard wiki text formatting.
wms_job	WMS Job	No	
workflow	Workflow	Yes	List field that displays a stage in a workflow.
workflow_conditions	Workflow Conditions	No	
xml	XML	Yes	

Address (Simple) field type

The Address (Simple) field type provides real-time address suggestions as you enter text to reduce manual entry errors.

You can add the Address (Simple) field type to any form in both Core UI and Workspace experiences. When a user enters text in the Address field, closely matched addresses appear for selection. It helps you add accurate addresses without manual entry errors.

The Address (Simple) field type uses an external address suggestions API to retrieve matching addresses for suggestion. The following system properties control the API connection:

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Address field type properties

Property	Description
glide.ui.address.suggestions.api.host.url	Specifies the host URL of the third-party address validation API. For example, Google Places API.
glide.ui.address.suggestions.api.host.apikey.encrypted	Stores the encrypted API key for the third-party address validation API specified in host URL. For example, Google Places API key.

Note: You must configure both system properties so that the Address field can return address suggestions.

Configuring Address field type

To configure the Address field to a form, complete the following setup:

1. Add the Address (Simple) field to a table to store and display data.

   For more information, see Add and customize a field in a table.

2. Configure the address suggestions API in system properties.

   For more information, see Configure address suggestion properties.

Configure address suggestion properties

Configure the address suggestion system properties so that the Address (Simple) field retrieves matching addresses as you enter text.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System properties** > **All properties**.
2. Search for and select the *glide.ui.address.suggestions.api.host.url* system property.
   a. In the **Value** field, enter the host URL of the address suggestions API.
   For example, https://places.googleapis.com/v1/places
   b. Select **Update**.
3. Search for and select the *glide.ui.address.suggestions.api.host.apikey.encrypted* system property.
   a. In the **Value** field, enter the API key of the host URL.
   b. Select **Update**.

Result
The address suggestions API displays closely matched addresses as you enter text in the Address (Simple) field.

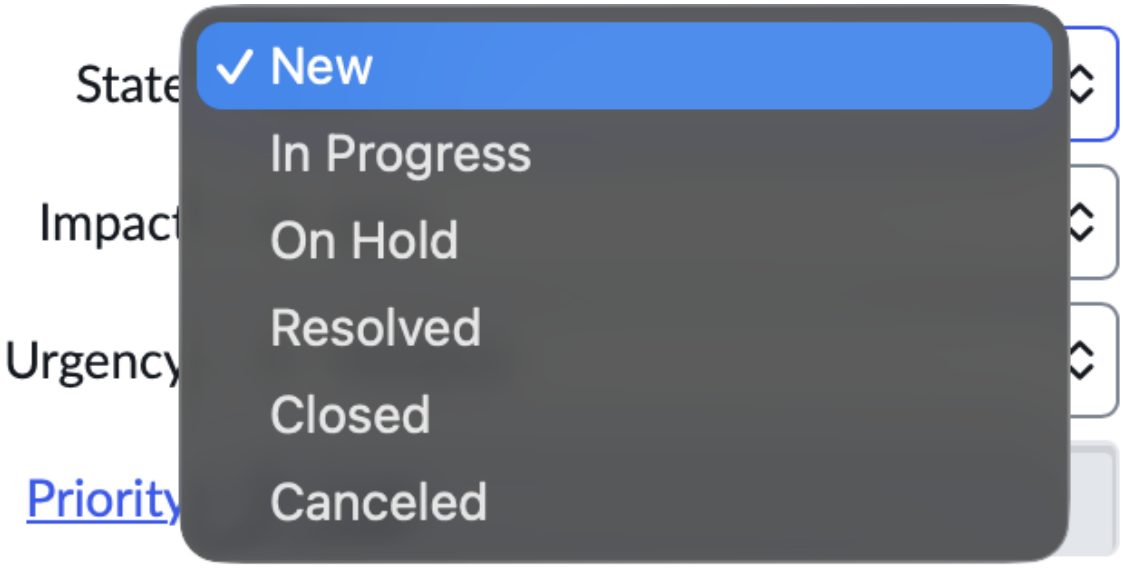
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Choice list field type

A choice list is a type of field that lets the user select from a pre-defined set of choices.

Administrators can define the available choices and customize the behavior and appearance of choice lists.

Incident state choice list



Note: Choice lists do not support a one to many relationship. Only one choice from a choice list can be selected at a time.

Choice list security

You can use the personalize_choices security role to enable non-administrators modify Choice elements options on all tables.

If more granular control is desired, you can also create a custom ACL (security rule) governing the personalize_choices operation either for a particular field or for all fields (*) on a particular table. However, access to the personalize_choices operation on a particular field does not confer the ability to add new choices for that field.

To be able to create new choices for a particular field, an ACL that grants personalize_choices access for that field is required. For example, to give the hris_admin role the ability to personalize only the Category field for Human Resources KB articles, you need an ACL granting personalize_choices access to the hris_admin role on the Category field of the Knowledge (kb_knowledge) table.

There are predefined ACLs granting both types of access to the personalize_choices security role, for all fields on all tables. The personalize_choices security role also has read, write, and delete access to the sys_choices table. However, this additional access is not required when making just the Personalize Choices functionality available on a granular basis.

Values to associate with choice labels for scripting

When you write a script that references a choice list, you need to know the value that is associated with each choice.

For example, to check whether the incident_state field is active, you could not use the condition `current.incident_state == "active"` because the value associated with the choice labeled **Active** is the integer **2**. Instead, you would use the condition `current.incident_state == 2`.

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The **Type** field on the choice list dictionary entry determines the data type of the values.

To determine the value associated with a choice, right-click the field label and select **Show Choice List**, and then locate the choice for which you need to know the value.

The **-- None --** option may not have a sys_choice record associated with it. A choice list field set to **-- None --** evaluates to these values, depending on the script context as listed below.

- For client-side scripts,such as client scripts: "" (empty string)
- For server-side scripts, such as business rules: "0" (string of the number zero)

Related topics

System dictionary

Integer values for default choice lists

Choice provide four default values.

Some common choice lists use integer values that do not match the string labels. For example, the Problem table uses these default values for the **State** field.

State field default values

Value	Label
1	Open
2	Known Error
3	Pending Change
4	Closed/Resolved

These integer values are also used in several default business rules. For example, a business rule on the Incident table sets the active flag to false when the **State** field changes to **7**, which is the default value for the **Closed**. If you change the values of your Incident state options, this business rule may no longer behave as desired or expected.

On the Incident table, the **Active**, **State**, and **Incident state** fields are affected by the following default business rules.

Default business rules

Business rule	Description
mark_closed (incident)	If the incident_state changes to **7** (**Closed**), the **Active** field is set to false
incident reopen (incident)	If the incident_state is less than **7** (**Closed**) and the **Active** field is false, the **Active** field is set to true
mark closed (task)	If the state changes to either **3** (**Closed Complete**) or **4** (**Closed Incomplete**), the **Active** field is set to false
task closer (task)	If the **Active** flag changes from true to false and the state is neither **3** (**Closed Complete**) nor **4** (**Closed Incomplete**), the state is set to **3** (**Closed Complete**)
task reopener (task)	If the **Active** field changes from false to true and the state is either **3** (**Closed Complete**) or **4** (**Closed Incomplete**), the state is set to **1** (**Open**)

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Note: Notice that these business rules do not change incident_state based on a change to either the **Active** field or the **State** field. Changes to incident_state drive the other two fields, not the other way around.

Configure state field choice values

State fields are a subset of choice list fields. Keep the following information in mind when you configure choice values for the state field.

- Use a negative value to add a new active state field.
- Search for and study the business rules that use a state number filter on the **Script** and **Conditions** fields. You can use the Debug tool to trace the order of the business rule execution.
- New values representing inactive states should have a value above 8.

You can define any of the following attributes for a state field by configuring the dictionary. If the attributes are not defined, the system uses the default values. The TaskStateUtil API uses the following attributes. For more information on the TaskStateUtil API, see TaskStateUtil.

Related Attributes

Attribute	Definition
close_states	Semicolon delimited list of state values that are inactive, used to identify whether the task should be set to active or inactive. This is a required attribute to use the TaskStateUtil functionality.
default_close_state	Optional attribute to define the state value of the default close state if you want to define business rules that automatically close a task. Defaults to 3, typically Closed Complete if attribute is not defined.
default_work_state	Optional attribute to define the state value of the default working state if you want to define business rules that automatically set a task for working. Defaults to 2, typically Work in Progress if the attribute is not defined.

State modification examples

Follow these examples for modifying the states of incidents and change requests.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Choice Lists**.
2. At the top of the list, construct a list filter like the following:
   - **Table**: incident
   - **Element**: incident_state
3. Run the filter.

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Notice that the **Closed** state has a value of **7** and the **Resolved** state has a value of **6**. Any state greater than or equal to **7** is assumed to be inactive. Therefore, you should use a positive integer greater than **7** if you want to add a new inactive-type of state. Use a negative value like **-1** or **-2** if you wish to add a new active-type of state field, such as **Awaiting Vendor**.

4. Navigate again to **System Definition** > **Choice Lists**.
5. At the top of the list, construct a list filter like the following:
   - **Table**: change_request
   - **Element**: phase_state
6. Run the filter.

   Notice that the **Complete** state has a value of **8**. Any state greater than or equal to **8** is assumed to be inactive. Therefore, you should use a positive integer greater than **8** if you want to add a new inactive-type of state, such as **Cancelled**. Use a negative value like **-1** or **-2** if you wish to add a new active-type of state field, such as **Pending**.

Troubleshoot change states and business rules

Business rules in the system make assumptions about state values. You can troubleshoot business rules to see the order in which they run and see how it affects changes you make to **State** field values.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
2. Construct a filter like this one to view the scripts and conditions that pertain to the Resolved incident_state of 6 or the Closed incident_state value of 7:

   The **Script** field contains 7 OR the **Condition** field contains 7 OR the **Script** field contains 6 OR the **Condition** field contains 6 AND the **Table** field is incident AND the **Active** field is true.

What to do next

See Debug Business Rule for information on how to trace the order of business rule execution. You can click **Debug All**, resolve an incident, and then check the trace at the bottom of form to watch the business rules execute. These two line examples show that the mark_closed business rule code is entered `==>` and then exited `<==`.

```
==> 'mark_closed' on incident
<== 'mark_closed' on incident
```

View choice list definitions

The Choice Set [sys_choice_set] table contains a record for every field that uses a choice list.

Before you begin

Role required: personalize_choices

Note: The personalize_choices role must be explicitly granted to the user; it cannot be an ACL.

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About this task

The choice set record is associated with an application file, which allows update sets and team development to track and transfer all choices for a field in a single update record.

Choice list values allow a maximum length of 40 characters. The range of allowable numerical values is [-999, 999].

Procedure

1. Right-click the choice list field label and select **Show Choice List**.
   To view other choice list values, modify the filter at the top of the list.

   Note: When you use an ACL to grant personalize_choices on a particular field, **Show Choice List** is not available. It is only available if you explicitly grant the role to the user. **Configure Choices** continues to appear regardless of whether it is an ACL or an explicitly granted user role.

2. Review the items in the list.

   Warning: Do not add new choices to the list. To add new choices to a choice list field, use the **Configure Choices** option.

Related topics

Define an option for a choice list

Define an option for a choice list

You can personalize the options that are available in a choice list.

Before you begin

Role required: personalize_choices

Procedure

1. Navigate to a form where the field appears.
2. If the choice list is dependent on another field, enter the choice value that the options depend on.

   For example, on the incident table, the **Subcategory** is dependent on the **Category**. To customize which subcategory choices are available for the hardware category, select **Hardware** in the **Category** field.

3. Right-click the field label and select **Configure Choices**.
4. Use the slushbucket to rearrange the order, add, or remove items or to create new items.
5. Click **Save**.

   To dynamically add items to a choice list, use the `addOption` GlideForm method .

   Note: Some business rules may be affected by changes to choice list options (for example, default Incident states).

Reuse a choice list

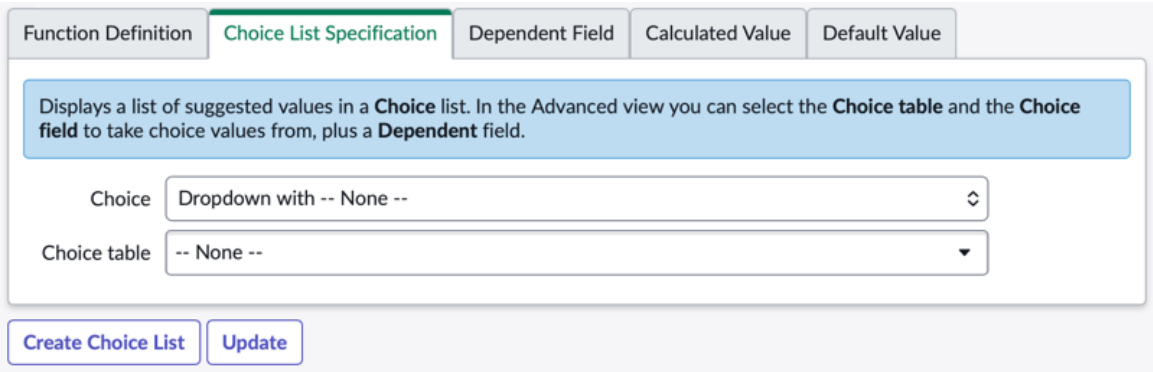
After defining a set of choice list values, you can reuse the values for another field in a different table.

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Before you begin
Role required: personalize_choices

Procedure

1. Right-click an existing choice field (Field A) and select **Configure Choices**.
2. Add the desired choice list values in the **Choices** related list.
3. To reuse the choice list values for another field (Field B) in a different table, right-click the label for Field B and select **Configure Dictionary**.
4. In the **Choice table** field, select the table where Field A resides.
5. In the **Choice field** field, select Field A.



6. Click **Update**.

   The choice list values defined on Field A are displayed on Field B. When you add or remove choice list values on Field A, those changes are also reflected on Field B. After you specify a choice table and a choice field, the field no longer uses the defined choice list.

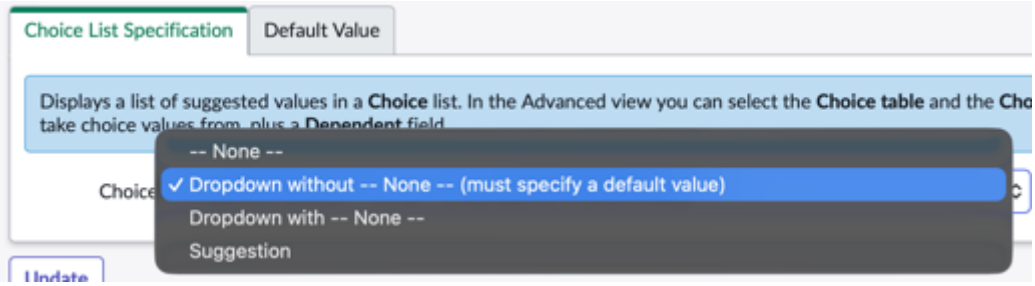
Remove the None option from a choice list

You can remove the **None** option from a choice list if it is not necessary.

Before you begin
Role required: personalize_dictionary

Procedure

1. Navigate to a form where the field appears.
2. Right-click the field label and select **Configure Dictionary**.
3. Change the **Choice** field value to **Dropdown without -- None -- (must specify a default value)**.



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4. Ensure that the **Default** field is populated to determine which choice is displayed by default.

Note: If the field is dependent on another field, the **-- None --** option remains available.

Change the None display value for a choice list

You can change the default display label of the **None** option for a choice field.

Before you begin

Role required: personalize_choices

Note: The personalize_choices role must be explicitly granted to the user; it cannot be an ACL.

Procedure

1. Navigate to a form on which the field appears.
2. Select and hold (or right-click) the field label and select **Show Choice List**.
3. Select **New**.
4. Complete the form.

Choice form fields

Field	Value
Table	Select the table.
Element	Leave the name of the field that is automatically populated.
Language	Enter ISO language code for the label.
Sequence	Leave empty. This field determines the order.
Inactive	Leave cleared.
Label	Enter the label to appear in the choice list. You can use JavaScript, including calls to script includes, to define the label. For example, the JavaScript label in the following example changes the **-- None --** value of the **Time zone** choice list in a user record to use the time zone value of the instance: `javascript:"System (" + gs.getSysTimeZone() + ")"`
Value	Enter `NULL_OVERRIDE`. **Note:** You must enter `NULL_OVERRIDE` as the value, or the new label appears in addition to the **-- None --** option.
Dependent value	Leave empty.
Hint	Leave empty. **Note:** When field type is set to **List (Glide List)** the hint won't display.

5. Select **Submit**.

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Delete all choice list options

You can delete all choices for a choice field from the Choice Set record.

Before you begin
Role required: personalize

About this task
You may want to use this method when you are developing a new application and the business requirements change. If you are updating a choice list that is already in use, consider deactivating the options you no longer use to avoid conflicts with existing data or scripts that may rely on the previous options.

Procedure

1. In the navigation filter, enter `sys_choice_set.list` and press Enter.
2. Open the choice set record for the field.

   For example, to locate the choice set for the incident subcategory, filter by **[Table] [is] [incident] AND [Element] [is] [subcategory]**.
3. Check the box beside the choice set record to delete and select **Delete** from the Actions choice list below the list.
4. Click **Delete** in the confirmation window.
   All choices for the field are deleted.

Create a choice list for another field type

You can create a choice list for a field with another type, such as an integer, string, or reference field.

Before you begin
Role required: personalize_dictionary

About this task
You can use this configuration to standardize data entry and limit available options for a field while still maintaining the original field type.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Open the dictionary entry for the field.

   Note: Reference fields with a large number of records in the reference table cannot be converted to look like choice fields. A reference field with too many records reverts to looking like a reference field.
3. Change the **Choice** value to **Dropdown with --- None ---** or **Dropdown without --- None --- (must specify a default value)**.
4. Right-click the form header and select **Save**.
5. Click **Create Choice List**.

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- The **Choices** related list appears on the dictionary entry form.
- If records on the table contains data for the field, a choice list value for each unique field value is created. For example, if three records exist on the table and each record has a unique value in the field, then three choices are created.
- If no data exists in the field, a choice list value of **-- New choice --** is created.

Display invalid choice list values

By default, inactive or invalid choice list values appear in blue text instead of black. You can disable the color indicator for invalid choices.

Before you begin
Role required: admin

About this task
In the following example, the **Network** category has been deactivated, so it appears in blue for records that still contain the inactive value.



Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Activate the check box for the **Display missing choice list entries** property.

Add search option to a choice field

Add a search field to choice fields that have a long list of options.

Before you begin
Role required: admin

Procedure

1. Navigate to a form that contains choice fields.
   For example, incident.
2. From a choice field on the form, for example State, right-click the field and select **Configure Dictionary**.
3. Switch to the advanced view for the dictionary entry form using the context menu by navigating to **View** > **Advanced**.
4. In the Attributes field, type `is_searchable_choice=true`.
   If there are other entries in the attributes field, use a comma to separate the entries.
5. Update the Dictionary Entry form and reload the page containing the choice list.

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Condition field types

A condition field specifies when to run business logic such as a business rule or workflow.

There are two types of condition field.

Condition field types

Condition field type	Description
Condition string	A text field that accepts a plain JavaScript condition statement. The system validates the condition syntax for correctness before an update.
Conditions	A field that adds a condition builder to a form. Condition builders require specifying a dependent field whose values the system uses to display choice list options. Typically, the dependent field is the **Table** field.

The system evaluates both types of condition field to determine if the conditions are true or false. When true, the system runs the business logic. When false, the system ignores the business logic.

To find dictionary attributes that affect condition fields, see Altering tables and fields using dictionary attributes.

Add the condition count to a condition field

The condition count widget can be activated on condition fields to display a preview of the records that would meet the current set of conditions. For fields where the condition count is activated, the number of records that match the conditions will automatically display. The count refreshes if the field the condition field depends on, such as Table, is changed. If the Table field is left empty, the widget is hidden.

Before you begin

Role required: personalize_dictionary

Procedure

1. Select and hold (or right-click) the field label, then select **Configure Dictionary**.
2. To the **Attributes** field, add `show_condition_count=true`.
3. Select Submit.

Update a conditions field to use condition builder v2

In Core UI, you can update a conditions field to display the version 2 condition builder.

Before you begin

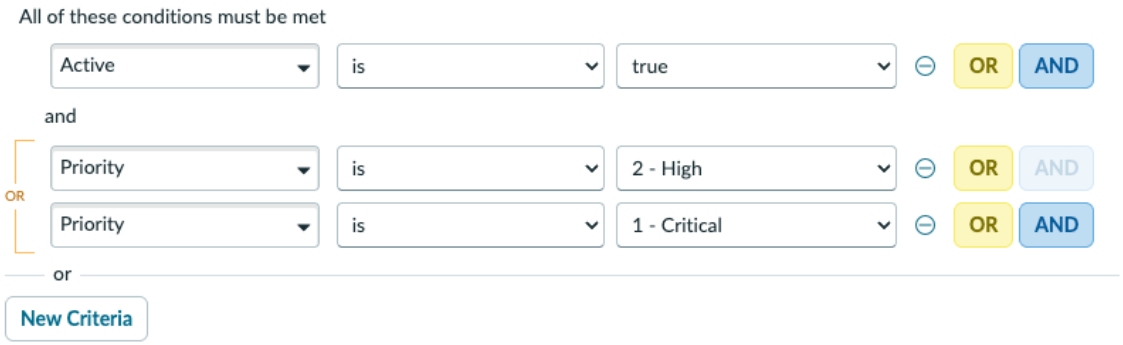
Role required: admin

About this task

You add a dictionary attribute to the Conditions field to enable condition builder version 2 (v2).

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Condition builder v2 enabled on a form



Procedure

1. Open the form with the condition builder to configure.
2. Right-click the **Conditions** label and click **Configure Dictionary**.
3. In the **Attributes** field, enter `condition_builder=v2`.
   If attributes exist, add this string at the end separated by a comma.
4. Select **Update**.
   The form reloads with the v2 version of the condition builder.

Database field type

Several field types are available in the system.

This table shows field types and corresponding MySQL database types. Typically, it isn't necessary to perform any actions at the database level. To learn about changing a field type, see System dictionary.

Database field types

Field types	Options	Dictionary XML type	MySQL DB type
String	small	string	VARCHAR(40)
String	medium	string	VARCHAR(100)
String	large	string	MEDIUMTEXT
String	extralarge	string	MEDIUMTEXT
Decimal		decimal	Decimal (15,2) older instances may have (12,2)
Integer		integer	Integer
True-False		boolean	TINYINT(1)
Date		glide_date	DATE
Date-Time		glide_date_time	DATETIME
Time		glide_time	DATETIME
Duration		glide_duration	DATETIME
Choice		string	VARCHAR(40)
Suggestion		string	VARCHAR(40)

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Database field types (continued)

Field types	Options	Dictionary XML type	MySQL DB type
Journal		journal	MEDIUMTEXT
Reference	<reference table>	reference	VARCHAR(32)
List		glide_list	MEDIUMTEXT
Url		url	MEDIUMTEXT
Image		user_image	VARCHAR(40)
Due-Date		due_date	DATETIME

Note: An example of option types is as follows:

- A string field defined in the platform with a max length of 40 characters → VARCHAR(40).
- A string field defined in the platform with a max length of x, where x = 41-255 characters, inclusive → VARCHAR(x) [examples: String 42 is VARCHAR(42) and String 211 is VARCHAR(211)].
- A string field defined in the platform with a max length of 256 and upwards → MEDIUMTEXT.

Dictionary entry data types

You can only change a dictionary entry's data type when the change does not result in data loss. Use the following guidelines to change a dictionary entry's data type.

Valid data type changes

Condition	Restrictions
The field is empty in all table records.	None. You can convert an empty field from any data type to another without restriction.
The table contains existing data for the field.	You can only convert between logical data types that map to the same physical data type in the database. For example, you can convert a glide duration to a glide datetime since both logical data types map to the DATETIME physical data type in the database.
The field is a string field you are converting to another type of string field.	You can change between string-based data types as long as length changes do not cause any data loss from truncation. For example, you can change from a MEDIUM database type to a VARCHAR(100) database type if none of the existing data is greater than 100.
The field is a string field you are converting to a globally unique ID (GUID).	You can only convert a string field to a GUID if all of the exiting data in the field are already **Sys ID** values.
The field is a GUID field you are converting to a string field.	None. You can convert a GUID field to a string field without restriction.

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Document ID field

You can create document ID fields to reference any record on any table.

Before you begin

Role required: personalize_dictionary

About this task

In comparison, a reference field references a record on a specific table. To reference records from any table, two fields need to work together—one to store the table reference and another to store the record reference.

You can select the document ID type when creating a new field.

Procedure

1. Navigate to the form view for the table.
2. Right-click the header and select **Configure** > **Form Layout**.
3. Create a field to store the table name and click **Add**.
   - **Name**: Any label (for example, `Model table`)
   - **Type**: String
4. Create a field to store the record reference and click **Add**.
   - **Name**: Label for your document ID field (for example, `Model ID`)
   - **Type**: Document ID
5. Click **Save**.
6. Right-click the form header and select **Configure** > **Dictionary**.
7. Open the dictionary entry for the document ID field.
8. Under **Related Links**, click **Advanced view**.
9. In the **Dependent** field, enter the column name of the table reference field (for example, `u_model_table`).
10. **Optional:** In **Attributes**, add the *`show_all_tables`* dictionary attribute to display system tables.
11. Click **Update**. When users click the reference lookup for the document ID field, a dialog appears that allows them to select the table and then the record. The sys_id of the selected record is stored in the document ID field and the table name is stored in the table reference field.
12. **Optional:** Configure the form to remove the table reference field.

Related topics

Configuring the form layout

Altering tables and fields using dictionary attributes

Dynamic attribute store field type

The dynamic attribute store field type stores one or more dynamic attributes and their values.

You can describe a record by capturing one or more dynamic attribute-value pairs as string objects in a dynamic attribute store field. For details on defining a flexible schema and creating a dynamic attribute store field to capture attributes and their values, see Dynamic Schema.

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You can also simply capture attribute-value pairs on a record by adding a dynamic attribute store field to a table and populating the field with string data using the Glide API. After populating the field with string data, you can query the field just like any string field.

When configuring a dynamic schema, you can create a relationship between a dynamic attribute store field and a dynamic schema reference field. You can make the dynamic attribute store field dependent on the dynamic schema reference field.

Function field

Create function fields and scripts in the ServiceNow AI Platform to perform common database transformations and calculations.

Regular fields store a value in the database. Instead of storing data, a function field displays the results of a database query. Function fields do not have an associated database column. Instead, function fields generate a value based on simple computations of other fields and constants. They can be used like any other fields in the system: in forms, lists, query conditions, reports, data visualizations, and so on.

Warning: A function field that references another function field in the function will result in an error. Function fields don't hold data or evaluate in run-time.

Example: Use case

You want to identify all incidents with a probably useless short description of fewer than 10 characters.

Instead of querying all records to determine which record meets a given criteria, create a function field or function script that retrieves only the records that meet the criteria.

For a simple computation, it is better to use a function field or function script rather than store a computed value. The value is always calculated on retrieval. Another benefit of using function fields is that the database server performs the transformation rather than the application node.

Function fields versus calculated fields

The values of the calculated fields are stored in the database. The values of function fields or function scripts are not stored in the database, but are calculated at the time of retrieval. Function field values are always up to date.

Function fields versus business rules

Use function fields or scripts when business logic is based on a simple transformation of one or more existing fields. Function fields and scripts let you implement business logic without storing and maintaining the result of a transformation.

Function fields versus filters, query strings, and Rhino

Rather than calling Rhino to perform string transformations, you can use a function field or function script to perform the transformations for you. Function fields and function scripts are more efficient and result in up-to-date values that do not have to be stored or maintained.

Function field limitations

Because function field calculations are not stored in the database, some operations are not relevant.

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- Function fields cannot be directly audited or indexed.

  Note: To index a function field as if it were a regular field, make sure the individual fields used by the function are indexed. Or for best performance, make sure that there is a composite index including all fields that are used in the function.

- Function fields cannot be encrypted, since a function field value is never stored in the database.
- Function fields cannot be converted to regular fields or vice versa.
- Function fields that you create in the Reporting UI do not support dot-walking. For more information, see Configure function fields in Reporting.
- Security is evaluated on the components of the function and on the calculated value of the field. When used in visualizations, sections that contain information that the user is not permitted to see are hidden from the user.
- Field function names must be unique.

Defining platform functions

Platform functions can be defined in two ways:

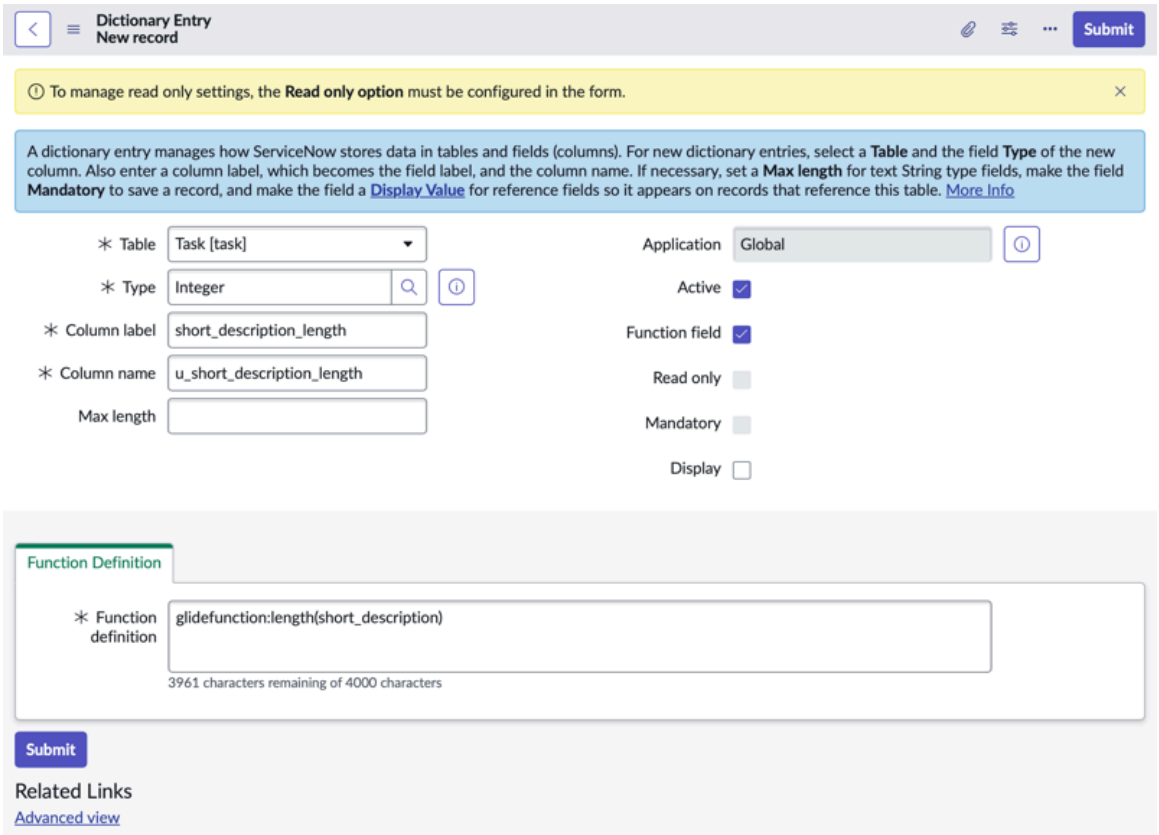
1. Use the following application programming interfaces (APIs) to build and use functions in a script.

   Function APIs

APIs	Description
Scoped GlideDBFunctionBuilder	Construct the function to perform a SQL operation.
GlideRecord - addFunction(Object function)	Apply the function to a GlideRecord.
GlideDBFunctionCaseBuilder - Global	Build case statements.

2. Create a field that holds the function definition, as shown in the following example.

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Select the **Function field** check box on the Dictionary Entry [sys_dictionary] form. This action specifies that the field runs a function rather than stores a value.

glidefunction operations

Function fields can perform the following operations using the `glidefunction:<operation>` syntax. When providing a field as an argument, you can dot-walk to related fields. For example, `cmdb_ci.name`.

Note: The function field type must be compatible with the return type of the glide function. For example, integer, longint, string, and so on. If the returned type cannot be converted to the dictionary type, you get exceptions.

Function field operations

Operation	Description	Example
add()	Takes two number fields as input, adds them, and returns the results as a field value. This function also takes numerical values for either input. Place numerical values in single or double quotation marks.	*glidefunction:add(child_incident parent_incident)* Returns 6 if the incident has five child incidents and one parent incident. Possible return types: Decimal, Floating Point Number, Large Whole Number, Whole Number

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Function field operations (continued)

Operation	Description	Example
`coalesce()`	Takes any number of comma-separated fields as input and returns the first non-empty value.	`glidefunction:coalesce(closed_at resolved_at, sys_updated_on)` If the value of closed_at is empty, the function returns the value of resolved_at. If the value of resolved_at is also empty, the function returns the value of sys_updated_on. Return type: Text
`concat()`	Takes any number of comma-separated fields and constants as input, concatenates the input, and returns a single string as a field value.	`glidefunction:concat(incident_nu '/', short_description)` Returns "INC0001 / My client needs a new laptop." if the value of the number field is 'INC0001' and the short_description is 'My client needs a new laptop'. Return type: Text
`datediff()`	Takes two date/time fields as input, calculates the difference between the dates in days, minutes, and seconds, and returns the results as a duration field value.	`glidefunction:datediff(closed_at sys_created_on)` Returns the duration of an incident from the creation date to the close date. Example result: 10 days, 8 hours 23 minutes 11 seconds Return type: Duration
`dayofweek()`	Takes two arguments: A date field and a constant of either `'1'` (week starts on Sunday) or `'2'` (week starts on Monday). Returns the results as an integer value that represents the day of the week. The `dayofweek()` function uses UTC dates, but adjusts comparison values based on the instance's time zone.	`glidefunction:dayofweek(resolved '1')`. If resolved_at occurs on a Wednesday, returns 4 if the integer is 1 and returns 3 if the integer is 2. Return type: Whole number

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Function field operations (continued)

Operation	Description	Example
`distance_sphere()`	Takes two locations and returns the distance between them in meters.	• `glidefunction:distance_sphere( '51.473584', '80.206458', '25.767242')` Returns the distance between the two sets of longitude and latitude pairs. • `glidefunction:distance_sphere(u '80.206458', '25.767242')` Returns the distance between the u_location geo point field and the longitude and latitude coordinates. • `glidefunction:distance_sphere(l location2)` Returns the distance between the location1 and location2 geo point fields. • `glidefunction:divide(distance_s '-0.189937', '51.473584'), '1000')` Returns the distance between the location1 geo point field and London in kilometers. Return type: Decimal
`divide()`	Takes two number fields as input, divides the first by the second, and returns the result as a field value. This function also takes numerical values for either input. Place numerical values in single or double quotation marks.	`glidefunction:divide(u_num2,u_nu` Returns 5 if num2 = 10 and num1 = 2. Possible return types: Decimal, Floating Point Number, Large Whole Number, Whole Number
`get_latitude()`	Takes any geo point column or numeric field or numeric constant and converts it to a valid latitude value within the [-90,90] range.	• `glidefunction:get_latitude(u_ge` Returns the latitude value in the u_geo_point_field. • `glidefunction:get_latitude(u_nu` the latitude value in the

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Function field operations (continued)

Operation	Description	Example
		u_numerical_column within [-90,90] range. • `glidefunction:get_latitude('305` Returns -54.232758 latitude value. Return type: Floating point number
`get_longitude()`	Takes any geo point column or numeric field or numeric constant and converts it to a valid longitude value within the [-179,180] range.	• `glidefunction:get_longitude(u_g` Returns the longitude value in the u_geo_point_field. • `glidefunction:get_longitude(u_numerical_column)` Re the longitude value in the u_numerical_column within [-179,180] range. • `glidefunction:get_longitude('38` Returns 20.206458 longitude value. Return type: Floating point number
`greatest()`	Takes two or more values as input and returns the greatest value of the list of arguments.	`glidefunction:greatest(10,100,10` Returns 1000 Possible numeric return types: Decimal, Floating Point Number, Large Whole Number, Whole Number This function also works with date and string fields.
`least()`	Takes two or more values as input and returns the lowest value of the list of arguments.	`glidefunction:least(10,100,1000)` Returns 10 Possible numeric return types: Decimal, Floating Point Number, Large Whole Number, Whole Number This function also works with date and string fields.
`length()`	Takes a string field as input, calculates the field length in characters, and returns the results as a field value.	`glidefunction:length(short_descr`

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Function field operations (continued)

Operation	Description	Example
		Returns 37 if short_description = "This application is performing a test". Return type: Whole number
`multiply()`	Takes two number fields as input, performs the multiplication, and returns the results as a field value. This function also takes numerical values for either input. Place numerical values in single or double quotation marks.	`glidefunction:multiply(u_num1, u_num2)` Returns 48 if num1 = 8 and num_2 = 6. Possible return types: Decimal, Floating Point Number, Large Whole Number, Whole Number
`position()`	Takes two text fields or two text fields and a whole number as input. One or both of the text fields can also be strings. **1.** Returns the position of the first occurrence of the string of the first text field in the second. **2.** If a whole number is specified, this function returns the position of the second text field after the position of the whole number. Returns 0 if the first text field is not present in the second (after the position of the whole number if specified).	• `glidefunction:position('e',shor` If the value of the short_description field is "This computer is performing an upgrade", returns 12. • `glidefunction:position('e',shor` If the value of the short_description field is "This computer is performing an upgrade", returns 19. Return type: Whole number
`substring()`	Takes a text field and two whole numbers as input. Returns the first instance of a string that starts at the position of the first whole number and is the length of the second.	`glidefunction:substring(short_de '7', '2')` If the value of the short_description field is 'We're going to the store', returns 'go'. Return type: Text
`subtract()`	Takes two number fields as input, subtracts the second from the first, and returns the result as a field value.	`glidefunction:subtract(u_num1, u_num2)` Returns 2 if num1 = 8 and num_2 = 6.

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Function field operations (continued)

Operation	Description	Example
	This function also takes numerical values for either input. Place numerical values in single or double quotation marks.	Possible return types: Decimal, Floating Point Number, Large Whole Number, Whole Number
`to_geopoint()`	Takes latitude and longitude columns or numerical values and converts them to a geo point column.	• `glidefunction:to_geopoint(u_lon u_lat_column)` Converts the latitude and longitude columns into a single geo_point column. • `glidefunction:to_geopoint('80.2` Returns a geo_point field with the coordinates "(80.206458, 25.767242)". Return type: Geo point

Create a function field to perform database functions

Create a field that displays the results of a database function, such as a mathematical operation, field length computation, or day of the week calculation. Test in a subproduction instance before deploying to a production instance.

Before you begin

Role required: personalize_dictionary or admin.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Click **New**.
3. Select **Function field**.
4. Fill in these fields on the form.

Fields for function fields

Field	Description
Table	Table to which the function field is added.
Type	Species the type of field: string, number, date, and so on.
Column label	Defines the label for the column.
Column name	Defines the name of the column. Created automatically based on **Column label**.
Max length	Defines the maximum length of the return value.

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Field	Description
Function field	If selected, creates a field that displays the results of a database function, such as a mathematical operation, field length computation, or day of the week calculation. Once the new function record is saved, you cannot clear the check box to make the field a regular field.
Function definition	Defines the function that the field performs. Starts with `glidefunction:`, followed by the operation to be performed (for example, `concat`), followed by function parameters. Constants must be enclosed in single quotes. For example, the following function definition creates a field that shows the short description, followed by a space, followed by the caller name: `glidefunction:concat(short_description, ' ', caller_id.name)` **Note:** Function parameters support dot-walking. See Dot-walking to data in related tables.

5. Click **Submit**.
   You return to the Dictionary Entry [sys_dictionary] table.
6. Navigate to the table to which you added the function field.
7. Add the function field to the list.
   See Configure items on forms or in lists using a list collector.

Result

Use the function field like any other field. For example, add it to a form, use it in a filter, or use it in the condition builder.
If the function definition is invalid, instead of the expected value you receive the message **Invalid function** if the function field is a string type field, or an empty value for other field types.

Geo point field type

The geo point data type stores longitude and latitude coordinates.

You can store longitude and latitude coordinates by adding a geo point data type field to any table. For example, you can define a geo point field to store a longitude and latitude pair to help technicians find the location of a part in a warehouse.

Function fields provide several glidefunction operations for working with geo point fields.

- Calculate the distance between geo points using distance_sphere() in a function field and use it to order records in a list based on how far away the warehouse is. For example:

```
glidefunction:distance_sphere(geopointField1, geopointField2)
```

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- Convert longitude and latitude columns to a geo point field using get_longitude() and get_latitude() in a function field. For example:

```
glidefunction:get_latitude(u_geo_point_field)
```

```
glidefunction:get_longitude(u_geo_point_field)
```

- Convert a geo point field or any valid numeric values or columns into longitude and latitude columns or values using to_geopoint() in a function field. For example:

```
glidefunction:to_geopoint(u_long_column, u_lat_column)
```

See Function field.

Values for geo points are in longitude, latitude format where:

- Both longitude and latitude are restricted to 6 decimal places of precision. For example, “80.206458”, “25.767242”.
- The longitude range is [-180, 180].
- The latitude range is [-90, 90].
- Values entered outside the ranges for longitude or latitude are normalized to values inside their respective ranges.

HTML field editors

An HTML field enables you to insert HTML content directly, which is useful for rich text or custom HTML content within forms. An HTML editor provides simple functionality and HTML source mode editing.

The HTML field editors available depend on your version of the UI.

UI support for available HTML field editors

HTML field editor	UI support
TinyMCE version 8.3.0	Core UI, configurable workspace
htmlArea (legacy)	Basic support in Core UI

Knowledge articles, service catalog item descriptions, release documentation, email clients, and HTML content blocks are common examples of entities using HTML field editors.

Note: The TinyMCE v8.3.0 editor doesn't support converting Microsoft Word shapes or nested lists with custom icons into HTML.

While HTML fields can be added to split pane forms, they can behave unexpectedly because of the limited width available in split pane forms.

If accessibility is enabled, a help icon appears with the HTML field. The help icon indicates how to use keys to access and escape the HTML field toolbar.

Configure a field editor for the HTML field

Configure HTML fields to use TinyMCE or the legacy htmlArea editor. The TinyMCE editor provides better stability and more editing functions than the legacy htmlArea editor.

Before you begin
Role required: admin

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About this task

There are two options for HTML editors:

- TinyMCE: A field that displays text as readers would see it on the screen. TinyMCE is the default editor.
- htmlArea: The legacy editor, which offers a more basic interface as well as a mode that shows only HTML markup.

Note: htmlArea only works in Core UI, not configurable workspace.

Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Locate the **HTML field editor to use** property (*glide.ui.html.editor*).
3. Select **TinyMCE** or **htmlArea**.
4. Select **Save**.

Configuring system properties for TinyMCE HTML editor

There are multiple system properties that are used to configure the behaviour of the HTML editor field type. Learn about the system properties available in the TinyMCE rich text editor.

HTML system properties in TinyMCE

System properties for TinyMCE HTML editor	Type	Description
glide.ui.html.editor.valid_plugins	String	Client-side HTML editor plugins that CAN BE added/or used (spaced delimited). **Important:** Removing plugins could cause undesirable side-effects.
glide.ui.html.editor.enabled_plugins	String	Client-side HTML editor plugins that should be added (spaced delimited) in order for them to get enabled on the widget. Only plugins added in glide.ui.html.editor.valid_plugins can be added. Removing plugins could cause undesirable side-effects.
glide.ui.html.editor.toolbar.valid_buttons	String	A valid (supported) button list for html fields. Use this to limit what buttons CAN BE added to the toolbar.

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HTML system properties in TinyMCE (continued)

System properties for TinyMCE HTML editor	Type	Description
glide.ui.html.editor.toolbar	String	Configures the editing toolbar for HTML fields. This is a space-separated list without commas. Only valid buttons added in glide.ui.html.editor.toolbar.valid_buttons can be added.
glide.ui.html.editor.paste.html_import	Choice list	Paste formatting behavior for HTML. This setting controls how content from sources other than Microsoft Word is filtered when being pasted on html-editor. Note that this includes content copied from TinyMCE itself. The supported values are: • Clean: Preserves the structure of the content such as headings, tables, and lists but remove inline styles and classes. This results in simple content that uses the site's CSS stylesheet while retaining the semantic structure from the original document. • Merge: Preserves the inline formatting and structure of the original document. Invalid and proprietary styles, tags and attributes are still removed ensuring that the HTML is valid while more closely matching the original document formatting. • Prompt: Prompts the user to choose between the clean and merge options after attempting to paste HTML content.
glide.ui.html.editor.paste.word_import	Choice list	Paste formatting behavior for word. This setting controls how content from Microsoft Word is filtered when being pasted on html-editor. Note

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HTML system properties in TinyMCE (continued)

System properties for TinyMCE HTML editor	Type	Description
		that this includes content copied from TinyMCE itself. The supported values are: • Clean: Preserves the structure of the content such as headings, tables, and lists. Removes inline styles and classes. This results in simple content that uses the site's CSS stylesheet while retaining the semantic structure of the original document. • Merge: Preserves the inline formatting and structure of the original document.Removes invalid and proprietary styles, tags and attributes.This ensures the HTML is valid while more closely matching the original document formatting. • Prompt: Prompts the user to choose between the clean and merge options after attempting to paste HTML content.
glide.ui.html.editor.font.collection	String	User can select different font collection for Tiny MCE HTML editor: Example with one font: `<pre> Arial=arial,helvetica,sans-serif; </pre>` **Note:** More than one font value should be separated by a semi-colon with no space or line-break. Example with more than one font:

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HTML system properties in TinyMCE (continued)

System properties for TinyMCE HTML editor	Type	Description
		<pre> Andale Mono=andale mono,times; Arial=arial,helvetica,sans-serif; Arial Black=arial black,avant garde; Book Antiqua=book antiqua,palatino; Comic Sans MS=comic sans ms,sans-serif; Courier New=courier new,courier; Georgia=georgia,palatino;Helvetica=helvetica; Impact=impact,chicago;Symbol=symbol; Tahoma=tahoma,arial,helvetica,sans-serif; Terminal=terminal,monaco; Times New Roman=times new roman,times; Trebuchet MS=trebuchet ms,geneva; Verdana=verdana,geneva; Webdings=webdings; Wingdings=wingdings,zapf dingbats; </pre>
glide.ui.html.editor.paste.filtered_inline_elements	String	This setting allows the content to be filtered when pasted from MS Word to the TinyMCE V6 editor. This property takes input as a comma separated string of inline elements to be filtered by selecting the **Remove formatting** button on the paste prompt dialog. Default value is 'strong, b'.
glide.ui.html.editor.convert_urls	True | False	This system property is used to set the convert_urls config of TinyMCE. Default: false.

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HTML system properties in TinyMCE (continued)

System properties for TinyMCE HTML editor	Type	Description
		Note: This is related to the value of relative_urls which itself is set by glide.ui.html.editor.relative_urls.
glide.ui.html.editor.extended_valid_elements	String	This system property is used to set the extended_valid_elements config of TinyMCE. Default: <Empty string>.
glide.ui.html.editor.relative_urls	True | False	glide.ui.html.editor.relative_urls is used to set the relative_urls config of TinyMCE. Default: true. **Note:** This is related to the document_base_url which is not configurable in ServiceNow and is set to the window.location.origin (the base url of the instance).
glide.ui.html.editor.contextmenu	String	Controls the context menu options available in the HTML editor. The default value is `false`, which displays the browser context menu when you press Ctrl and right- click. To display the HTML editor context menu, set the value to `link image table`.
glide.ui.html.editor.toolbar.on.focus	String	True: User should be able to see hide toolbar behaviour if they move focus out. False: User should always see the toolbar regardless of the tab focus. **Note:** This property isn't added OOTB (out of the box) but can be added by an admin.

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HTML system properties in TinyMCE (continued)

System properties for TinyMCE HTML editor	Type	Description
glide.ui.html.editor.default_link_target	Choice list	This system property is used to set link_default_target.
glide.ui.html.editor.textpatterns	String	Takes an array of objects used to configure text patterns for HTML editor on forms. Use this property to enable or disable text patterns for formatting, text replacement, or command execution in HTML editor. For more information, see TinyMCE text patterns documentation.

Configuring plugins for the TinyMCE HTML editor

The TinyMCE HTML editor is a powerful, flexible, and customizable rich text editor. You can configure and extend the editor by using plugins.

Plugins supported in the TinyMCE HTML editor

Plugin name	Description
a11ychecker	Allows you to check the HTML in the editor for various WCAG & Section 508 accessibility problems. It has an auto-repair feature that lets the user fix identified problems.
accordion	Enables the creation of sections in a document that can be expanded or collapsed to show or hide additional content.
advlist	Extends the core bullist and numlist toolbar controls by adding additional CSS list-style-type styled number formats and bullet types to the controls.
align_listitems	Confirms that bullets and numbers are aligned along with the content.
anchor	Adds an anchor/bookmark button to the toolbar that inserts an anchor at the editor's cursor insertion point. It also adds the menu item anchor under the Insert menu.
autolink	Creates hyperlinks automatically when you enter a valid, complete URL. For example, `www.example.com` is converted to `http://www.example.com`.
autoresize	Resizes the editor to the content inside it automatically. It's typically used to help prevent the editor from expanding infinitely as you enter text into the editable area.

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Plugins supported in the TinyMCE HTML editor (continued)

Plugin name	Description
charmap	Adds a dialog to the editor with a map of special unicode characters, which can't be added directly from the keyboard.
codemirror	Provides a more advanced code editor than the default text area.
codesample	Insert and embed syntax color highlighted code snippets into the editable area. It also adds a button to the toolbar that opens a dialog box to accept raw code input.
directionality	Adds directionality controls to the toolbar, enabling TinyMCE to better handle languages written from right to left. It also adds a toolbar button for each of its values, ltr for left-to-right text and rtl for right-to-left text.
editimage	Adds editing capabilities for images within the TinyMCE editable area.
emoticons	Adds a dialog to the editor that lets you insert emoji into the TinyMCE editable area.
formatpainter	Enables copying and applying formatting-including font style, size, and table styles-between locations within the TinyMCE editable area, supporting various formats like inline and block styles.
fullscreen	Adds full screen editing capabilities to TinyMCE. When you press the toolbar button, the editable area fills the viewport of the browser.
help	Allows users to check the handy shortcuts, keyboard navigation for accessibility and TinyMCE.
image	Enables you to insert an image into the TinyMCE editable area.
insertdatetime	Provides a toolbar control and menu item that lets you insert the current date and time into the editable area at the cursor insertion point.
link	Enables you to link external resources, such as website URLs, to selected text in their document.
lists	Enables you to add numbered and bulleted lists to TinyMCE. To enable advanced lists, such as alpha numbered lists and square bullets, you should also enable the Advanced List (advlist) plugin.
media	Lets you add HTML5 video and audio elements to the editable area.

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Plugins supported in the TinyMCE HTML editor (continued)

Plugin name	Description
nonbreaking	Adds a button for inserting nonbreaking space entities such as at the cursor insert point. It also adds a menu item Nonbreaking space under the Insert menu drop-down list and a toolbar button.
pagebreak	Adds page break support and enables you to insert page breaks in the editable area. This ability is useful where a CMS uses a special separator to break content into pages.
preview	Adds a preview button to the toolbar that opens a dialog box showing the current content in a preview mode.
readonlynoborder	Enables a read-only mode for HTML field types.
searchreplace	Adds search and replace dialogs to TinyMCE.
table	Adds table management functionality to TinyMCE , including dialogs, context menus, context toolbars, menu items, and toolbar buttons.
tableofcontents	Generates a basic table of contents (ToC) and inserts it into the editor at the cursor insert point. ToC entries are generated from header elements in the content.
visualblocks	Enables you to see block-level elements in the editable area.
visualchars	Adds the ability to see invisible characters like in the editable area.
wordcount	Adds the functionality for counting words to the TinyMCE editor. **Note:** This plugin is no longer supported in workspaces.
powerpaste	Cleans up content from Microsoft Word, Microsoft Excel, Google Docs, and HTML sources automatically to create clean content that matches the look and feel of the site.

Note: Adding a custom plugin to the valid plugins can cause unexpected results.

Change the TinyMCE HTML editor plugins

Configure the TinyMCE plugins in our workspaces.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Search for and select the plugin (glide.ui.html.editor.enabled_plugins).

Plugins for TinyMCE HTML editor

Type	Plugins
Default value	**Note:** The **value** field displays the default plugins that are enabled in the TinyMCE editor. ○ accordion ○ advlist ○ align_listitems ○ anchor ○ autolink ○ autoresize ○ charmap ○ codemirror ○ codesample ○ directionality ○ editimage ○ emoticons ○ formatpainter ○ fullscreen ○ help ○ image ○ insertdatetime ○ link ○ lists ○ media ○ nonbreaking ○ pagebreak ○ preview ○ readonlynoborder ○ searchreplace ○ table ○ tableofcontents ○ visualblocks

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Type	Plugins
	○ visualchars ○ wordcount
Available plugins	**Note:** The **choices** field lists all available plugins. Add a plugin from the **choices** list to the **value** field in order to enable them. ○ a11ychecker ○ accordion ○ advlist ○ align_listitems ○ anchor ○ autolink ○ charmap ○ codemirror ○ codesample ○ directionality ○ editimage ○ emoticons ○ fullscreen ○ help ○ image ○ insertdatetime ○ link ○ lists ○ media ○ nonbreaking ○ pagebreak ○ preview ○ readonlynoborder ○ searchreplace ○ table ○ tableofcontents ○ visualblocks ○ visualchars ○ wordcount

Note: PowerPaste is a standard plugin that is enabled by default. Unlike other HTML plugins listed here, PowerPaste can't be added or removed.

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3. Make changes (add/remove) in the available plugins property.
4. Select save.
   If there's a custom plugin added to available plugins its not recommended unless critical.

Configure the HTML toolbar

Configure which buttons are available on the HTML toolbar.

Before you begin

Role required: admin

Procedure

1. Update the toolbar options for your preferred HTML field editor.

Option	Description
htmlArea toolbar	**a.** Navigate to the System properties [sys_properties] table by entering `sys_properties.list` in the application navigator. **b.** In the **Name** column, search for `glide.ui.html.toolbar`. **c.** Select the **glide.ui.html.toolbar** property.
TinyMCE	**a.** Navigate to the System properties [sys_properties] table by entering `sys_properties.list` in the application navigator. **b.** In the **Name** column, search for `glide.ui.html.editor.toolbar`. **c.** Select the **glide.ui.html.editor.toolbar** property.

2. In the **Value** field, enter or remove buttons for each toolbar as a space-separated list without commas.

   For the TinyMCE toolbar, all the toolbar buttons mentioned in the TinyMCE button options table are available in the **glide.ui.html.editor.toolbar.valid_buttons**. You can choose from the list found there and add it to the System properties [sys_properties] **glide.ui.html.editor.toolbar**. Use a vertical bar ("|") to add a section separator.

TinyMCE button options

Button purpose	Accepted button names
Formatting	○ aligncenter ○ alignjustify ○ alignleft ○ alignright ○ backcolor ○ blocks ○ blockquote

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Button purpose	Accepted button names
	○ bold ○ bullist ○ editimage ○ fontfamily ○ fontsize ○ formatpainter ○ forecolor ○ help ○ indent ○ italic ○ ltr ○ newdocument ○ nonbreaking ○ numlist ○ outdent ○ pagebreak ○ removeformat ○ rtl ○ strikthrough ○ subscript ○ superscript ○ underline
Table functions	○ table ○ tableofcontents
Editing	○ copy ○ cut ○ paste ○ pastetext ○ redo ○ searchreplace ○ undo
Extended functions	○ a11ycheck ○ anchor ○ charmap ○ code ○ codesample

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Button purpose	Accepted button names
	○ emoticons ○ fullscreen (not supported by Internet Explorer) ○ help ○ hr ○ editimage ○ insertdatetime ○ link ○ media ○ preview ○ print ○ unlink ○ visualblocks ○ visualchars

For the htmlArea toolbar, use the buttons listed in the htmlArea button options table. Use **separator** to add a section separator.

htmlArea button options

Button purpose	Accepted button names
Formatting	○ bold ○ editimage ○ fontname ○ fontsize ○ forecolor ○ formatblock ○ formatpainter ○ help ○ hilitecolor ○ indent ○ insertorderedlist ○ insertunorderedlist ○ italic ○ justifycenter ○ justifyfull ○ justifyleft ○ justifyright ○ outdent ○ underline

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Button purpose	Accepted button names
Editing	○ copy ○ paste ○ undo
Extended functions	○ a11ycheck ○ createlink ○ editimage ○ help ○ htmlmode ○ inserthorizontalrule ○ insertimage ○ inserttable ○ insertvideo

3. Select **Update**.

What to do next

See Change the TinyMCE default toolbar for more detailed information.

Formatting functions in HTML field editors

The formatting table displays how to control the way text appears.

The following table displays icons that are available in the TinyMCE and the htmlArea editors. Names marked with an asterisk (*) aren't available with the htmlArea editor.

Formatting table

Name	htmlArea icon	TinyMCE icon	Description
A11y Checker			Allows you to check the HTML in the editor for various WCAG & Section 508 accessibility problems. `a11ychecker`
Align Center			Applies center alignment to the current paragraph. Code reference: `text-align:center`
Align Left			Applies left alignment to the current paragraph. Code reference: `text-align:left`
Align Right			Applies right alignment to the current paragraph. Code reference: `text-align:right`

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Formatting table (continued)

Name	htmlArea icon	TinyMCE icon	Description
Background Color			Applies background color to the current word or selected text. Select the button to use the current color. Select **More Colors...** to view various color options and the hexadecimal codes.
Blocks			Applies the selected header or paragraph style to the current word or selected text.
*Block quote			Applies block quote format to the current block level element.
Bold			Applies bold formatting to the selected text or current word. Keyboard shortcut: CTRL + B
Bullet List			Applies or removes unordered list tags for the selected paragraphs. Select the arrow to choose a different bullet type.
Font Family			Applies a font family to the selected text or current word.
Font Size			Applies a font size to the selected text or current word.
Format painter			Applies formatting choices, including font style, size, and table styles, between locations within the TinyMCE editable area. Supports various formats like inline and block styles.
Increase Indent			Applies indentation to the current or selected paragraphs, adding 30 px of left padding. Code reference: `padding-left`
Italic			Applies italic formatting to the selected text or current word. Keyboard shortcut: CTRL + I
Justify			Applies justified alignment, which stretches the lines to be equal widths, to the selected paragraph. Code reference: `text-align:justify`
*LTR (Left to Right)			Sets the directionality of contents to from left to right.

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Formatting table (continued)

Name	htmlArea icon	TinyMCE icon	Description
*New document			Creates a document without any formatting.
Non-breaking			Inserts a non-breaking space into the editor.
Numbered List			Applies or removes ordered list tags for the selected paragraphs. Select the arrow to choose a different number type.
Outdent			Removes indentation from the current or selected paragraphs, removing 30 px of left padding. **Note:** Padding can't be less than 0. Code reference: `padding-left`
*Page-break			Inserts a page-break into the editor.
*Remove format			Removes the formatting from the selected text.
*RTL (Right to Left)			Sets the directionality of contents to right to left.
Strike through			Applies strikethough formatting to the selected text.
*Subscript			Applies subscript formatting to the selected text.
*Superscript			Applies superscript formatting to the selected text.
Text Color			Applies text color to the selected text. Select the button to use the current color. Select **More Colors...** to view various color options and the hexadecimal codes.
Underline			Applies underline formatting to the selected text or current word. Keyboard shortcut: CTRL + U

Highlight text in TinyMCE

On the bottom bar of TinyMCE, the path of HTML tags for the text at the cursor position is displayed.

Click a tag in the path to highlight the text affected by the tag.

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Insert a line break in the HTML editor

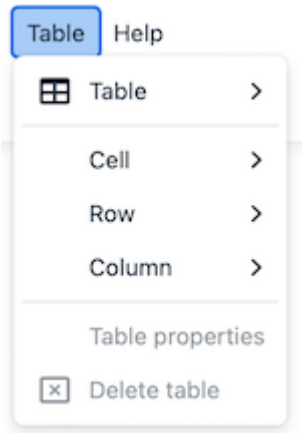
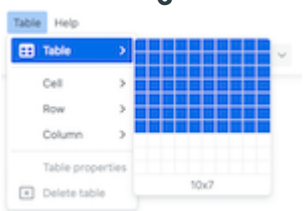
When you use the `Enter` key, the editor creates a paragraph element (`<p>`) tag, which appears as a double space.

To enter a single-line space, use the `Shift` + `Enter` key combination, which inserts a line break (`<br>`) tag.

Table functions in HTML field editor

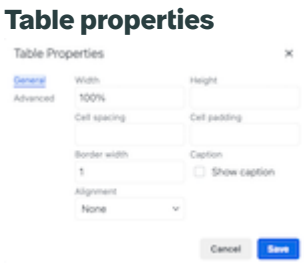
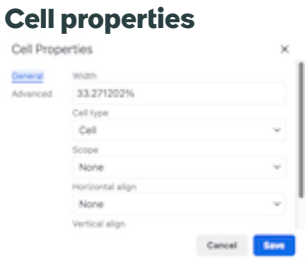
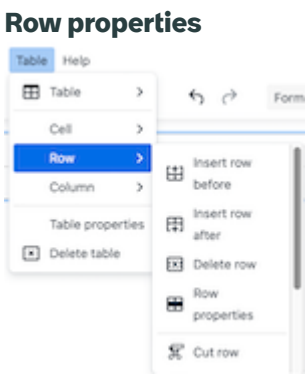
TinyMCE version 8.3.0 uses menus and menu selections to create and edit tables.

TinyMCE version 8.3.0

UI element	Action
Table menu 	Select the table icon (⊞) to access the TinyMCE version 8.3.0 table menu. Use the table menu to: • Insert or delete a table • Modify table properties • Add, move, or delete rows and columns • Modify row and column properties • Split and merge cells
Table insert grid 	To insert a table in the HTML field, select **Insert table** and highlight squares in the grid to represent the desired number of rows and columns. Select the last highlighted square to insert the table. After you insert the table, you can modify the size by selecting and dragging the handles at the table edges.
Table of Contents 	The Table of Contents plugin generates a basic table of contents (ToC) and inserts it into the editor at the current cursor position. ToC entries are generated from header elements in the content.

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TinyMCE version 8.3.0 (continued)

UI element	Action
	From the table menu, select the **Table properties** button to open the Table properties dialog box. From this menu, you can take any of the following actions: • General tab: ○ Set table width and height ○ Set cell spacing and padding ○ Enable borders and captions ○ Set the table alignment • Advanced tab: ○ Configure the table style ○ Select the border color ○ Select the background color
	With the cursor in the desired table cell, open the table menu and select **Cell properties**. From this menu, you can set the following properties for table cells: • General tab: ○ Width and height ○ Type and scope ○ Horizontal and vertical alignment • Advanced tab: ○ Cell style ○ Border color ○ Background color
	With the cursor in a table cell in the desired row, open the table menu and select **Row properties**. From this menu, you can set the following properties for rows: • General tab: ○ Row type ○ Alignment ○ Height • Advanced tab: ○ Row style ○ Border color ○ Background color

You can also paste tables into HTML fields from table-based editors.

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Add a table to an HTML editor

Add and format an example table to a knowledge article using HTML field controls.

Before you begin

Role required: admin

About this task

In this task, you create and format a table in either htmlArea or TinyMCE v8.3.0. The resulting tables should look similar to one of the following images.

Table example in htmlArea

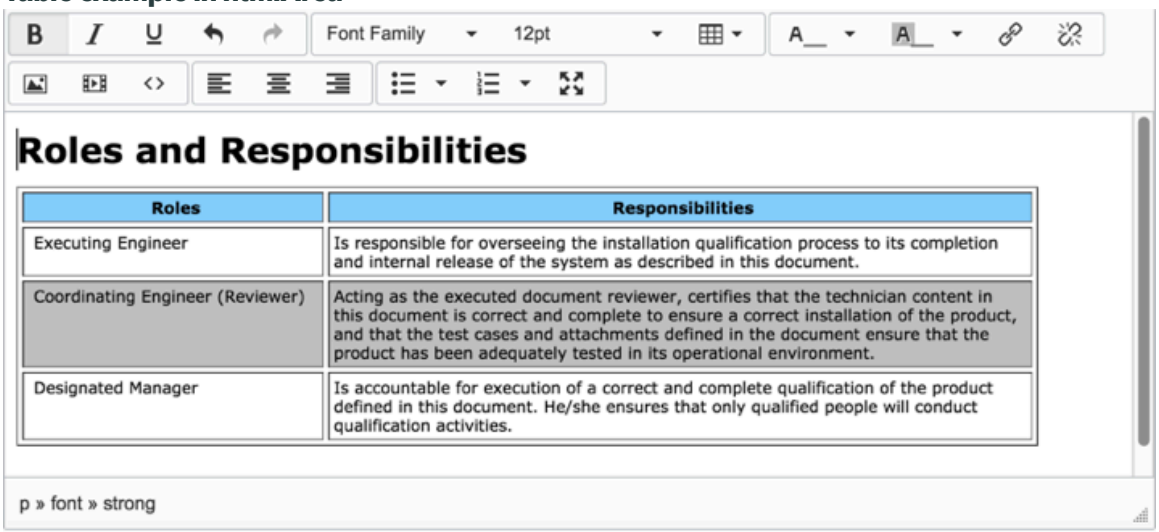
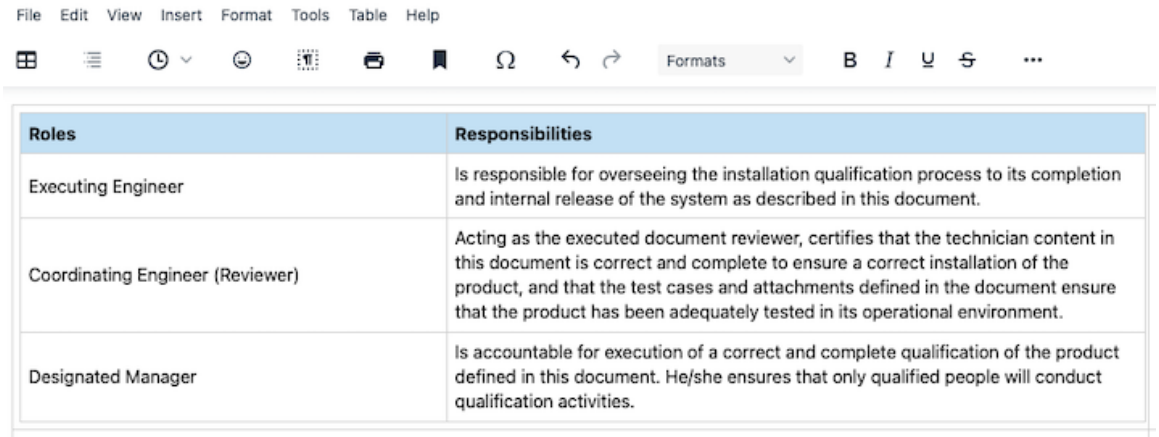


Table example in TinyMCE v8.3.0



If you enter alternative values for aspects such as width, cell spacing, cell padding, border, and alignment, the resulting table varies from the examples given.

Procedure

1. Navigate to **All** > **Knowledge** > **Edit** and select the knowledge article that you want to edit.
2. In the HTML field, position the cursor at the location where you want to add the table.
3. Select the table icon, select **Insert table**, and then select the number of rows and columns.
4. Edit the table properties.

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a. Position your cursor in the table, select the table icon, and select **Table properties**.

b. Enter the following values on the **General** tab.

- Width: 75%
- Cell spacing: 3
- Cell padding: 3
- Border: 1
- Alignment: Left

c. On the **Advanced** tab, select the text field next to **Border color** and enter `Gray`.
The color picker box turns gray to indicate the color that you entered. You can also select the box and select the colors in the palette.

d. Select **Ok**.

5. Update the header table row.

a. Select the cells in the first table row, select the table icon, and select **Row** > **Row properties**.

b. Enter the following values on the **General** tab.

- Row type: Header
- Alignment: Center

c. On the **Advanced tab**, enter `#87cefa` in the text box beside **Background color** to set it to a light blue.

d. Select **Ok**.

6. Set the table cell properties.

a. Select all table cells in the first column except the cells in the header row.

b. Select the table icon and select **Cell** > **Cell properties**.

c. Enter the following values on the **General** tab:

- H Align: Left
- V Align: Top

d. Select **Ok**.

e. Repeat these steps for the table cells in the second column.

7. Set the background color of the middle row.

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a. Position your cursor in the middle table row, select the table icon, and select **Row** > **Row properties**.

b. On the **Advanced tab**, enter `Silver` in the text box beside **Background color** to set it to color #c0c0c0.

c. Select **Ok**.

d. Repeat this procedure for every other table row.

8. Set the width of the columns.

a. Select the first column of the table, select the table icon, and select **Cell** > **Cell properties**.

b. On the **General** tab, enter `30%` in the **Width** text field.

c. Select **Ok**.

9. Select and hold (or right-click) the form header and select **Save**.

10. Enter data in the table cells and then save the article.

Editing functions in HTML field editor

Several editing functions are built into TinyMCE.

You can add more edit functions to TinyMCE v8.3.0 using the *`glide.ui.html.editor.toolbar`* property and properties on the **UI Properties** page. For more information on configuring the edit functions, see Configure the HTML toolbar.

Editing functions

Name	Icon	TinyMCE v8.3.0 Icon	Description
Cut*			Cuts the selected text. Not supported in all browsers; use keyboard shortcut. Keyboard shortcut: CTRL + X
Copy*			Copies the selected text. Not supported in all browsers; use keyboard shortcut. Keyboard shortcut: CTRL + C
Find/ Replace			Enables you to replace the next (Replace) or all (Replace All) occurrences of a text string in the HTML field. Keyboard shortcuts: CTRL + F, Cmd + F
Paste*			Pastes the selected text. Not supported in all browsers; use keyboard shortcut. Keyboard shortcut: CTRL + V
Paste as Plain Text*			Enables you to paste as plain text without source formatting.

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Editing functions (continued)

Name	Icon	TinyMCE v8.3.0 Icon	Description
Paste from Word			Opens a new window that enables you to copy and paste content from Microsoft Word into the HTML field.
Undo*			Reverts the previous edit.
Redo*			Reapplies the last reverted edit.

Note: *These options aren't available with htmlArea.

Paste content into an HTML editor

Paste content from a desktop application to the HTML editor. Content might not paste the same from every application.

Before you begin

Role required: admin

Procedure

1. Navigate to an HTML field.
   For example, the **Text** field of a Knowledge article.
2. Paste the content from another application.
   Google Chrome and Mozilla Firefox don't support paste using the Paste icon. Use the command/control+V keyboard shortcut instead.
3. From the paste formatting options dialogue, choose to **Keep** or **Remove** the text formatting for the pasted content.

Result

The HTML editor has the following pasting limitations:

- Pasting images: Pasting images and text from OneNote works in Microsoft browsers. Pasting from OneNote into Google Chrome or Firefox works, but styles and images aren't included. You can still select images individually and paste them into the HTML field. Pasting images and text from Microsoft Word into any browser works as expected.
- Pasting tables: Pasting tables into Safari doesn't always work correctly. Pasting tables into Internet Explorer only works from Microsoft Excel.

Extended functions in HTML field editor

The extended functions available for working with HTML content.

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Extended functions

Name	HTML Icon	TinyMCE v8.3.0 Icon	Description
Accordion*			Executes the `InsertAccordion` command, adding an Accordion element at the current location.
Add character map*			Inserts a special character at the current cursor location. Select the button to view a list of available characters. Point to a character to view the name and HTML code. Select a character to insert it.
Anchor*			Inserts an anchor into the editor.
Cleanup Messy Code			Fixes standard HTML errors for the selected text, such as invalid tags. Selecting this button might change the layout of existing content. If you don't like the results, you can select **Undo** to revert this action.
Edit HTML Source/ Code	HTML		Opens HTML source code in a separate window. See Editing in HTML Source Mode.
Emoticons*			Opens the Emojis dialog.
Insert date/time*			Inserts the current date and time into the editor.
Insert/Edit Embedded Media			Embeds a video from the video library or an attachment. You can also add videos to the video library with this feature. To learn more, see Embedding Video in HTML Fields.
Insert/Edit Image			Inserts an image from the image library or an attachment. You can also add images to the image library with this feature. To learn more, see Embedding Images in HTML Fields.
Insert/Edit Link			Configures a link for the selected text. You can define the link URL, title (additional information that appears in the tooltip), and the target (same window or new window or tab). Code reference: `<a>`
Insert Horizontal Line			Inserts a horizontal line at the current location.
Preview*			Opens a preview of the HTML field in a separate window without saving changes.
Print*			Prints the current document.

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Extended functions (continued)

Name	HTML Icon	TinyMCE v8.3.0 Icon	Description
Remove link*			Removes the current hyperlink.
Spell Checker			Checks the spelling of text in the HTML field. **Note:** Spell Checker is only available in the htmlArea editor.
Toggle Full Screen Mode*			Expands the HTML field to use the full form view. Select the button again to return to standard form view. **Note:** This feature is available only for the htmlArea editor and isn't available for Internet Explorer.
Visual blocks*			Toggles block visibility on or off.
Visual chars*			Shows or hides invisible elements in the article, such as collapsed table borders.

Note: *These options aren't available with htmlArea.

Embed images in the HTML editor

You can use the HTML field image picker to embed images into HTML fields, and to add images to the image library.

Before you begin

Role required: the role necessary to update the record that contains the HTML field. For example, any user with a role can create a knowledge article and embed an image in it.

About this task

Note: Administrators and users with the image_admin role manage the image library at **System UI** > **Images**. See Storing images in the database .

Procedure

1. Open the form that contains the HTML field.
2. Click the position where the image is to appear, or to modify an existing image, click the image.
3. Click the insert/edit image icon ( ) on the HTML editor toolbar.
4. In the Insert/Modify image form, enter information in each field.

Insert/Modify Image form

Field	Description
Type	Select the image type.

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Field	Description
	○ **Image Library**: Images stored in the db_image table. You can reuse images in the image library in multiple locations. ○ **Attachment**: Available in the current record only
Image	Begin typing a file name and select an image from the list, or click the reference lookup icon and select an image. To upload a new image, click **New**, click **Choose File**, locate the image, and click **Upload**. If you chose the **Attachment** type, click **Choose File**, locate the image, and click **Attach**.
Tooltip	Enter alternate text that appears when a user points to the image.
Alt	Enter alternate text that can be used to improve accessibility. For example, it could be used with a screen reader. If this field is left blank, it defaults to the text entered in the **Tooltip** field.

Note: To resize an embedded image, click the image. The sizing frame appears. Drag a sizing point until the image is the desired size. Corner points adjust the size proportionally. Depending on your browser, you may need to highlight the image before the sizing frame appears.

5. **Optional:** To provide additional control over the appearance of an image, click **Advanced options**.

Advanced options

Field	Description
Layout	Select the image **Alignment** (default is **Baseline**) and enter the **Border thickness**.
Spacing	Enter the number of **Horizontal** and **Vertical** pixels around the image.
Size	Enter the **Width** and **Height** of the image (in pixels).

6. Click **OK**.
7. **Optional:** Paste an image into the HTML editor.
   To edit the image, save the entry then select the image. Click the insert/edit image icon and complete the form using the same tables for adding an image.

   (Optional) Pasted images are saved in the system as attachments.

Link a website in HTML editor

You can insert a link to a website in an HTML field.

Before you begin

Role required: the role necessary to update the record that contains the HTML field. For example, any user with a role can create a knowledge article and link to a website in the article text.

Procedure

1. Move the cursor to the position where the link is to appear.
2. Select the insert/edit link icon (🔗) in the HTML toolbar.

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3. Enter information in each field.

Insert/Edit Link form

Field	Description
URL	Enter the URL for the link. Copying and pasting is usually the easiest method.
Text	Enter the text you want to display for the link.
Target	Select the target window for the URL. For files, the **None (use implicit)** selection is generally the best choice. However, if you're linking to a complete web page, choose **New window (_blank)** so the browser opens the link in a new tab or window.

4. Select **OK** to insert the link into the field.

Embed videos in the HTML editor

You can insert videos into HTML fields. You can also add videos to the video library using the HTML Insert/Modify Video form.

Before you begin

Note: The Videos [db_video] table is a public table that does not have any security restrictions. Unauthenticated users have full access to videos uploaded to the db_video table.

Role required: The role necessary to update the record that contains the HTML field. For example, any user with a role can create a knowledge article and embed a video in it.

About this task

The following file formats are supported in the base system.

- MPEG-4 video `.mp4`
- WebM Video `.webm`

The larger the file size, the longer it takes to download before the video starts. To reduce file size, you can reduce the bit rate, but doing so reduces the quality of the video. The following bit rates optimize download speed and video quality:

Video resolution	Recommended bitrate
Standard definition (480p)	1.5–2.5 megabits per second (mbps)
High definition (720p)	3–5 mbps
High definition (1080p)	6–8 mbps

Note: For the best viewing experience the following specifications are suggested:

Optimal viewing settings

Type	Definition
Size	20MB
Bit rate	320KBPS

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Optimal viewing settings (continued)

Type	Definition
Resolution	480*320

Internet Explorer and Safari have difficulty streaming videos uploaded to the database. Attach a file rather than embedding if you intend to use one of these browsers or an unsupported file type. For more information on attaching files, see Add and manage attachments.

Note: Administrators and users with the image_admin role can manage the video library at **System UI** > **Videos**.

Procedure

1. Open the form that contains the HTML field.
2. Click the position where the video is to appear, or to modify an existing video, click the video.
3. Click the insert/edit video icon ( ) on the HTML editor toolbar.
4. Enter information in each field.

Insert/Modify Video

Field	Description
Type	Select the video type. ○ **Video Library**: List of videos stored in the db_video table. You can reuse it. ○ **URL**: from an external source ○ **Attachment**: available in the current record only For an attachment or video library file, select a video from the list or click **New**. For an external URL, enter the URL.
Size	Enter the **Width** and **Height** of the video in pixels.

5. Click **OK**.

Define video file types for HTML fields

You can define the types of video files that can be added to HTML fields.

Before you begin

Role required: image_admin

About this task

Users can add videos to HTML fields. By default, users can add one of the following types of videos to HTML fields: `.mp4`, `.webm`, and `.swf` video file types. You can inactivate video types that you do not want to allow users to add, or add new video types. `.swf` files are only minimally supported. `.mp4` files might be limited by browser type.

Note: By default, the HTML Sanitizer removes videos from HTML fields. To allow video file types, see Embed videos in the HTML editor

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Procedure

1. Navigate to **All** > **System UI** > **Embed Object Types**.
2. To deactivate a video type, set the **Active** field to **false**.
3. To add an additional video type, click **New** and complete the form.

> **Note:** If you specify values for the **Codebase** or **Pluginspage** fields, which instruct the browser where to get the plugin, point to `https` pages to avoid warnings from Internet Explorer about unsecure content on the page.

Disable user access to the image library for HTML area

By default, users can use and upload images to the image library from an HTML field. You can disable access to the image library from HTML fields. This is only applicable to HTML area and not TinyMCE.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System UI** > **UI Pages**.
2. Select **html_insert_image_dialog**.
3. Locate the following lines of code in the **HTML** field and comment them out.

```
<g:evaluate var="jvar_use_dbimage">
 var imageGR = new GlideRecord('db_image');
  if(imageGR.isValid())
  imageGR.canRead();
</g:evaluate>
```

and

```
<j:if test= "${jvar_write_dbimage}">
    <j:set var = "jvar_default_insert_image_type" value =
 "dbimage" />
    <g:ui_select_option text = "${gs.getMessage('Image
 Library')}" value = "dbimage" selected =
 "${jvar_default_insert_image_type}" />
</j:if>
```

4. Select **Update**.

What to do next
To remove the **Upload from URL** option in the HTML editor, add a new property named *`glide.ui.html.image.allow_url`* and set the **Value** to **false**.

Related topics

Add a system property

Configure accordion in TinyMCE HTML editor

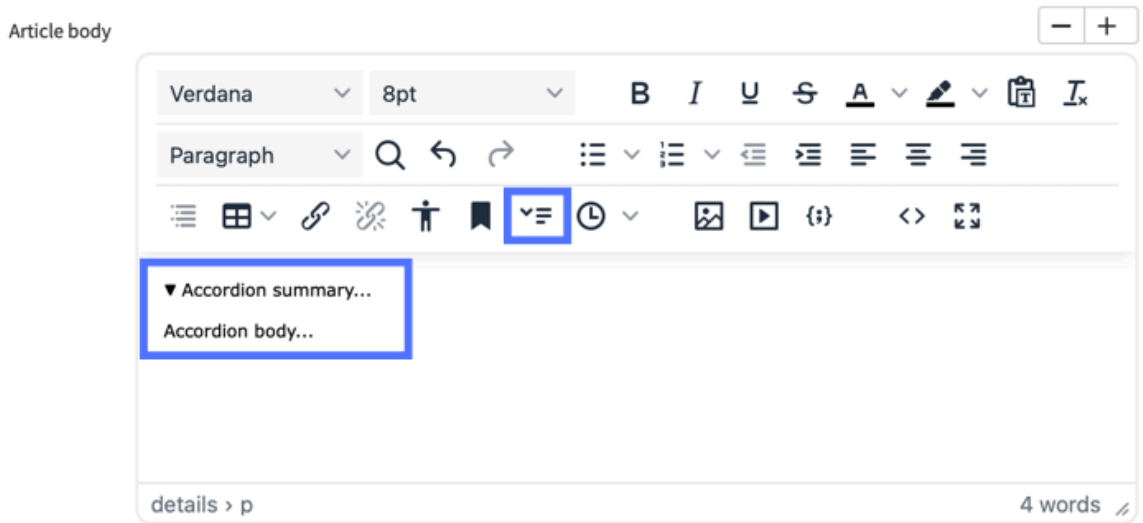
You can enable the accordion on the TinyMCE HTML editor in both CoreUI and workspaces. When enabled, the accordion button appears on the HTML editor and can be used to expand/collapse content.

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Before you begin
Role required: admin

Procedure
1. Add an accordion to the TinyMCE HTML editor.
   a. Navigate to **All** > **System Properties** > **UI Properties**.
   b. Locate the system property, **glide.ui.html.editor.toolbar**.
   c. Add an accordion as an option in the **value** field.
   d. Select **save**.
2. Use accordion in TinyMCE HTML editor.
   a. Verify you have the role necessary to update the record that contains the HTML field.

      For example, any user with a role can create a knowledge article and embed an image in it.
   b. Open the form that contains the HTML field.
   c. Select the accordion button on the toolbar.
   d. Add the accordion summary and body.



   e. Select the accordion to expand and collapse the content.

Configuring the TinyMCE toolbar via Dictionary attributes
You can configure the TinyMCE HTML editor for a specific table by configuring the dictionary attributes.

Change the TinyMCE default toolbar
Set the toolbar items in your system properties to enable or disable throughout Workspace.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Update the **Configures the editing toolbar for HTML fields(TinyMCE v8.3.0)** (glide.ui.html.editor.toolbar) property to add or remove buttons for the toolbar.

   Note: Use a vertical bar ("|") to add a section separator.

Type	Buttons
Default buttons	`bold italic underline undo redo | fontfamily fontsize table | forecolor backcolor link unlink | image media code | alignleft aligncenter alignright | bullist numlist fullscreen`
Available buttons	`newdocument, bold, italic, underline, strikethrough, justifyleft, justifycenter, justifyright, justifyfull, blocks, fontfamily, fontsize, tablecontrols, cut, copy, paste, pastetext, pasteword, search, replace, bullist, numlist, outdent, indent, blockquote, undo, redo, link, unlink, image, cleanup, code, forecolor, backcolor, removeformat, hr, visualaid, sub, sup, charmap, media, preview, fullscreen, accordion`

3. Select **Save**.

Change the TinyMCE toolbar for a specific table

Set the attributes in the TinyMCE dictionary to determine which TinyMCE attributes show in a specific table.

Before you begin

Role required: admin

Procedure

1. Navigate to a record with an HTML-type field that you want to change.
   For example, select an incident, problem, or knowledge record.
2. Right-click the field label (for example, Article body) and select **Configure Dictionary**.
3. In the Related Links section, select **Advanced View**.
4. In the **Attributes** field, input `editor.toolbar=` followed by the desired toolbar buttons.
   For example, `editor.toolbar=blocks|bold italic underline strikethrough blockquote subscript superscript removeformat| bullist numlist outdent indent|undo redo|table hr|link unlink| image media code|visualblocks preview fullscreen`.

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Note:

- Include all the toolbar items that you want displayed, not just the toolbar items you want to add.
- The configurations made to a field's Attribute field on the associated Dictionary record overrides the value of the System Property glide.ui.html.editor.toolbar.
- Multiple attributes, such as height, toolbar buttons, and toolbar plugins, can be combined within the Attributes field. For example, `editor.height=300,editor.plugins=table colorpicker textcolor link image media codemirror lists advlist fullscreen charmap directionality emoticons hr insertdatetime nonbreaking pagebreak print searchreplace wordcount anchor codesample visualblocks visualchars compat3x autolink align_listitems,editor.toolbar= fontfamily fontsize | bold italic underline strikethrough forecolor backcolor pastetext removeformat | blocks searchreplace undo redo | bullist numlist outdent indent alignleft aligncenter alignright | tableofcontents table link unlink image media codesample | code fullscreen`.

5. Select **Update**.

Change TinyMCE plugins for a specific table

Set the attributes in the TinyMCE dictionary to enable or disable plugins in a specific HTML field.

Before you begin

Role required: admin

Procedure

1. Navigate to a record with an HTML-type field that you want to change.
   For example, select an incident, problem, or knowledge record.
2. Right-click the field label (for example, Article body) and select **Configure Dictionary**.
3. In the Related Links section, select **Advanced View**.
4. In the **Attributes** field, input `editor.plugins=` followed by the desired plugins, separated with a space.

   For example, `editor.plugins=table colorpicker textcolor link image media codemirror lists advlist fullscreen charmap directionality emoticons hr insertdatetime nonbreaking pagebreak print searchreplace wordcount anchor tableofcontents codesample visualblocks visualchars compat3x autolink align_listitems`.

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Note:

- Include all the toolbar items that you want displayed, not just the toolbar items you want to add.
- The configurations made to a field's Attribute field on the associated Dictionary record overrides the value of the System Property glide.ui.html.editor.toolbar.
- Allowed plugins include: advlist align_listitems anchor autolink autoresize bbcode charmap codemirror codesample colorpicker directionality emoticons fullscreen hr image insertdatetime link lists media nonbreaking pagebreak preview print readonlynoborder searchreplace table textcolor tableofcontents visualblocks visualchars wordcount
- Multiple attributes, such as height, toolbar buttons, and toolbar plugins, can be combined within the Attributes field. For example, `editor.height=300,editor.plugins=table colorpicker textcolor link image media codemirror lists advlist fullscreen charmap directionality emoticons hr insertdatetime nonbreaking pagebreak print searchreplace wordcount anchor codesample visualblocks visualchars compat3x autolink align_listitems,editor.toolbar= fontfamily fontsize | bold italic underline strikethrough forecolor backcolor pastetext removeformat | blocks searchreplace undo redo | bullist numlist outdent indent alignleft aligncenter alignright | tableofcontents table link unlink image media codesample | code fullscreen`.

5. Select **Update**.

Change the default height of an HTML field

Change the default height of a specific HTML field to expand the size of a journal field.

Before you begin

Role required: admin

About this task

HTML field height is configured per HTML field.

Procedure

1. Navigate to a record with an HTML-type field that you want to change.
   For example, select an incident, problem, or knowledge record.
2. Right-click the field label (for example, Article body) and select **Configure Dictionary**.
3. In the Related Links section, select **Advanced View**.
4. In the **Attributes** field, enter `editor.height=X`, where X is the desired height.
   For example, `editor.height=250`

   Note:

   HTML fields can range from 72 to 2000. HTML fields are by default 64.

5. Select **Update**.
6. To configure the height of form fields dynamically as the text line increases rather than providing a specific height, complete the following steps:

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

b. In the search bar, enter `glide.ui.html.editor.enabled_plugins` and select the property.

c. In the value field, add `autoresize`.

d. Select **Update**.
The autoresize plugin is active.

Change the default font size of an HTML field

Change the default font size of a specific HTML field to use a standard font size across forms.

Before you begin
Role required: admin

About this task
HTML font size is configured per HTML field.

Procedure

1. Navigate to a record with an HTML-type field that you want to change.
   For example, select an incident, problem, or knowledge record.
2. Right-click the field label (for example, Article body) and select **Configure Dictionary**.
3. Select the Default Value tab.
4. In the **Default value** field, enter `<p style="font-size:X;"></p>`, where X is the default value.
   For example:
   - To set the font to large, enter `<p style="font-size:large;"></p>`
   - To set the size to 10, enter `<p style="font-size:10pt;"></p>`
5. Select **Update**.

Configure TinyMCE to allow deprecated tags

You can set a dictionary attribute on a TinyMCE field to allow the use of deprecated HTML tags, such as <b> and <i>. By default, TinyMCE uses the and tags for bold and italic formatting.

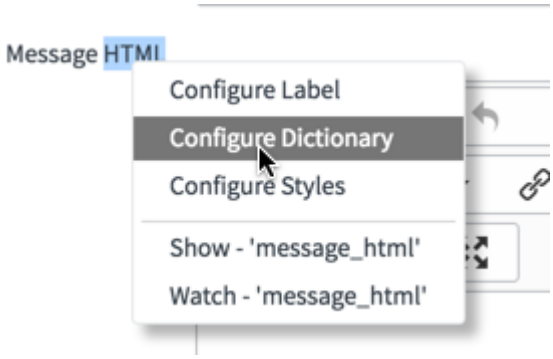
Before you begin
Role required: personalize_dictionary or admin

About this task
After you set the dictionary attribute, use code view to manually enter deprecated tags. The editor does not validate any tags you enter manually, for example, if you type an incorrect character.

Procedure

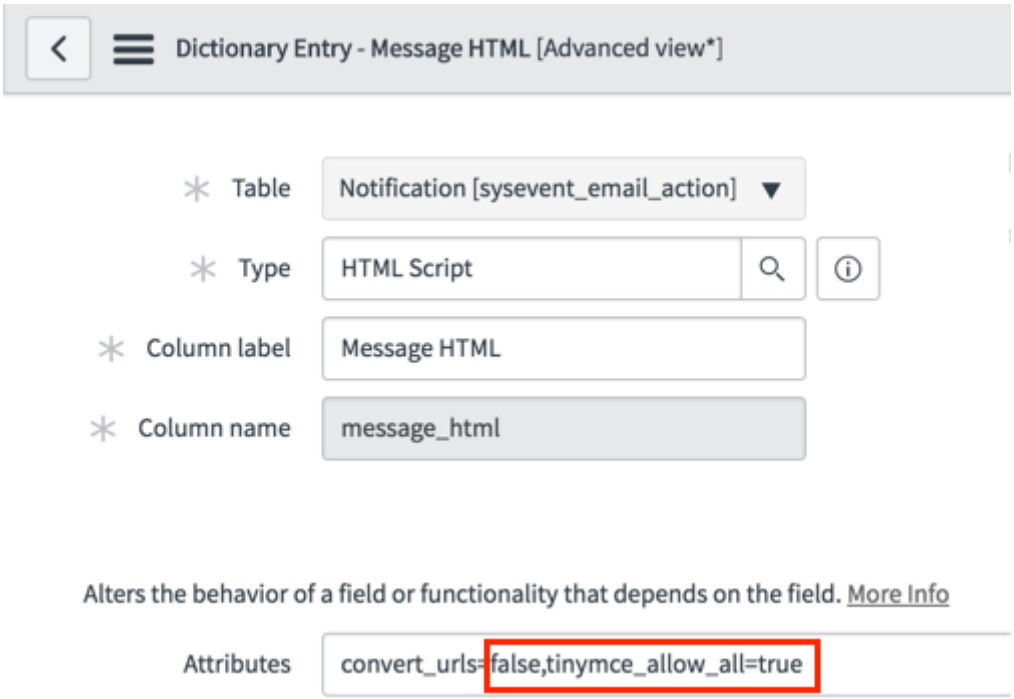
1. Navigate to the form with an HTML field that uses TinyMCE.
2. Right-click the HTML field label and select **Configure dictionary**.

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3. In the **Attributes** field, enter `tinymce_allow_all=true`, separated by a comma if needed.

   Dictionary entry attributes can only be added to when the dictionary entry form is in advanced view, as they are not shown in default view.



   If other attributes are already listed, use a comma as a separator.

4. Select **Update**.

Configure TinyMCE to allow JavaScript in URLs

You can set a dictionary attribute on a TinyMCE field to allow the use of JavaScript in a URL.

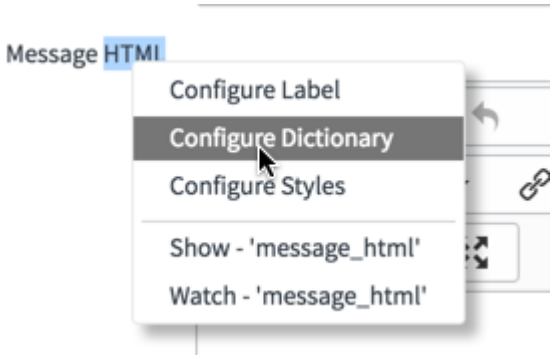
Before you begin

Role required: personalize_dictionary or admin

Procedure

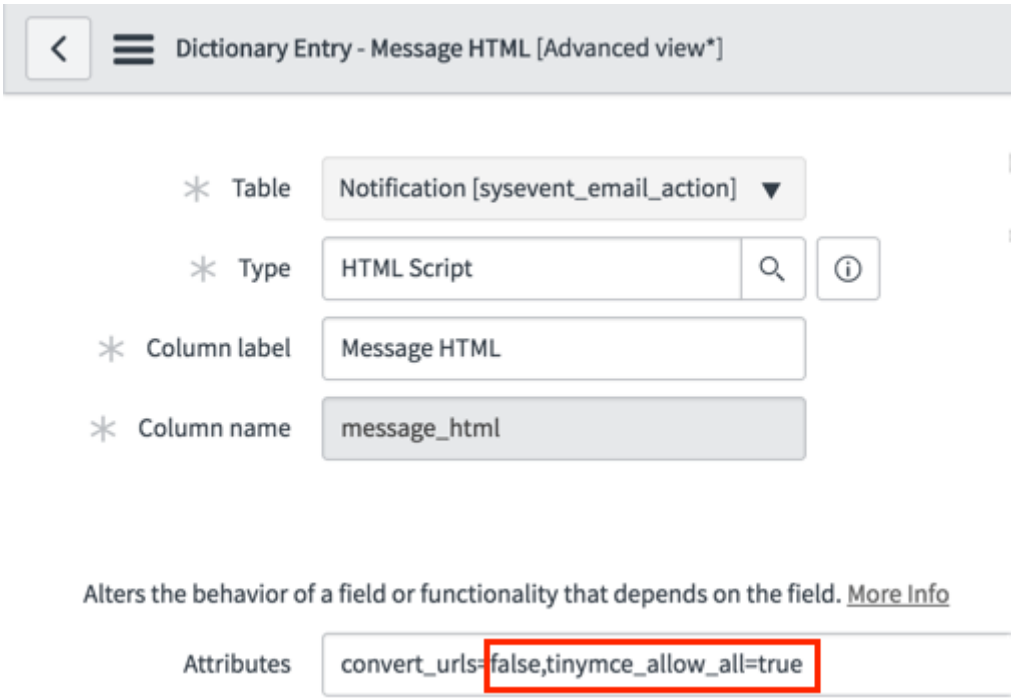
1. Navigate to the form with an HTML field that uses TinyMCE.
2. Right-click the HTML field label and select **Configure dictionary**.

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3. In the **Attributes** field, enter `tinymce_allow_script_urls=true`, separated by a comma if needed.

   Dictionary entry attributes can only be added to when the dictionary entry form is in advanced view, as they are not shown in default view.



   If other attributes are already listed, use a comma as a separator.

4. Select **Update**.

Configure the menu bar on the TinyMCE HTML editor

You can enable the menu bar on the TinyMCE HTML editor in both CoreUI and workspaces. When enabled, the menu bar appears on the top of the HTML editor which can be used to create, edit and format content. By default, the menu bar is inactive. You can enable it for a specific table via dictionary attribute configuration.

Before you begin
Role required: admin

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Procedure

1. Navigate to a record with an HTML-type field that you want to change.
2. Right-click the field label and select **Configure Dictionary**.
3. In the Related Links section, select Advanced View.
4. In the Attributes field, input `editor.config=new TinymceConfigScript().getConfiguration()`.

   This editor.config attribute points to a script: TinymceConfigScript().

5. Access the **TinymceConfigScript**.

   a. Navigate to **All** > **System Definition** > **Script Includes**.

   b. Enter `TinymceConfigScript` in the search bar near the top of the form, and select **enter** or **return**.

   c. Select **TinymceConfigScript**.

   You will be able to see the following script by default.

```
var TinymceConfigScript = Class.create();
TinymceConfigScript.prototype = {
    initialize: function() {
    },
    setTinymceConfig: function() {
    var tinyConfig = {
        menubar: 'edit format',
        menu: {
            file: { title: 'File', items: 'importword
 exportpdf exportword | print | deleteallconversations' },
            edit: { title: 'Edit', items: 'undo redo | cut
 copy paste pastetext | selectall | searchreplace' },
            view: { title: 'View', items: 'code
 revisionhistory | visualaid visualchars visualblocks |
 spellchecker | preview fullscreen | showcomments' }
        },
        style_formats: [
            { title: 'Headings', items: [
                { title: 'Heading 1', format: 'h1' },
                { title: 'Heading 2', format: 'h2' },
                { title: 'Heading 3', format: 'h3' },
                { title: 'Heading 4', format: 'h4' },
                { title: 'Heading 5', format: 'h5' },
                { title: 'Heading 6', format: 'h6' }
            ]},
            { title: 'Inline', items: [
                { title: 'Bold', format: 'bold' },
                { title: 'Italic', format: 'italic' },
                { title: 'Underline', format: 'underline' },
                { title: 'Strikethrough', format:
 'strikethrough' },
                { title: 'Superscript', format:
 'superscript' },
                { title: 'Subscript', format: 'subscript' },
```

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```
                { title: 'Code', format: 'code' }
            ]},
            { title: 'Blocks', items: [
                { title: 'Paragraph', format: 'p' },
                { title: 'Blockquote', format:
 'blockquote' },
                { title: 'Div', format: 'div' },
                { title: 'Pre', format: 'pre' }
            ]},
            { title: 'Align', items: [
                { title: 'Left', format: 'alignleft' },
                { title: 'Center', format: 'aligncenter' },
                { title: 'Right', format: 'alignright' },
                { title: 'Justify', format: 'alignjustify' }
            ]}
        ]
    };
    return tinyConfig;
},
getConfiguration: function() {
    var config = this.setTinymceConfig();
    answer = JSON.parse(JSON.stringify(config));
},

    type: 'TinymceConfigScript'
};
```

d. Set the menu bar attribute to **true** in the script to enable the menu bar.
This will enable these options in the menu bar: File, Edit, View, Insert, Format, and Table.

e. If you want to disable the menu bar set the menu bar attribute to **false**.

f. If you only want to enable specific options on the menu bar, you can change the script by listing those specific options in the menu bar.

For example, menu bar: 'file edit format' so that only these 3 options appear on the menu bar.

g. You can also configure the buttons that display within a menu by changing the script.

```
tinymce.init({
    selector: 'textarea', // change this value according to
 your HTML
    menu:{
        file: { title: 'File', items: 'newdocument
 restordraft | preview | importword exportpdf exportword |
 print | deleteallconversations' },
        edit: { title: 'Edit', items: 'undo redo | cut copy
 paste pastetext | selectall | searchreplace' },
        view: { title: 'View', items: 'code revision history
 | visualaid visualchars visualblocks | spellchecker |
 preview fullscreen | showcomments' },
        insert: { title: 'Insert', items: 'image link media
 addcomment pageembed codesample inserttable | math | charmap
 emoticons hr | pagebreak nonbreaking anchor tableofcontents
 | insertdatetime' },
```

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```
        format: { title: 'Format', items: 'bold italic
 underline strikethrough superscript subscript codeformat
 | styles blocks fontfamily fontsize align lineheight |
 forecolor backcolor | language | removeformat' },
        tools: { title: 'Tools', items: 'spellchecker
 spellcheckerlanguage | a11ycheck code wordcount' },
        table: { title: 'Table', items: 'inserttable | cell
 row column | advtablesort | tableprops deletetable' },
        help: { title: 'Help', items: 'help' }
    }
});
```

6. Configure custom style format options in the TinyMCEConfigScript by appending the CSS in the style_formats section.

   Example of style_formats section of the TinyMCEConfigScript:

```
style_formats: [
  { title: 'Headings', items: [
    { title: 'Heading 1', format: 'h1' },
    { title: 'Heading 2', format: 'h2' },
    { title: 'Heading 3', format: 'h3' },
    { title: 'Heading 4', format: 'h4' },
    { title: 'Heading 5', format: 'h5' },
    { title: 'Heading 6', format: 'h6' }
  ]},
  { title: 'Inline', items: [
    { title: 'Bold', format: 'bold' },
    { title: 'Italic', format: 'italic' },
    { title: 'Underline', format: 'underline' },
    { title: 'Strikethrough', format: 'strikethrough' },
    { title: 'Superscript', format: 'superscript' },
    { title: 'Subscript', format: 'subscript' },
    { title: 'Code', format: 'code' }
  ]},
  { title: 'Blocks', items: [
    { title: 'Paragraph', format: 'p' },
    { title: 'Blockquote', format: 'blockquote' },
    { title: 'Div', format: 'div' },
    { title: 'Pre', format: 'pre' }
  ]},
  { title: 'Align', items: [
    { title: 'Left', format: 'alignleft' },
    { title: 'Center', format: 'aligncenter' },
    { title: 'Right', format: 'alignright' },
    { title: 'Justify', format: 'alignjustify' }
  ]}
]
```

   Example with three new style formats added (Bold text, Red text, My-inline):

```
tinymce.init({
  selector: 'textarea',  // change this value according to your
 HTML
  style_formats: [
    { title: 'Bold text', inline: 'b' },
```

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```
    { title: 'Red text', inline: 'span', styles: { color:
 '#ff0000' } },
    { name: 'my-inline', title: 'My inline', inline: 'span',
 classes: [ 'my-inline' ] }
  ],
  // The following option is used to append style formats
 rather than overwrite the default style formats.
  style_formats_merge: true
});
```

Access the HTML editor and you will see that the new custom style formats (Bold text, Red text, My-inline) appear in the formats section of the menu bar.

Image field type

Image fields enable you to add images to forms.

Before you begin

Role required: personalize_form

About this task

For example, you can add portraits to the user records in your system. The image type must be `.gif`, `.jpg`/`.jpeg`, or `.png`.

Image resizing is defined by the CSS. Larger images are resized to 250 pixels. For most browsers, the larger of the height and width measurements is reduced to 250 pixels and the proportion of the image is maintained. For example, an image with a size of 1508 x 663 pixels is resized to 250 x 110 pixels. Some browsers resize both the height and width measurements to 250 pixels, resulting in a square image.

You can add a new image field.

Procedure

1. Open the desired form.
2. Create a new field with the **Type** set to **Image**.
   For instructions, see Add and customize a field in a table.
3. Add the new field to the form and save your customization.
   The form displays the new blank image field.
4. Click **Click to add** in the image field, select an image to upload, and click **OK**.
   The selected image is attached to the form and displayed in the image field.

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Result



Related topics

Configuring the form layout

IP address field type

The **IP Address (Validated IPV4, IPV6)** [ip_addr] field type stores valid IPv4 and IPv6 addresses.

Support for IPv4 and IPv6

Standard dot-decimal notation is supported for IPv4 and standard hex notation is supported for IPv6. For IPv6, you can use canonical notation to compress zeros. Familiarize yourself with IETF RFC5952 for examples and guidelines on text representation for IPv6 addresses.

The following are examples of valid IP addresses:

- **A standard IPv4 address in dot-decimal notation**:

  `10.34.51.20`

- **An expanded IPv4 address would be zero padded**:

  `10.1.10.210` would be represented as `010.001.010.210`

- **An IPv6 address in fully expanded notation**:

  `1507:f0d0:1002:0051:0000:0000:0000:0004`

- **The same IPv6 address above using the canonical notation**:

  `1507:f0d0:1002:51::4`

How IP addresses are stored in the database

The IP address `ip_addr` field is a Variable Character (VARCHAR) field with a length of 40 characters. The values are normally stored in standard (dot-decimal or canonical) notation for both IPv4 and IPv6 addresses regardless of the notation you use when you input values in the field.

For example, if you enter an IPv6 address in a non-canonical format (expanded or any other valid formats per IETF RFC5952), by default, the system will store it in canonical format unless an IP Data Control attribute value is defined on that column with a different address format. See the

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[ip_data_control] glide attribute section in Altering tables and fields using dictionary attributes for more details.

Support for data migration

Provide support in migrating IP addresses stored as string fields to the new **IP Address(Validated IPV4,IPV6)** type. The new IP address type accepts only a valid IP address. The existing data is formatted according to the ip_data_control attribute. The ip_data_control attriute can be set to exactly one of the following four values:

- *canonical*: Incoming IP addresses are validated and canonicalized before they are entered in the database. Invalid IP addresses are rejected.
- *canonicalize_when_possible*: Valid IP addresses are canonicalized before before being entered in to the database. Invalid IP addresses are also entered in to the database without being changed.

  Note: *canonicalize_when_possible* is the default value for the ip_data_control attribute, unless it's otherwise specified.

- *expanded*: The IP addresses are validated and stored in an expanded form to support efficient database range queries. Invalid IP addresses are rejected.
- *none*: No validation or normalization is performed in this value type. It is used only as an emergency mechanism as it essentially reverts this type to a plain string field.

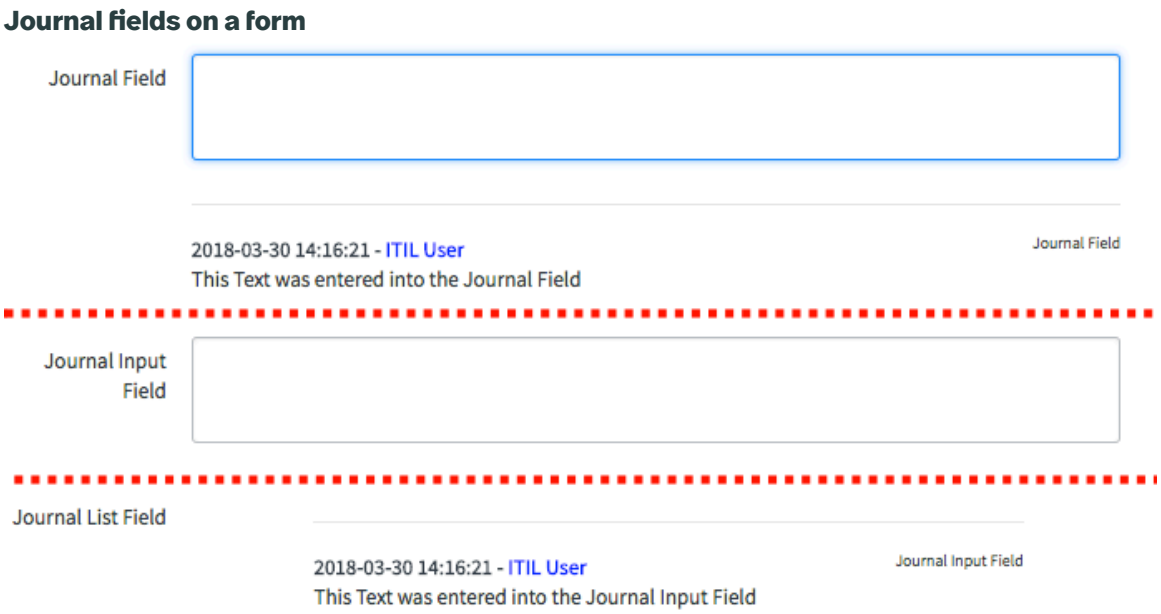
Journal field type

There are three types of journal field: journal, journal_list, and journal_input.

Journal field types

Journal field types	Description
journal	Allow and store input, and display the combined inputs below the input box. Journal fields display in the activity stream in the form and in the list view.
journal_input	Allow and store input, but do not display the combined inputs. Journal input fields only display with the record they are associated with, so they do not display in the activity stream on the list view.
journal_list	Do not allow or store input; they merely display the contents of other Journal fields upon which the journal_list field is dependent. If a journal_list field is dependent on more than one Journal field, it will chronologically interweave those fields' inputs. The journal_list field does not display content within the activity stream, but rather in a separate block.

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The example image contains the three available journal field types. The first is a journal field, with its inputs displayed below the field. The second is a journal input field, which does not show its previous inputs. The third is Journal list field, which is configured to show the input from the journal input field above it.

Restricting journal entries sent in a notification

Administrators can control the number of journal entries notifications include with the following system property.

Property	Label	Description
glide.email.journal.lines	Number of journal entries (Additional comments, Work notes, etc.) included in email notifications (-1 means all).	Specifies the number of entries from a journal field (such as **Additional comments** and **Work notes**) included in email notifications. A value of -1 includes all journal entries. • Type: integer • Default value: 3 • Location: System Properties > Email

Code for getting the contents of a journal field into an array

To put the contents of a journal field into an array so that you can iterate through each entry, you can use the code in this page.

```
var notes = current.work_notes.getJournalEntry(-1);
//gets all journal entries as a string where each entry is
 delimited by '\n\n'
var na = notes.split("\n\n");

//stores each entry into an array of strings
```

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```
 for (var i = 0; i < na.length; i++)
  gs.print(na[i]);
```

Journal field script values

The *setValue()* method is not supported for journal fields. Instead, assign values in script as in the following example.

```
var now_GR = new GlideRecord('incident');

//query priority 1 incidents in the state of either 'new' or
 'active'.
gr.addQuery('priority', 1);
var gc = gr.addQuery('state', 1);
gc.addOrCondition('state', 2);
gr.query();

while(gr.next())
{

//print a list of the incident numbers updated
gs.print(gr.number);

//add an entry to the 'work notes' journal field for each
 incident
gr.work_notes = "This is a high-priority incident. Please
 prioritize.";
gr.update();
}
```

Render journal field entries as HTML

Journal fields can render text enclosed within code tags as HTML.

Before you begin

- Role required: any role that grants write access to a journal field
- System property: the glide.ui.security.allow_codetag is set to the default value of **true**

> **Note:**
>
> To learn more about this property, see Allow JavaScript tags in embedded HTML (instance security hardening) in Instance Security Hardening Settings.

About this task

By default, a High Security Setting escapes any HTML code you type in a journal field by replacing it with its equivalent HTML entity value. Escaping causes the system to display HTML code as text rather than forwarding it to the browser as rendering instructions.

Procedure

1. Enter `[code]` `[/code]` tags around any code you want to render as HTML.

> **Note:** A single journal entry can contain multiple code tags as long as each code tag has a beginning and ending tag.

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Example
For example, enter these lines:

Results of entering HTML code

Code entered	Result
`[code]<a href="http://www.service-now.com">ServiceNow</a>[/code]`	The system renders a hyperlink to the ServiceNow web site.
`[code]<b>This text will be bold.</b>[/code]`	The system renders the sentence in bold.
`<b>This text will not be bold.</b>`	The system escapes the bold tags and renders them as text.
`[code]<script>gs.info(gs.getUserDisplayName());</script>[/code]`	The system escapes the content of the script tag. **Note:** By default, the HTML Sanitizer prevents the entry of <script> elements.

For more examples of HTML formatting options, see the blog post Formatting within Journal fields using HTML & [code] by a ServiceNow Technical Support Engineer in the ServiceNow Community.

2. Click **Post**.

Note: You cannot edit previous journal entries.

Result
The system renders the text within code tags as HTML.

Related topics

General security settings properties

HTML sanitizer

Restrict the CODE tag in journal fields

You can prevent journal fields from rendering HTML code by disabling support for the `[code]` tag.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Clear the check box for **Allow support for embedding HTML code by using the [code] tag** (the *glide.ui.security.allow_codetag* property).

Note: To learn more about this property, see Allow embedded HTML code (instance security hardening) in the Instance Security Hardening Settings.

3. Click **Save**.

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Journal field display limits

Journal fields can greatly increase the size of task records because they allow users to enter very large string values.

Display limits prevent the instance from loading the entire journal field into memory. Administrators have the option to:

- Set the length at which journal fields stop displaying the entire field's contents and instead only display a portion (called a preview) of the field's contents. Users can still access the field's entire contents by clicking a **Show All** button.
- Set the size of the preview text the journal field displays.
- Set the maximum number of journal entries journal fields can display.

In Core UI, journal fields and the activity formatter must be in the same form section. You cannot place another field in between a journal field and the activities formatter. The Activity Stream is built to keep journal fields stacked on top of the activity formatter.

Note: Journal field display limits are not supported in the legacy **Comments and Worknotes** field.

Set the maximum display size for journal fields

You can set the maximum display size for journal fields by adding a system property.

Before you begin
Role required: admin

About this task
When a journal field exceeds the length set in this property, the instance shows a preview of the journal field instead of the field's entire contents. The preview includes a **Show All** button to display the rest of the field's contents. A separate property determines the number of characters the preview displays.

Procedure
1. Add a system property with the following settings.

Property	Value
Name	glide.max_journal_list_size
Description	Size in megabytes when a journal field should display a preview rather than the field's entire contents.
Type	Integer
Value	10

2. Click **Submit**.

Set the journal preview size

Set the size of the *glide.max_journal_list_size* system property. When a journal field exceeds this size, the instance displays a preview rather than the field's entire contents. Users can click the **Show All** button to see the rest of the field's contents.

Before you begin
Role required: admin

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Procedure

1. In the navigation filter, enter `sys_properties.list`.
2. Select **New**.
3. Set the values for the property as listed in the table.

Property	Value
Name	glide.shortened_journal_length
Description	Number of characters to display as a preview of journal fields.
Type	Integer
Value	512000

4. Select **Submit**.

Set the maximum number of journal entries

To set the maximum number of entries the system shows in the activity formatter, edit the following system property. The activity formatter displays the entries starting with the most recent entry up to the maximum number.

Before you begin
Role required: admin

Procedure

1. Enter `sys_properties.list` in the navigation filter.
2. Search for the property *`glide.history.max_entries`*.
3. Edit the **Value** of the property.

Property	Value
Name	glide.history.max_entries
Description	Maximum number of entries the system shows in the activity formatter. The default is 250.
Type	Integer
Value	250

4. Click **Update**.

Related topics

Activity formatter

Enable the text field character counter

By default, multi-line text fields have a 4000 character limit. To help users see how many characters remain before they reach the limit, you can enable the *`glide.ui.textarea.character_counter`* property.

Before you begin
Role required: admin

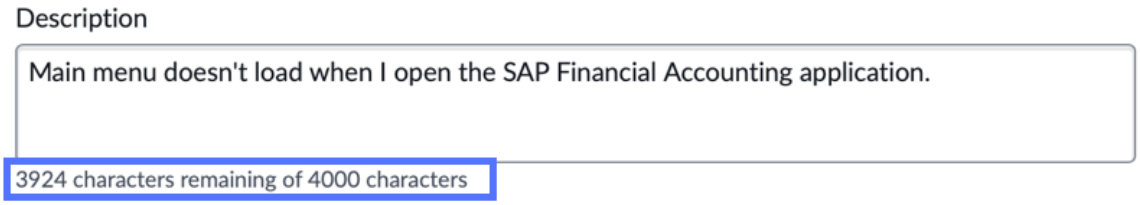
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About this task

This property adds a counter under text fields, such as the **Additional Comments** and **Work notes** fields. The counter is dynamically updated as users enter text.

Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Select the check box next to **Character counter for textarea (journal and multi line text fields)**.
3. Select **Save**.



Markdown field type

The Markdown field type enables users to write, edit, and store Markdown content in the ServiceNow AI Platform.

The Markdown field type is supported in Core UI and configurable workspaces. Admins can add Markdown fields to forms using the form layout, similar to other field types.

Features

The Markdown field type provides the following capabilities:

Write in Markdown

Users can write or edit Markdown content using standard Markdown features.

Store without loss

Markdown content is saved exactly as written.

View a clean preview

The Markdown editor shows the rendered HTML in the **Preview** tab.

View the source anytime

Users can switch to the raw Markdown to see what is stored and the rendered HTML.

Use the toolbar

The editor includes a toolbar for formatting Markdown content.

Standard field features

The Markdown field type supports standard field features including read-only mode, unsaved field indicator, field decorators, AI indicators, highlighted value, field styles, resize, and keyboard shortcuts.

Configure Markdown toolbar using system properties

Configure the toolbar options for Markdown editors across all tables in the platform using a system property.

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Before you begin
Role required: admin

About this task
The Markdown field type provides a default toolbar. You can customize the toolbar options globally for all Markdown editors in the platform.

Procedure
1. In the application navigator, enter `sys_properties.list` to navigate to the System Properties [sys_properties] table.
2. In the Name column, search for *`glide.ui.markdown.editor.toolbar`*.
3. Select the *`glide.ui.markdown.editor.toolbar`* property.
4. In the Value field, modify the toolbar options.

   The default value is: `heading | bold italic strike code | ul ol tasklist | link table codeblock | quote hr | download fullscreen`

   Available toolbar options: `heading`, `bold`, `italic`, `strike`, `highlight`, `subscript`, `superscript`, `code`, `ul`, `ol`, `tasklist`, `link`, `table`, `codeblock`, `quote`, `hr`, `download`, `fullscreen`.

   Use the pipe character (|) to separate groups of options.
5. Select **Update**.

Related topics
Configure Markdown toolbar using dictionary attributes

Markdown toolbar options and syntax

Configure Markdown toolbar using dictionary attributes
Configure the toolbar options for a specific Markdown field using a dictionary attribute.

Before you begin
Role required: admin

About this task
You can customize the toolbar options for a specific Markdown field without affecting other Markdown fields in the platform.

Procedure
1. Navigate to the dictionary configuration screen for the Markdown field.
2. Select **Advanced view**.
3. In the Attributes field, add the dictionary attribute *`markdown_toolbar`* and specify the toolbar options.

   Available toolbar options: `heading`, `bold`, `italic`, `strike`, `highlight`, `subscript`, `superscript`, `code`, `ul`, `ol`, `tasklist`, `link`, `table`, `codeblock`, `quote`, `hr`, `download`, `fullscreen`.

   Use the pipe character (|) to separate groups of options.

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Example: `markdown_toolbar=heading | bold italic | link`

4. Select **Update**.

Related topics

- Configure Markdown toolbar using system properties
- Markdown toolbar options and syntax

Markdown toolbar options and syntax

The Markdown field type supports standard Markdown syntax and toolbar options for formatting content.

Default toolbar options

The following options are available by default on the Markdown toolbar.

Default Markdown toolbar options

Toolbar option	Markdown syntax	Description
Heading	`# H1, ## H2, ### H3, #### H4, ##### H5, ###### H6`	Organize content into section titles (sizes H1-H6)
Bold	`**bold text**`	Emphasize important text
Italic	`*italicized text*`	Italicize text
Strikethrough	`~~Strikethrough text~~`	Strikethrough text
Code	`` `code` ``	Format inline technical terms or commands
Highlight	`==Highlighted words==`	Draw attention to key information
Subscript	`H~2~O`	Position text below the line
Superscript	`X^2^`	Position text above the line
Bullet List	`- First item`	Unordered list for non-sequential items
Numbered List	`1. First item`	Ordered list for sequential or priority items
Task List	`- [ ] point 1`	Checklist for tracking action items
Link	`[title](https://www.example.com)`	Create clickable references to URLs or resources
Table	`| Header | Header |`	Display structured data in rows and columns
Code Block	```` ```code``` ````	Format multi-line code or technical content
Quote	`> quote`	Highlight important statements or references
Horizontal Rule	`---`	Insert visual divider between sections

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Default Markdown toolbar options (continued)

Toolbar option	Markdown syntax	Description
Download	N/A	Save the current Markdown as a .md file
Full Screen	N/A	Change the editor into full screen mode

Additional supported Markdown syntax

The following Markdown elements are supported in addition to the toolbar options.

Additional supported Markdown elements

Markdown element	Markdown syntax	Description
Image	`![Image](/url)`	Embed images
Fenced code block	```` ```json ````	Display formatted code snippets with syntax preservation
Footnote	`[^1]: This is the footnote.`	Add reference notes at the bottom of the page
Heading ID	`### My Great Heading {#custom-id}`	Create custom anchor links for direct navigation within documents
Definition List	`term : definition`	Present terms with their corresponding definitions
Emojis	`:joy:`	Insert emoji characters

Markdown field keyboard shortcuts

Keyboard shortcuts are available for common Markdown formatting actions.

The following keyboard shortcuts are available in Markdown fields.

Markdown keyboard shortcuts

Action	Mac	Windows and Linux
Bold	#B	Ctrl+B
Italic	#I	Ctrl+I
Inline code	#E	Ctrl+E
Code block	##C	Ctrl+Alt+C
Blockquote	##.	Ctrl+Shift+.
Link	#K	Ctrl+K
Focus toolbar	#F8	Alt+F8 or Alt+F10
Return to editor or exit full screen	Escape	Escape
Resize (focus the handle first)	↑ or ↓	↑ or ↓

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Name-value pairs field type

You can access the values stored in a name-value pairs field in scripts using the name.

Sample script

The following example demonstrates how to add mappings to a name-value pairs field, and how to query existing values using the name.

```
// Script example demonstrating setting and getting values
var gr = new GlideRecord('u_nv_table');
gr.initialize();

gr.nv_field.name1 = "value1"; //add a name-value Pair mapping
 with the name "name1" and value "value1"
gr.nv_field.name2 = "value2"; //add another name-value Pair
 mapping with the name "name2" and value "value2"

// Access by dot notation
gs.print("name1 = " + gr.nv_field.name1); // Expected output:
 name1 = value1

// Iterate over each property and print name and value
for(var name in gr.nv_field) {
    gs.print(name + " = " + gr.nv_field[name]);
}

gs.print(gr.nv_field); // Expected output:
 {"name1":"value1","name2":"value2"}
```

Percent complete field type

Administrators can create percent complete fields, which accept decimal input and appear as progress bars when displayed in lists.

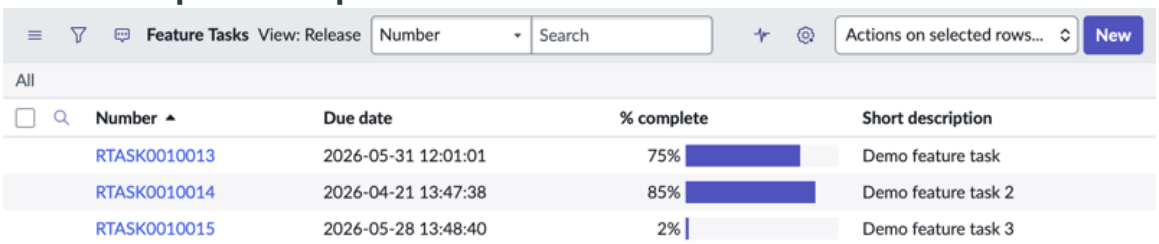
For example, use a percent complete field to set the completion percentage for a task or project in a form and then see that percentage displayed as a progress bar in a list.

Administrators can also configure views that compare actual progress with a target value to determine if goals are being met and then apply color to provide visual alerts where progress does not meet expectations.

Form view of a percent complete field



List view of a percent complete field



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Target threshold colors attribute

If the *target_field* attribute is configured, a second attribute called *target_threshold_colors* enables an administrator to define additional parameters.

The parameters are:

- Different thresholds at which the colored bar should change color
- A specific color for each threshold

The format of this attribute's value is **number1:color1;number2:color2** and so on. Use this attribute to apply warning colors to completion percentages that are lower than target percentages. These values are defined as the percentage of target accomplished. For example, a value of **0:red;50:yellow;90:green** displays a red bar if the progress to target pecentage is between 0-49. If the percent of target is between 50 and 89, the color is yellow. Percent of target 90 and above displays in green. Completion percentages that exceed target percentages also display in green. Order the color attributes from the smallest percentage to the largest.

If you do not specify a target_field, then a target of 100 is used, allowing you to use the color thresholds with a single field value.

```
target_field=percent_complete_target,target_threshold_colors=0:tomato;50:khaki;90:lightgreen
```

The following table lists examples of percent of target calculation using the colors defined above.

Target threshold colors attribute

Target percent	Percent field value	Percent of target calculation	Color
100	40	40%	tomato
65	59	90.7%	lightgreen
15	10	66.7%	khaki

Add a target field attribute

Add an optional attribute (*target_field*) to a percent complete field to compare the actual completion percentage of a task or project with a target percentage in a different decimal field that specifies where the task should be at this point.

Before you begin

Role required: personalize_dictionary

About this task

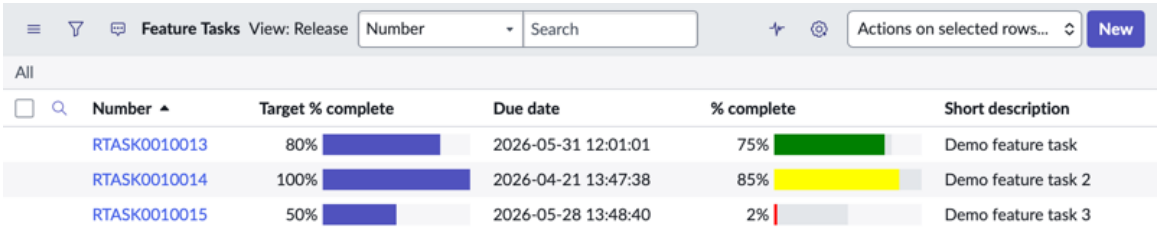
If a target field is not specified, the target of 100 is assumed.

Procedure

1. Right-click the **% Complete** field in a form.
2. Select **Configure Dictionary** from the pop-up menu.
3. In the Dictionary Entry form, add the following attribute:
   target_field=percent_complete_target
4. Update the dictionary record.

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In the list, a gray bar appears behind the colored bar to indicate the target value. The gray target bar appears only if you defined a target field.



Phone number field type

The E.164 phone number standard ensures that all necessary information for a phone number is included and properly formatted to successfully route an international call over a territory's public telephone network.

When a user enters a phone number, it is received and stored as a string of numbers. An E.164 phone number field automatically formats and validates the numbers so that they are E.164-compliant when displayed as local and international numbers. The E.164 phone number field type does not replace the phone field type.

An E.164 phone number field displays:

- [Optional] A choice list for the phone number territory.
- [Always] An input box for entering phone numbers.
- [By Default] A red underline when a phone number does not match the format for the selected phone territory and cannot be saved.
- [Optional] A green underline when a phone number does not match the format for the selected phone territory but can be saved with **Other / Unknown** as the territory.



Territories assigned

Territories are assigned to locations, and are not assigned directly to users.

A user's territory, and so the user's E.164-compliant phone functionality, is based on the user's location. For example, if a user has a location of **SHS quadra 5, Bloco E., Brasilia** defined in the User [sys_user] table, the parent record for Brazil in the location table defines the phone territory. The phone territory may be assigned at any level of the Map pages hierarchy, which is searched going up to the next parent until the territory is found or no parents remain.

Dependent fields

In the dictionary, you can specify a dependent field in the **User** or **Location** field, which displays the appropriate territory in the selector choice list when a user enters a phone number.

For example, if you enter `caller_id` in the dependent field in the Incident table, the appropriate territory is added to the territory selector choice list when a user enters caller information.

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Related topics

Make a field dependent

E.164 phone number field configuration

Administrators can use the phone number system properties and dictionary attributes to do certain things.

The system properties apply the configuration option to all phone number fields that do not have a comparable dictionary attribute. The dictionary attributes apply the configuration only to the phone number field it is added to. Since dictionary attributes take precedence over system properties, administrators can set a global configuration with a property and then apply exceptions on a field-by-field basis.

Note: Alpha numeric characters are not allowed and is not considered as a valid phone number.

Requiring territory format validation

By default, phone number fields require that a phone number match the display format of the selected territory.

By default, phone number fields require that a phone number match the display format of the selected territory. If a phone number does not match this format, users are prevented from saving it.

Setting the *glide.phone_number_e164.strict* system property to **false** or adding the *pn_strict* dictionary attribute allows the phone number input box to display a green line underneath numbers that do not match the territory format listed for the selected territory or the whole box turns green. You can use the **Other / Unknown** territory to store otherwise invalid phone numbers.

Warning: Switching from optional territory format validation to required territory format validation may result in some phone numbers failing validation altogether. In such cases, the E.164 phone number field displays an error message.

Requiring entry of international format

By default, users can enter phone numbers in their territory's local format and do not have to format the number for international dialing.

The phone number field automatically formats local phone numbers into E.164-compliant international phone numbers when the user finishes editing the field. As long as the phone number entered matches the territory's format for a local number, users can save the phone number.

Changing the *glide.phone_number_e164.allow_national_entry* system property or adding the *pn_allow_national_entry* dictionary attribute requires users to enter a phone number in the territory's international format, which starts with the plus (+) character. Users cannot save a locally formatted phone number, and the phone number input box displays a red line underneath phone numbers without the proper international formatting.

Configure the display of the local format

By default, an E.164 phone number field always displays phone numbers in an international format.

Change the E.164 phone number to use the local format in certain circumstances by adding the following system property:

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Property	Description
glide.phone_number_e164.display_national	• **Type**: string • **Default value**: false • **Other possible values**: ○ **true or form**: Displays phone numbers in a local format on forms, but displays an international format on lists. ○ **all**: Always displays phone numbers in a local format. ○ **user**: Only displays phone numbers in a local format when the phone number matches the local setting of the current user. ○ **false**: Does not display phone numbers in local format.

Select one of the possible values to determine how the system handles the E.164 phone number.

You can also add the following dictionary attribute to a specific field to override the system property:

Dictionary attribute	Description
pn_display_national	Overrides the *glide.phone_number_e164.display_national* property setting for how an E.164 phone number field displays phone numbers. Available values are identical to those described for the *glide.phone_number_e164.display_national* property. • Type: string • Default value: false • Example:pn_display_national=all

Configure the display of territory labels

A property controls how territory labels are displayed.

You can display territory labels next to the number in an E.164 phone number field by setting the system property or adding the dictionary attribute. This display is useful if the territory selector choice list is turned off and you want the user to see the territory for the entered phone number.

Enabling territory labels also displays the phone territory in lists.

Add the following system property to display the territory label next to the number in an E.164 phone number.

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Property	Description
glide.phone_number_e164.display_territory	Determines when an E.164 phone number field displays a territory label. • **Type** : string • **Default value**: read-only • **Other possible values**: ○ **all**: Displays the territory label. ○ **national**: Displays the territory label only if the phone number is in local format. ○ **read-only**: Displays the territory label in read-only mode, regardless of whether the number is in local or international format. ○ **read-only-national**: Displays the territory label in read-only mode only if the number is in local format. ○ **list**: Displays the territory label in a list. ○ **list-national**: Displays the territory label in a list if the number is in national format. ○ **none**: Does not display the territory label.

You can also add the following dictionary attribute to a specific field to override the system property:

Dictionary attribute	Description
pn_display_territory_text	Overrides the *glide.phone_number_e164.display_territory_t* property that defines when a phone number field displays a territory label. Available values are identical to those described previously for the *glide.phone_number_e164.display_territory_t* property. • Type: string • Default value: read-only • Example:pn_display_territory_text=all

Configure the international direct dialing prefixes

A property is available to control the display of prefixes.

You can enable the display of the international direct dialing prefix, which appears between the territory selector choice list and the input box for an E.164 phone number field on forms, by setting the system property or adding the dictionary attribute.

Add the following system property to display the international direct dialing prefix.

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Property	Description
glide.phone_number_e164.display_users_idd	Determines whether to display the international direct dialing prefix between the territory selector choice list and the input box on forms. • Type: true | false • Default value: false

You can also add the following dictionary attribute to a specific field to override the system property:

Dictionary attribute	Description
pn_display_users_idd	Overrides the *glide.phone_number_e164.display_users_idd* property that determines whether to display the international direct dialing prefix between the territory selector choice list and the input box on forms. Available values are identical to those described above for the *glide.phone_number_e164.display_users_idd* property. • Type: true | false • Default value: false • Example:pn_display_users_idd=false

Configure the phone territory selector choice list

By default, an E.164 phone number field always displays the phone territory that is associated with the phone number.

Changing the system property or adding the dictionary attribute hides the territory selector choice list. If the territory selector choice list is hidden, users can only enter a local or national number.

Add the following system property to show or hide the territory selector choice list.

Property	Description
glide.phone_number_e164.display_territories	Determines whether to display the territory selector choice list. Hiding the territory selector choice list restricts users to entering only local or national phone numbers. • Type: true | false • Default value: true

You can also add the following dictionary attribute to a specific field to override the system property:

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Dictionary attribute	Description
pn_display_territory_selector	Overrides the *glide.phone_number_e164.display_territory_s* property setting that determines whether to display the territory selector choice list. Available values are identical to those described above for the *glide.phone_number_e164.display_territory_s* property. • Type: true | false • Default value: true • Example: pn_display_territory_selector=false

E.164 phone number field system properties

Several properties are available to configure E.164 phone number fields.

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

e.164 phone number field system properties

Property	Description
glide.phone_number_e164.strict	Determines whether all phone number fields must match the display format for the selected territory. When the value is **true**, the phone number input field displays a red line underneath the phone numbers that do not match the format for the selected territory. Users cannot save the phone number. When the value is **false**, the phone number input field displays a green line underneath phone numbers that do not match the format for the selected territory. Users can save the phone number. The territory selector choice list offers the option to select an **Other / Unknown** territory format. • Type: true | false • Default value: true • Location: Add to the System Properties [sys_properties] table.
glide.phone_number_e164.allow_national_entry	Determines whether users can enter phone numbers in the local format or

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e.164 phone number field system properties (continued)

Property	Description
	whether they must enter phone numbers in international format. When **true**, users can enter phone numbers in the local format for the selected territory. When **false**, users must enter phone numbers in the international format for the selected territory. • Type: true | false • Default value: true • Location: Add to the System Properties [sys_properties] table.
glide.phone_number_e164.display_national	Determines whether to display E.164 phone numbers in local format. • Type: string • Default value: false • Other possible values: ○ **true or form**: Displays phone numbers in a local format on forms, but displays an international format on lists. ○ **all**: Always displays phone numbers in a local format. ○ **user**: Only displays phone numbers in a local format when the phone number matches the local setting of the current user. The local setting of the current user is determined by the location associated with the user record. ○ **false**: Does not display phone numbers in local format. • Location: Add to the System Properties [sys_properties] table.
glide.phone_number_e164.display_territory_selector	Determines whether to display the territory selector choice list. Hiding the territory selector choice list restricts users to entering only local or national phone numbers.

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e.164 phone number field system properties (continued)

Property	Description
	• Type: true | false • Default value: true • Location: Add to the System Properties [sys_properties] table.
glide.phone_number_e164.display_territory_text	Determines when an E.164 phone number field displays a territory label. • Type: string • Default value: read-only • Other possible values: ○ **all**: Always displays the territory label. ○ **national**: Displays the territory label only if the phone number is in local format. ○ **read-only**: Displays the territory label in read-only mode, regardless of whether the number is in local or international format. ○ **read-only-national**: Displays the territory label in read-only mode only if the number is in local format. ○ **list**: Displays the territory label in a list. ○ **list-national**: Displays the territory label in a list if the number is in national format. ○ **none**: Does not display the territory label. • Location: Add to the System Properties [sys_properties] table.
glide.phone_number_e164.display_users_idd	Determines whether to display the international direct dialing prefix between the territory selector choice list and the input field on forms. • Type: true | false • Default value: false • Location: Add to the System Properties [sys_properties] table.

E.164 phone number field dictionary attributes

You can override the global system property with certain dictionary attributes.

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e.164 phone number field dictionary attributes

Dictionary attribute	Description
pn_strict	Overrides the *glide.phone_number_e164.strict* property setting that requires all phone number entries match the format for the selected territory. Available values are identical to those described for the *glide.phone_number_e164.strict* property. • Type: true | false • Default value: true • Example:pn_strict=false
pn_allow_national_entry	Overrides the *glide.phone_number_e164.allow_national_entry* property setting that determines whether users can enter phone numbers in the local format or whether they must enter phone numbers in international format. Available values are identical to those described for the *glide.phone_number_e164.allow_national_entry* property. • Type: true | false • Default value: true • Example:pn_allow_national_entry=false
pn_display_national	Overrides the *glide.phone_number_e164.display_national* property setting for how an E.164 phone number field displays phone numbers. Available values are identical to those described for the *glide.phone_number_e164.display_national* property. • Type: string • Default value: false • Example:pn_display_national=all
pn_display_territory_selector	Overrides the *glide.phone_number_e164.display_territory_selector* property setting that determines whether to display the territory selector choice list. Available values are identical to those described for the *glide.phone_number_e164.display_territory_selector* property. • Type: true | false • Default value: true • Example: pn_display_territory_selector=false
pn_display_territory_text	Overrides the *glide.phone_number_e164.display_territory_text* property that defines when a phone number field displays a territory label. Available values are identical to those described for the *glide.phone_number_e164.display_territory_text* property.

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e.164 phone number field dictionary attributes (continued)

Dictionary attribute	Description
	• Type: string • Default value: read-only • Example:pn_display_territory_text=all
pn_display_users_idd	Overrides the *glide.phone_number_e164.display_users_idd* property that determines whether to display the international direct dialing prefix between the territory selector choice list and the input box on forms. Available values are identical to those described for the *glide.phone_number_e164.display_users_idd* property. • Type: true | false • Default value: false • Example:pn_display_users_idd=false

Configure a territory phone display rule

The string of numbers that make up a phone number is automatically validated and formatted for a specific territory by applying a series of regular expressions.

Before you begin

Role required: admin

About this task

The number is first validated against the phone validations that have been defined for the territory, and in the order specified by the **Order** field. To be valid, the number must match the regular expression defined in the **Condition** field for at least one phone validation.

After a number has been validated, the **Condition** expression for each format defined for the territory is applied to the number in the order determined by the **Order** fields. The **Pattern** and **Format** regular expressions are applied to produce a phone number that is formatted correctly for the territory.

The Sys Phone Territory screen allows administrators to edit the display rules for a given territory. Administrators may want to modify the **Active**, **Display**, or **Order** fields. To edit the display rules for a territory:

Procedure

1. Navigate to **All** > **System Policy** > **Rules** > **Telephone Display Rules**.
2. Click a territory **Name**.
3. Edit the fields, as appropriate (see table).
4. Click **Update**.

Territory phone display rules

Field	Description
Name	The unique name of the territory.

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Field	Description
Country calling code	The country code for dialing numbers from outside the territory.
International direct dial	The prefix for calling internationally from the territory, such as 00 or 001.
STD	The subscriber trunk dialing code, also know as the direct distance dialing code, which is a sequence of numbers before the telephone number that indicate whether the call is to be routed outside of the local calling area.
International prefix	The prefix required to dial an international call, such as a plus sign (+).
National prefix	The prefix required to dial a local call.
Active	An indicator for whether the territory phone definition is active. If deactivated, this territory unavailable to users.
Trunk dialing code optional	An indicator for whether the STD code is optional.
STD follows country	An indicator for whether the STD code should be displayed to the right of the country calling code.
Display	An indicator for whether to display the territory in the choice list. Clearing this check box removes the territory from the choice list. If an international number is entered for a territory that is not displayed in the territory selector choice list, that territory is temporarily added to the selector choice list for that field only. For example, If the United Kingdom **Display** field is not selected, the United Kingdom does not appear in the territory selector choice list. However, if the user enters an international number beginning with +44, the United Kingdom is added to the list and the number is formatted and validated accordingly.
Order	The order in which a territory appears in a choice list. Territories are sorted numerically by the number assigned here. If more than one territory is assigned the same number, they are subsorted alphabetically. All territories are assigned a default value of 100. To display a territory at the top of the list, assign a value that is less than 100. To display a territory at the end of the list, assign a value that is greater than 100. For example, if a territory is assigned an order of 500, it is displayed at the end of the list, and if more than one territory is assigned an order of 500, they are listed alphabetically at the end of the list.

Phone validations

Phone validations are already configured for all territories and are automatically applied to the phone number to ensure that the number is valid for the territory.

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E164 phone validations

Phone validations | New | Go to Order | 1 to 7 of 7

Phone territory = Singapore

Name	Condition	Order
SG fixedLine	[36]\d{7}|[17-9]\d{7,10}	100
SG fixedLine	6[1-9]\d{6}	110
SG mobile	(?:8[1-7]|9[0-8])\d{6}	120
SG tollFree	1?800\d{7}	130
SG premiumRate	1900\d{7}	140
SG voip	3[12]\d{6}	150
SG uan	7000\d{7}	160

Actions on selected rows... | 1 to 7 of 7

Phone formats

Phone formats are already configured for all territories and are automatically applied to the phone number to ensure that the number is valid for the territory.

Reference field type

A reference field stores a reference to a field on another table. For example, the **Caller** field on the Incident table is a reference to the User [sys_user] table.

When you define a reference field, the system creates a relationship between the two tables. Adding a reference field to a form makes the other fields in the referenced table available to the form.

Note: A reference field can refer only to records from one other table. To add a field that can refer to records on any table, use the Document ID element type.

Administrators can create new reference fields and configure several options for reference fields.

Reference field options

Option	Description
Display values	Each reference field stores a sys_id for each referenced record in the database, but the sys_id is not shown. The reference field shows the specified display value.
Decorations	A reference decoration is an icon that appears next to a reference field.
Reference styles	Reference styles are specialized field styles that control the appearance of reference fields.
Reference qualifiers	Reference qualifiers restrict the records that are available for reference fields.
Cascade delete rules	Cascade delete rules specify what should happen to records that reference a record that is deleted.
Auto-complete	By default, a reference field auto-completes as the user types in the field. Administrators can configure auto-complete settings.
Reference key	A reference key saves a field other than sys_id as the unique identifier for a reference field.
Enable dynamic creation	When dynamic creation is enabled, entering a nonexistent value in a reference field creates a new record on the referenced table instead of returning an error.

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Add a reference field

Add reference fields to a table using the same method as for any other field.

Before you begin
Role required: personalize_form

About this task
The related table also appears in the Available Tables list for future form customizations.

Procedure
1. Open the desired form.
2. Right-click the header and select **Configure** > **Form Layout**.
3. Use dot-walking to locate and select the field in the referenced table that you want to add.

   Example
   It appears as *`Table name.Field`*. For example, the caller's email address appears as *`Caller.Email`*.
4. Click **Save**.

Enable dynamic creation for reference fields

When dynamic creation is enabled, entering a nonexistent value in a reference field creates a new record on the referenced table instead of returning an error.

Before you begin
Role required: personalize_dictionary

About this task
By default, a user must enter a value in a reference field that matches an existing record in the table that the reference field refers to. For example, the **Caller** field in an Incident must have a value that is an existing user. You can enable dynamic creation to create a new record on the referenced table when a user enter a nonexistent value in a reference field instead of returning an error.

Procedure
1. Right-click the field label in the form and select **Configure Dictionary**.
2. Populate the following fields (you may need to configure the Dictionary form):
   - **dynamic_creation**: Select the check box.
   - **dynamic_creation_script**: Enter a script that dynamically creates the record.
3. Click **Update**.
   Examples:

   You could use the following `dynamic_creation_script` to create a record on the referenced table.

   ```
   current.name = value;
   current.insert();
   ```

   Note: The parent object can be used to access anything from the parent record.

   You could create a script include named *`MyUserReferenceCreator`* with the following contents:

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```
var MyUserReferenceCreator = Class.create();
MyUserReferenceCreator.prototype = {
    initialize: function() {
    },

    create: function(current, value) {
        current.name=value;
        return current.insert();
    },

    type: 'MyUserReferenceCreator'
}
```

When the script include is created, the following `dynamic_creation_script` generates a new location for an invalid reference field value:

```
new MyUserReferenceCreator().create(current, value);
```

Related topics

Configuring the form layout

Configure cascade delete rules

When a record is deleted, there are different options for how the deletion will affect records that reference the deleted record. You can configure what happens to records that reference a record when that record is deleted.

Before you begin

Role required: personalize_dictionary

About this task

For example, if you delete a user record that is referenced in the **Caller ID** field on several incident records, you can configure what happens to those incident records. By default, the references are cleared, so the incident records are maintained with an empty **Caller ID** field.

Procedure

1. Navigate to a reference field on a form.
2. Right-click the field label and select **Configure Dictionary**.
3. Under **Related Links**, click **Advanced view**.
4. Locate the Reference Specification section.
5. In the **Reference cascade rule** field, select one of the following options.

Note: The option for this field have no effect for tables with m2m relationships, meaning that in this example, if the tables have an m2m relationship, the user record is deleted.

Option	Description
Clear or -- None --	Deleting a record clears references (default option).
Delete or Cascade	Deleting a record also deletes all referencing records. For example, when a user record is deleted, any incidents assigned to the user are also deleted.

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Option	Description
	Caution: Use this method with caution.
Restrict	Deleting a record is restricted unless there are no references to the record. For example, prevent the user record from being deleted if any incident includes a reference to the user.
None	Deleting a record does not change records that reference the record.

6. Click **Update**.

Related topics

Modify dictionary entries

Define the reference key

By default, reference fields store the sys_id of the record in the database.

Before you begin
Role required: personalize_dictionary

About this task
By defining a reference key, you can identify a field other than sys_id to use as the unique identifier for the reference field. The value of the reference key field, instead of the sys_id, is stored in the database for that reference field.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Open the field record (for example, **resolved_by** on the Incident table).
3. In the **Reference key** field, enter a field name on the referenced table (for example, email on the sys_user table).

   Note: Always choose a field from the referenced table that is both required and unique.

4. Select **Update**.

Display a reference field as a choice list

You can display a reference field as a choice list instead of opening a lookup window.

Before you begin
Role required: personalize_dictionary

About this task
Note: A choice reference field with a defined reference key won't function.

Procedure

1. In the form, right-click the label for the reference field and select **Configure Dictionary**.
2. In the Choice List Specification section, select one of the following options in the **Choice** field.

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- **Dropdown with --None--**
- **Dropdown without --None--**

3. Right-click the form header and click **Save**.
4. Under **Related Links**, click **Advanced view**.
5. In the **Attributes** field, add the following attribute, separated from other attributes by a comma.

```
ref_auto_completer=AJAXReferenceChoice
```

6. Click **Update**.
   The form reopens, with the reference field as a choice list.

Note:

The *glide.ui.max_ref_dropdown* system property determines whether a reference field is displayed as a choice list or a reference icon. When the number of available choices exceeds the value of this property, a reference icon displays instead of a choice list. The default value of this property is 25. This property affects the entire instance, however you can override this property on an individual field by using the *max_ref_dropdown* dictionary attribute. Modifying dictionary attributes requires the personalize_dictionary role.

The *glide.xmlhttp.max_choices* system property determines how many choices display on a choice list. This property has a value of 15 by default, however, when the property is not present on the instance, the instance uses a hard coded value of 10.

Related topics

System dictionary

Display values

Reference fields store a sys_id for each referenced record in the database, but the sys_id is not shown.

The reference field shows the display value. For example, an incident's **Assigned to** field stores the sys_id of a particular user, but actually displays the user's name. The following example shows how **Charlie Witherspoon**, which is the display value of a user record, is shown in the **Assigned to** field.

Display value xml

```
<xml>
    <incident>
        <active>true</active>
        <activity_due/>
        <approval/>
        <approval_history/>
        <approval_set/>
        <assigned_to display_value="Charlie Witherspoon">46b87022a9fe198101a78787e40d7547</assigned_to>
        <assignment_group/>
```



Reference field

Reference field	Value stored in database	Display value field of source table	Value displayed in UI
Assigned to [task.assigned_to]	46b87022a9fe198101a78787e40d7547	Name [sys_user.name]	Charlie Witherspoon

Reference fields show display values in:

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- Lists
- Forms
- Reports
- Auto-complete suggestions
- Slushbuckets

Related topics

Unique record identifier (sys_id)

Select a field as the table display value

Only one field can be defined as the display value for a table.

Before you begin

Role required: personalize_dictionary

About this task

When you set the **Display** value to **true**, a business rule sets the **Display** value to **false** for all other fields on the table. In previous versions, you must manually ensure that no other fields on the table have a value of **true** in the **Display** column.

Note: Extended tables inherit the display value of the parent table. Setting a separate display value for the extended table overrides the parent table's display value.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Filter on **[Table] [is] [<name of the referenced table>]**.
3. Locate the desired field and set **Display** to **true**.

   For best results, choose a field that is required and unique in each record as the display value field.

   Note: If you make a field the display field for a table, be sure to translate all values for the field in the Translated Text [sys_translated_text] table into all the languages provided. Display field options left untranslated are not presented by the autocomplete (type ahead) feature.

   Reference fields look for the display value in the following order:

   a. A field with display=true in the system dictionary on the lowest sub-table for extended tables.
   b. A field with display=true in the system dictionary on the parent table.
   c. A field named **name** or **u_name** or **x_name**.
   d. A field named **number** or **u_number** or **x_number**.
   e. The field named in the Glide Property *glide.record.display_value_default*
   f. The **Created on** field of the referenced record.

Decorations

Reference decorations are icons that appear next to a reference field on a form, providing quick access to related records and actions.

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Four decoration types can appear next to a reference field. Each decoration serves a distinct purpose and appears under different conditions.

Reference lookup

Appears next to editable reference fields. Selecting the reference lookup icon opens a list of records from the referenced table, letting you select a record to populate the field. For more information, see Reference lookup.

Reference icon

Appears next to populated reference fields. Selecting the reference icon opens a read-only preview of the referenced record. Select **Open Record** in the preview to navigate to the full record. For more information, see Reference field icon.

Related incidents icon

Displays incidents related to the record referenced in the field. This decoration requires a dictionary attribute and is not enabled by default. For configuration instructions, see Configure the related incidents icon.

Show workflow icon

Appears next to a workflow field and opens the related workflow in the Workflow Editor. This decoration requires a dictionary attribute and is not enabled by default. For configuration instructions, see Configure the show workflow icon.

The reference lookup icon is visible whenever the reference field is editable. Other decorations appear only after a record is selected in the field.

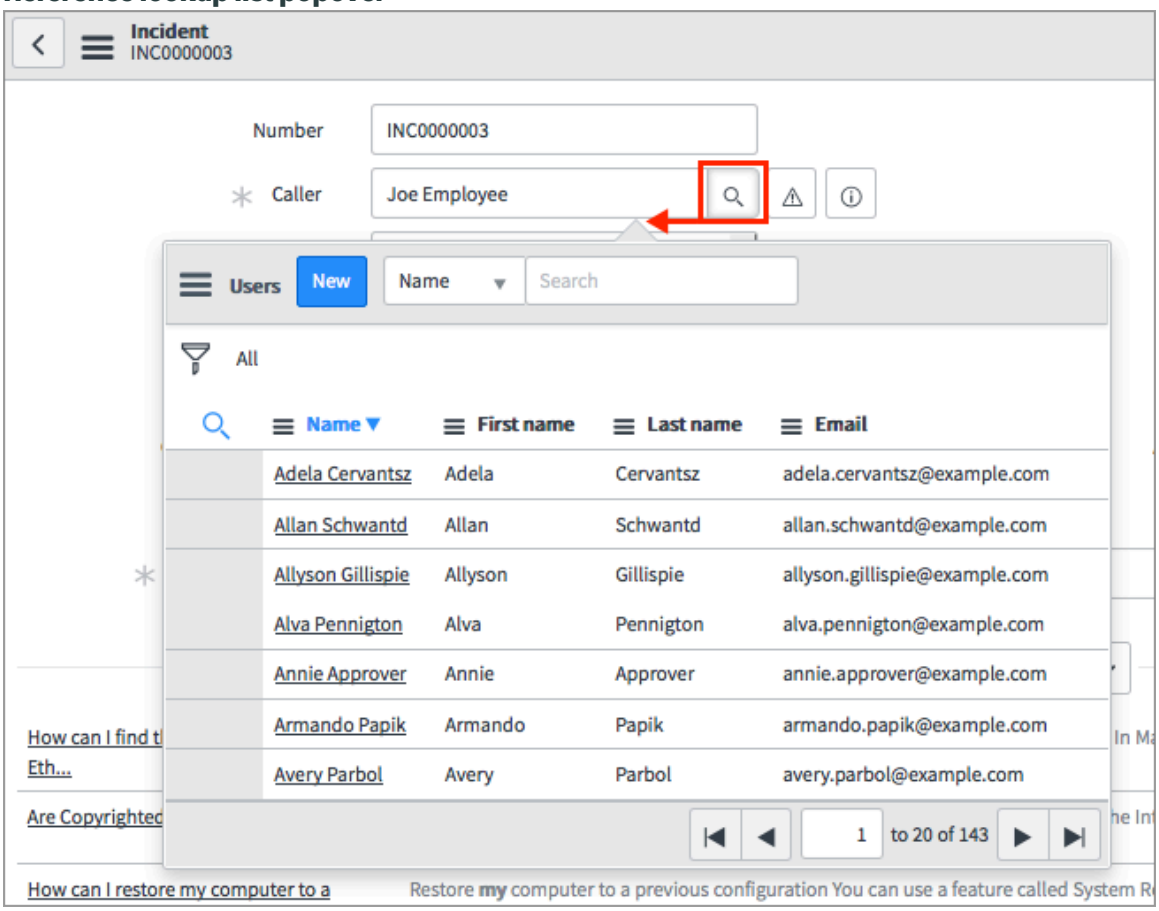
Reference lookup

On forms, the reference lookup icon ( ) appears by editable reference fields. Clicking the reference lookup icon displays a list of records on the referenced table.

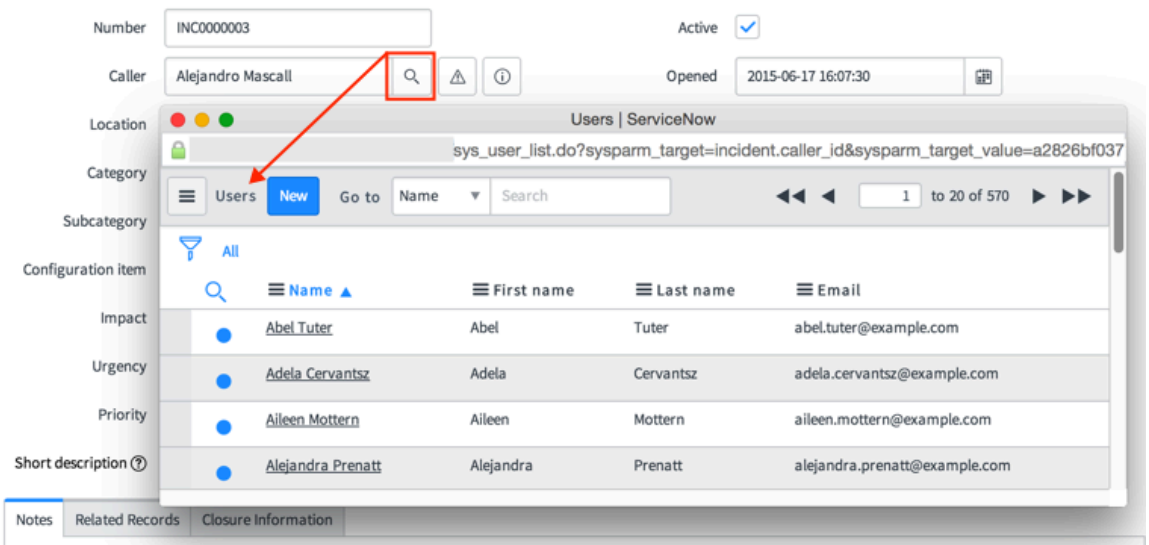
When List v3 is enabled, the list appears in a popover. Otherwise, the list appears in a pop-up window.

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Reference lookup list popover



Reference lookup list pop-up



Tree picker lookup

The reference lookup can be rendered in the tree picker format by modifying the dictionary and adding the attribute *`tree_picker`*.

You cannot customize the label names used in the tree picker. The label names are taken from the values in the table.

Note: The tree display hierarchy does not appear in reference fields when using mobile applications.

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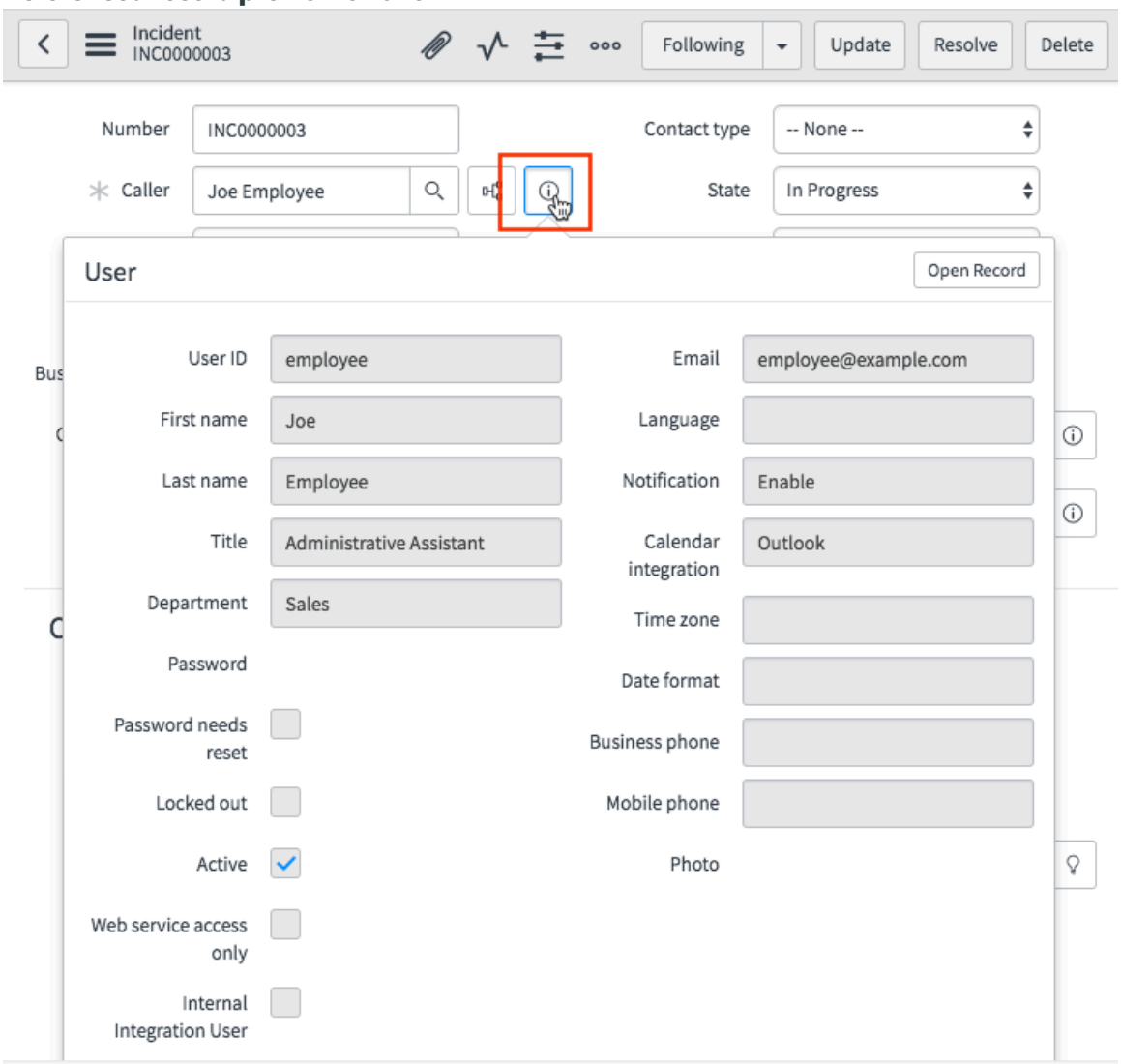
Related topics

Tree picker

Reference field icon

On forms, the reference icon (ⓘ) appears by populated reference fields. Clicking the icon opens a read-only preview of the referenced record.

Referenced record preview on a form



The preview remains open until you click somewhere else on the form.

Click **Open Record** to navigate to the referenced record.

Note: When using a reference icon in Service Portal, a form opens using the default view of the form rather than a popup view. Write permissions to this form are the same as opening the form in the default view in the standard UI.

Configure the reference icon view of fields

Use a table's sys_popup form view to configure the fields in the pop-up form that appear when pointing to a reference icon. If the table has no sys_popup view, the pop-up uses the default view.

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Before you begin
Role required: personalize_form

About this task
The pop-up form displays in the top form section only.

Procedure
1. To configure a reference field popup form for a table using the default sys_popup view, navigate to the following URL format, substituting the instance name and table name:

```
<your instance name>.service-now.com/<table
 name>.do?sysparm_view=sys_popup
```

Note: This URL format only shows a table and default sys_popup view. It does not work for records that use a different view.

Example
An example of an instance for Acme, the sys_user table, and the sys_popup default view:

```
acme.service-now.com/sys_user.do?sysparm_view=sys_popup
```

2. **Optional:** To configure a reference field popup form for a table using a non-default sys_popup view, navigate to the following URL format, substituting the instance name, table name, and name of view:

```
<your instance name>.service-now.com/<table
 name>.do?sysparm_view=sys_popup,<name_of_view>
```

Example
An example of an instance for Acme, the sys_user table, and the sys_popup ESS view:

```
acme.service-now.com/sys_user.do?sysparm_view=sys_popup,ess
```

3. Configure the form to add or remove fields as appropriate.

Related topics
Configuring the form layout

Configure pop-ups on read-only fields
Reference pop-ups and click-throughs are hidden by default when a client script, UI policy, variable, or ACL makes the field read-only. The ability to see or click through to the target record does not depend on whether the reference field is writable. You can change the read-only setting.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Change the value of the **Enable click-through of a reference field when the reference field is read-only.** (*glide.ui.reference.readonly.clickthrough*) property.
If set to true, the pop-up appears for read-only fields and for variables.

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What to do next

If this system value is set to **false**, you can override the setting for a specific read-only reference field. Configure the dictionary entry and add the *readonly_clickthrough=true* attribute.

Configure the related incidents icon

You can configure an icon to appear beside a reference field in a form, such as the **Caller** field, to display related incidents.

Before you begin

Role required: admin

About this task

The show related incidents icon () displays other incidents related to the referenced record.

Procedure

1. In the form, right-click the label for the reference field and select **Configure Dictionary**.
2. Add the *ref_contributions=user_show_incidents* dictionary attribute in the **Attributes** field.
3. Click **Update**.
   The form reopens and the related incidents icon appears beside the field on the right.

Related topics

Altering tables and fields using dictionary attributes

Configure the show workflow icon

You can configure an icon to appear beside a workflow field to display the related workflow in the Workflow Editor.

Before you begin

Role required: admin

About this task

The show workflow icon () opens the workflow in the Workflow Editor.

Procedure

1. In the form, select and hold (or right-click) the label for the workflow field and select **Configure** > **Configure Dictionary**.
2. Add the *ref_contributions=show_workflow* dictionary attribute in the **Attributes** field.
3. Select **Update**.
   The form reopens and the show workflow icon appears beside the field on the right.

Related topics

Altering tables and fields using dictionary attributes

Reference qualifiers

Use reference qualifiers to filter the data that is returned for a reference field.

A reference field stores a link (reference) to a field on another table, making the records/fields in the referenced table available to the form containing the reference field.

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For example, the **Assigned to** field on the Incident table is a reference to the User [sys_user] table. By default, all values for the field that is being referenced appear in the reference lookup and can be directly accessed through the reference field (type ahead). Expanding on the prior example, if a reference qualifier is not defined, all users in the User table appear in the reference lookup. Including those users that are inactive. Sometimes, this might be the desired functionality. In other cases however, only a subset of the available values may be desired. In this case, create a reference qualifier to filter the available data so that only the desired values are returned and made available to the form. Such as only the active users or users that have a specific role. Reference qualifiers are robust and can consist of simple AND/OR conditions, inline JavaScript, or complex script include.

You can modify the reference qualifier for a table, and any table based on that table (parent or extended), by defining a reference qualifier through the Dictionary Entry form. You can also modify the reference qualifier only on an extended table and its children (not the parent table), through a dictionary override. You can only define a single reference qualifier per field, per form/table. Reference qualifiers are not applicable to condition builders. For information on using filtering in condition builders, see Create a dynamic filter option.

Note:

- Creating reference qualifiers requires knowledge of the underlying ServiceNow data model (tables and fields) and knowledge of the Web services and Scripts.
- To restrict what data specific users can access, use ACLs not reference qualifiers.

You can define a reference qualifier using one of the following methods.

Simple reference qualifier

Simple reference qualifiers use AND/OR statements (conditions) to create simple filters. Use simple reference qualifiers when filtering on conditions such as whether a company is active, a user has a specific role, and/or a caller is in a specific time zone. Simple reference qualifiers can have a maximum of 13 reference qualifier conditions. For additional information on how to use condition builders, see Condition builder.

Dynamic reference qualifiers

Dynamic reference qualifiers enable you to use a Create a dynamic filter option to run a query against a reference field to filter the returned data set. Dynamic filter options are stored filters that can contain Encoded query strings, JavaScript, or script includes, and can be used in multiple dynamic reference qualifiers. Changes made to a dynamic filter option automatically apply to all reference qualifiers that use the same dynamic filter option. Use this type of reference qualifier when you want to use the same filter on multiple forms or to provide filter functionality to "non-code savvy" implementers.

The base instance provides several OOB dynamic filter options. If a dynamic filter option that meets your needs does not exist, you can create a new dynamic filter option that is specific to your requirements. An example of an OOB dynamic filter option is the reference qualifier on the **Model ID** field on a configuration item form, such as the Computer form. The reference qualifier calls the **CI Model Qualifier** dynamic filter option, which in turn calls the `ModelAndCategoryFilters` script include. This script include filters the data set based on the class of the CI. The only options for the model ID are options that belong to the same class as the current CI. For example, only CIs that belong to the Computer class are available in the **Model ID** field on the Computer form.

To locate the available dynamic filter options, navigate to **System Definition** → **Dynamic Filter Options**. In the right-corner of the Dynamic Filter Options list, click the filter icon and create the

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filter condition `Available for ref qual is true`. All dynamic filter options that can be used in dynamic reference qualifiers appear.

Advanced reference qualifier

Advanced reference qualifiers enable you to define an inline encoded query string or JavaScript (actual code or the name of an existing script include or business rule) filter directly in the **Reference qual** field of the reference qualifier. Similar to the other reference qualifier types, when the form loads, the filter is executed, and only the records that match the filter appear in the reference field. Use this type of reference qualifier for implementations that only require a simple, unique filter, that cannot be handled by a simple reference qualifier, and is not used across multiple reference fields.

Note: As a good practice, make JavaScript calls to functions in a script include instead of a global business rule.

An example of an encoded query string is `vendor=true`, which returns all companies that are designated as vendors. Entering this string is the same as using the condition builder as shown in the example for the simple reference qualifier. For additional information on valid encoded query string syntax and examples, see Encoded query strings.

An example of a JavaScript call is `javascript:new myScriptInclude().my_refqual()`. This code calls the function *`my_refqual()`* in the script include *`myScriptInclude()`*. The function must return a query string that can filter the options available on a reference field.

Note: You can also use encoded JavaScript filters such as `javascript:'u_active=true^' + "u_hr_service="+current.hr_service` in reference qualifiers.

In another example, if you are trying to filter based on the current company, you don't have use a lookup script but can simply add this line to your dynamic qualifier:

```
return "company=" + current.company;
```

You can also simplify this and use an advanced reference qualifier instead of a dynamic one:

```
javascript:"company=" + current.company
```

For an additional example, configuring the reference field to show only users of a specific group, see the How to select only users of a specific group into a reference field [KB0831564] article in the Now Support Knowledge Base

.

Related lists and reference qualifiers

When a field appears on multiple Related lists on a single form view, it may be necessary to validate which related list is being referenced to properly build the reference qualifier for the field. In this situation, configure the list control for the related list and enter a unique tag in the **List edit tag** field. This tag value is available to filter scripts as a variable named *`listEditRefQualTag`*. The following script include code is an example of a function that uses this type of tag.

```
// Advanced reference qualifier on the CI Relationship Child
 field that takes into account
// the related list that we are editing the child field on, if
 the field is being edited
// from a tagged related list.
```

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```
cmdb_rel_ci_child_refQual:function(){

 if(listEditRefQualTag =="application") return "sys_class_name
= cmdb_ci_appl";

 if(listEditRefQualTag =="database") return "sys_class_name =
cmdb_ci_database"

 }
```

Using Javascript current syntax in reference qualifiers

`current` is a JavaScript object that contains the fields and field values of the active (current) record. For forms, this is the record that is displayed (loaded) in the form. Within advanced and dynamic reference qualifiers, you can use the JavaScript `current` object to define filters such as `javascript:"company=" + current.company`.

This JavaScript, within a reference qualifier, only returns the records from the referenced table that are equal to the company field value of the current record. So, if the value that appears in the **Company** field is Acme, the JavaScript returns all reference field records whose company value is equal to Acme (company="Acme"). If you then bring up a record whose company value is "ViewRite", the JavaScript resolves to company="ViewRite."

All fields within the currently loaded form (tables) are available for use with the `current` object. Use dot-walking to access values in a table, including the referenced table. For example, on the Incident form, the **Assigned To** field references the User table. To access the email address of the user, use the following syntax: `javascript:"emailAddress=" + current.assigned_to.email`.

Related topics

- Create a dynamic filter option
- Create scripted filters
- CMDB classifications

Configure reference qualifiers

System administrators can configure reference qualifiers that enable filtering of the associated reference field.

About this task

This task walks you through creating a reference qualifier in the system dictionary. When creating a reference qualifier in the system dictionary, it not only applies to that table, but also to all the children of the table.

> **Note:** You can also create reference qualifiers on extended tables through dictionary overrides. Dictionary overrides only impact the extended table and any of its children, not the parent table.

Procedure

1. Navigate to the reference field on the form or table on which you want to define a reference qualifier.
2. Right-click the reference field label and select **Configure Dictionary**.
3. Under **Related Links**, select **Advanced view**.

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The simple reference qualifier is available in both the default view and the advanced view. The dynamic and advanced reference qualifiers are available only in the advanced view.

4. In the Reference Specification section, verify that the table in the **Reference** field contains the table that you want associated with the reference field, or select another table if necessary.
5. From the **Use reference qualifier** choice list, select the reference qualifier to implement.
6. Configure the qualifier based on the type of reference qualifier.
   - **Simple**: Build the condition using the choice lists.
   - **Dynamic**: Either select an existing dynamic filter option or Create a dynamic filter option.
   - **Advanced**: In the **Reference qual** field, enter an Encoded query strings, JavaScript that returns a query string, or the name of a script include or business rule to run.
7. Complete the **Reference Specification — Additional Customization** section, as appropriate.

Field	Description
Reference key	Identifies a field other than sys_ID to use as the unique identifier for the reference field.
Reference cascade rule	Defines what happens to a record if the record it references is deleted. Possible options include: ○ None ○ Cascade ○ Clear ○ Delete ○ Delete no workflow ○ Restrict
Reference floats	Flag that determines whether to Configure the edit option for one-to-many relationships.
Dynamic creation	Flag that determines if the system should create a new record when a value for the reference field does not match an existing record. If you select this option, enter a script that specifies how to create the record in the **Dynamic creation script** field.

8. Click **Update**.

Constrain the assigned to field by role

This example shows how to use JavaScript and a business rule to restrict the incident **Assigned to** field choices to only the users with the itil_admin role.

Before you begin

Role required: personalize_dictionary or admin

About this task

You can also change itil_admin to any other role on a reference field that refers to the User [sys_user] table.

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Procedure

1. Open an incident.
2. In the upper-left corner of the screen, click the form context menu, and then select **Configure** > **Dictionary**.
3. In the **Reference qual** field, enter `javascript:"sys_idIN"+getRoledUsers("itil_admin").join(",")`.
4. Save the record.
5. To see the base system business rule that this JavaScript code calls, navigate to **System Definition** > **Business Rules**.
6. Open **getRoledUsers**.
   The business rule uses the following JavaScript code.

```
// Return an array of sys_ids of the users that have at least
 one role
// optional parameters allow the exclusion (NOT IN) of some
 roles or
// look for specific roles (IN)
//
// optional: queryCondition - 'IN' or 'NOT IN'
// optional: roleList - a comma separated list of role names
//
function getRoledUsers(queryCondition, roleList) {
   var roleListIds;
   if (queryCondition && roleList) {
      roleListIds = getRoleListIds(roleList);
   }

   var users = {};
   var now_GR = new GlideRecord('sys_user_has_role');
   if (roleListIds) {
      now_GR.addQuery('role', queryCondition, roleListIds);
   }
   now_GR.query();
   while (now_GR.next()) {
      users[now_GR.user.toString()] = true;
   }

   var ids = [];
   for (var id in users)
      ids.push(id);

   return ids;
}

// get sys_id's for the named roles
function getRoleListIds(roleList) {
   var ids = [];
   var now_GR = new GlideRecord('sys_user_role');
   now_GR.addQuery('name','IN',roleList);
   now_GR.query();
   while (now_GR.next()) {
      ids.push(now_GR.sys_id.toString());
   }
```

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```
   return ids;
}
```

Constrain the assignment group field

This example shows how to use an advanced reference qualifier with JavaScript and a script include to restrict the incident **Assignment group** choices to only the groups that contain the user specified in the **Assigned to** field.

Before you begin

Role required: personalize_dictionary or admin

Procedure

1. Open an incident.
2. Right-click the **Assignment group** label and select **Configure Dictionary**.
3. If the form appears in **Default view**, under **Related Links**, click **Advanced view**.
4. In the **Use reference qualifier** field, ensure that the **Advanced** option is selected.
5. In the **Reference qual** field, enter `javascript:new ReferenceQualifierHelper().backfillAssignmentGroup()`.
6. Save the record.
7. Navigate to **System Definitions** > **Script Includes**.
8. Click **New**.
9. Name your script includes as `ReferenceQualifierHelper` to match the Javascript in the following step.
   This name ensures the API Name is generated correctly, based on the Name field.
10. Script includes with the following JavaScript code.
    Ensure that the **Accessible form** field is properly set for the environment.

```
var ReferenceQualifierHelper = Class.create();
ReferenceQualifierHelper.prototype = {

 backfillAssignmentGroup:function() {
  var assigneeGroupsQualifier = '';
  var assignee = current.assigned_to;

  //return if the assigned_to value is empty (this causes all
 groups to be returned)
  if(!assignee)
   return;

  //sys_user_grmember has the user to group relationship
  var grAssigneeGroups = new GlideRecord('sys_user_grmember');

  grAssigneeGroups.addQuery('user',assignee);
  grAssigneeGroups.query();

  while(grAssigneeGroups.next()) {
   if (assigneeGroupsQualifier.length == 0) {
    // Create the beginning of the qualifier and add the 1st
 group
    assigneeGroupsQualifier = 'sys_idIN' +
 grAssigneeGroups.getValue('group');
```

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```
   }
   else {
    // build a comma separated string of groups if there is
 more than one
    assigneeGroupsQualifier += (',' + grAssigneeGroups.group);
   }
  }
  // return Groups where assigned to is in those groups we use
 IN for lists

  gs.log('DP: RefQual = ' + assigneeGroupsQualifier);

  return assigneeGroupsQualifier;
 },
 type: 'ReferenceQualifierHelper'
};
```

What to do next

To test, create an incident and select a user in the **Assigned to** field. Click the **Assignment group** lookup icon. Only the groups that contain the user you selected appear. For example, you assign an incident to Bob Smith, who belongs to the **Database** group and the **Networking** group. The only options that appear in the assignment group are **Database** and **Networking**.

The INSTANCEOF operator in reference qualifiers

You can use the INSTANCEOF operator in a reference qualifier to shorten or simplify a complex class qualifier.

For example, use the INSTANCEOF operator for a reference field to the cmdb_ci table to specify that all subclasses of a class are included in the results. The following reference qualifier returns all servers, including Linux, UNIX, Windows, and so on, because each of those subclasses extend the cmdb_ci_server class.

```
sys_class_nameINSTANCEOFcmdb_ci_server
```

In another example, you can simplify the following reference qualifier in a similar way.

```
 u_active=true^sys_class_name=cmdb_ci_acc
^ORsys_class_name=cmdb_ci_computer
^ORsys_class_name=cmdb_ci_server
^ORsys_class_name=cmdb_ci_win_server
^ORsys_class_name=cmdb_ci_unix_server
^ORsys_class_name=cmdb_ci_linux_server
^ORsys_class_name=cmdb_ci_appl
^ORsys_class_name=cmdb_ci_netgear
```

Using the INSTANCEOF operator, the reference qualifier is rewritten as follows because the server subclasses extend the cmdb_ci_computer class.

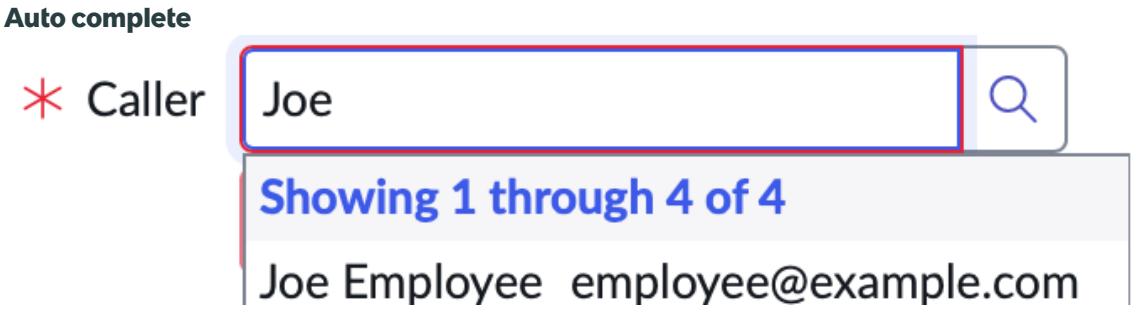
```
 u_active=true^sys_class_name=cmdb_ci_acc
^ORsys_class_nameINSTANCEOFcmdb_ci_computer
^ORsys_class_name=cmdb_ci_appl
^ORsys_class_name=cmdb_ci_netgear
```

Auto-complete for reference fields

By default, a reference field auto-completes as the user types in the field.

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Administrators can configure additional auto-complete options. A user must have table-level read permission on the referenced table for auto-complete to display any options.



Dictionary attributes for auto-completion of reference fields

There are dictionary attributes that are specific to reference fields and that determine auto-complete behavior.

Reference field auto-completion dictionary attributes

Attribute	Description
ref_auto_completer	Specifies the name of the client-side JavaScript class that creates the drop-down auto completion choices. Valid class values include: • *AJAXReferenceCompleter*: Displays matching auto-complete choices as a drop-down choice list. The list only displays the reference table's display value column. Reference fields automatically use this class if there is no other auto-completion class specified. • *AJAXTableCompleter*: Displays matching auto-complete choices as rows in a table. The table displays the reference table's display value column and any columns listed in the *ref_ac_columns* attribute. • *AJAXReferenceChoice*: Displays matching auto-complete choices as a drop-down choice-list. The list only displays the reference table's display value column. Furthermore, the list only displays up to 25 matching choices. If there are more than 25 auto-complete choices, the reference field instead displays the choices with the AJAXTableCompleter class.
ref_ac_columns	Specifies the list of reference table columns to display. Separate column names with a semi-colon. For example, *ref_ac_columns=user_name;email;sys_created_on* allows auto-complete to match text from the user_name, email, and sys_created_on columns.
ref_ac_order_by	Specifies the reference table column that sorts the auto-completion choices. For example, *ref_ac_order_by=name* sorts the auto-completion choices alphabetically by name.

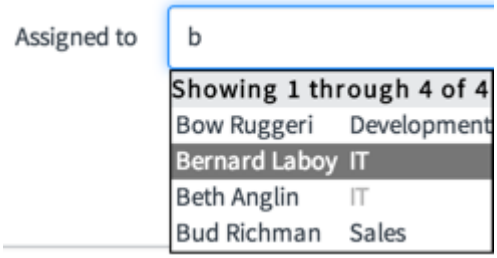
Auto-complete UI features

The AJAX table completer class has a number of UI improvements.

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- The table completer always displays the number of records the auto-complete query finds.
- The table completer highlights the entire selected row by changing the color of the background and text.
- The table completer lists a value for every column.
  - The first time a value appears in a column, the table completer displays it in black text.
  - The table completer displays subsequent duplicate values in grey text. Previously, the table completer displayed an empty cell in a column containing a duplicate value.

Selected row highlight



Set the *ref_auto_completer=AJAXTableCompleter* dictionary attribute to use these improvements.

Define auto-complete attributes for all references to a table

A field inherits and uses the reference table's auto-complete attributes unless the field has its own value for the same attributes. You can define the attributes for references to a table, and it affects every form that references that table.

Before you begin

Role required: personalize_dictionary

About this task

A field-level attribute overrides a table-level attribute of the same name. If a field uses different reference attributes from those that are defined for the reference table, then the field uses both sets of attributes.

Use these steps to define auto-complete attributes for all fields in a table that do not already have their own auto-complete attributes. This example describes how to define auto-complete attributes for all references to the User [sys_user] table.

Note: A field's auto-complete attribute value supersedes a table's auto-complete attribute value. This means that any existing field-level value for an auto-complete attribute supersedes any value the administrator applies to the auto-complete attribute from the reference table.

Procedure

1. Navigate to a list of the target table, such as **All** > **User Administration** > **Users**.
2. Right-click the column header and click **Configure** > **Dictionary**.
3. Select the row that does not list a column name.
   This row is typically the first row in the list. For example, select the first **sys_user** link.
4. Under **Related Links**, click **Advanced view**.
5. In the **Attributes** field, enter a comma-separated list of auto-complete attributes you want to apply to all fields in the table.

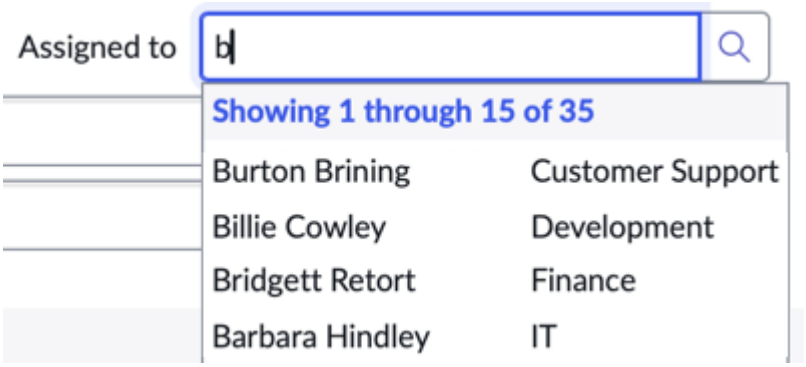
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Example
For example, to display the user's department with all references to the sys_user table, enter:

```
ref_auto_completer=AJAXTableCompleter,ref_ac_columns=department
,ref_ac_order_by=department
```

6. Click **Update**.

What to do next
To test the new auto-complete attributes, open a form that references the User [sys_user] table, such as an open incident. Enter a single character in the **Assigned to** field. The auto-complete options now include both the user name and department.



Remove the display value column

You can remove the display value column from a reference field by setting the *ref_ac_display_value* attribute to false.

Before you begin
Role required: personalize_dictionary

About this task
This causes the reference field to remove the display value column and only display the columns listed in the *ref_ac_columns* attribute. This feature requires the use of the *AJAXTableCompleter* class and the *ref_ac_columns*, *ref_ac_columns_search*, and *ref_ac_display_value* attributes.

Note: Auto-complete cannot match text from additional columns when the reference field is a product of the *ui_reference* UI macro. This means any auto-complete action against a selector, such as the Impersonate User list, can only match text against the display value.

This example describes how to remove the display value column from references to the User [sys_user] table and replace it with references to the first_name and last_name columns.

Procedure
1. Navigate to a list of the target table, such as **All** > **User Administration** > **Users**.
2. Right-click the column header and click **Configure** > **Dictionary**.
3. Select the row that does not list a column name.
   This row is typically the first row in the list. For example, select the first **sys_user** link.
4. Under **Related Links**, click **Advanced view**.

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5. In the **Attributes** field, add the *ref_auto_completer*, *ref_ac_columns*,*ref_ac_columns_search* , and *ref_ac_display_value* attributes.

   Example
   For example, to hide the display value column and only display the user's first and last names enter the following.

   ```
   ref_auto_completer=AJAXTableCompleter,ref_ac_columns=first_name
   ;last_name,ref_ac_columns_search=true,ref_ac_display_value=fa
   lse
   ```

6. Click **Update**.

What to do next
To test the new auto-complete attributes, open a form that references the User [sys_user] table, such as an open incident. Enter a single character in the **Assigned to** field. The auto-complete options now hide the display value column (user_name) and only display the first_name and last_name columns.

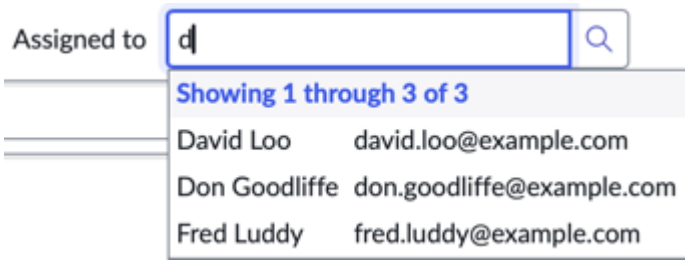


Improve auto-complete queries

By default, all reference fields use a **starts with** query to search for matching text in the reference table. This prevents auto-complete from executing inefficient **contains** queries every time a user searches a reference field. You can require all reference fields to use a **starts with** query.

Before you begin
Role required: admin

About this task
The following example illustrates a **contains** query. Note that the letter "d" appears anywhere in the user's first or last name.



This procedure describes how to change the *glide.ui.ref_ac.startswith* system property to always use a *starts with* query.

Procedure

1. In the navigation filter, enter `sys_properties.list` and press the Enter key.
2. Select the *glide.ui.ref_ac.startswith* property.
   To search for the property, enter `*startswith` in the **Go to** search filter for the **Name** column.

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3. In the **Value** field, replace **false** with **true**.

   Note: Setting the *glide.ui.ref_ac.startswith* system property to **true** overrides any existing *autocomplete.contains* settings in both user and system level preferences. This property changes the autocomplete query method for all users regardless of preferences.

4. Click **Update**.
5. Test the change by opening a record with a reference field and entering a character in it, as illustrated in the example below.



Configure auto-complete to match text from any reference field

By default, auto-complete only matches text in the display value column. You can configure a reference field to match text from any additional column the reference field displays.

Before you begin

Role required: personalize_dictionary

About this task

You can add the *ref_ac_columns_search* attribute to enable auto-complete to match text in any column listed in the *ref_ac_columns* attribute. Set the *ref_ac_columns_search* attribute to **true** to match text from all reference field columns. By default (or when this attribute is **false**) auto-complete only matches text in the display value column.

Procedure

1. Select and hold (or right-click) the label of a reference field.
2. Select **Configure Dictionary** from the list.
3. Under **Related Links**, click **Advanced view**.
4. In the **Attributes** field, add the desired auto-completion attributes.
   For example, these attributes add the department field to the caller list and sort callers by their department:

```
ref_auto_completer=AJAXTableCompleter,ref_ac_columns=department
,ref_ac_order_by=department,ref_ac_columns_search=true
```

5. Click **Update**.

Example:

The following example describes how to set the **Configuration Item** field display the CI class names from auto-complete choices for the Configuration item [cmdb_ci] table.

```
ref_auto_completer=AJAXTableCompleter ,ref_ac_columns
 =sys_class_name ,ref_ac_order_by
```

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```
=sys_class_name ,ref_contributions
=task_show_ci_map ;ci_show_incidents
```

Note: The *ref_contributions* attribute controls the icons that appear next to the reference field.

Enable contains auto-complete searches

By default, the reference auto-complete uses a **starts with** search. A user preference can be created to implement a **contains** search.

Before you begin
Role required: admin

Procedure

1. Disable the *glide.ui.ref_ac.startswith* system property.
   For more information, see Improve auto-complete queries.

   Note: Setting the *glide.ui.ref_ac.startswith* system property to **true** overrides any existing "autocomplete.contains" settings in both user and system level preferences. This property changes the auto-complete query method for all users regardless of preferences.

2. Navigate to **User Administration** > **User Preferences**.
3. Select the preference **"'<referenced table>.autocomplete.contains'"**.
4. Set the **value** field to **true**.
5. Select **Update**.

What to do next
Log out and log back in to display the updated search.

Wildcards in reference auto-completes

Wildcard searches use the auto-complete functionality.

Use an asterisk in the reference field for wildcard searches.

If two asterisks are entered, a list of available records display in the auto-complete suggestions.

Recent selections

Reference fields store a list of each user's recent selections to enable you to quickly select past values when filling in a reference field.

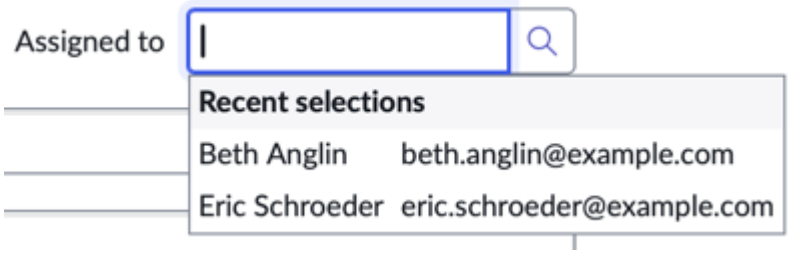
By default, the system stores up to 15 selections from a reference field for each user in the Recent Selection [sys_ui_recent_selection] table. You can see the recent selections list by selecting an empty reference field.

Note:

- The system doesn't store recent selections for Service Catalog reference variables.
- Recent selections aren't available in the Service Portal or mobile user interfaces.

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Recent selections



The system uses auto-complete to filter the list of recent selections to match the values that you enter.

Recent selections filtered



The system adds a Recent Selection record whenever you insert or update a reference field value. Administrators can control the number of recent selections the system displays with the *glide.xmlhttp.max_choices* system property. Setting the property to zero disables recent selections.

Note:

- The *glide.xmlhttp.max_choices* property also controls the number of entries the system displays in lists.
- For information on clearing recent selections, see the How to clear out the "Recent Selections" that appears up on the reference fields. [KB0747334] article in the Now Support Knowledge Base.

Related topics

Available system properties

Suggestion field type

To help users find what they are looking for, you can add a suggestion field to any form.

Before you begin

Role required: personalize_dictionary

Procedure

1. Open the form to which you're adding a suggestion field.
2. Add a new field or locate an existing field.
3. Right-click the field label and select **Configure Dictionary**.
4. In the **Choice** field, select **Suggestion**.
5. Select **Update**.

Configure suggested text for string fields

You can configure the suggested text options for string fields.

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Before you begin
Role required: personalize_choices

Procedure
1. Select and hold (or right-click) the field label and select **Configure Choices**.
2. Select options and the order in which you want them to appear.
   - To create a new option, enter the suggested text in the **Enter new item field** and click **Add**.
   - The **Apply to Table** field is available when the current table extends another table (for example, Incident extends Task). This field allows suggested text options to be configured for all tables that extend the parent or for only the current (child) table.
3. Select **Save**.
4. To edit existing options, select and hold (or right-click) the field label and select **Show Choice List.**.

Configure suggested text for journal fields

You can configure the suggested text options for journal fields, such as work notes or the activity stream. Suggested text options for journal fields are unavailable in Core UI.

Before you begin
Role required: personalize_responses

Procedure
1. Select and hold (or right-click) the field label and select **Configure Responses**.
2. Select **New**.
3. Enter a label, or brief description, for the option.
4. Enter the complete text in **Response text**.
5. Select **Save**.

Wiki field type

Wikitext fields use the basic wiki markup language and support links to external URLs and to sources within the system.

Some fields in the base system support Wikitext and administrators can add Wikitext fields on any form in the system.

Supported wiki tags

Basic tags are supported for Wikitext fields in the system.

Supported wiki tags

Format	Wiki tag
Headers	= Header 1 =, == Header 2 ==, etc.
Numbered step	#Step 1
Bullets (multi-level)	*Bullet 1, **Bullet 2
Indentation	:Level 1, ::Level 2

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Supported wiki tags (continued)

Format	Wiki tag
Line break	

Tables	Full table support, including cell spacing, padding, borders, background shading, and width measurements.
	
	For example:
	`{| class="wikitable"`
	`|-`
	`! Header 1`
	`! Header 2`
	`|-`
	`| row 1, cell 1`
	`| row 1, cell 2`
	`|-`
	`| row 2, cell 1`
	`| row 2, cell 2`
	`|}`
	
	Note: Sortable tables are not supported (class="sortable").

Code blocks	<pre> Generic block </pre> <javascript> Javascript Syntax </javascript> <xml> XML Syntax </xml>
Bold	'''text'''
Italics	''text''
Ignore Wiki and HTML formatting	<nowiki> wikitext </nowiki>
Web link	[http://community.service-now.com/ <link text>]
Placed images	[[Image:<image name>]] For more information on uploading images or files to the database, see Storing images in the database.
HTML	Most common HTML tags are supported bold, strong, italics, header1 , header2 , header3 , paragraph , _{sub}, ^{sup}, center

Create a Wikitext field

You can create a Wikitext field on any form.

Before you begin

Role required: personalize_form

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Procedure

1. Create a field with the **Type** set to **Wiki**.
2. On the form with the new Wiki type field, select **Wikitext** to begin editing.
   The Wikitext field appears on the form.

Related topics

Add and customize a field in a table

Extend the functionality of a Wikitext field

Configure the Wikitext field to link to other sources within the system.

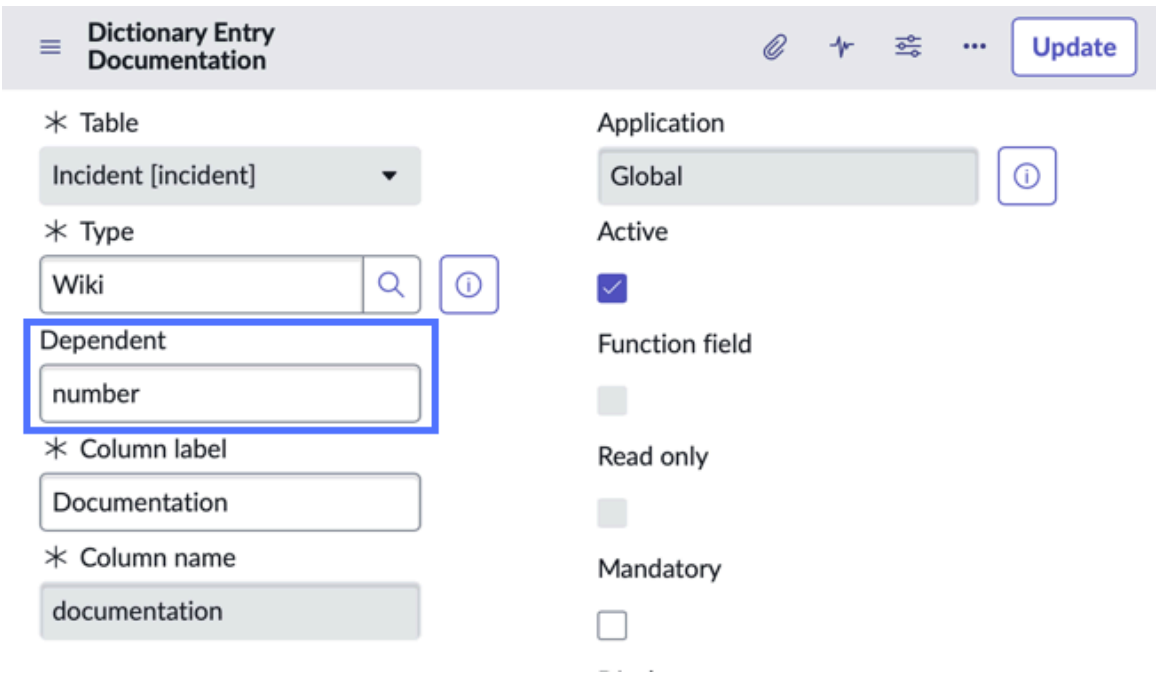
Before you begin

Role required: personalize_dictionary

Procedure

1. Right-click in the header of the new Wikitext field.
2. Select **Configure Dictionary**
3. In the **Dependent** field of the dictionary form, enter the field you want to use for linking to other pages.

   For example, on the Incident table, you might choose the **number** field.



   This configuration enables you to link to any incident by using that incident's number. For example, to open INC0000002, you enter `[[INC0000002]]`.

   The following dictionary attributes are available for wiki_text fields.

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- *preview_first=true* - sets the preview mode to display on page load, otherwise editor will be displayed
- *preview_selector=true* - enables the toggle button to switch between the editor and preview
- *dual_mode=true* - enables displaying both the editor and the preview simultaneously during edit mode.

ServiceNow AI Platform® list administration

Administrators control the data presented to end users in a list, the controls that appear, and the behavior of the controls.

Get started

Note: For information about using lists, see Lists.

Configure	Administer
	
Configure lists for all users.	Administer list behavior and allow personalization for individual users.

Configuring lists on the ServiceNow AI Platform®

Users with the appropriate roles can configure various aspects of lists. Configuration changes apply to all users.

With list configuration, you can add, remove, and reorder list columns. You can configure calculations to appear under columns. You can also hide controls and define access conditions by role for existing list controls. Configuring lists is called personalizing lists in versions prior to the Fuji release.

Note: Configuring a list in this way modifies the list for all users. To make changes to a list that are visible to you only, see Personal lists.

Configure the list layout

You can configure a list to choose which columns appear in a list, create list views, and create fields on the table.

Before you begin

Role required: personalize_list

About this task

https://player.vimeo.com/video/1198909309?h=c2a44f3071&badge=0&autopause=0&player_id=0&app_id=58479%22

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Procedure

1. Navigate to the list you want to configure.
2. Open the **List controls** menu ( ) and select **View** > **(view name)**to select the view you want to configure.
3. Right-click any column heading and select **Configure** > **List Layout**.
4. Add, remove, or reorder fields to configure the columns displayed and their order of appearance.
   The first non-reference field automatically links to the form view of the record. For this reason, consider using the record number as the first column in the list layout.
5. Select **Save**.

Note:

- If you use Personal lists and then configure the list view differently, the changes do not appear until you reset your personal list to column defaults.
- Inactive fields display in admin-configured lists until an admin updates the list layout to remove them.

Trouble?

If a reference field in a list displays as (empty) instead of the expected value, it is due to another field in the list containing an incorrect reference to either an orphaned record or a sys_id that does not exist in the referenced table. The solution is to remove the incorrect reference data from any reference fields in that table.

Add an extended field to a base table list

Administrators can configure a property that determines whether fields on extended tables can be added to a parent table list. For example, when this feature is enabled, you can view and filter on the **Caller** field, from the Incident table, on a Task table list.

Before you begin

Role required: admin

Note: Enabling this property does not show the extended table fields in the personalize list.

Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Locate the property **Allow base table lists (task, cmdb_ci, etc.) to include extended table fields (incident_state, os_version, etc.), and allow filtering on extended table fields** (*glide.ui.list.allow_extended_fields*).
3. Select the check box to enable extended fields on parent table lists, or clear the check box to disable the feature.
4. Select **Save**.

Configure list calculations

You can configure list calculations for columns, which calculate column totals, minimums, maximums, and averages.

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Before you begin
Role required: personalize_list

About this task
You can configure list calculations for multiple columns in the same list. List calculations apply only to the view of the list in which they are configured. All users can see configured list calculations.

Note:

- List calculations are also available in list reports.
- List calculations for a calculated field can only operate on the *current values stored in the database for each record and not the values as calculated fresh when the list is rendered.

Procedure

1. In a list of records, right-click the header of a numeric column you want to evaluate with list calculations.
2. Select **Configure** > **List Calculations**.
3. Select one or more of the following list calculation options:
   - Total value (not available for string, date, or date/time fields)
   - Minimum value
   - Maximum value
   - Average value (not available for string, date, or date/time fields)
4. Select **OK**.
   The calculations appear below the last record in the column. If the list is grouped, in addition to the overall calculations at the bottom of the list, group calculations appear below the last record in each group.

Omit record count in a list

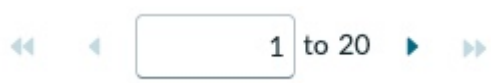
Speed up how fast lists load by removing the calculation of the total number of records in a list.

Before you begin
Role required: workspace_admin

About this task
Calculating the total number of records included in a list that's filtered from large tables can take a long time. Platform displays the total number of records in the list.



To load lists faster, you can remove the page calculation for all or only specified filtered lists. When you remove the calculation, the total record count is not displayed and the Last Page icon ( ) is grayed out.



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Procedure

1. Open a list, for example navigate to **Incident** > **All**.
2. Right-click a header in the list and navigate to **Configure** > **List Control**.
3. Select **Remove pagination count**.
4. **Optional:** To omit the record count only in specific view:
   a. Select **Remove pagination count for specific views**.
   b. Beside **Specific list of views prevented from getting full record count**, select the lock icon ( ).
   c. Select the search icon ( ) and select the view where platform omits the page count.
   d. Repeat the previous step for as many views as necessary.
5. Select **Update**.

Configure list controls

You can configure list controls, such as buttons and filters.

Before you begin

Role required: personalize_control

Procedure

1. Open a list.
2. Right-click any column heading and select **Configure** > **List Control**.
3. Complete the form.

Note: The list control fields that are available for embedded lists are more limited. Unless otherwise noted, the list control fields in the following table are available for both standard and embedded lists.

List Control form

Field	Description
Table	Name of the table for the list or related list. For example, **Change Request [change_request]**. The system automatically sets this value.
Related list	Name of the table and field that define the related list. For example,**sysapproval_approver.sysapproval**. The system automatically sets this value.
Label	Label to display for this list. Allows an admin to customize the label for a related list or list. If not supplied, the default plural label for the file is used. For example, the label for the Incident table would be **Incidents**.
Omit new button	Option to prevent the **New** button from displaying on this list. Clear the check box to display the **New** button or to control the **New** button with roles (**New roles** field). This field is available for standard lists only.
Omit edit button	Option to prevent the **Edit** button from displaying on this list. Clear this check box to display the **Edit** button or to control the **Edit** button with roles (**New roles** field). The **Edit** button does not apply to all lists.

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Field	Description
	This field is available for standard lists only.
Omit if empty	Option to omit the **Related List** from the form entirely (no header) if there are no entries for the **Related List**.
Omit columns if empty	Option for a top-level list to omit the column headers AND filters/breadcrumbs for an empty column.
Omit filters	Option to hide filters or breadcrumbs for this list. Clear this check box if you always want filters or breadcrumbs or to control filters/breadcrumbs with roles (**Filter roles** field). This field is available for standard lists only.
Omit links	Option to hide links for fields that reference other files in this list. Leave this button unchecked to generate links or to control the use of links with roles (**Link roles** field).
Omit drill-down link	Option to disable the link to the record from the first column in list view. Users can still select the reference icon to access the record. This field is available for standard lists only.
Omit related list count	Option to hide the related list count from displaying on initial load. Set it to **False** to restore it.
Hierarchical lists	See Enable a hierarchical list. Hierarchical list inserted into a record list. Hierarchical lists enable a user to view the contents of a record's related lists without leaving the record list form. This field is available for standard lists only.
List edit type	Ability for the user to edit values directly in individual cells in a list. The options are: ○ **Save immediately (cell edit mode):** enables cell editing. The entire row is saved when the user enters a new value. ○ **Save data by rows:** enables cell editing. The row is saved only when the user navigates away from the row or selects the **Save** icon ( ). This mode allows the user to modify multiple values before saving a record. ○ **Disable list editing:** prevents users from editing cells in the list. This field is available for standard lists only.
List edit tag	Unique tag that is sent to a reference qualifier as the script variable *`listEditRefQualTag`*. Enter an arbitrary string of letters or numbers.
List edit insert row	Ability for a user to create records in list view. When it is enabled, an empty row appears at the bottom of the list. This field is available for standard lists only.
Remove pagination count	Option to remove pagination count from the list.

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Field	Description
Disable Natural Language Query (NLQ)	Option to disable the NLQ filter in specific lists when NLQ on lists is enabled in the instance. The NLQ filter enables you to use natural language to filter lists instead of using the condition builder. For more information on NLQ filters, see Natural Language Query. **Note:** When the system property *com.snc.listv2.nlq.lists.enabled* (com.snc.listv2.nlq.lists.enabled) is set to **false**, the query destructs. Text entered in the search replaces existing conditions.
Application	Scope of this setting's applicability. Global means that all workspaces can use this setting.
New roles	User roles that can access the **New** button on this list. Leave the field blank to enable all users to access the **New** button. This option does not apply to embedded lists, which do not contain **New** buttons.
Filter roles	User roles required to have the filter appear in the list. This field is available for standard lists only.
Link roles	User roles required to have links generated for fields that reference other files.

Example of configuring list controls

The following example shows how to configure a list of related incidents in a problem record to suit specific business needs.

Before you begin
Role required: personalize_control

About this task
In this example, a related list label is configured to say `Child Incidents`, not just `Incidents`. The related list is also configured to remove the **New** button to prevent users from creating incidents from the Problem form.

Procedure
1. Navigate to a problem record.
2. Open the list context menu in the **Incidents** related list and select **Configure** > **List Control**.
3. On the List Control form, change the **Label** field to `Child Incidents`.
4. Select the **Omit new button** check box.
5. Select **Submit** to save your changes and return to the previous record, in this case, the problem record.
   In the problem record, the label for the embedded incident list has changed and the **New** button is no longer available.

Advanced list control with scripts

You can write scripts to specify which list elements, such as links, filters, and buttons, are present.

These scripts can react to the record that is being displayed. For related list controls, the global variable **parent** identifies the parent record. For primary lists, there is no parent record.

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Configure the List Control form and add the script field that you need:

- **Omit Columns Condition:** If there are no conditions, omit column headings.
- **Omit Edit Condition:** Omit the **Edit** button.
- **Omit Empty Condition:** If there are no conditions, omit the list header.
- **Omit Filter Condition:** Omit the list filter.
- **Omit Links Condition:** Omit related links.
- **Omit New Condition:** Omit the **New** button.

In these script fields, if the script evaluates to **true**, the item is omitted. The following script is an example that you can use on the **Affected CIs** related list to show only the **Edit** button if the parent task is active. This script is placed in the **Omit Edit Condition** script field.

```
var answer;
 if (parent.active == true ) {
 //Do not remove the 'Edit' button
  answer = false;
}
else {
 //Remove the 'Edit' button
  answer = true;
}
answer;
```

Configure a list UI action

You can create a UI action that opens the slushbucket interface to customize lists in the list view.

Before you begin

Role required: ui_action_admin

Procedure

1. Navigate to **All** > **System Definition** > **UI Actions**.
2. Click **New**.
3. In the **Table** field, select the **List [sys_ui_list]** table.
4. Select the **List context menu** check box.
5. Ensure the **Active** check box is selected.
6. Paste the following script in the **Script** field:

```
var url  = "slushbucket.do?sysparm_form=list&sysparm_list=" +
 current. name + "&sysparm_view=" + current. view. name ;
url  += "&sysparm_collection=" + current. parent +
 "&sysparm_collection_relationship=" + current. relationship ;
url  += "&sysparm_referring_url=sys_ui_view.do?sys_id=" +
 current. view. toString ( ) ;
action. setRedirectURL (url ) ;
```

7. Click **Submit**.

Show/hide filter controls

The Show/hide filter used in the list configuration, lists the fields to configure in the filter conditions.

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The fields mentioned in the Show/hide filter are sorted in an alphabetical order.

Note: If the name of the fields start with an accented character, those fields are placed at the end of the list.

You can enable the *guide.ui.condition_builder.sort_labels_by_locale* sys property to sort the fields of the Show/hide filter as per the locale-based language. The sys property is set to **False**, by default. If you have a customized script that's based on alphabetical sorting of the fields, the locale-based language setting might break your script. So, you can enable the sys property only when you need the filter to be locale-based language.

Note: If the sys property is not enabled, the fields are sorted in an alphabetical order. The fields starting with an accented character are placed at the end of the list.

Administering lists on the ServiceNow AI Platform®

Administrators can control the sort sequence, allow personal lists, restrict filters and breadcrumbs, allow context ranking and more.

Administration overview

- Controlling the sort sequence used to display lists

  All lists have a default sort sequence based on the type of fields present in the list.

- List editor administration

  The list editor allows users to edit field values directly from a list without navigating to a form.

- Personal list administration

  Users can customize the layout for any list view by personalizing a list. Administrators can configure options related to list personalization.

- Administer detail rows

  Detail rows provide additional information about records in a list.

- Restrict filters and breadcrumbs with fixed queries

  The record list view allows users to navigate to different subsets of a table using breadcrumbs and filters. You can limit access to parts of the table by restricting active links in breadcrumbs or by suppressing breadcrumbs and filters for specific roles.

- Enable a hierarchical list

  You can enable hierarchical lists to make data from related lists directly accessible from within a v2 list.

- Context ranking

  Context ranking allows a user to sort a collection of records preferentially; that is, independently of the attributes of those records.

- Customize list context menus

  You can customize the content and behavior of list context menus.

Controlling the sort sequence used to display lists

All lists have a default sort sequence based on the type of fields present in the list.

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When a user displays a list for the first time, it is sorted by one of the following items.

- The **ORDERBY** arguments found the URL. (See the following section on sort order control.)
- The **<table>.db.order** and **<table>.db.order.direction** user preferences.
- The **isOrder** dictionary attribute.
- The **Order** field if one is present in the table.
- The **Number** field if one is present in the table.
- The **Name** field if one is present in the table.
- The field specified as the display field for the table.

Note: The task table is an exception to the preceding sequence. Task and tables extended from task use the **Number** field when no URL arguments or user preferences are found.

Setting default order with user preferences

The **<table>.db.order** and **<table>.db.order.direction** user preferences determine the field and sort direction seen by the user. A default sort can be created by creating user preference records with no value in the **User** field and checking the **System** check box. This preference is applied to any users who do not have their own preference.

Setting the default sort order in the system dictionary

An administrator can set the sort order of records displayed for a table in the system dictionary when there is no other sort specified. This is done by adding an attribute called **isOrder** with a value of **true** to the dictionary entry of the desired field. This sort is the sort order presented to all users initially. Once a user sorts a list, that user preference is saved, and the list is always sorted for that user based on the previous sorting preference.

Note: **isOrder** can define which field is used for list sorting, but cannot control the sort direction.

Sorting a column in a list according to session language

By default, when sorting columns in lists, the field values are ordered according to the English alphabet. To support sorting a column according to the user's session language, you can configure the instance behavior and behavior of individual columns. See Sorting according to the session language.

Related topics

System dictionary

User preferences

Altering tables and fields using dictionary attributes

Sort order control

For any list, if the user has clicked a column header to sort by that column, then that action is remembered. The next time that list is displayed, the same field is used to order the list.

This remembered sort field can be overridden by adding a *sysparm_order* specification to the definition of the module. For example, if each time **News** is displayed, you want the new items listed in order of importance, then the **News** module can be updated accordingly.

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Set module sort order to the Importance field value



The actual order (ascending or descending) can be specified by adding a *sysparm_order_direction* specification. Here are two examples of sorting a list by the **sys_created_on** field, one ascending and one descending:

```
&sysparm_order=sys_created_on &sysparm_order_direction=desc
&sysparm_order=sys_created_on &sysparm_order_direction=asc
```

Sort by multiple fields

To sort a list by multiple fields, remove everything from the filter field and place it in the arguments field. For example, if the filter specifies **[Active] [is] [true]** and you want to sort by category and subcategory, remove the condition and put the following in the module arguments:

```
active=true^ORDERBYcategory^ORDERBYsubcategory
```

This argument first orders by the category and then orders by the subcategory. If you want any field to be a descending sort, then change *ORDERBY* to be *ORDERBYDESC*.

List editor administration

The list editor allows users to edit field values directly from a list without navigating to a form.

Administrators can manage this feature by using the following options. Some of the options are not supported in List v3.

- Configure global properties
- Configure list control settings for a table
- Configure contextual security rules
- Manage user preferences (List v2 only)

Warning: In List v2, the list editor does not enforce client scripts or UI policies. In List v3, the list editor enforces UI policies and mandatory dictionary attributes, but not client scripts. Allowing list editing with client scripts running on fields in a form can result in incorrect data being saved to the record. For systems in which client scripts or UI policies apply to forms, consider disabling list editing or creating appropriate business rules or access control to control the setting of values in the list editor. See Use business rules and client scripts to control field values for information on managing form and list editing.

Warning: You cannot edit state fields that are extended from the Task [task] table from a list of task records. Examples include:

- problem_state
- incident_state
- phase_state
- request_state

While these fields are visible from the task list, they must be edited from the extended table.

Related topics

Use the list editor

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Configure list editor properties

Configure list editor properties that control whether lists can be edited and, in List v2, which field types cannot be edited.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. To disable list editing, set the **Enable list editing** (*glide.ui.list_edit*) property to **No** by clearing the check box.
   This property is enabled by default, and it globally enables list editing. When you disable it, the list editor is disabled globally.
3. To configure the field types that cannot be edited for v2 lists, complete the following steps.

   a. Locate the **List of element types (comma-separated) that cannot be edited in the list editor** (*glide.ui.list_edit_ignore_types*) property, which contains several element types that cannot be edited by default.

   Note: This property does not impact v3 lists. There is no equivalent property for List v3.

   The following field types are not editable from the list editor by default.

   - Conditions [conditions]
   - Currency [currency]
   - Document ID [document_id]
   - Field List [field_list]
   - HTML [html]
   - Image [user_image]
   - List [glide_list]
   - Price [price]
   - Template Value [template_value]
   - Time [glide_time]
   - User Roles [user_roles]
   - Video [video]
   - Array [array]

   b. Add any other field types you want to disable to the end of the list, separated by a comma.
4. Select **Save**.

Configure list control settings for the list editor

You can configure the list control settings that affect the list editor.

Before you begin

Role required: personalize_control

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About this task

List control settings customize the behavior of list functions for a table.

Procedure

1. Navigate to a list view for the desired table.
2. Right-click any column heading and select **Configure** > **List Control**.
3. On the List Control form, select the desired settings.

List control settings for the list editor

Field	Description
List edit type	Ability for the user to edit values directly in individual cells in a list. The options are: ○ **Save immediately (cell edit mode):** enables cell editing. The entire row is saved when the user enters a new value. ○ **Save data by rows:** enables cell editing. The row is saved only when the user navigates away from the row or selects the **Save** icon ( ). This mode allows the user to modify multiple values before saving a record. ○ **Disable list editing:** prevents users from editing cells in the list. This field is available for standard lists only.
List edit insert row	Ability for a user to create records in list view. When it is enabled, an empty row appears at the bottom of the list.  This field is available for standard lists only.

4. Click **Update**.

Configuring contextual security for the list editor

The list editor enforces existing access control rules (ACLs) and additional security controls to restrict editing from a list.

The list_edit security operation specifically controls the ability to edit information in a list. Apply this operation in the same manner as the write operation to limit list editing for fields that require the user to navigate to the form. Reasons you may require a user to edit a field in a form include complex UI policy constraints or other policies you have in place.

- write and list_edit access to the field
- write and list_edit access to any dependent fields of the field
- write and list_edit access to any fields that depend on the field being edited

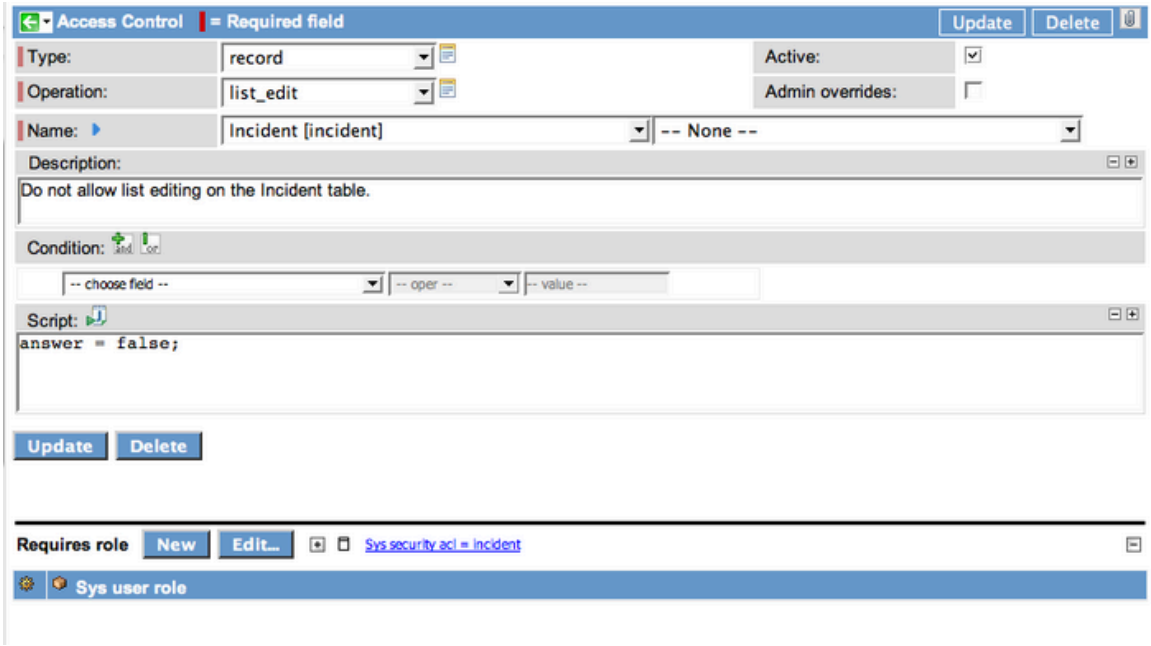
To configure access controls, navigate to **System Security** > **Access Controls**. The following examples use the list_edit security operation to restrict list editing in certain contexts.

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Example - Restrict a table

This access control prevents everyone from editing all fields in the Incident table in a list.

Restrict the Incident Table



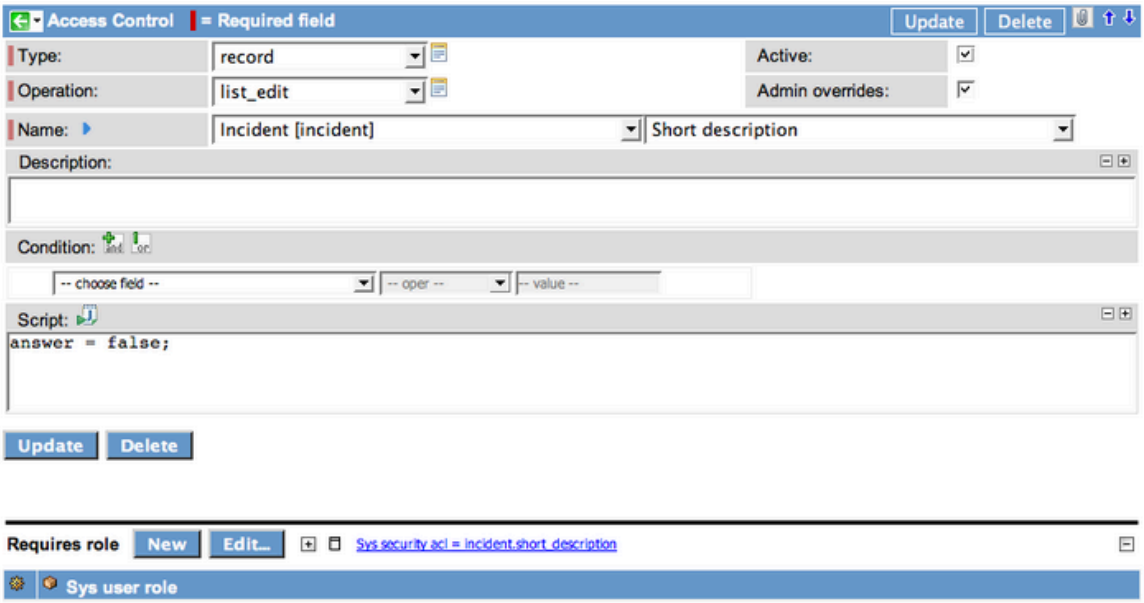
- **Type:** record
- **Operation:** list_edit
- **Name Incident:**[incident]
- **Admin overrides:** Clear the check box.
- **Script:** `answer = false;`

Example - Restrict a field

This access control prevents everyone except an administrator from editing the Short Description field of an incident record in a list.

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Restrict the Incident Short Description

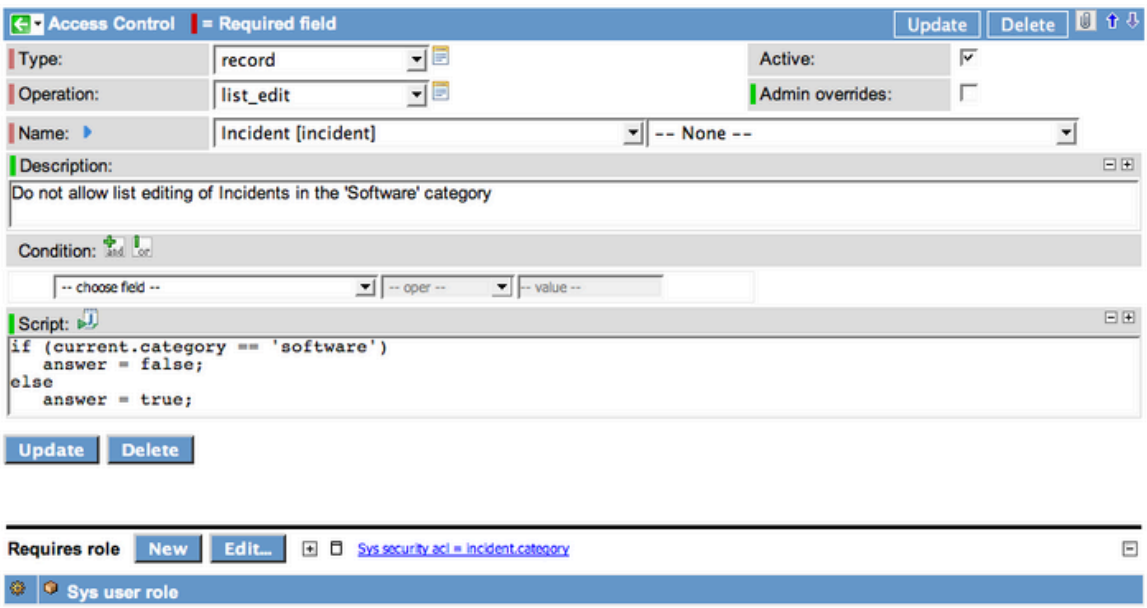


- **Type:** record
- **Operation:** list_edit
- **Name:** Incident [incident], Short Description
- **Admin overrides:** Select the check box.
- **Script:** `answer = false;`

Example - Restrict a field with a script

This access control prevents everyone from editing an incident with a category of Software in a list. It is defined by a script.

Restrict Software Incidents



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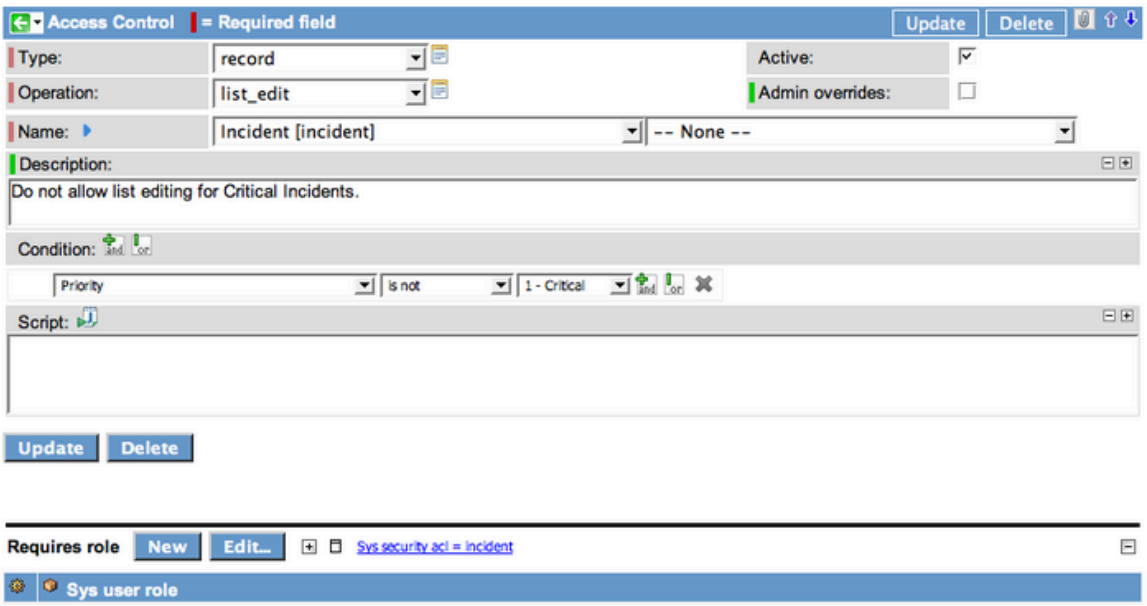
- **Type:** record
- **Operation:** list_edit
- **Name Incident:**[incident]
- **Admin overrides:** Clear the check box.
- **Script:**

```
if (current.category == 'software')
answer = false;
else
answer = true;
```

Example - Restrict a field with a condition

This access control prevents everyone from editing a Critical Incident in a list. It is defined by a condition.

Restrict Critical Incidents



- **Type:** record
- **Operation:** list_edit
- **Name Incident:**[incident]
- **Admin overrides:** Clear the check box.
- **Condition:** Priority is not 1 - Critical

User preferences for list editing

Users can set user preferences for list editing by personalizing a list (available when the list mechanic is activated).

To view and manage list editor user preferences, navigate to **User Administration** > **User Preferences**.

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User preferences for list editing

User preference name	Description
list_edit_enable	Set the value to **true** to enable or **false** to disable list editing. Default value is **true**.
list_edit_double	Set the value to **true** for double-click or **false** for single-click. Default value is **true**.

Related topics

Personal list administration

Personal list administration

Users can customize the layout for any list view by personalizing a list. Administrators can configure options related to list personalization.

In List v2, administrators can also disable or restrict access to list personalization. This functionality is not supported in List v3.

Enable or disable personal lists

You can enable or disable personal lists through the UI Macros module.

Before you begin
Role required: ui_macro_admin

Procedure

1. Navigate to **All** > **System UI** > **UI Macros**.
2. Activate (or deactivate) the *list_mechanic2* UI macro.

Control which roles can personalize lists

You can control who can create personal lists.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **UI Properties**.
2. Locate the property labeled **List of roles (comma-separated) that can use Personal Lists. If blank, all can use** (*glide.ui.list_mechanic.roles*).
3. Enter the roles for which personal lists are available, separated by commas, or leave the field blank to allow access for all users (default).

Manage personal lists

Administrators can manage personal lists.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System UI** > **Lists**.
2. Personal lists have a user value in the **User** field.

Related topics

Personal lists

Administer detail rows

Detail rows provide additional information about records in a list.

Before you begin
Role required: admin

About this task
To display detail rows, an administrator must enable them globally and add them to lists.

Note: Detail rows are not supported in List v3.

Procedure

1. To enable detail rows, add a new system property with the following field values.

Name	glide.ui.list.detail_row
Type	true | false
Value	true

2. To add detail rows to a list, complete the following steps.

   a. Add the *detail_row* dictionary attribute to the table.
   Specify the name of the field to display in the following format:
   `detail_row=short_description`

   b. Use the *all_tables* element descriptor with the *detail_row* attribute to display detail rows for all child tables that contain the designated field.

   Example
   For example, *all_tables.detail_row=short_description* is on the Task [task] table by default, so the short description detail row appears in lists for Incident [incident], Problem [problem], and other child tables unless you set *detail_row* to a different field for each one.

Related topics

Lists

Altering tables and fields using dictionary attributes

Restrict filters and breadcrumbs with fixed queries

The record list view allows users to navigate to different subsets of a table using breadcrumbs and filters. You can limit access to parts of the table by restricting active links in breadcrumbs or by suppressing breadcrumbs and filters for specific roles.

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Before you begin
Role required: admin

About this task
A breadcrumb option enables an administrator to control the base view of a record list presented to users. By adding a fixed query to the argument for a module, an administrator can prevent users from expanding their view past a specified starting point. The argument for this fixed query is written as *`&sysparm_fixed_query=active=true`*. A use case for this query is to prevent users from using the breadcrumbs to switch a list of open incidents to a list of all incidents. When users select **Incident** > **Open**, they are limited to viewing and filtering a list of open (active=true) incidents.

Note: A new Create ACL allows all users to save filters by default. This overrides any custom ACLs in place if administrators are restricting filter access. The new ACL gives all users access to the User field by default, and access to the Group field only if users have the filter_group role and are in the currently selected group.

Procedure
1. Point to the application menu that contains the module to edit and click the edit application (pencil) icon.
   To open the module directly, point to the module and click the edit module (pencil) icon.
2. Select the module to edit.
   For example, select **Open**.
3. In the **Link Type** section of the Module form, select **List of Records** for the **Link type**.
4. Delete the **Active is true** filter, if present.
5. Add `&sysparm_fixed_query=active=true` to the **Arguments** field and update the record.

Suppress filters and breadcrumbs with list controls

Use list controls to suppress filters and breadcrumbs on defined tables for users with specific roles.

Before you begin
Role required: personalize_control

Procedure
1. Navigate to the list view of the table to restrict breadcrumbs.
2. Open list control by performing the appropriate action for the list version.

Version	Action
List v2	Right-click any column header and select **Configure** > **List Control**.
List v3	Open the list title menu and select **List Control**.

   You can also navigate to **System UI** > **List Control**.
3. On the List Control form, select the **Omit Filters** check box, or clear the check box to include filters.
   The **Filter Roles** field allows an administrator to specify certain roles that can see the filters.

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Use script includes to suppress filters and breadcrumbs

You can use a script to restrict filters and breadcrumbs to specific roles, either on a per-table or global basis. Using a script is an advanced option that offers additional flexibility compared to using list control.

Before you begin

Using a script include requires knowledge of JavaScript.
Role required: script_include_admin

About this task

The examples shown must be modified for your environment.

Procedure

1. Create a script include with the name *<tablename>DisplayFilter.*
   The script section contains one function with the same name as the script include.
2. Use your function to set the global variable *answer* to either true (show the filters and breadcrumbs) or false (hide them.)

   Example
   The following example restricts filters and breadcrumbs on the Incident table to users with any role. Be sure that the name of the script matches the function name exactly, including case.

```
function incidentDisplayFilter() {
    if (gs.getUser().hasRoles()) {
        answer = "true";
    } else {
        answer = "false";
    }

    return answer;
}
```

3. **Optional:** To exclude a specific role from having access to filters and breadcrumbs, make the following change.

```
function incidentDisplayFilter() {
    if (gs.getUser().hasRoles()
 && !gs.getUser().hasRoles('newrole')) {
        answer = "true";
    } else {
        answer = "false";
    }

    return answer;
}
```

   Users with the role `newRole` do not have access to filters and breadcrumbs.

4. **Optional:** To let all users use filters and breadcrumbs on the Incident table, make the following change to your script.

```
function incidentDisplayFilter() {
    var answer = true;
```

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```
    return answer;
}
```

5. **Optional:** To modify filter and breadcrumb access for another table, create a script include using the name of that table instead of Incident.

Increase the allowed number of breadcrumb entries

You can add a property to allow for a larger number of breadcrumb entries in the filter.

Before you begin
Role required: admin

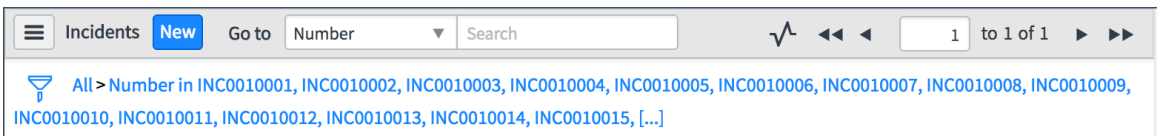
Procedure

1. Enter `sys_properties.list` in the Navigation filter.
   The entire list of properties in the System Properties [sys_properties] table appears.
2. Verify that the property does not exist by searching for *`glide.ui.breadcrumb_max_entries`*.
3. Click **New**.
4. Complete the form.

Field	Value
Name	glide.ui.breadcrumb_max_entries
Type	integer
Value	The number of breadcrumb entries you want to appear in the filter, for example, 15.The de fault number is 10.

5. To verify this property, go to any table and use the filter modifier **is one of** to search for any number of items.
   The number of entries you entered in the Value field displays before ending in a [...].

Breadcrumb entries



Enable a hierarchical list

You can enable hierarchical lists to make data from related lists directly accessible from within a list.

Before you begin
Role required: personalize_control

About this task
Hierarchical lists enable a user to view the contents of the related lists of a record without leaving the record list form.

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Procedure

1. Right-click any column header, and select **Configure** > **List Control** from the context menu.
2. Select the **Hierarchical lists** check box in the List Control dialog box and then select **Submit** or **Update**.
3. Select the arrow beside a record number to display the related lists for the record.

Use list controls in hierarchical lists

By default, no related list tabs are visible in a hierarchical list and only a single related list is displayed at a time. The column headers are hidden by default.

Before you begin

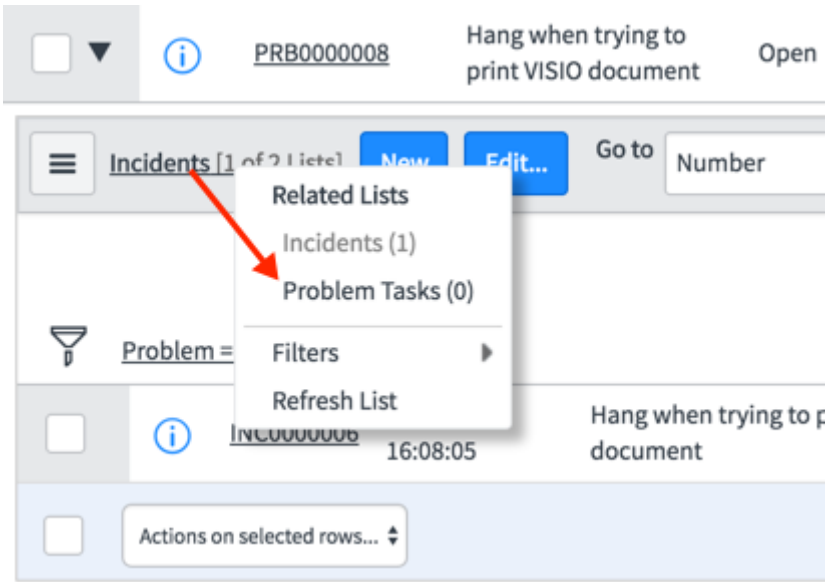
Role required: none

About this task

Note: Hierarchical lists are not supported in List v3.

Procedure

1. To select a different related list, click the link in the list title.
2. Select a list from the menu.

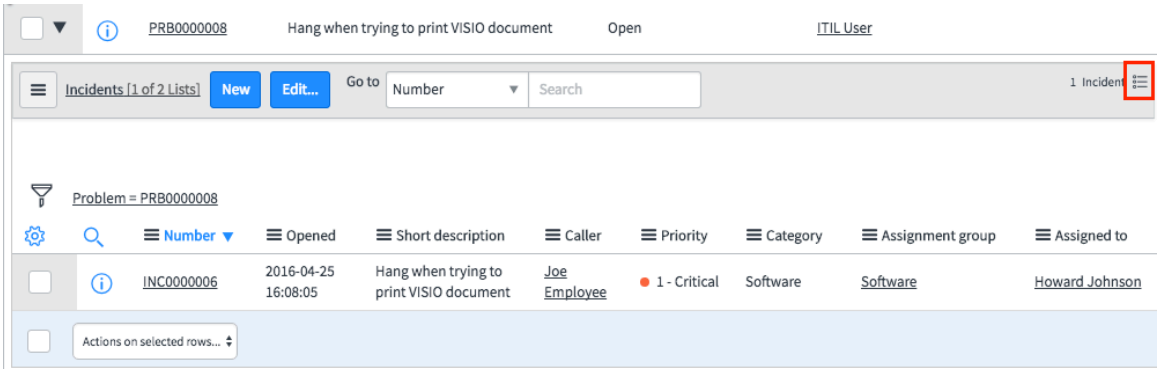


If the related list is empty, the hierarchical list indicates that there are no records to display.

The platform remembers this preference and displays the last selected related list for each table when you open another hierarchical list within that table.

3. To display column headers in the related list, click the show/hide headers icon in the upper right corner of the hierarchical list.

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The platform remembers this preference and opens all hierarchical lists with column headers enabled until the headers are hidden.

Context ranking

Context ranking allows a user to sort a collection of records preferentially; that is, independently of the attributes of those records.

For example, a Customer Support manager can organize a list of incidents in the order in which a technician should work on the tasks. Creating such an arbitrary list with a list filter is not possible.

Activate context ranking

If you have the admin role, you can activate the Context Ranking plugin (com.glide.sorting). This plugin activates related plugins if they are not already active.

Before you begin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Context Ranking plugin (com.glide.sorting) 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.

Create a ranking definition

Enable context ranking for a related list by creating a ranking definition.

Before you begin

Role required: admin

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Procedure

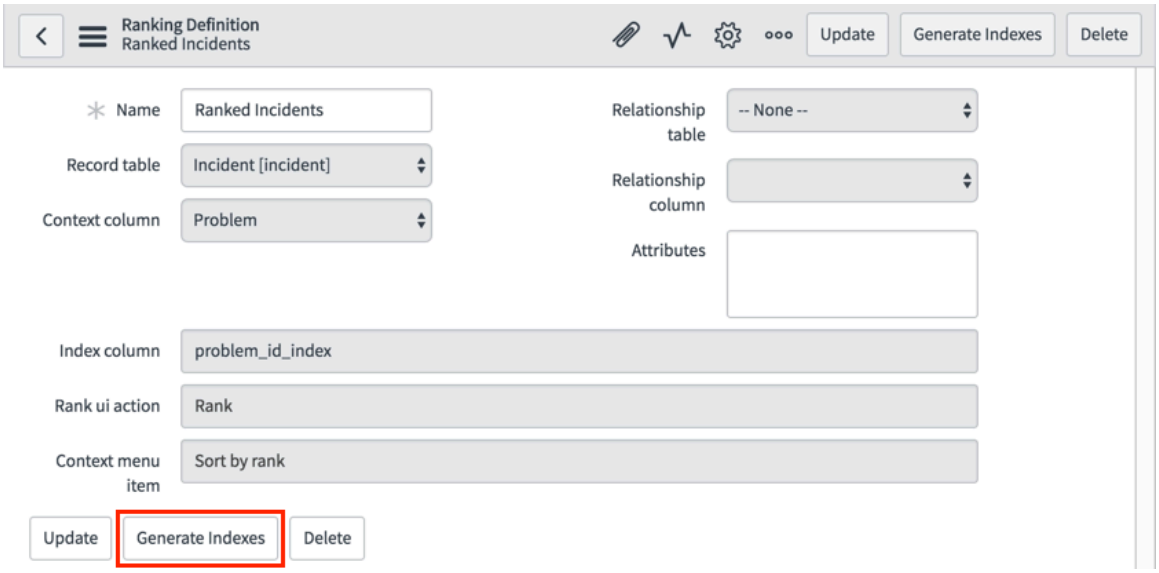
1. Navigate to **All** > **System Definition** > **Ranking Definitions**.
2. Click **New**.
3. Enter a **Name** for the ranking definition.
4. In the **Record table** field, select the table for which ranking is enabled.
   This is the table of the records in the ranked related list. For example, to enable ranking for a related list of incidents in the Problem form, select the Incident [incident] table.
5. In the **Context column** field, select the reference column providing the context in which ranking is to be performed.
   The context in this case is the form in which the related list appears and not a table name. For example, a related list with a **Record table** of Incident [incident] can have several contexts, including the **Problem** form or a **Configuration item** form.
6. Complete the relationship-based fields if the ranking is to be performed on a related list that is defined by a relationship.
   - **Relationship table:** select the table forming the other side of the relationship. In the case of the ranking definition for Product stories in scrum, you might use the Product Model [cmdb_model] table.
   - **Relationship column:** select the column from the relationship table to compare with the context column. To avoid adding a related list of user stories to the Product Model [cmdb_model] table, you might use the **Sys ID** column, which defines a subclass of the Product Model table (cmdb_model.sys_id).
7. In the **Attributes** field, enter attributes to change and restrict the contents of the Rank dialog box, as appropriate.
   - *visible_columns:* a semi-colon separated list of columns to be displayed in the Rank dialog box. If not specified, the Rank dialog box uses the default view of the related list you selected in the **Record table** field.
   - *extra_conditions:* an encoded query to restrict the records shown in the Rank dialog box. For example, the query `extra_conditions=^state!=7` displays all incidents whose state is not **Closed**. If not specified, the Rank dialog box shows all records for the relationship.
8. Click **Submit**.
   The index is generated automatically. The system completes these read-only fields:
   - Index column
   - Rank ui action
   - Context menu item

   Note: After you submit a ranking definition, only the **Attributes** field can be edited. If additional changes are required, delete the record and create a new one with the revised settings.

What to do next

The system does not generate indexes for ranking definitions inserted into the database by an update set. To use a ranking definition inserted by an update set, you must generate the indexes manually. To generate indexes, open the Ranking Definition form, and click **Generate Indexes**.

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Rank a list

After you create a ranking definition for a table, related lists based on that table and context include options for ranking the list and displaying the list by rank.

Before you begin

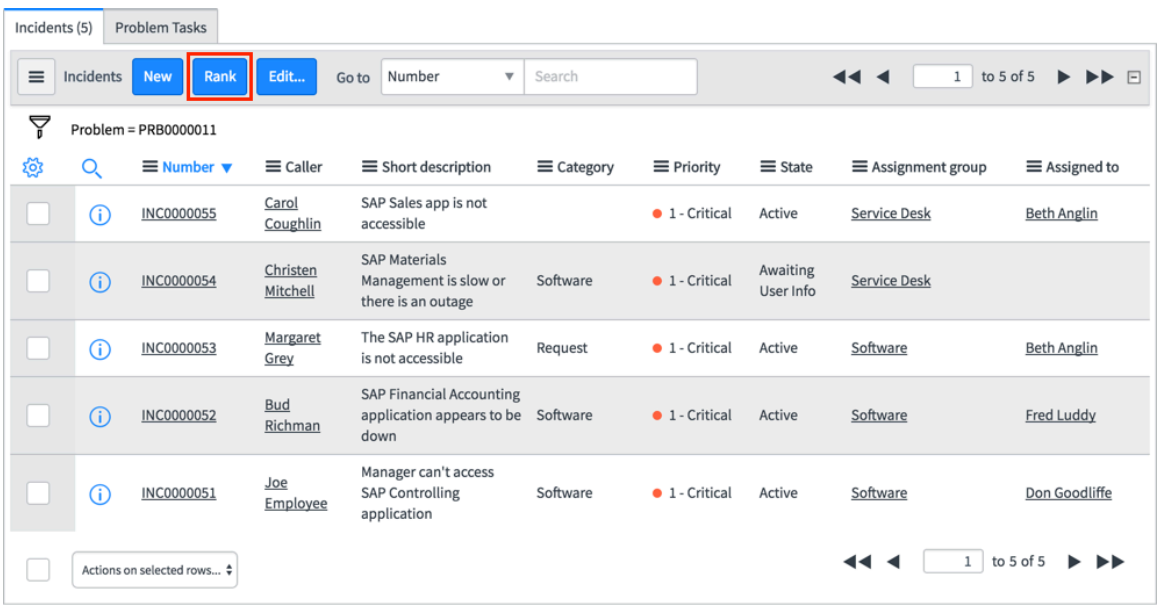
Role required: none

About this task

You can set the preferential order of records.

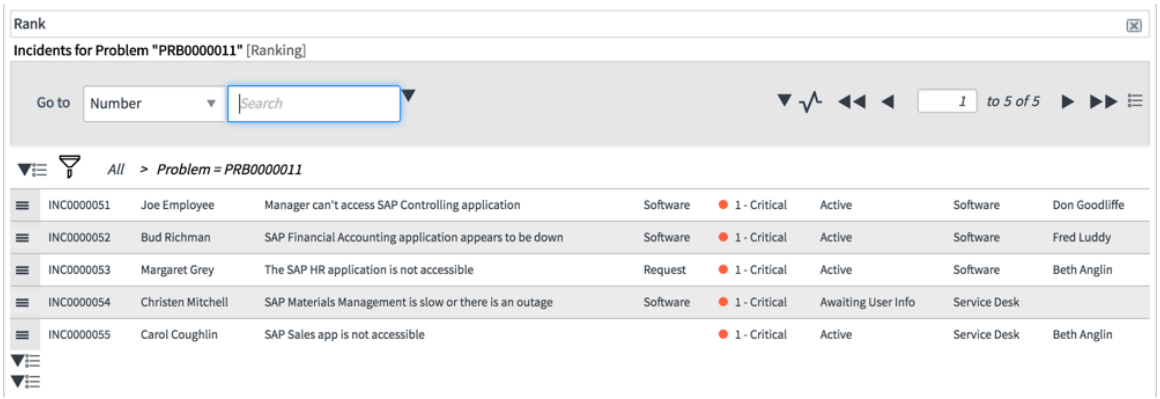
Procedure

1. Click the **Rank** button in the related list to reorder the records.



The Rank dialog box appears, allowing you to sort the records in any order.

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2. Click and drag the move icon ( ) to change the position of a record.

Note: Administrators can define which columns appear in the Rank dialog box in the **Attributes** field of the Ranking Definition form.

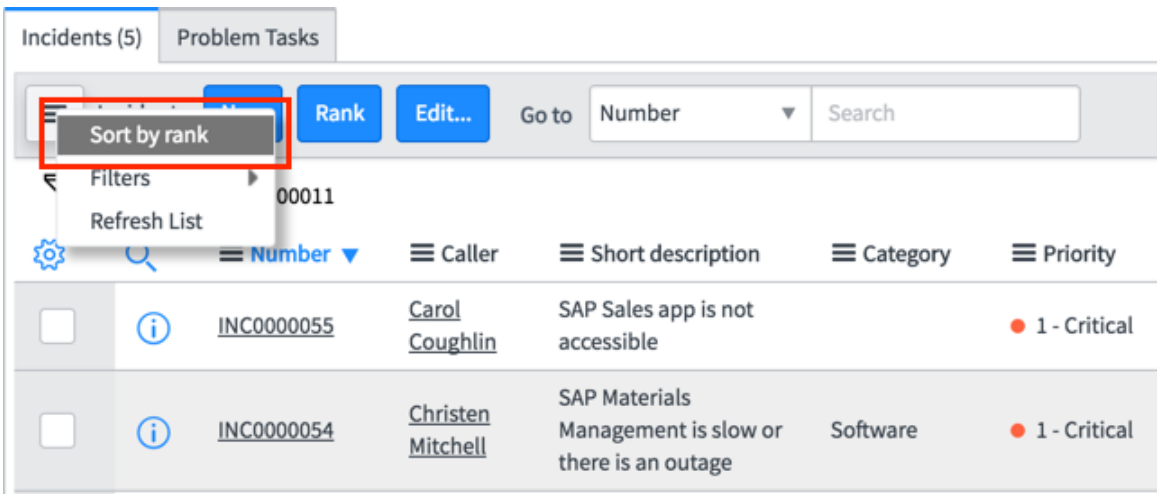
Apply a new sort order to a list

You can apply a new sort order to the records in a list.

Before you begin
Role required: none

Procedure

1. Open the context menu from the list title and select **Sort by rank**.



2. To remove the ranking and return to the original order of the list, click the label in any column that contains data.

Scrum ranking definitions

Ranking definitions for user stories are part of the SDLC (scrum process) application.

These ranking definitions enable scrum users with the proper roles to rank related lists of stories in these tables:

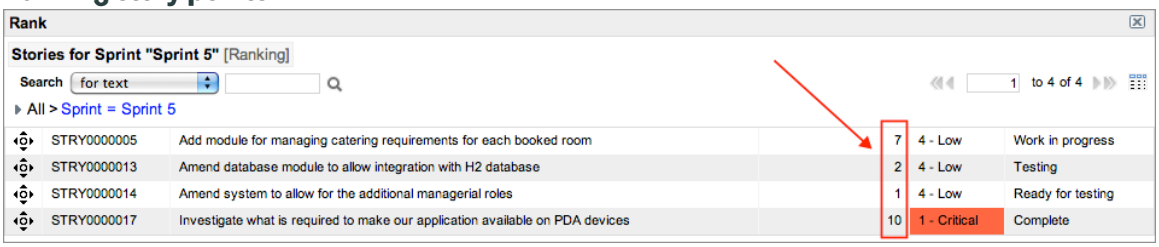
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- Product stories: Application Model [cmdb_application_product_model] table
- Release stories: Release [rm_release] table
- Sprint stories: Sprint [rm_sprint] table

Users can rank stories in the scrum planning board by priority. Story lists ranked in the planning board appear in the new order in product, release, and sprint forms. Stories ranked in one of these scrum forms changes the order in the planning board.

Story points for each story are listed in a ranked view, which is useful for prioritizing stories.

Ranking story points



Related topics

Agile Development

Rank stories in a related list

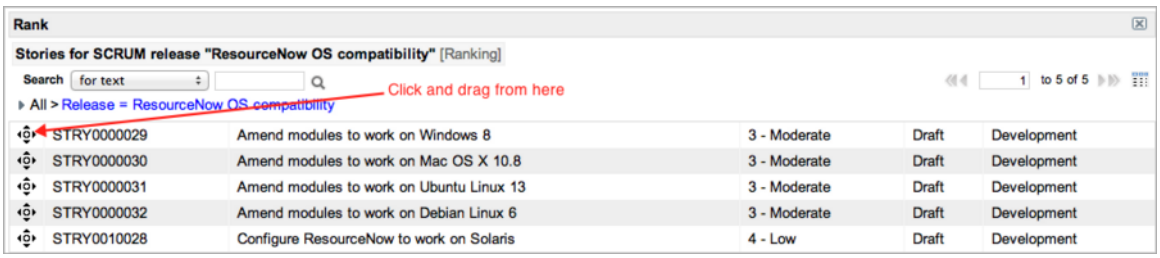
The Context Ranking feature enables all scrum users to manually sort a related list of stories by priority.

About this task

A product owner or release planner uses this tool to establish the order in which to work the stories. Stories ranked in a related list (in the Product, Release, and Sprint forms) appear in the same order in the planning board when the appropriate backlog is displayed. Conversely, stories ranked in the planning board appear in that order when viewed in the related list in the form. Users can switch the view in a Stories related list from ranked to any sort order without changing the ranking in the planning board.

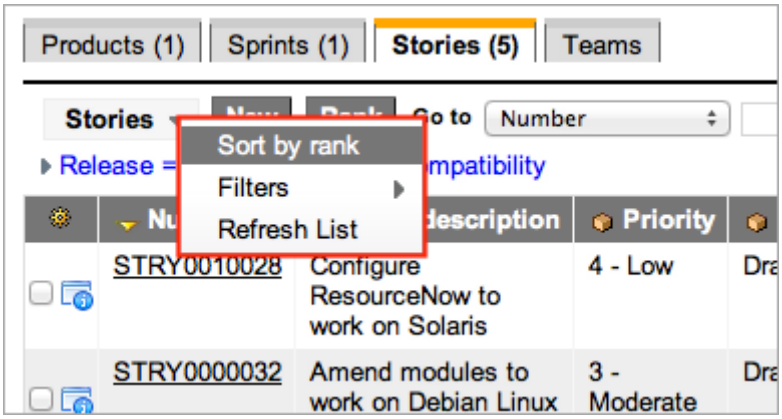
Procedure

1. In the **Stories** related list, click **Rank**.
   A dialog box appears, allowing you to arrange the stories in any order, such as by priority.
2. Click and drag each story into position using the move icon to the left of the story number.



3. When you are done, click the **X** in the upper right corner to close the list.
   The **Stories** related list is not sorted by your ranking initially.
4. To view the related list in its ranked order, open the context menu from the related list and select **Sort by rank**.

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5. To return the sort order of the list to an unranked state, click once in the heading of any column that contains data.
   The system uses this ranked list to display the appropriate backlog in the planning board. For example, if you rank stories in the **Stories** related list in the Release form, the release backlog in the planning board uses the same ranking to display the stories. Conversely, scrum masters, product owners, and release planners can create a new ranking order for the **Stories** related list by rearranging the list of stories in the planning board.

Related topics

Agile Development

Customize list context menus

You can customize the content and behavior of list context menus.

Before you begin
Role required: admin

About this task
For example, you might add an option to the list column heading menu for a specific table. You might also want to change the roles required to access a global context menu option.

Procedure

1. Navigate to **All** > **System UI** > **UI Context Menus**.
2. Select **New**.
3. Complete the form.

Context menu form fields

Field	Description
Table	Select the table to which this context menu option is attached. The base system menu items are attached to the Global [global] table, which applies the context menu option to all lists for all tables. If you specify a particular table, the option is available only on context menus in lists from that table. **Note:** The list shows only tables and database views that are in the same scope as the context menu.
Menu	Select the list context menu in which this option appears.

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Field	Description
	○ List title menus ○ Column headings ○ List fields
Type	Select the type of menu option to create: ○ **Action**: A menu option that performs an immediate action. ○ **Menu**: Creates a parent menu that can display a submenu. ○ **Separator**: Draws a line between groups of options on a menu. Menus do not display separator lines next to one another or at the bottom of a menu. If a condition that removes options for a role forces two separators together, one of the separators is removed from the view. ○ **Label**: Create an unlinked label for a menu or section of a menu. ○ **Dynamic actions**: Menu options dynamically created, such as the available views or user filters that can only be generated at the time the list is displayed.
Name	Enter the label for the action as it will appear in the menu.
Parent	If this action is part of a submenu, type the name of the parent menu item. For example, in the base system, **Configure** is a parent.
Order	Assign an order number to this item, menu, or separator to specify where in the menu it appears.
Active	Enable or disable this context menu item. Only active items are shown in the context menu.
Run onShow script	Select this check box to display the **onShow script** field.
Condition	Create the conditions under which this menu option appears. For example, define the role that has permission to see this item.
Action script	The action script runs when someone selects the context menu option. For more information, see Action script for list context menus.
Dynamic actions script	The dynamic actions script populates the context menu with dynamic options, such as filters or views. For more information, see Dynamic actions script for list context menus.
onShow script	The onShow script runs before the context menu is displayed, to determine which options appear in the context menu. For more information, see onShow script for list context menus.

4. Select **Submit**.

Action script for list context menus

The **Action script** field, on the Context Menu form, defines a script. The script runs when someone selects the context menu option.

This script is client-side and runs in the user's browser. The following JavaScript variables are available to the Action script when it is executed.

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Action script variables

Variable	Description
g_list	GlideList2 against which the script runs.
g_fieldName	Name of the field against which the context menu runs.
g_fieldLabel	Label of the field against which the context menu runs.
g_sysId	The sys_id of the row or form against which the script runs.

The base system uses the following code in an action script to refresh the platform view.

```
g_list.refresh(1);
```

Another example is the use of these variables in a list header menu to sort a list by the selected field in descending order (z to a).

```
g_list.sortDescending(g_fieldName);
```

Dynamic actions script for list context menus

The **Dynamic actions script** field, on the Context Menu form, defines a script. The script populates a list context menu with dynamic options, such as filters or views.

The following JavaScript variables are available to the dynamic actions script when it is executed.

Dynamic actions script variables

Variable	Description
g_tableName	Name of the current table.
g_listId	ID of the list for which the context menu is built.
g_itemName	Name defined in the UI context menu record.
g_itemOrder	Order defined in the UI context menu record. Use this variable to pass the value of the **Order** field to the dynamic actions script.
g_contextMenu.addAction(item_id, label, script_string, order)	Add options to the context menu and select the order in which they appear.

The following example displays a list title menu item that controls the number of records per page in the list view.

```
g_contextMenu.addAction('50', g_itemName,
 'showRowsPerPage("50");', g_itemOrder);
```

Note: The action script for this item must define the *showRowsPerPage* function so that when selecting this menu item, that function is called with an argument of 50.

onShow script for list context menus

The **onShow script** field defines a script that runs before the context menu is displayed to determine which options appear in the context menu.

Use this script to change the menu items on the list header menu based on the current field column. The following JavaScript variables are available to the *onShow* script when it is executed:

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onShow script variables

Variable	Description
g_menu	Context menu to be displayed.
g_item	Current context menu item.
g_list	GlideList2 against which the script runs.
g_fieldName	Name of the field against which the context menu runs.
g_fieldLabel	Label of the field against which the context menu runs.
g_sysId	The sys_id of the row or form against which the script runs.

An example of an *onShow* script is one that determines when to enable or disable the **Ungroup** option in a list column heading menu based on whether the list is grouped or not.

```
if (g_list.getGroupBy()) {
   // list is grouped so enable to Ungroup menu item
   g_menu.setEnabled(g_item);
} else {
   // list is not grouped, so disable the Ungroup menu item
   g_menu.setDisabled(g_item);
}
```

Search administration

The ServiceNow AI Platform® includes multiple search engines and interfaces to help users easily and quickly find the information they need.

Search engines

The ServiceNow AI Platform includes two search engines:

AI Search

AI Search is the default search engine for the ServiceNow AI Platform. It provides consumer-grade search capabilities for Customer Service Management, Now Mobile, Service Portal, and Virtual Agent .

Zing text indexing and search engine

Zing is a legacy search engine which provides fast results and emphasizes relevancy scoring.

Search plugins

These search plugins offer specialized search experiences for particular search contexts.

Contextual Search

The Contextual Search plugin enables search that focuses on query context and user intent to fetch the most relevant set of results. Contextual search displays related results within a form or record producer based on the text you enter in a field.

Intelligent Search for CMDB

Intelligent Search for CMDB enables users to query for a set of Configuration Items in the CMDB. Complex queries open in CMDB Query Builder, where you can refine them or run them.

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Search interfaces and widgets

These are search fields and widgets offered in the ServiceNow AI Platform UI or in ServiceNow AI Platform applications.

Global search

Global search in the Next Experience UI allows you to search multiple tables from a single search field.

Service Portal

The Service Portal framework displays search data within a widget on the search page.

Service Portal search widgets

Service Portal includes widgets for multiple forms of search.

Now Mobile app

The Now® Mobile app provides global search, voice search, and photo search.

Mobile Agent

The Mobile Agent app enables service desk agents to promptly manage and resolve end user issues from their mobile devices.

Virtual Agent

The Virtual Agent platform uses search to help parse user statements and intents in chats.

Machine learning solutions for Search administration

Machine learning in Search administration helps to enhance business scalability and improve business operations for organizations.

Businesses face a challenge with growing volumes of data, in extracting meaningful information from a huge set of raw data, and in deriving meaningful business insights. Machine learning can serve as a solution to a variety of business complexities as its algorithm is built using historical data. It helps avoid duplicate and inaccurate data being entered into the database and enables businesses to compute and process information much faster.

Predictive Intelligence for Contextual Search

The Predictive Intelligence for Contextual Search capability uses machine-learning algorithms to search for Similar Incidents, Similar Knowledge Articles, Similar Open Incidents, and Similar Resolved Incidents.

Predictive Intelligence suggests related results to help you solve an issue or resolve a question.

The sources such as Similar Incidents, Similar Knowledge Articles, Similar Open Incidents, and Similar Resolved Incidents are available only when the Predictive Intelligence plugin (com.glide.platform_ml) and the Predictive Intelligence for Contextual Search plugin (com.snc.contextual_search_ml) are active.

For more information, see Predictive Intelligence.

Features of Search administration

Enable and configure Search administration features.

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Feature	Description	Top tasks	Status
Zing text indexing and search engine	Index and search record data by table.	• Configure a table for indexing and searching • Zing can expand search results with synonyms • Zing can include attachments in search results	Active
Contextual search	Display search results on forms and record producers when users enter text in a field.	Define a search context	Active

Search Suggestions

The Search Suggestions application uses saved user search data to create auto-complete suggestions for AI Search applications and search suggestions for Zing. These suggestions appear as you enter terms into an application's search field. You can refine your search or jump to a relevant search result by selecting an applicable suggestion.

Get started

Explore



Learn about Search Suggestions concepts, workflow, and benefits.

Configure



Configure settings for creation of auto-complete suggestions and search suggestions from saved search results.

Use



View and select suggestions in AI Search applications and Zing. Analyze saved search data to learn how users interact with search.

Reference



Component and domain separation information for Search Suggestions.

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Exploring Search Suggestions

Learn how Search Suggestions displays suggestions to users in AI Search applications and the Zing text indexing and search engine. Review the rules that dictate which suggestions are offered in each search application and context.

Search Suggestions overview

The Search Suggestions application makes it possible for search applications to display suggested search completions or results to users as they enter terms into a search field.

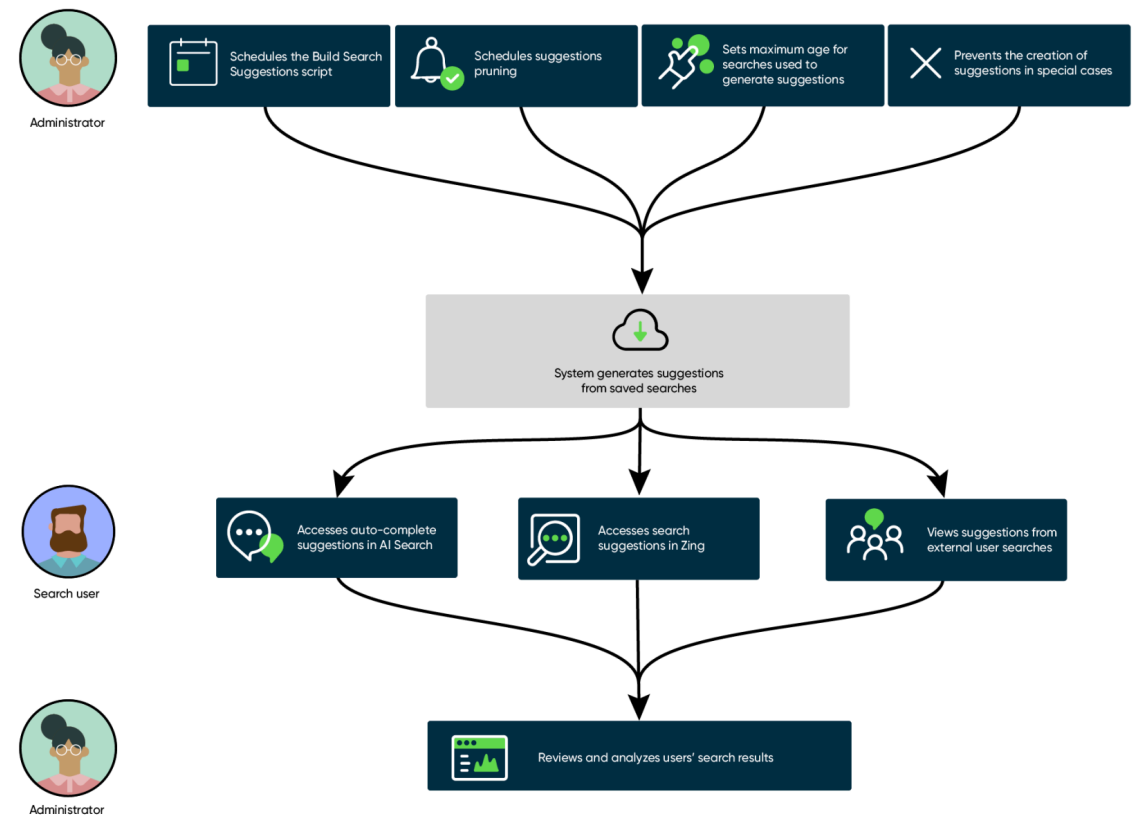
Search Suggestions saves query terms and results from user searches. A Build Search Suggestions script runs against this saved data periodically to generate auto-complete suggestions for AI Search and search suggestions for Zing text search. The Prune Search Suggestions script runs periodically to remove low-relevancy suggestions.

Administrators can limit the age of saved search data used to generate suggestions. They can also configure specific suggestions to prevent them from being displayed to search application users.

Search Suggestions workflow

In this infographic, see a sample workflow of how different users in an organization configure and use auto-complete suggestions and search suggestions with the Search Suggestions application.

Configuring and using Search Suggestions



In this Search Suggestions workflow:

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1. ○ Administrators configure Search Suggestions settings, including scheduling of scripts and restrictions on which saved search results the system uses to create auto-complete suggestions and search suggestions.
   ○ The system saves users' search results and uses them to generate new auto-complete suggestions and search suggestions.
2. ○ Search users view and select generated auto-complete suggestions in AI Search applications.
   ○ Search users view and select generated search suggestions in Zing.
   ○ Non-authenticated guest users access and review the list of generated suggestions created from searches by external users.
3. Administrators review and analyze saved search results to improve understanding of how users interact with generated suggestions, allowing for more effective tuning of Search Suggestions settings.

Search Suggestions benefits

Benefit	Feature	Users
View and select relevant auto-complete suggestions when searching in AI Search applications.	Auto-complete suggestions in AI Search applications	AI Search users
View and select relevant search suggestions when searching with the Zing text search engine.	Zing displays search suggestions as users enter search terms	Zing search users
See the list of auto-complete suggestions and search suggestions created from searches by external users.	Use the GraphQL REST API to view suggestions created from external user searches	Non-authenticated guest user
Control suggestion generation time by configuring how often the system builds auto-complete suggestions and search suggestions from user search strings.	Schedule the Build Search Suggestions script	Administrator
Improve suggestion relevancy by configuring how often the system prunes the least relevant auto-complete suggestions and search suggestions from the Search Suggestion [sys_search_suggestion] table.	Schedule suggestion pruning	Administrator
Increase suggestion freshness by using only the most recent search event records to create auto-complete suggestions and search suggestions.	Set maximum age for searches used in suggestion generation	Administrator
Prevent creation of unwanted auto-complete suggestions and search suggestions.	Prevent the creation of suggestions in special cases	Administrator
Understand how users interact with search by analyzing data from the Search Suggestions tables.	Analyze search relevancy	Administrator

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Configuring Search Suggestions

You can configure Search Suggestions settings to control the creation of auto-complete suggestions and search suggestions on your instance.

Configuration overview

Task	Description
Schedule the Build Search Suggestions script	Specify how often and at what time the system generates auto-complete suggestions and search suggestions from stored search strings. By default, this task runs daily.
Schedule suggestion pruning	Specify how often and at what time the system prunes the lowest-rated suggestions to limit the Search Suggestion [sys_search_suggestion] table to 500,000 suggestions. By default, this task runs weekly.
Set maximum age for searches used in suggestion generation	Specify the maximum age of search strings the system considers when creating auto-complete suggestions and search suggestions. By default, the system only generates suggestions using search strings from the last 180 days.
Prevent the creation of suggestions in special cases	Disable generation of suggestions from specific search strings to keep unhelpful terms from appearing in suggestions or to prevent disclosure of personal or secure information. As part of this task, you may want to test regular expression patterns in your Search Suggestion Exclusion List Rule entries.

Schedule the Build Search Suggestions script

Specify when to run the script that builds auto-complete suggestions and search suggestions from user search strings.

Before you begin

Role required: admin

About this task

Search Suggestions stores search strings entered by users in the Search Event [sys_search_event] table. The *`Build Search Suggestions`* script turns those search strings into auto-complete suggestions and search suggestions and stores them in the Search Suggestion [sys_search_suggestion] table.

By default, this script runs daily. You can customize how often and at what time the script runs. How often you run the script depends on how frequently you want to update suggestions for users. When you run the script might depend on performance considerations.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs** and select **Build Search Suggestions**.
2. In the Scheduled Search Execution form, edit how often the script runs in the **Run** field.

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3. Edit the time of day the script runs in the **Time** field.
4. Select **Update**.
5. **Optional:** Select **Execute Now** to run the script immediately.

Schedule suggestion pruning

Search Suggestions limits the number of auto-complete suggestions and search suggestions stored in the Search Suggestion [sys_search_suggestion] table to 500,000. A periodic pruning job removes the least relevant suggestions and increases the overall relevancy of suggestions.

Before you begin

Role required: admin

About this task

By default, the pruning job runs once a week and limits the Search Suggestion [sys_search_suggestion] table to 500,000 suggestions. Once the table reaches that limit, the pruning job removes the lowest-rated auto-complete suggestions and search suggestions to keep the maximum number of suggestions at 500,000. Pruning the least relevant suggestions improves the relevancy of the suggestions.

How often you run the pruning job might depend on how frequently you generate suggestions from the Search Suggestion table, and how quickly the table exceeds 500,000 suggestions.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the **Prune Search Suggestions** job.
3. On the Scheduled Script Execution form, edit the following fields.

Field	Description
Run	Frequency of execution for the pruning job. To execute the job manually, select **On Demand** and select **Execute Now**.
Day	Day of the week to run the pruning job.
Time zone	Time zone to use when interpreting the **Time** field value.
Time	Time of day to run the pruning job. Specify hours (00–23), minutes (00–59), and seconds (00–59).
Repeat interval	Interval between executions of the pruning job when **Run** is set to *Periodically*. Specify days (01–07, where 01 is Sunday), hours (00–23), minutes (00–59), and seconds (00–59).
Conditional	Script to run when executing the pruning job.

Note: The fields on the form change with the choice of the **Run** value.

4. Select **Update**.

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Set maximum age for searches used in suggestion generation

Set the Auto Flush parameter to limit the age of search strings used to create auto-complete suggestions and search suggestions.

Before you begin
Role required: ais_admin

About this task
The Search Event [sys_search_event] table contains all of the strings used in searches. Scripts use this table to generate search analytics, search suggestions, and auto-complete suggestions. A system property sets the maximum age for records preserved in the table. The default is 180 days, but you can change this number to preserve search events for a shorter or longer duration. Longer durations increase the size of the table and its disk consumption.

Procedure

1. Navigate to the Auto Flush [sys_auto_flush] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_auto_flush.list`.
   c. Press Enter.
2. Search on `*search` and open the **sys_search_event** record.
3. On the Auto Flush form, edit the **Age in seconds** value.
   The default is 15,552,000 seconds, which is 180 days.

Prevent the creation of suggestions in special cases

Disable generation of suggestions from specific search strings to keep unhelpful terms from appearing in suggestions or to prevent disclosure of personal or secure information.

Before you begin
Make sure you're familiar with Java's regular expression pattern syntax. To learn about regular expression pattern syntax, see the Javadoc for the java.regex.util.Pattern class.

Role required: admin

About this task
Search Suggestions generates auto-complete suggestions and search suggestions from the search strings that users enter. You may not want to create suggestions from all search strings. You can prevent the generation of suggestions using one of the following approaches:

- Exclude words or regular expression patterns from auto-complete suggestions and search suggestions.

  For example, a user might search on `KB2938272`. This search string is too opaque to provide a meaningful suggestion. Or, someone might enter a social security number or phone number as search strings which shouldn't be surfaced as suggestions to anyone else. So, you might exclude all search strings that contain multiple numbers. Likewise, if someone uses an expletive in a search string, you may not want to surface that word in suggestions. The Search Suggestion Exclusion List [sys_search_suggestion_blacklist] table contains the list of excluded words and regular expression patterns.

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Note: In the base system, the Search Suggestion Exclusion List table contains excluded words for English and language-independent regular expression patterns. Search Suggestions inserts additional language-specific excluded words into this table when you activate any of the following languages: Chinese, Czech, Dutch, Finnish, French, German, Hebrew, Hungarian, Italian, Japanese, Norwegian, Polish, Portuguese, Russian, Spanish, Swedish, Thai, or Turkish.

- Assign roles to users that prevent the generation of suggestions from their search strings.

  There may be individuals whose searches shouldn't appear in search or auto-complete suggestions for privacy or security reasons. To prevent their searches from generating suggestions, assign them the suggestion_exempt role. This role is unnecessary in most situations. Search Suggestions never shows who performed the initial search. To prevent people from seeing auto-complete suggestions and search suggestions, assign them the cannot_read_suggestions role.

Procedure

1. Navigate to the Search Suggestion Exclusion List [sys_search_suggestion_blacklist] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_search_suggestion_blacklist.list`.
   c. Press Enter.
2. To make a word or regular expression pattern active or inactive:
   a. Select the term in the list that you want to activate or deactivate.
   b. In the Search Suggestion Exclusion List form that appears, select or clear the **Active** option.
3. To add a new excluded word or regular expression pattern:
   a. Select **New**.
   b. On the Search Suggestion Exclusion List form, fill in the fields.

Search Suggestion Exclusion List form

Field	Description
Phrase	Word or regular expression pattern to exclude.
Language	The language that the excluded word is in. Use the ISO 639-1 code for the language, such as "en" for English. Because regular expression patterns work for all languages, search suggestions ignores this field for regular expression patterns.
Description	Explanation of why you excluded the word or regular expression pattern if it's not obvious. This field is especially important for regular expression patterns.
Active	Option to remove the excluded word or regular expression pattern from suggestions.

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Field	Description
Type	Option that specifies whether the **Phrase** field represents one word or a regular expression pattern.

Note: If you use regular expression patterns, you should verify that they exclude the words you want. For more information, see Test regular expression patterns in Search Suggestion Exclusion List Rule entries.

4. To assign someone a role that prevents them from seeing auto-complete suggestions and search suggestions, or to prevent their search strings from becoming suggestions:
   a. Navigate to **All** > **User Administration** > **Users** and select the name of a user.
   b. In the Roles related list, select **Edit**.
   c. To prevent a user from seeing auto-complete suggestions and search suggestions, move **cannot_read_suggestions** from the Collections column to the Roles List column and select **Save**.
   d. To prevent a user's search strings from generating auto-complete suggestions and search suggestions, move **suggestion_exempt** from the Collections column to the Roles List column and select **Save**.

Test regular expression patterns in Search Suggestion Exclusion List Rule entries

Regular expression patterns are powerful and often require editing to get the correct behavior. When using regular expression patterns to exclude search strings, test the patterns thoroughly so as not to have unintended results.

Before you begin

Make sure you're familiar with Java's regular expression pattern syntax. To learn about regular expression pattern syntax, see the Javadoc for the java.regex.util.Pattern class.

Role required: admin

About this task

The Exclusion List Rule and Search Suggestion Relations [m2m_blacklist_search_suggestion] table lists the suggestions eliminated from the Search Suggestion [sys_search_suggestion] table by entries in the Search Suggestion Exclusion List [sys_search_suggestion_blacklist] table.

Procedure

1. In your browser, navigate to `https://<instance name>.service-now.com/m2m_blacklist_search_suggestion_list`.
   A list of words excluded from search suggestions appears in the Exclusion List Rule and Search Suggestion Relations table. The Suggestion column shows the search string that was eliminated in the creation of suggestions.
2. Add a regular expression pattern to the exclusion list table.
   For more information, see Preventing suggestions in special cases.
3. In a search field, for example, on the ServiceNow® Service Portal, enter words that satisfy the regular expression pattern.
4. Run the script that builds the search suggestions.
   For more information, see Schedule the Build Search Suggestions script. Select **Execute Now** to run the script immediately.

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5. In the m2m_blacklist_search_suggestion_list table, select the menu icon for the Exclusion List column heading, then select **Group By Exclusion List** to see the regular expression patterns and what they eliminated.
6. Review the suggestions in the table to see if the regular expression patterns removed the suggestions they should have and no more.
7. In the sys_search_suggestion_blacklist table, set an excluded regular expression pattern's **Active** field to **false**, then run the Build Search Suggestions script again to make sure that only excluded suggestions were removed.
8. Revise the regular expression patterns if necessary and repeat the procedure.

Using Search Suggestions

Search applications display auto-complete suggestions and search suggestions as you type in their search fields. Administrators can analyze data from Search Suggestions tables to learn how users interact with search. Guest users can view suggestions created from self-registered external user searches.

Using Search Suggestions in AI Search

AI Search applications display auto-complete suggestions created by the Build Search Suggestions script. Auto-complete suggestions appear as you enter terms into the application's search field. You can select an auto-complete suggestion to accept it as your search query.

To learn more about auto-complete suggestion usage and configuration in AI Search applications, see Auto-complete suggestions in AI Search applications.

Using Search Suggestions in Zing text indexing and search engine

Zing displays search suggestions created by the Build Search Suggestions script. Search suggestions appear as you enter terms into the Zing search field. You can select a search suggestion to accept it as your search.

For more details on how search suggestions appear in Zing, see Zing displays search suggestions as users enter search terms.

Analyze search relevancy

Analyze data from the Search Suggestions tables to understand how your users interact with search.

Before you begin

Role required: ais_admin

About this task

Search Suggestions uses the following tables:

- Search Event [sys_search_event]: Stores all search strings and search results.
- Search Source Event [sys_search_source_event]: Stores search strings and search results and ties them to a data source, for example, the suggestion came from the knowledge base table rather than the catalog table.
- Search Suggestion [sys_search_suggestion]: Stores suggestions for searches.

For details on the Search Suggestions tables, see Search Suggestions tables.

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Procedure

1. Display the Search Event [sys_search_event] table by navigating in your browser to `https://<instance name>.service-now.com/sys_search_event_list.do`.
2. Find search queries with **Has results** column values of **false**.
   A value of false means that someone searched but didn't get any search results. You can choose to create information, such as a Knowledge article, to provide search results in the future, create synonyms for the search words that would surface a search result, or not provide information if the question is irrelevant.
3. Average the numbers in the **Click rank** column.
   Click rank shows which search result you selected. If you click the first result in the list of search results, the click rank value is 1. If you click the 6th result listed, the click rank value is 6. If you click multiple search results, the click rank is the highest listing value. For example, if you click the first result, return to the search page and click the 6th result, return to the search page and click the 4th result and find an answer, the click rank is 6 (not 4). A click rank of 0 means that you didn't select any search result, or that you selected a Genius Result answer card in AI Search. Lower positive click rank values indicate that the top search results are the most relevant, so the goal is to reduce the average value for this field.
4. Determine the click-through rate by dividing the number of records where the click rank isn't zero by the total number of records.

   Higher click-through rate numbers are better. Click-through rate is a good indicator of how often users find relevant results, but it doesn't reveal how much effort it took to find those results. That's where click rank comes in. Click rank describes how much effort it took the user to find what they perceived to be a relevant result.

5. Average the numbers in the **Refinements** column.
   Refinement is the number of actions a user took to reduce the number of search results. Actions include sorting and filtering. More refinements means more effort to find relevant search results, so lower numbers are better.
6. Display the Search Source Event [sys_search_source_event] table by navigating in your browser to `https://<instance name>.service-now.com/sys_search_source_event_list.do`.
7. Find search queries with **Has results** column values of **false**.
   False means that someone searched but didn't get any search results from a particular source table, for example, the Knowledge Base table. You can choose to create information, such as a Knowledge article, on the source to provide search results in the future, create synonyms for the search words that would surface a search result in that source table, or not provide information if the question is irrelevant.

Use the GraphQL REST API to view suggestions created from external user searches

Submit a request to the GraphQL REST API endpoint to retrieve search suggestions created from searches by self-registered external users. This endpoint allows access by non-authenticated guest users.

Before you begin

Ensure that the following conditions are met in your instance:

- The Domain Separation plugin isn't activated. For details on this plugin, see Domain separation plugin.
- The Explicit Roles plugin (com.glide.explicit_roles) is activated. To learn more about this plugin, see Explicit Roles.

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- External users with the snc_external role have submitted searches in search applications that generate search suggestions, such as ServiceNow® Service Portal, Now Mobile, or ServiceNow® Virtual Agent.
- The *glide.search.suggestions.allow_guest_user* system property is set to **true**. For details on setting a system property value, see Add a system property.

Obtain the sys_id of the search application that you want to retrieve external user search suggestions for.

Note: Users with the search_application_admin, agent_workspace_user, or workspace_user roles can obtain this sys_id by copying it from the search application record in the Search Application Configuration [sys_search_context_config] table.

Download a third-party GraphQL client, such as the GraphiQL, Insomnia, or Postman client.

Role required: none

About this task

Search Suggestions creates suggestions for searches performed by self-registered external users. When the *glide.search.suggestions.allow_guest_user* system property is set to **true**, non-authenticated guest users can access the GraphQL REST API endpoint for your instance to retrieve external user search suggestions for a search application.

No authentication is required or enforced for this GraphQL REST API endpoint.

Note: Non-authenticated guest users can only retrieve search suggestions from the Global domain. If domain separation is enabled in your instance, guest users can't retrieve any search suggestions.

Procedure

1. In your third-party GraphQL client, configure a new request that uses the HTTP POST method.
2. Set the endpoint for the request to the GraphQL REST API endpoint for your instance, `https://<instance name>.service-now.com/api/now/graphql`.
3. Set the request body to the following GraphQL query, replacing `<search_application_sys_id>` with the sys_id of the search application that you want to retrieve external user search suggestions for:

```
{
  GlideSearch_Query {
    suggestions(searchContextConfigId:
 "<search_application_sys_id>", searchTerm: "") {
      term
      data {
        name
        records {
          type
          columns {
            label
            fieldName
            value
            displayValue
          }
        }
      }
    }
```

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```
  }
}
```

Result

The system returns search suggestions from application searches by self-registered external users as a JSON object, as shown in this example:

```
{
  "data": {
    "GlideSearch_Query": {
      "suggestions": {
        "term": "",
        "data": [
          {
            "records": [
              {
                "type": "POPULAR_QUERY",
                "columns": [
                  {
                    "label": "name",
                    "displayValue": "automatic replies",
                    "value": "automatic replies",
                    "fieldName": "name"
                  }
                ]
              },
              {
                "type": "POPULAR_QUERY",
                "columns": [
                  {
                    "label": "name",
                    "displayValue": "contact group",
                    "value": "contact group",
                    "fieldName": "name"
                  }
                ]
              },
              {
                "type": "POPULAR_QUERY",
                "columns": [
                  {
                    "label": "name",
                    "displayValue": "tablet",
                    "value": "tablet",
                    "fieldName": "name"
                  }
                ]
              },
              {
                "type": "POPULAR_QUERY",
                "columns": [
                  {
                    "label": "name",
                    "displayValue": "laptop",
                    "value": "laptop",
                    "fieldName": "name"
                  }
```

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```
                ]
              },
              {
                "type": "POPULAR_QUERY",
                "columns": [
                  {
                    "label": "name",
                    "displayValue": "new email account",
                    "value": "new email account",
                    "fieldName": "name"
                  }
                ]
              }
            ],
            "name": "Popular searches"
          }
        ]
      }
    }
  }
}
```


Search Suggestions reference

Reference topics provide additional information about components and domain separation behavior for Search Suggestions.

Installed with Search Suggestions

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

Roles installed

Role title [name]	Description	Contains roles
Search Suggestions blocked searcher [cannot_read_suggestions]	Doesn't see search or auto-complete suggestions displayed when searching.	None
Search Suggestions exempt searcher [suggestion_exempt]	Submits searches that the system ignores when generating search or auto-complete suggestions.	None

For more details on restricting generation of search suggestions, see Prevent the creation of suggestions in special cases.

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Scheduled jobs installed

Scheduled job	Description
Build Search Suggestions	Converts searches stored in the Search Event [sys_search_event] table into auto-complete suggestions and search suggestions stored in the Search Suggestion [sys_search_suggestion] table.
Prune Search Suggestions	Removes the lowest-rated auto-complete suggestions and search suggestions from the Search Suggestion [sys_search_suggestion] table to keep the maximum number of suggestions at 500,000.

Tables installed

Table	Description
Search Event [sys_search_event]	Search strings and details about their associated results, including the search user, application, UI source, session, and language, and any user-specified click rank and refinements.
Search Event per source table [sys_search_source_event]	Correlations between search strings with search results from a specific table (data source). A search that queries multiple tables produces multiple Search Event per source records.
Search Suggestion [sys_search_suggestion]	auto-complete suggestions and search suggestions generated from user searches by the Build Search Suggestions scheduled job. The Prune Search Suggestions scheduled job removes the lowest-rated auto-complete suggestions and search suggestions from this table to keep its maximum size at 500,000 suggestion records.

To learn about individual columns on these tables, see Search Suggestions tables.

Search Suggestions tables

Search Suggestions uses tables to generate and track relevant search suggestions. You can review data from these tables to gain insight into search suggestions offered in your system.

Note: Because the Search Suggestions tables are system tables, they are excluded from the Reporting module by default. To learn about enabling reporting on system tables, see Reporting on system tables.

Search Event table

The Search Event [sys_search_event] table stores search strings and their search results.

sys_search_event table

Column	Description
Search query	Search string that the user entered.
Has results	Boolean value that specifies whether the search did (true) or didn't (false) return results. For all false values, consider adding information so that the same search would return suggestions in the future.

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sys_search_event table (continued)

Column	Description
Click rank	Click rank shows which search result you selected. If you click the first result in the list of search results, the click rank value is 1. If you click the 6th result listed, the click rank value is 6. If you click multiple search results, the click rank is the highest listing value. For example, if you click the first result, return to the search page and click the 6th result, return to the search page and click the 4th result and find an answer, the click rank is 6 (not 4). A click rank of 0 means that you didn't select any search result, or that you selected a Genius Result answer card in AI Search. Lower positive click rank values indicate that the top search results are the most relevant, so the goal is to reduce the average value for this field.
User	User who performed the search.
Application ID	Application where the search feature was used, for example, you did a search in the Service Portal. See **UI source**.
Language	Language of the query. Search only returns results that are in the same language as the search query.
Refinements	Number of actions that you took to reduce the number of search results. Actions include sorting and filtering. The goal is to reduce this number.
UI source	Specific page (mobile) or page (portal) where the search query came from. See **Application ID**.
Session	ID of the session, which specifies when the search happened.
AI Search Profile	Name of the search profile used for the search. Only applicable for searches made with the AI Search engine.
GR Configurations Executed	Shows the list of Genius Result configurations that the system evaluated for the search. Genius Result configurations in this list may or may not have displayed answer cards for the search. Only applicable for searches made with the AI Search engine.
Genius Result Displayed	Shows whether or not any Genius Result answer cards were displayed for the search. Only applicable for searches made with the AI Search engine.
GR Configurations with Result Displayed	Shows the list of evaluated Genius Result configurations that displayed answer cards for the search. A Genius Result configuration can appear multiple times in this list if it displayed multiple answer cards for the search. Only applicable for searches made with the AI Search engine.
Last Clicked Genius Result Position	Shows which Genius Result answer card you selected an action from. If you select an action from the first displayed Genius Result answer card, the position value is 1. If you select an action from the third answer card, the value is 3. A value of 0 means that you didn't select actions from any Genius Result answer card. Only applicable for searches made with the AI Search engine.
Genius Result Events	JSON document showing details of actions you selected from Genius Result answer cards displayed for the search. Only applicable for searches made with the AI Search engine.

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Search Event per source table

The Search Event per source [sys_search_source_event] table stores records correlating search strings with results from a specific table, here called a data source. A search can query multiple tables. The sys_search_event table lists one record for the entire search, while the sys_search_source_event table lists one record for each data source (table) queried.

sys_search_source_event

Column	Description
Search query	Search string that you entered.
Source	System ID of the data source. For example, the system ID of the Knowledge Base might be c45067sample3c82eef3e. Suggestions from one source are used as suggestions for that source only. For example, a suggestion derived from the Service Portal wouldn't be used as a suggestion in Now Mobile.
Has results	Boolean value that specifies whether the source did (true) or didn't (false) supply search results. For all false values, consider adding information so that the same search query would return suggestions in the future.
Created	Time stamp of the search query.

Search Suggestion table

The Search Suggestion [sys_search_suggestion] table stores auto-complete suggestions and search suggestions. A scheduled job uses the sys_search_event table to build the content of the suggestion table. This job segregates generated suggestions by source. Suggestions generated from searches on the Service Portal, for example, are only returned for other Service Portal searches. These suggestions aren't returned for Now Mobile queries.

sys_search_suggestion

Column	Description
Application ID	Application where the search feature was used, for example, you did a search in the Service Portal.
User group	Specifies whether an internal or external user generated the search query. Suggestions for internal users aren't shared with external users and vice versa.
Language	Language of the query. Search only returns suggestions that are in the same language as the search query.
Score	Suggestion rank. The higher the score, the more relevant the suggestion. Once all suggestions are returned for a search query, the suggestions are sorted by **Score**, the highest listed first. Scores reflect how often you selected a suggestion. A popular suggestion implies that it answers the query.
Source	System ID of the data source. For example, the system ID of the Knowledge Base might be c45067sample3c82eef3e. Suggestions from one source are used as suggestions for that source only. For example, a suggestion derived from the Service Portal wouldn't be used as a suggestion in Now Mobile.

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Domain separation and Search Suggestions

Domain separation is unsupported in the Search Suggestions application. 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.

Search Suggestions domain separation overview

Domain separation provides complete data isolation for domain-specific users.

How domain separation works with Search Suggestions

By default, Search Suggestions results are limited to the specific domain of the logged-in user. Search and auto-complete suggestions aren't shared in parent or child domains.

Related topics

Domain separation

Search signals

Search stores signal data from user searches. The aggregated signal data helps improve search result relevancy in your system.

Signals record details of user searches, search refinements, and interactions with search results.

AI Search machine learning relevancy analyzes aggregated signal data and automatically tunes search relevancy scoring to reflect user behavior patterns. This tuning helps improve result relevancy for search users.

To learn more about AI Search machine learning relevancy, see Machine learning relevancy in AI Search.

Search signal tables

Search uses tables to store details from user searches, search refinements, and interactions with search results. These details are called search signals. Data from the search signal tables helps improve the relevancy of search results in your system.

Search signals refer to user, query, and similar data stored in columns on search suggestion tables. For a guide to search suggestion tables and their columns, see Search Suggestions tables.

Note: Because the search signal tables are system tables, they are excluded from the Reporting module by default. To learn about enabling reporting on system tables, see Reporting on system tables.

Search Signal Event table

The Search Signal Event [sys_search_signal_event] table stores signal data produced when users submit a search.

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sys_search_signal_event

Column	Description
Search event	Reference to the record for the search event on the Search Event [sys_search_event] table.
Browser	User browser agent string.
Latitude	Latitude coordinate of the user location in decimal degrees.
Longitude	Longitude coordinate of the user location in decimal degrees.
Matched Query Intents	List of query intents matched in the user search query.
First page results	JSON array of objects in which each node represents a single result returned in the first page of results for the search. The result order is preserved. Each object includes the unique record identifier (sys_id) of a result and the table where the result is located. **Note:** The first page results aren't updated when you refine a search.
Search Response Time(ms)	Time taken by the search, in milliseconds.
User Query Language	Language of the user search query.

Search Signal Result Event table

The Search Signal Result Event [sys_search_signal_result_event] table stores signal data for search results that users select.

sys_search_signal_result_event

Column	Description
Search query	Search query that led to the search result selection.
User	User that selected the search result.
Result DocID	Source table and record names for the selected search result.
Description	Short description for the selected search result.
Source Table	Source table for the selected search result.
AIS DocID	Source table name and record sys_id for the selected search result.
Result Type	Type of search result selected. For example, *REGULAR* for a regular search result or *GENIUS* for a Genius Result answer card.

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sys_search_signal_result_event (continued)

Column	Description
Search Signal Event	Reference to the record for the search on the Search Signal Event [sys_search_signal_event] table.
Number	Record number for the selected search result.
Domain	Domain to which the selected search result belongs.
Use for Suggestions	Option indicating whether AI Search uses this result selection when computing auto-complete suggestions. For more details, see Auto-complete suggestions in AI Search applications
Source URL	URL for the selected search result.
Action Data	JSON array of objects representing the search result selection action.

Search Signal Result Event Action table

The Search Signal Result Event Action [sys_search_signal_result_event_action] table stores signal data for user interactions with search results.

sys_search_signal_result_event_action

Column	Description
Signal Type	The type of user interaction signal recorded for the search result. For example, *CLICK* indicates that the user selected a search result.
Signal Value	The value for the user interaction signal. For example, when the signal type is *CLICK*, the signal value is the numeric index for the search result that the user selected.
Search Signal Result Event	Reference to the record for the search result on the Search Signal Result Event [sys_search_signal_result_event] table.

Search Autocomplete Query Event table

The Search Autocomplete Query Event [sys_search_autocomplete_query_event] table stores signal data for auto-complete suggestions that users select from the search input field.

sys_search_autocomplete_query_event

Column	Description
Selected Query	The auto-complete suggested query that the user selected in the search input field.

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sys_search_autocomplete_query_event (continued)

Column	Description
Click Index	The numeric index of the auto-complete suggestion that the user selected in the search input field.
Latitude	Latitude coordinate of the user location in decimal degrees.
Longitude	Longitude coordinate of the user location in decimal degrees.
Search Profile	Reference to the search profile used for the search query.

Genius Result Event Action table

The Genius Result Event Action [sys_search_genius_result_event_action] table stores signal data for user interactions with Genius Result answer cards.

sys_search_genius_result_event_action

Column	Description
Action Id	The identifier for this Genius Result event action signal.
Action Type	The type of action taken from the Genius Result answer card.
Action Value	The value, if any, for the action taken from the Genius Result answer card.
Matched Genius Result Intents	List of NLU model intents matched by the action taken from the Genius Result answer card. **Note:** This field is only populated for Genius Result configurations with NLU triggers.
Card Type	The type of Genius Result answer card that the user interacted with.
Search Signal Result Event	Reference to the record for the Genius Result answer card on the Search Signal Result Event [sys_search_signal_result_event] table.

Zing text indexing and search engine

Index and search record data by table.

The ServiceNow® Zing text indexing and search engine is a legacy search engine that you can use to search ServiceNow AI Platform® record data. Its engine is created entirely with ServiceNow code and implemented within the relational model.

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Note: To learn about the AI Search engine, which is the default search engine for ServiceNow AI Platform record data, see AI Search.

The Zing text search index is split into multiple database shards for parallel querying. Its search engine logic yields fast results and emphasizes relevancy scoring. Relevancy scores include frequency and proximity weighting. Scores also include weighting for specific indexed fields such as title, short description, and metadata.

Zing provides type-ahead search suggestions and **Did you mean:** global search suggestions.

Administrators and users with the ts_admin role can configure the following Zing text search settings:

- match relevance
- relevancy field weights for each indexed table
- global stop words
- stop words for each index
- synonym dictionaries for each table
- tables with attachment indexing

Explore	Set up	Administer
• Brazil • Features of Search administration • Features of Zing text indexing and search engine	• Set global text search properties • Zing can include attachments in search results • Zing can expand search results with synonyms	• Zing indexes words • Global search finds records from multiple tables • List search finds records from the current table
Use	**Develop**	**Troubleshoot and get help**
• Boolean operators allow conditional search results • Quotation marks allow exact phrase searches • Wildcard characters allow searching for patterns and variations	• Developer training • Developer documentation • Create synonym dictionaries	• Ask or answer questions in the Platform forum • Search the Known Error Portal for known error articles • Contact Customer Service and Support

Features of Zing text indexing and search engine

Enable and configure Zing text indexing and search engine features.

Feature	Description	Top tasks	State
Zing indexes words	Index documents by dividing them into words. Depending on the languages your instance supports, a word may be a single character such as a Chinese or Japanese pictogram or a sequence of characters	• Configure a table for indexing	Active

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Feature	Description	Top tasks	State
	separated by spaces such as with Latin, Arabic, and Pinyin languages.	and searching • Regenerate a text index for a table • Configure tables to use the Japanese tokenizer	
Zing computes document scores using three components	Compute document scores based on the frequency, sequence, and weight of search terms in the document.	• Score search terms by inverse document frequency (IDF) • Set the relative weight of a field	Active
Global search finds records from multiple tables	Search multiple record types from a single search field.	• Add a search group for Core UI • Configure a table for indexing and searching	Active
Search results page in Core UI and UI15	Display global text search results for each table as Zing generates them.	• Add a search group for Core UI • Revert to the legacy global search UI	Active
List search finds records from the	Search records from a table list view.	• Configure a table for indexing	Active

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Feature	Description	Top tasks	State
current table		and searching • Regenerate a text index for a table	
Zing can include attachments in search results	Search content from attachments on indexed tables. Display attachments for search results from the Knowledge [kb_knowledge] table.	• Index attachments on a table • Configure a table for indexing and searching	Active
Zing removes stop words from queries	Remove common words from search queries that don't produce meaningful results.	• Configure a global stop word • Configure a table-specific stop word	Active
Zing matches derived words with stemming	Convert any multiple-character search keyword to its stem form to find derived versions of the word.	• System Localization properties • Activate a language	Active
Zing can expand search results with synonyms	Expand search results to include additional search terms. Requires configuration before use	• Enable search synonyms • Create synonym dictionaries	Inactive

Available search options

Zing offers users several search interfaces and search operators to conduct text searches.

Available search interfaces

Search interface	Description
Global search	Find records in multiple tables using the global search field in the Next Experience Unified Navigation.

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Available search interfaces (continued)

Search interface	Description
Search a list	Find records in a list; search in a specific field (Go to), all fields (Search), or in a specific column.
Knowledge Base	Find knowledge articles.
Live feed	Filter, search, or sort messages in live feed.
UI pages	Create a custom UI page to search for records in a table.

Available search operators

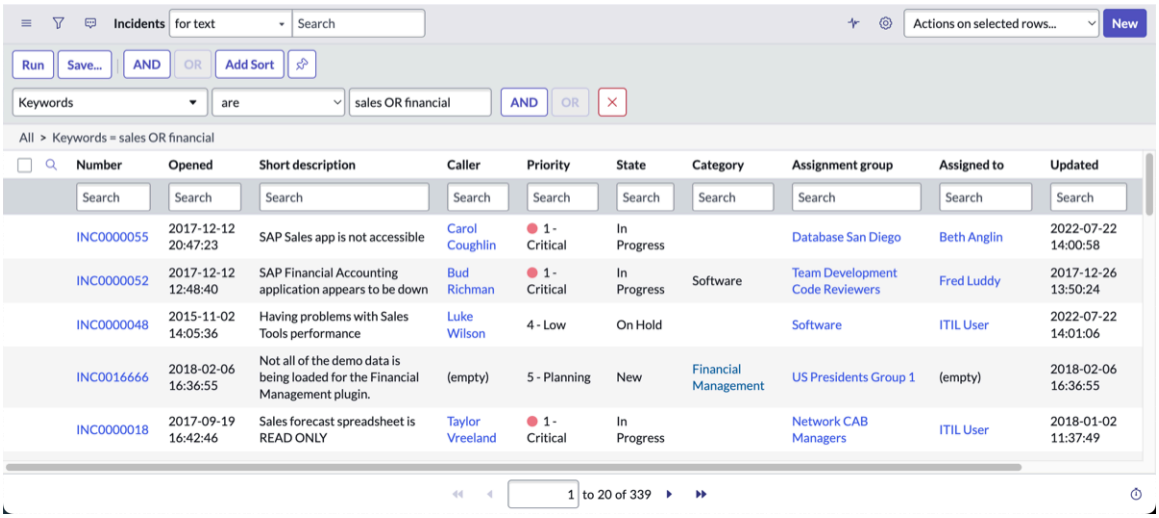
Search operator	Description
Boolean operators	Construct complex searches using Boolean AND, OR, and NOT operators in global text searches.
Quotation marks	Wrap search terms in quotation marks to search for an exact phrase consisting of one or more words.
Wildcard characters	Expand search results to match any non-space character. Zing supports both single-character and multiple-character wildcards.

List search finds records from the current table

Search records from a table list view.

Indexed tables display the *for text* option in the list title bar, which searches all records for matching field values.

List search



The list search field accepts Boolean operators (AND, OR, and NOT) in search queries. When a user adds a Boolean operator to a search query, the system only returns records that match all search conditions of the query.

The system also converts any search query into an equivalent keyword condition in the list breadcrumbs and filter. For example, searching for the text "Oracle OR SAP" produces the

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condition **[Keywords] [are] [Oracle OR SAP]**. The standard list controls can modify or remove these breadcrumbs and conditions.

Boolean operators allow conditional search results

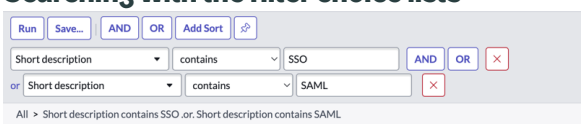
Construct complex searches using Boolean AND, OR, and NOT operators in global text searches.

You can use Boolean operators in all global text search interfaces:

- Global text search field
- Knowledge Base search
- List search for text

Note: Boolean operators are case-sensitive. As an example, the system recognizes `OR` as a Boolean operator, but treats `Or` and `or` as regular search terms.

Boolean operators

Operator	Description
OR or vertical bar symbol (|)	Finds a match if any of the search terms exist in a document (a union of sets). For example, to find documents that contain either `email password` or just `email`, you can search for `"email password" OR email` or `"email password" | email`. Using the `.or.` operator, which the system uses when you create OR condition groups for fields other than Keywords with the condition builder, can produce different results. For example, this filter searches for records with short descriptions containing SSO and then searches separately for records with short descriptions containing SAML: **Searching with the filter choice lists**  **Note:** By design, you can only have one Keywords filter condition per condition set. If you select the Keywords field in a filter choice list, the OR button for that filter condition becomes unavailable. Similarly, if you construct an OR filter condition, the Keywords field becomes unavailable in the filter choice lists.
AND	Finds a match if all search terms exist in a document (an intersection of sets). For example, to find documents that contain both "CPU load" and "10 minutes", search for `"CPU load" AND "10 minutes"` By default, Zing applies an AND operator between all search terms not separated by OR or NOT operators. For example, if you enter `email server down` as your search terms, the system searches for `email AND server AND down`. **Note:** For Knowledge Base searches, if the default AND search returns poor results, the search is automatically re-run with the OR operator. Administrators can configure the knowledge base search to always use OR by modifying the *`glide.knowman.search.operator`* system property.
NOT, minus (-), or	Excludes documents that contain the search term after the NOT operator (a difference of sets). For example, to find documents that contain "CPU load" but

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Boolean operators (continued)

Operator	Description
exclamation point (!)	not "10 minutes", you can search for `"CPU load" NOT "10 minutes"` or `"CPU load" -"10 minutes"` or `"CPU load" !"10 minutes"`. NOT must be a stand-alone term in your search. For example, `atom NOT ion` excludes the term `ion`, but `NOTION` searches for the term `notion`. The minus and exclamation point symbols must immediately precede the search term that you want to exclude. For example, a search for `email !Joe` excludes `Joe` but a search for `email ! Joe` includes `Joe`. You can't use the NOT operator to exclude all terms in your search. For example, the following search returns no results: `NOT "10 minutes"`.

Related topics

Knowledge properties

Quotation marks allow exact phrase searches

Wrap search terms in quotation marks to search for an exact phrase consisting of one or more words.

Search terms in quotation marks are treated as exact phrase searches. When you search for an exact phrase, Zing only matches documents that contain the quoted words in the exact order you specify.

As an example, searching for `email password` returns search results that include `email` and `password` in any order, including records with these text strings:

- `enter your email password`
- `your email account password`

If you search for the quoted phrase `"email password"`, Zing returns search results with text `enter your email password` because they contain `email password` as an exact phrase. It doesn't return results with text `your email account password` because the search terms don't occur in the exact order specified in your search phrase.

Exact phrase searches ignore:

- stop words
- punctuation marks
- wildcard characters

Note: Wildcard characters are ignored as punctuation.

For example, searching for the phrase `"email password"` returns the same search results as these phrases:

- `"email the password"` because the stop word `the` is ignored.
- `"email password?"` because the punctuation mark ? is ignored.
- `"email password*"` because the wildcard character * is ignored as punctuation.

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Wildcard characters allow searching for patterns and variations

Expand search results to match any non-space character. Zing supports both single-character and multiple-character wildcards.

The following searches support Zing wildcard characters.

- Global text search
- Knowledge Base

> **Note:** Users with the admin role can enable wildcard search in the Knowledge context by navigating to **All** > **Contextual Search** > **Search Contexts**, editing the **Knowledge Base Search** record, and selecting the **Enable wildcard searches** check box.

- Search a list

> **Note:** To perform a wildcard text search of a list, you must select **for text** as the search field. If you select a list field instead of **for text**, wildcard characters in search terms will be interpreted as list search wildcards (for non-reference fields) or as auto-complete wildcards (for reference fields).

To perform a single-character wildcard search, use the percent sign (`%`) character. This wildcard finds words that contain any one character in place of the percent-sign-character. For example, to find words such as **text** or **test**, search for `te%t`.

To perform a multiple-character wildcard search, use the asterisk (`*`) character. This wildcard finds words that contain zero or more characters in place of the asterisk-character. For example, to find words such as **planned** or **placed**, search for `pl*d`.

You can use wildcard characters anywhere in a search string, and can include multiple wildcards in the same word. For example, to find words including **affordable**, **effort**, and **offering**, search for `%ff%r*`.

If a wildcard search returns too many hits, the system displays a message asking you to refine the search. Administrators can set a global text search property to change the limit for wildcard search results.

> **Note:** Wildcard text searches are only effective with multiple character words. A wildcard within a sequence of pictogram characters returns too many options for an efficient search. Wildcards are best used with letter-based words.

Wildcard characters and synonym matching

Zing doesn't expand the `%` and `*` wildcard characters when looking for synonyms that match your search term. These characters are treated as literal characters when finding matching synonyms. As an example, if you search for `issu*`, Zing doesn't find synonyms for `issue`, but it does find synonyms for `issu*`.

Enable or disable the Zing junk filter

When its junk filter is enabled, Zing doesn't index or search for 2-digit numbers or single-character words (unless they are Chinese or Japanese characters). You can enable or disable the junk filter for individual tables.

Before you begin
Role required: admin

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About this task

For example, to disable matches for search terms like `a` or `40` in the Knowledge Base, turn on junk filtering for the kb_knowledge table.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Open the dictionary entry for the table.
3. In the Attributes related list, set the value of the **Text index filter junk** attribute:
   a. If you want Zing to include 2-digit numbers and single-character words when indexing and searching the table, set the attribute value to `false`.
   b. If you want Zing to ignore 2-digit numbers and single-character words when indexing and searching the table, set the attribute value to `true`.
4. Select the additional actions icon in the Dictionary Entry form header, then select **Save**.
5. Select the **Generate Text Index** related link and select **OK**.

Note:

- To have the desired effect, you may also need to reconfigure the automatic stop words. For example, if a specific 2-digit number appears in all of your problem numbers (92-0001, 92-0002, and so on), the automatic stop word threshold is quickly exceeded and the word is no longer found in searches. To find that 2-digit number in the problem table, you must disable both junk filtering and automatic stop words.
- Disabling the junk filter results in a larger table index. For optimal performance, don't apply this attribute unless it's required.

Debug Zing

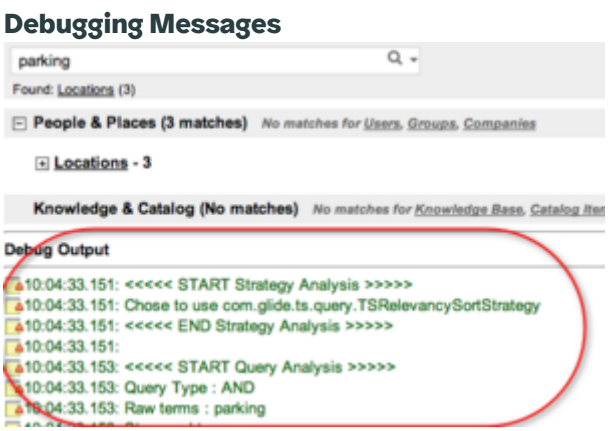
Debugging messages create a log of search processes as they occur. These messages may help administrators configure optimal performance settings.

Before you begin

Role required: admin

About this task

- To view debugging messages, navigate to **All** > **System Diagnostics** > **Session Debug** > **Debug Text Search**. The search log messages appear at the bottom of the results page for the remainder of your session.



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- To debug text indexing problems, you may want to view text_index events in the system log.
- In rare cases, you may need to reset the text search caches after regenerating a text index. If text search fails for known words, diagnose and fix this problem:

Procedure

1. Enable text search debugging messages.
2. In any table with search problems, search for the problem text.
3. In the debug output, note the numbers used for the Stemmed terms.
4. Navigate to the Ts Word [ts_word] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `ts_word.list`.
   c. Press Enter.
5. Locate the stemmed terms and compare the numbers in the list to the debug output from step 3.
   If the numbers are different, the UI node's cache is stale.
6. Navigate to **All** > **System Definition** > **Text Indexes**.
7. Select the **Reset Text Search Caches** related link and select **OK**.

Global search finds records from multiple tables

Search multiple record types from a single search field.

To perform a global search, perform one of the following actions based on your UI version.

UI version	Action
Next Experience UI	Enter your search terms in the Unified Navigation search field, then select **View results** or press Enter.
Core UI	Select the search icon in the banner on the upper right of the System settings for the user interface (UI) , then enter your search terms and press Enter.

All UI versions also have a global search keyboard shortcut. The `ui_global_text_search` UI Macro provides the global search field.

For a list of search source tables that the system searches by default, along with steps for adding new search source tables, see Default global search sources for Next Experience UI and Default global text search groups for Core UI.

Global search supports Boolean operators, quoted phrases, and wildcard characters. For details on these search features, see Boolean operators allow conditional search results, Quotation marks allow exact phrase searches, and Wildcard characters allow searching for patterns and variations.

Related topics

Keyboard shortcuts

Global search displays a page of matching results

Global search displays a page of results that match your search, grouped by table.

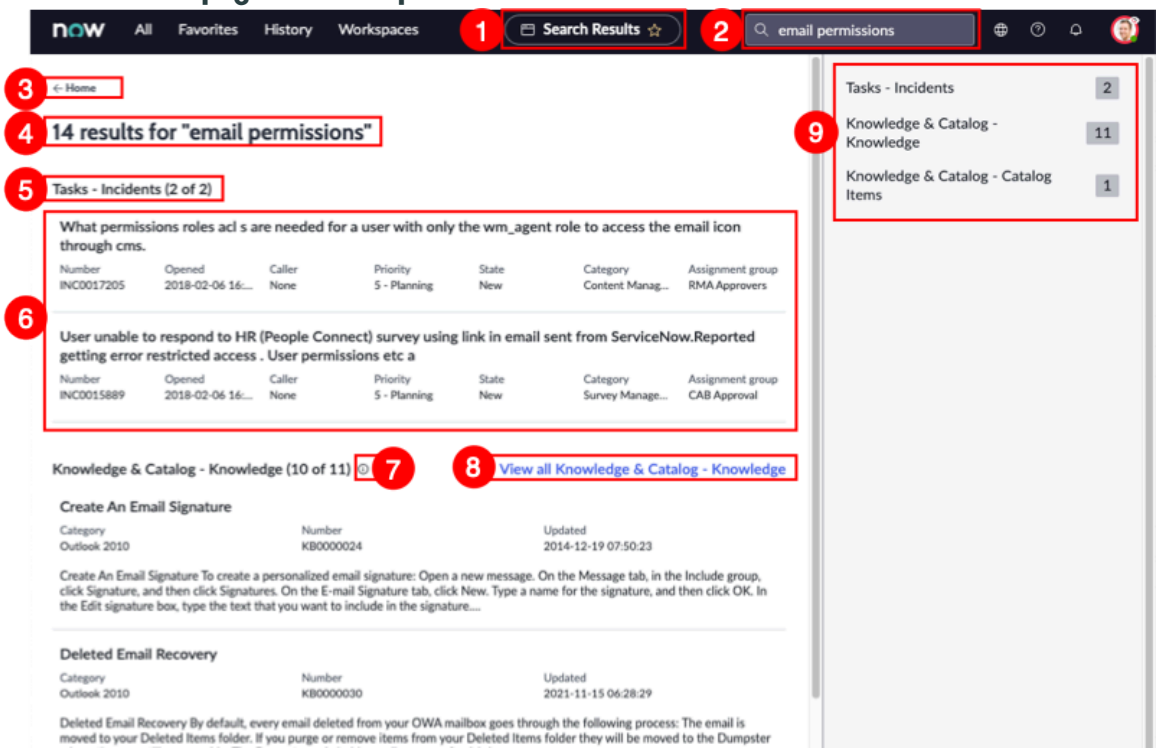
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The elements included on the search results page differ by UI, as described in the following sections.

Search results page in Next Experience UI

Global search displays a Search Results page containing results that match your search terms, grouped by search source. Results appear when the search is complete.

Search Results page in Next Experience UI



Zing displays global search results in a dedicated page consisting of these elements.

Elements of the global search results page in Next Experience UI

UI element	Description
1. Search Results page title	Contextual app pill for the search results page.
2. Global search field	Field displaying your current search terms. If you edit these terms, refresh the results page by selecting the **View results** link that appears in a panel below the search field.
3. Contextual return link	Link to return to the page you were on when you performed the search. The title of this link depends on which page you searched from.
4. Total result count	Total number of records matching your search.
5. Search source table name	Name of a search source table and the number of previewed and total matching records in that table.

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Elements of the global search results page in Next Experience UI (continued)

UI element	Description
and result count	Users with the admin or ui_builder_admin roles can hide the per-table counts of matching records. For details on making this change, see Hide per-table search result counts in Next Experience UI.
6. Preview of matching records for table	Partial list of matching records for the specified table, with maximum count controlled by the preview limit. By default, the system displays up to 10 matching records per table, sorted from highest to lowest document score. The system displays a separate list for each table in the search source. By default, the system displays fields from the table's text_search list view for each search result. If this view doesn't exist for the table, it instead displays fields from the default list view. For more details on the text_search list view and the format of individual result listings, see Text search views control format of global search results for tables. Users with the admin role can override the preview results limit for a search application by modifying the application's record in the Workspace Global Search Configuration [sys_aw_global_search_config] table. For more details on this procedure, see Set the preview limit for global or workspace search in Next Experience UI. Administrators can also modify the search results table list view by modifying the value of the *glide.ui.text_search.view* system property. For details on changing this value, see Set global text search properties.
7. Table filter	Icon indicating that a filter was applied to results from this search source table. Pointing to the information icon displays a pop-up containing the search filter applied.
8. Link to all table results	Link to all matching records from the searched table. Select the link to launch a filtered list view based on the query. This link only displays when the total number of matching records in the table exceeds the preview limit.
9. Results summary	List of search source tables, showing the number of matching search results per table. Select the search source table name to display the associated preview list results. Search source tables with no matching results don't appear in this list. Users with the admin or ui_builder_admin roles can hide the per-table counts of matching records. For details on making this change, see Hide per-table search result counts in Next Experience UI.

View and open search results using workspace applications in Next Experience Unified Navigation

Use the search context menu to view and open results for your current search in workspace applications.

Before you begin

You must be using Next Experience UI.

Role required: none

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About this task

In addition to global search, you may have access to workspace search applications, such as CSM/FSM Configurable Workspace. If you have access to multiple search applications, the search field's drop-down search context menu displays all available search applications, with the current application preselected. To view and open search results in another application, select it from the search context menu.

Users with the administrator role can add workspace applications to the search context menu. For details on this procedure, see Add a workspace application to the Unified Navigation search context menu.

Procedure

1. Use the search field to perform a search and view search results.
2. To open the search context menu, select the **Choose search context** icon in the search field.

   Note: If the **Choose search context** icon isn't displayed in the search field, the current search applications is the only one available. You can't switch search applications.

   A drop-down menu of available search applications displays, with the current search applications preselected.



3. Select an alternate search application from the drop-down menu.
   The drop-down menu disappears and the **View results** link appears.
4. To view search results in the selected application, select **View results** or press Enter.

Result

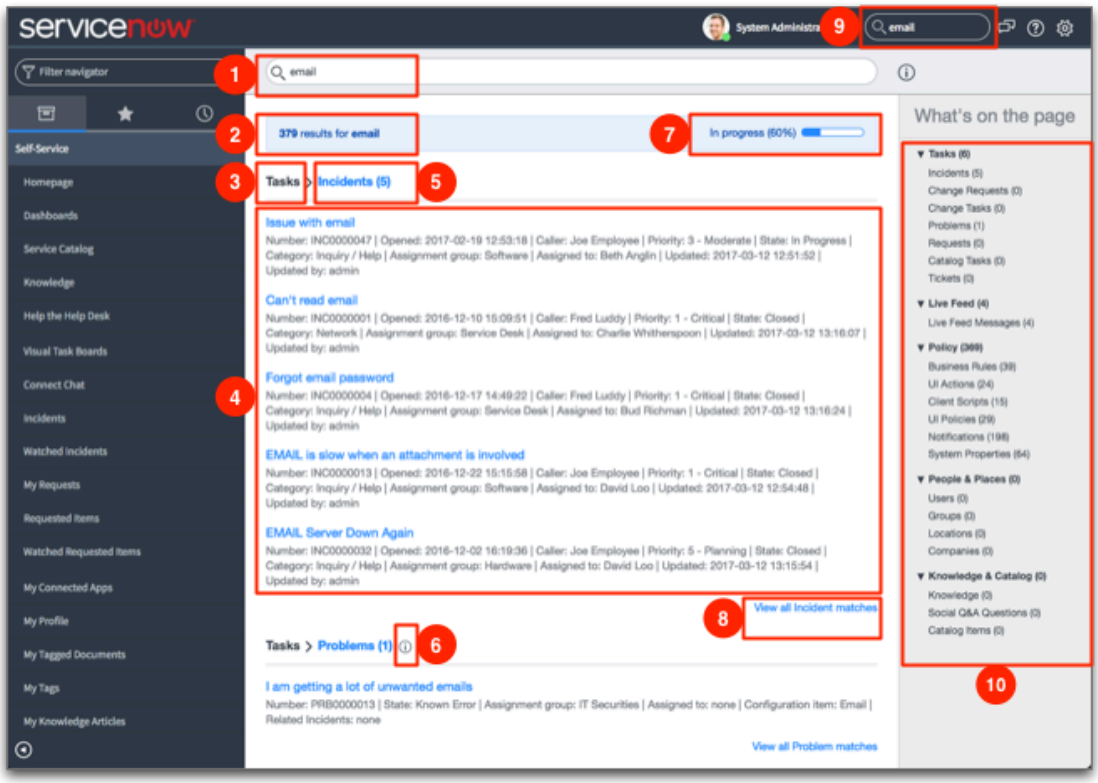
The page reloads and displays results for your current search from the selected search application. If you select a previewed matching record, it opens in the selected search application.

Search results page in Core UI and UI15

Global text search displays a page of results that match your search terms. Search results appear dynamically on this page as Zing generates them.

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Global text search results page in Core UI



Zing displays global text search results in a dedicated page consisting of these elements.

Elements of the global text search results page in Core UI and UI15

UI element	Description
1. Search terms	Field displaying your current search terms. If you edit these terms, refresh the results page by selecting the search icon or pressing Enter. **Note:** If you delete your search terms and select the search icon or press Enter, the search results page doesn't refresh. To refresh the page, enter search terms, then select the search icon or press Enter.
2. Total results	Total number of records matching your search.
3. Search group name	Name of the search group that includes the table with matching records.
4. Preview of matching records	Partial list of matching records for the specified table, with maximum count controlled by the preview limit. By default, the system displays up to 10 matching records per table, sorted from highest to lowest document score. The system displays a separate list for each table in the search group. By default, the system uses the table's text_search list view if available. Otherwise, it displays fields with the default list view.

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Elements of the global text search results page in Core UI and UI15 (continued)

UI element	Description
	Users with the admin role can modify the default preview results limit and search results table list view by changing the values of the *glide.ui.text_search.rowcount* and *glide.ui.text_search.view* system properties. For more details on these properties, see Set global text search properties.
5. Table name	Name of the search group table and the number of matching records in the table. Click the link to launch a filtered list view based on the query. Users with the admin role can hide matching record counts by setting the *sn_global_searchui.hide_results_count* property to **true** in the System Property table.
6. Table filter	Current filter applied to search results from this table. Pointing to the information icon displays a pop-up containing the search filter applied. For information on applying a table filter to a search group, see Add a search group for Core UI.
7. Progress bar	Current percentage of tables searched. The system hides this element after the search is complete.
8. Link to all table results	Link to see all matching records from the search group table. Click the link to launch a filtered list view based on the query.
9. Global search field	Global search field. **Note:** If you delete your search terms and select the search icon or press Enter, the search results page refreshes, displaying zero search results.
10. Results summary	List of search groups and tables with the number of search results per group and table. Select the table name to display the associated preview list results.

Text search views control format of global search results for tables

The text_search view for a table determines how global search displays results from that table.

Results displayed by global search include multiple elements. For each search result, the system populates these elements with values of fields included in the table's text_search list view.

Sample search result listing in Next Experience UI



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Sample search result listing in Core UI



Search result elements

Element	Description	Matching criteria
1. Title	The title is the first line of the search result block. It links to the matching record of the search result.	Global search uses the first string field in the table's text_search list view that is not the number field. If there is no matching string field or the contents of the field is empty, the system displays the text "No title" in the session language. For example, in the default text_search view for the Incident table, the short description field satisfies the title criteria. Global search uses this field as the search result title.
2. Field list	The field list is the second line of the search results. It displays field name-value pairs, separated by the pipe character, for up to 10 fields.	Global search uses the first 10 fields in the table's text_search list view that don't match the title or description criteria. For example, in the default text_search view for the Incident table, the number, opened, caller, priority, state, category, and assignment group fields satisfy the field list criteria. Global search displays the names and values for these fields in the search result field list.
3. Description	The description is the third line of the search results. This line is optional and may not appear for all search results.	Global search uses the first string field in the table's text_search list view that is not the title and is over 100 characters in length. If no field matches these criteria, the search results omit this line. For example, in the default text_search view for the Incident table, the description field satisfies the description criteria. Global search uses this field as the search result description.

By default, the system uses the text_search list view for a table to format global text search results for that table. If a text_search view doesn't exist for the table, the system instead formats search results using the table's default form view. Implementers can specify which view the system uses to format search results by modifying the value of the *glide.ui.text_search.view* system property.

Related topics

Create and delete views

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Default display fields for global search tables

Multiple tables are enabled for global search in the base system. Each global search table has its own set of fields included in the table's default text_search list view. The system uses fields from this view to format global search results from these tables.

Table	Display fields
Catalog Item [sc_cat_item]	Short description, Description, Category, Price
Catalog Task [sc_task]	Short description, Description, Number, Priority, State, Assignment group, Request item
Change [change_request]	Short description, Description, Number, Type, Assignment group, State, Risk, Priority
Change Task [change_task]	Short description, Description, Number, Type, State, Assignment group
Company [core_company]	Name, Street, City, Zip / Postal code, Phone
Group [sys_user_group]	Name, Description, Type
Incident [incident]	Short description, Description, Number, Opened, Caller, Priority, State, Category, Assignment group
Knowledge [kb_knowledge]	Short description, Article body, Category, Number, Updated
Problem [problem]	Problem statement, Description, Number, State, Resolution code, Assignment group, Configuration item, Related Incidents
Request [sc_request]	Short description, Number, Requested for, State, Opened by
Requested Item [sc_req_item]	Number, Item, Stage, State, Requested for, Opened by, Opened
User [sys_user]	Name, Email, Company, Department, Title

Search settings filter and group global search results by table

Global search filters and groups matching results by table. You can configure search sources (in Next Experience UI) or search groups to define tables and groups for global search.

The configuration settings for table-based filtering and grouping of global search results differ by UI, as described in the following sections.

Search sources filter global search results by table in Next Experience UI

Global search in Next Experience UI displays search results broken out by search source. A search source is a collection of global search settings for a ServiceNow AI Platform® table.

A user must have read access to a table to see search results for it.

Default global search sources for Next Experience UI

The base system includes these default search sources for global search in Next Experience UI.

When Next Experience UI is activated, the following search sources are defined for global search. These search sources appear in the Application Search Sources related list for the

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Now Experience Search Configuration record in the Search Application Configuration [sys_search_context_config] table.

Search source	Table searched
Tasks - Incidents	Incident [incident]
Tasks - Change Requests	Change Request [change_request]
Tasks - Change Tasks	Change Task [change_task]
Tasks - Problems	Problem [problem]
Tasks - Requests	Request [sc_request]
Tasks - Catalog Tasks	Catalog Task [sc_task]
People & Places - Users	User [sys_user]
Tasks - Requested Items	Requested Item [sc_req_item]
People & Places - Groups	Group [sys_user_group]
Knowledge & Catalog - Knowledge	Knowledge [kb_knowledge]
People & Places - Companies	Company [core_company]
Knowledge & Catalog - Catalog Items	Catalog Item [sc_cat_item]

Note: Search sources only affect filtering of global search results in Next Experience UI. In Core UI, global text search filters results based on settings defined in text search groups. For details on these settings, see Search groups filter global text search results by table in Core UI.

Add a search source for Next Experience UI

Add a new search source to make a table searchable by global search or workspace search in Next Experience UI.

Before you begin

You must be using Next Experience UI.

Note: You can configure tables for global text search in Core UI by adding new text search groups. For more details, see Add a search group for Core UI.

The tables you want to include in the search group must have text indexing enabled. To enable text indexing for a table, see Configure a table for indexing and searching.

Role required: search_application_admin or workspace_admin

About this task

A search source defines a table that is searchable by global or workspace search in Next Experience UI. Define new search sources to add to the default set of tables configured for global search or your workspace search. For the list of global search sources included in the base system, see Default global search sources for Next Experience UI.

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Procedure

1. Define the new search source in the Search Source [sys_search_source] table.

   a. Select **All**.

   b. In the **Filter** field, enter `sys_search_source.list`.

   c. Press Enter.

   d. Select **New**.

   e. On the Search Source form, fill in the fields.

Field	Description
Name	Name to display for the search source in the global search results page.
Table	Table to make searchable for global search.
Conditions	Filter conditions that table records must satisfy to be searchable.
Application	Application scope for the search source. This field is automatically set.

   f. Select **Submit**.

2. Link the new search source to the record for the global or workspace search application in the Search Application Configurations [m2m_search_context_config_search_source] table.

   a. Select **All**.

   b. In the **Filter** field, enter `m2m_search_context_config_search_source.list`.

   c. Press Enter.

   d. Select **New**.

   e. Select the additional actions icon  , then select **Configure** > **Form Layout**.

   f. Use the slushbucket to add the Search context config field to the selected field list, then select **Save**.

   g. On the Application Search Sources form, fill in the fields.

Field	Description
Source	Name to display for the search source in the global search results page.

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Field	Description
Order	Order of appearance for the search source in the search application configuration context.
Application	Application scope for the search source. This field is automatically set.
Search context config	Record for the global or workspace search application in the Search Application Configuration [sys_search_context_config] table. To add the search source for global search, select the **Now Experience Search Configuration** record. To add the search source for a workspace application, select the record for that application. For example, to add a search source for Agent Workspace, select the **Agent Workspace Search Config** record.

h. Select **Submit**.

3. **Optional:** Reorder search sources for the global or workspace search application.

a. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.

b. Open the record for the search application.

Note: For global search, open the **Now Experience Search Configuration** record. For a workspace application, open the record for that application, such as the **Agent Workspace Search Config** record for Agent Workspace.

c. In the Application Search Sources related list, edit the **Order** values for search source records to alter the display order for table filters on the application's search results page.

Result
The new search source appears in global or workspace search results.

Search groups filter global text search results by table in Core UI

Global text search in Core UI displays search results broken out by search group. A search group is a collection of related searchable tables.

Within each search group, the system divides search results by table. A user must have read access to a table to see search results for it.

Displaying search results by group

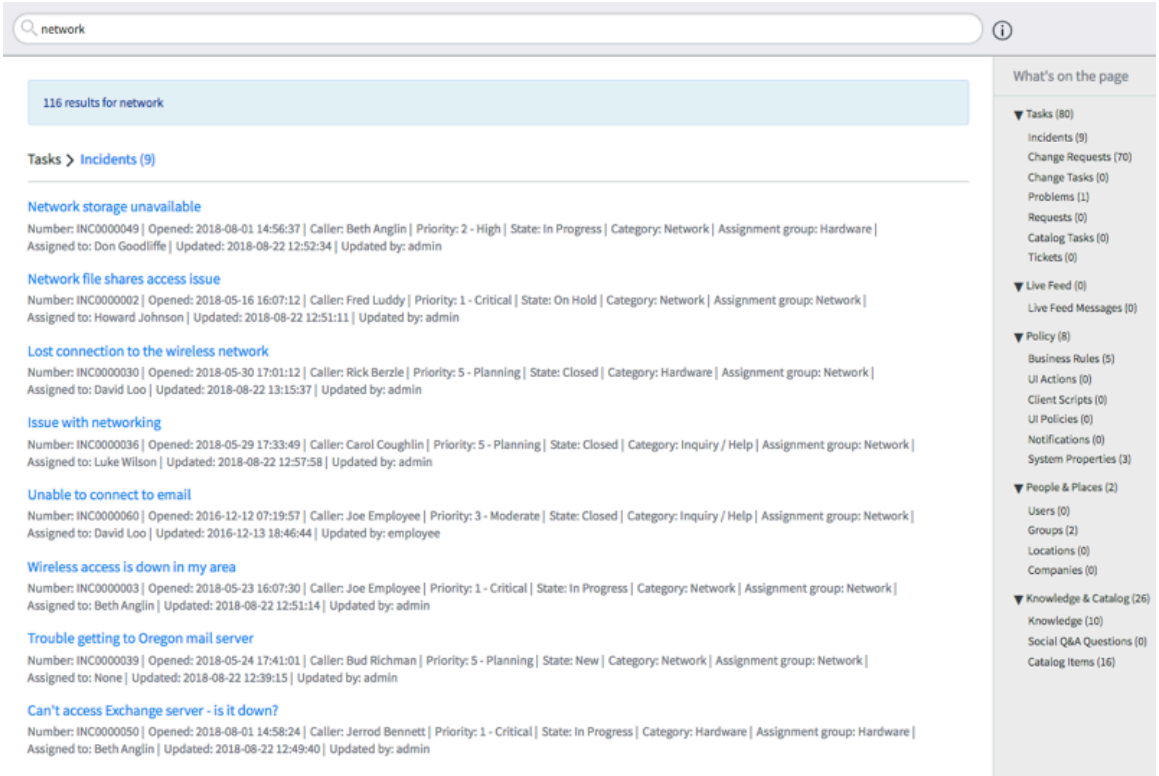
The system displays knowledge and service catalog search results within their respective search results pages. The system displays other results in list format.

For exact match searches, the system only returns records from the Task (task) and Knowledge (kb_knowledge) tables.

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Note: The system filters global search results to display only knowledge articles that are in the same language as the preferred language setting.

Example global text search results



Options for administrators

Administrators can customize these search group settings for all users:

- Specifying which tables are part of the group.
- Specifying whether the search group is available for use.
- Specifying whether searches include results from this search group by default.
- Creating new search groups.

Enabling a search group allows users to see records from the search group's tables. Disabling a search group hides records from the search group's tables.

Default global text search groups for Core UI

The base system includes these default text search groups for global text search in Core UI.

Search group	Tables searched
Tasks	• Incident [incident] • Change Request [change_request] • Change Task [change_task] • Problem [problem] • Request [sc_request]

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Search group	Tables searched
	• Catalog Task [sc_task] • Requested Item [sc_req_item]
People & Places	• User [sys_user] • Group [sys_user_group] • Company [core_company]
Knowledge & Catalog	• Knowledge [kb_knowledge] • Catalog Item [sc_cat_item]

Note: Text search groups only affect filtering of global text search results in Core UI and UI15. In Next Experience UI, global search filters results based on search sources linked to the **Now Experience Search Configuration** record in the Search Application Configuration [sys_search_context_config] table. For details on the search sources included in the base system, see Default global search sources for Next Experience UI.

Add a search group for Core UI

Add a new text search group to filter global text search results by table in Core UI.

Before you begin

You must be using Core UI.

Note: You can configure tables for global search in Next Experience UI by adding new search sources. For more details, see Add a search source for Next Experience UI.

The tables you want to include in the search group must have text indexing enabled. To enable text indexing for a table, see Configure a table for indexing and searching.

Role required: text_search_admin

About this task

A text search group defines a set of tables to use as filters for global text search results in Core UI. Define new search groups to add to the default set of text search groups configured for global text search.

For the list of text search groups included in the base system, see Default global text search groups for Core UI.

Procedure

1. Navigate to **All** > **System Definition** > **Search Groups**.
2. Select **New**.
3. On the Text Search Groups form, fill in the fields.

Field	Description
Name	Enter a name for the search group.

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Field	Description
Roles	Select one or more user roles if you want to restrict access to the search group to those roles.
User group	Select a user group if you want to restrict access to the search group to users in that user group.
Description	Enter text to display as a tooltip for the search group.
Active	Ensure the check box is selected to make the search group available.
Searched	Clear the check box if you want to exclude results from this search group.
Order	Enter a number to determine the order in which this search group is listed relative to other search groups.

4. Select the additional actions icon, then select **Save**.
5. For each table that you want to add to the search group, perform the following steps.

   a. In the search group record's Text Search Tables related list, select **New**.

   b. On the Text Search Table form, fill in the fields.

Text search table

Field	Description
Search group	The search group that you want to add a table to.
Table	Select the table to include in the search group. **Note:** You can select any table not excluded by the *glide.ui.no_text_search* system property, but global search only displays search results for tables that have text indexing enabled.
Application	Application scope for the text search table record. This field is automatically set.
Active	Option to search the table as part of the search group.
Searched	If you want to exclude results from this table by default, clear this option. A user can manually choose to show results from this table on the search results page.
Order	Order in which this table is listed relative to other tables in the search group.
Conditions	Select one or more conditions to determine which records on the selected **Table** are searched.

   c. Select **Submit**.

Global search displays exact matching records

When your search exactly matches the **Number** field value for a record, global search takes you directly to that record, bypassing the search results page.

As an example, if you search for `INC0038278`, global search shows Incident record INC0038278 in form view instead of showing the search results page.

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Note: Exact match respects security settings. If you don't have permission to view the record that matches your search, global search won't show you that record.

If more than one record has a **Number** field value that exactly matches your search, global search displays the first exact match. An informational message reports the total number of exact matches and provides links to the other exact matches.

Exact match configuration settings

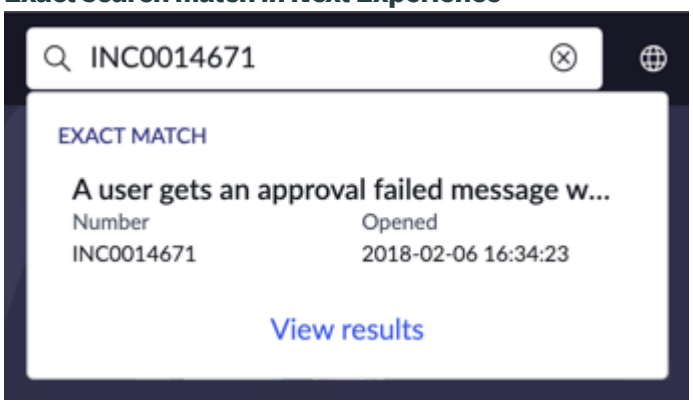
Exact match only returns matches for Number values that contain prefixes defined in the Numbers [sys_number] table. To view prefixes and their matching tables, navigate to **All** > **System Definition** > **Number Maintenance**.

Search behavior for exact match is controlled by the *com.snc.agent_workspace.global_search.typeahead.exact_match_request_criterion* system property. This property's value is a Java regular expression pattern. Only search queries that match the regular expression pattern are evaluated as possible exact record matches. For details on Java regular expression pattern syntax, see the Javadoc for the java.regex.util.Pattern class.

Exact search matches in Next Experience UI

When your search in Next Experience UI exactly matches a searchable record, the Unified Navigation search field displays a preview of that record. Selecting the preview takes you directly to that record and bypasses the search results page.

Exact search match in Next Experience



The preview of the matching record appears below the Unified Navigation search field with an **Exact Match** tag. Select this tag or press Enter to navigate directly to the record.

To see the full search results page for your search, select **View results**. For details on the elements that make up the search results page, see Search results page in Next Experience UI.

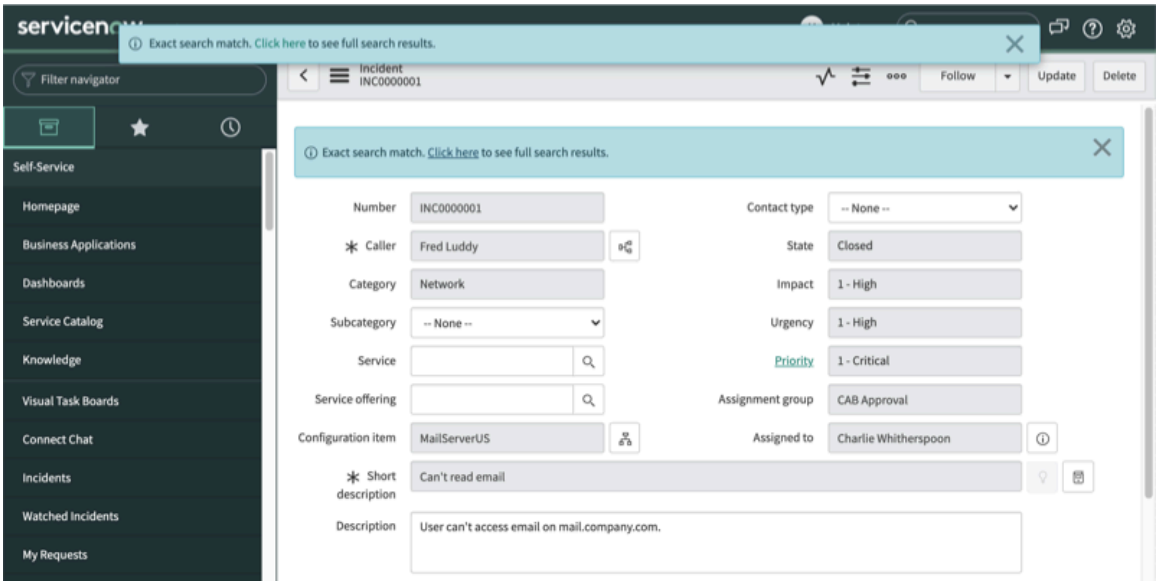
Note: You may need to wait a few seconds after entering your record number into the search field for the system to process your search request and display the preview. Once the preview appears, you can press Enter to go directly to the matched record. If you press Enter before the preview appears, the system shows you the full search results page for your search instead.

Exact search matches in Core UI

When your search in Core UI exactly matches a searchable record, global search takes you directly to that record, bypassing the search results page.

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Exact search match in Core UI



The system displays the matching record with an informational message indicating that your search produced an exact search match.

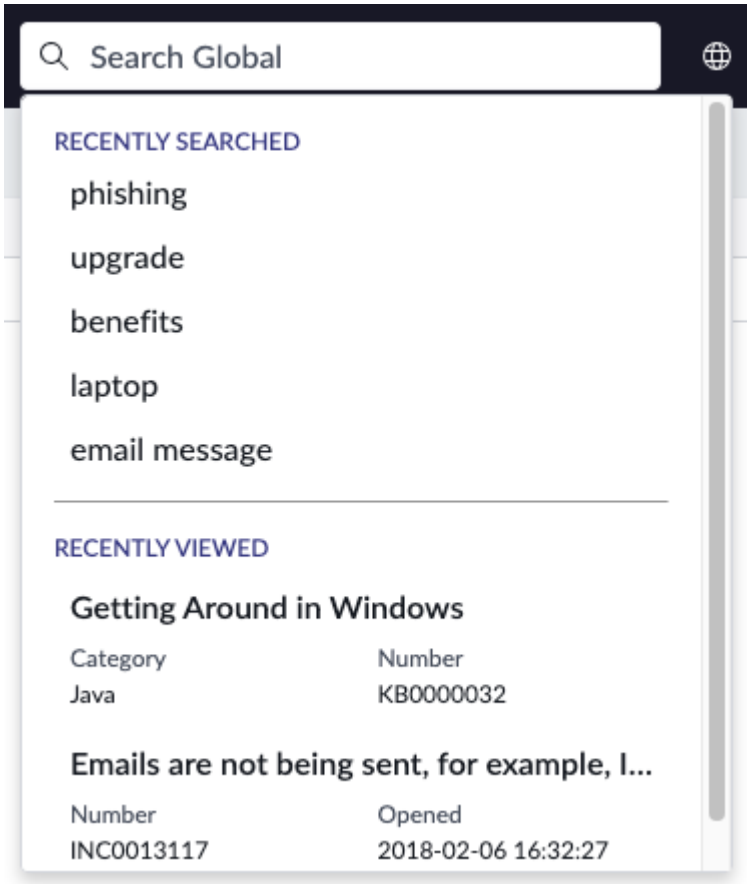
To see the full search results page for your search, select the link in the informational message. For details on the elements that make up the search results page, see Search results page in Core UI and UI15.

Global search displays your most recent search queries and results in Next Experience UI

When you select the empty Unified Navigation search field, the system displays lists showing your most recent search queries and your most recently viewed search results. Select a **Recently Searched** query to repeat it, or select a **Recently Viewed** search result record to navigate to it.

The **Recently Searched** and **Recently Viewed** lists appear below the Unified Navigation search field.

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The **Recently Searched** list shows the most recent search queries from your personal search history. This list only appears when your search history includes previous search queries.

The **Recently Viewed** list shows the most recently viewed search results from your personal search history. This list only appears when your search history includes previously viewed search results.

Set global text search properties

Administrators can control how global text search behaves with system properties.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **Global Text Search**.
2. Review the values for the following global text search properties and change them as needed.

UI properties for global text search

Property	Description
Enable Global Text Search (*glide.ui.text_search.enable*)	Option to enable global search in Core UI and UI15. ○ Type: Boolean ○ Default value: *true* ○ Supported values:

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Property	Description
	▪ *true*: Global search is enabled in Core UI. ▪ *false*: Global search is disabled in Core UI. **Note:** When Next Experience is enabled, this system property has no effect. To enable or disable the Unified Navigation search field in Next Experience, set the *glide.ui.polaris.global_search* system property described in Next Experience system properties.
List of roles (comma-separated) that can use the Global Text Search capability (*glide.ui.can_search*)	Comma-separated list of user roles that allow access to global search. To enable global search for users with a role, add the role to this list. ○ Type: String ○ Default value: *itil, text_search_admin, admin*
List of tables (comma-separated) that won't appear as options when setting up Global Text Search tables (*glide.ui.no_text_search*)	Comma-separated list of tables that don't appear as options when defining text search groups for Core UI. Examples are system or maintenance tables. ○ Type: String ○ Default value: *sys_audit, sys_event, ecc_queue, ecc_event, syslog, syslog_transaction, sys_journal_field, sys_audit_relation, ecc_agent_log, ecc_mi_result, sysrule_escalate_history, sys_user_token, sys_time_dimension, sys_attachment_doc, sys_audit_delete*
Number of Global Text Search matches returned per table (*glide.ui.text_search.rowcount*)	Maximum number of matching records previewed for each table on the global text search results page. Users can select a table to see all matching results for that table. ○ Type: Integer ○ Default value: 10 **Note:** This system property only controls the global text search preview limit in Core UI. In Next Experience UI, you can set the global search preview limit by editing the **Now Experience Search Configuration** record in the Workspace Global Search Configurations [sys_aw_global_search_config] table.
Global Text Search background color for Knowledge Base results (*css.textsearch.kb.background.color*)	Background color for Knowledge article global text search results. This property only affects display of results on the legacy global search results page. ○ Type: String ○ Default value: *#f0f7f9*
Global Text Search background color for Catalog results (*css.textsearch.catalog.background.color*)	Background color for Catalog global text search results. This property only affects display of results on the legacy global search results page.

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Property	Description
	○ Type: String ○ Default value: *#ffffdd*
Form view to use for Global Text Search exact match - blank means Default view (*glide.ui.text_search.match_view*)	Name of the form view that global text search uses to display exact match results. If no value is specified, global text search uses the default form view. For information on creating and managing views, see View management. ○ Type: String ○ Default value: (empty)
List and form view to use for Global Text Search results. Blank means default view (*glide.ui.text_search.view*)	Name of the list view that global text search uses to format results for each searched table. If no value is specified, global text search uses the default list view. For information on creating and managing views, see View management. ○ Type: String ○ Default value: *text_search*
Query method for global text search. Run a query for each table, for each base class (parent table), against a single index regardless of table (requires text index regeneration), or let GlideRecord handle the query (simple). With the Zing text search engine, the preferred value is "simple" (*glide.ir.query_method*)	Query method to use for global text search. **Note:** The *base*, *single*, and *table* values aren't supported. Leave this system property set to its default *simple* value. ○ Type: Choice list ○ Default value: *simple* ○ Available values: ▪ *base*: Run a search query for each base class. This value is no longer supported. ▪ *simple*: Let GlideRecord handle the search query. ▪ *single*: Run a search query against a single text search index. To use this method, you must regenerate text search indexes. This value is no longer supported. ▪ *table*: Run a search query for each searchable table. This value is no longer supported.
The maximum number of results that will be returned during a text index search. This limits the number of records that will be extracted from the text index and displayed (*glide.lucene.base_result_max*)	Maximum number of results that global text search will return when searching a text search index. **Note:** When the query method is set to *simple*, this property is ignored. ○ Type: Integer ○ Default value: 100
The maximum number of entries that will be retrieved from the text index. Only the	Maximum number of entries that global text search will retrieve from a text search index.

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Property	Description
table that is involved will be returned from the text index for all entries that are between the value specified for maximum results and this value. This is done so that it can be indicated that more results exists for any given table that are going to be displayed (*glide.lucene.base_hits_max*)	**Note:** When the query method is set to *simple*, this property is ignored. ○ Type: Integer ○ Default value: 500
Number of simultaneous processes (1 to 16) used when searching though multiple groups in a global search (*glide.ts.global_search.parallelism*)	Number of concurrent threads global text search uses when searching multiple search groups. Each search group requires one thread. Set this value to yield optimal results for your search group configuration. For example, if you have five search groups and four threads, the first four groups run in parallel and the fifth group starts when one of the first four groups finishes. This setup may work well if one of the groups is much larger than another. Similarly, if you have five search groups, setting this value higher than five yields no benefits. ○ Type: Integer ○ Default value: 4

3. Select **Save**.
   The business rule **Text Search Property Change Rationally** validates the new values and aborts the update if they are outside its acceptable ranges.
4. To set the maximum number of matches to display for a wildcard search term, follow these steps.

   a. Open the System Properties table and search for the property **glide.ts.max_wildcard_expansion**.

Field	Description
Name	glide.ts.max_wildcard_expansion
Description	Maximum number of matches for a wildcard search term that are allowed as unambiguous.
Type	Integer
Default value	500

   b. Edit the **Value**.
   If a wildcard search matches more words than this value, the system displays a message asking the user to refine the search.

   c. Select **Update**.

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5. To set the Zing text search stemming language, follow these steps.

   a. Install the internationalization (i18n) plugin for the language you want to stem text search terms in.

   b. Add a new system property, *glide.ts.stemming_language*:

Field	Description
Name	glide.ts.stemming_language
Description	Language to use for text search stemming. For details on stemming, see Zing matches derived words with stemming.
Type	String
Values supported	▪ English ▪ French ▪ German
Default value	English

   c. To make tables use the new stemming language for text search, manually regenerate their text search indexes.
   For details on this procedure, see Regenerate a text index for a table.

6. **Optional:** To enable and configure fallback number search for exact matches, follow these steps.

   Note: Fallback number search is disabled by default. When it's enabled, if a global text search finds no exact match for a record number, the system searches a list of specified tables for matches. This additional search can make global text searches take longer, so enable fallback number search only if you need it.

   a. To enable fallback number search, add a new system property, *glide.ui.text_search.enable_fallback_number_search*:

Field	Description
Name	glide.ui.text_search.enable_fallback_number_search
Description	Option to enable fallback number search for use when global text search finds no exact matches for a record number. **Note:** Fallback number search can make global text searches take longer. Enable the option only if you need it.
Type	Boolean
Default value	false

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b. To configure the list of tables searched by fallback number search, add a new system property, *glide.ui.text_search.fallback_table_list*:

Field	Description
Name	glide.ui.text_search.fallback_table_list
Description	Comma-separated list of names of tables to search when performing fallback number search. Use the special value *all* to search all tables that have prefixes defined in the Number [sys_number] table. **Note:** Increasing the number of tables to search may increase the time required for fallback number search. Test any changes to this system property before putting them into production.
Type	String
Default value	task,kb_knowledge

Configure parallel processing of search groups

To improve performance, only activate search groups and tables that are necessary to meet business needs.

Before you begin
Role required: admin

About this task
For example, if you don't need Change Task results, deactivate that table in the Tasks search group. If only one group of users needs Change Task results, set up a separate search group that includes Change Tasks. Other users search using a group that doesn't contain Change Tasks.

Global text search can render results in parallel to improve performance. To configure the number of parallel processes:

Procedure

1. Navigate to **All** > **System Properties** > **Global Text Search**.
2. Locate the property called **Number of simultaneous processes(1 to 16) used when searching though multiple groups in a global search**.
3. Enter the number of processes to run in parallel.
   Each search group uses one thread to render results. Set this value to yield optimal results for your search group configuration. For example, if you have five search groups and four threads, the first four groups run in parallel and the fifth group starts when one of the first four groups finishes. This setup may work well if one of the groups is much larger than another. Similarly, if you have five search groups, setting this value higher than five yields no benefits.
4. Select **Save**.

Revert to the legacy global search UI

Disable the dynamic global search UI to preserve customizations you made to the legacy global search UI.

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Before you begin

You must have Next Experience disabled on your instance. The legacy global search UI is only available in Core UI.

Role required: admin

Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Select **New**.
3. Enter these field values.

Field	Value
Name	glide.ui.use_legacy_global_search
Type	true | false
Value	true

4. Select **Submit**.

Result

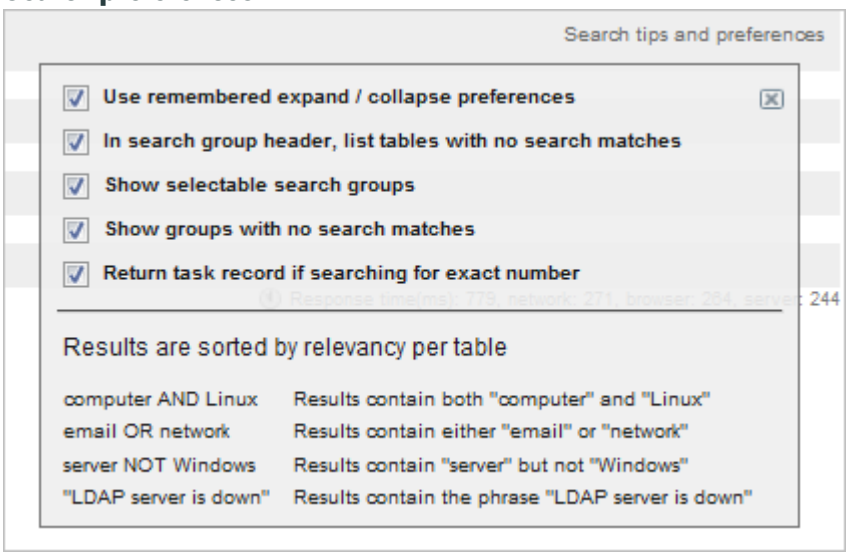
The system displays the global search UI and uses the legacy display logic.

Legacy global search user preferences

The global text search results page allows users to set several user preferences for global text search.

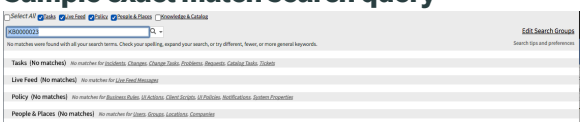
The following search preferences are available from the **Search tips and preferences** link.

Search preferences



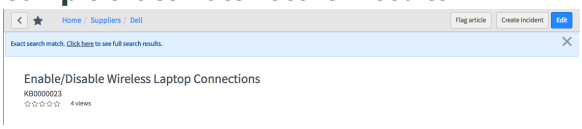
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Search preferences

User preference	Description
Label Use remembered expand / collapse preferences **Preference** ts.remember.expanded	Specifies whether you want the collapse state of any search groups/tables remembered for your next search. If selected and you collapse the search results for the People & Places search group for example, that group will be collapsed on your next search. If cleared, all groups and tables are expanded for every search.
Label Show list of tables with no search matches **Preference** ts.show_negative_result_info	Specifies whether or not you want to see a summary of tables that had no search matches. For example: No matches for Requests, Catalog Tasks, Tickets.
Label Show selectable search groups **Preference** ts.show_search_groups	Shows or hides the search group check box row.
Label Show groups with no search matches **Preference** ts.show_empty_groups	Shows or hides a search group if it returns no matches. If selected, the search results display a placeholder row stating there were no matches for that group.
Label Return task record if searching for exact number **Preference** ts.match	Shows or hides the full search results page if the search term matches a task record number. When selected, an exact match to a record number causes the system to hide the full search results and instead display the record with an exact match message. Exact search matches ignore most additional search conditions normally applied to the record such as the currently selected search groups or the knowledge article published state. For example, an exact search match for a knowledge article returns the article in any state as long as the current user has read access to it. **Note:** The system filters exact search results to display only knowledge records that are in the same language as the preferred language setting. **Sample exact match search query** 

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Search preferences (continued)

User preference	Description
	In this sample search, the **Knowledge & Catalog** search filter is cleared, which would normally prevent returning any knowledge articles. **Sample exact match search results**  In this sample exact match, the system displays the matching article and an information message in the form header reading `Exact search match. Click here to see full search results.`

Related topics

User preferences

Set the preview limit for global or workspace search in Next Experience UI

Override the default limit of 5 preview results per search source on the Next Experience UI search results page for global or workspace search.

Before you begin

You must be using Next Experience UI.

Role required: workspace_admin

About this task

The preview limit for a search application specifies how many preview results can appear for each search source on the search results page. By default, the system displays up to 5 preview results per search source. Workspace administrators can override this default limit separately for global search and for all workspace searches.

Procedure

1. Navigate to the Workspace Global Search Configuration [sys_aw_global_search_config] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_aw_global_search_config.list`.
   c. Press Enter.
2. Open the configuration record for the search application that you want to modify the preview limit for:
   - To modify the preview limit for global search, open the **Now Experience Search Configuration** record.
   - To modify the preview limit for a workspace application, open the **Workspace search settings** record.
3. On the Workspace Global Search Configuration form, enter your desired preview limit into the **Tab overview items per section** field, then select **Update**.

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Result
The search results page for global or workspace search displays preview results up to the new limit for each search source.

Hide per-table search result counts in Next Experience UI

Suppress display of per-table search result counts in the Next Experience UI search results page.

Before you begin
You must be using Next Experience UI.

Role required: ui_builder_admin or admin

About this task
By default, the search results page displays the total number of search results along with per-table result counts for each searchable table that contains matching records. You can hide the per-table result counts for search users by following this procedure.

Procedure
1. Navigate to **All** > *Next Experience* **Framework** > *UI Builder*.
   UI Builder opens in a new browser tab.
2. In the list of available experiences, open the *Unified Navigation* **App** record.
3. In the Pages and variants listing, open the **Search Results** > **search Default** record.
   UI Builder reloads and displays settings for the Search Results (search Default) page.
4. In the Content pane, select the **Body (Grid)** > **Search Result Wrapper 1** component.
   Properties, styles, and events for the selected component appear in the configuration panel.
5. If a `Different application scope` informational message appears, select **Edit in original scope**.
   The system displays an informational message indicating that you are editing in the application scope.
6. On the configuration panel's Config tab, enable the **Hide search results count** option.
7. Select **Save**.

Result
Per-table search result counts no longer display on the search results page.

Add a workspace application to the Unified Navigation search context menu

Enable users to view results for their Unified Navigation searches in workspace applications as well as in global search.

Before you begin
You must be using Next Experience UI.

The workspace application that you want to add to the search context menu must be installed. A search application configuration record must exist for the workspace, with AI Search specified as the search engine. If you need to create a new search application configuration record for the workspace, see Create a search application configuration for AI Search.

Role required: admin

About this task
You can add a workspace application, such as CSM/FSM Configurable Workspace, to the Unified Navigation search context menu. Adding the workspace application to the search context menu enables users to switch between global search results and search results from the specified workspace.

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Procedure

1. Copy the sys_id of the record for the search application configuration for the chosen workspace:

   a. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.

   b. Open the record for the chosen workspace's search application configuration.
   As an example, for Agent Workspace, open the **Agent Workspace Search Config** record.

   c. Select the Additional actions icon, then select **Copy sys_id**.

2. Define a globalSearchDataConfigId UX page property to map the search application configuration record to the workspace's UX application:

   a. Navigate to the UX Page Property [sys_ux_page_property] table's list view by selecting **All**, entering `sys_ux_page_property.list` in the **Filter** field, and pressing Enter.

   b. Select **New**.

   c. On the UX Page Property form, fill in the fields as follows:

Field	Description
Page	Use the Lookup using list icon to select the UX Application record for your workspace.
Name	Enter `globalSearchDataConfigId`.
Type	Select **string**.
Value	Enter the search application configuration record sys_id that you copied in step 1.c.

   d. Select **Submit**.

3. Copy the sys_id of the record for the Workspace Global Search Configuration that you want workspace search to use:

   a. Navigate to the Workspace Global Search Configuration [sys_aw_global_search_config] table's list view by selecting **All**, entering `sys_aw_global_search_config.list` in the navigation filter, and pressing Enter.

   b. Open the record for the Workspace Global Search Configuration that you want workspace search to use.
   If you have a custom Workspace Global Search Configuration record that you want to use, open that record. Otherwise, open the Workspace search settings record.

   c. Select the Additional actions icon, then select **Copy sys_id**.

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4. Define a global_search_configurations UX page property to configure the workspace's search settings:

   a. Navigate to the UX Page Property [sys_ux_page_property] table's list view by selecting **All**, entering `sys_ux_page_property.list` in the **Filter** field, and pressing Enter.

   b. Select **New**.

   c. On the UX Page Property form, fill in the fields as follows:

Field	Description
Page	Use the Lookup using list icon to select the UX Application record for your workspace.
Name	Enter `global_search_configurations`.
Type	Select **json**.
Value	Enter the following JSON: `{ "globalSearchViewConfigId": "00000000000000000000000000000000", "globalSearchRoute": "search" }` Replace the `globalSearchViewConfigId` value of `00000000000000000000000000000000` with the Workspace Global Search Configuration record sys_id that you copied in step 3.c. For example, if you selected the Workspace search settings record, replace the value with `97a574ea53c0130084acddeeff7b12a6`.

   d. Select **Submit**.

5. Enable Unified Navigation search for the chosen workspace:

   a. Navigate to the UX Page Property [sys_ux_page_property] table's list view by selecting **All**, entering `sys_ux_page_property.list` in the **Filter** field, and pressing Enter.

   b. Look for a UX Page Property record with name **chrome_header** and page matching the chosen workspace.
   As an example, for Asset Workspace, look for a record with name **chrome_header** and page **Asset Workspace**.

   c. If a **chrome_header** record exists for the workspace, edit it and change the **searchEnabled** JSON element to true in its **Value** field, then select **Update**.

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d. If no **chrome_header** record exists for the workspace, select **New** and fill in the UX Page Property form fields as follows, then select **Submit**.

Field	Description
Page	Use the Lookup using list icon to select the UX Application record for your workspace.
Name	Enter `chrome_header`.
Type	Select **json**.
Value	Enter the following JSON: `{ "privatePage": { "searchEnabled": true } }`

6. Refresh your browser tab to reload the ServiceNow AI Platform®.
7. Clear your instance's system cache by entering `<instance-name>.service-now.com/cache.do` in your browser's address bar and pressing Enter.

> **Important:** Clearing the system cache can affect overall performance and degrade system response times. Don't run cache flushes during business hours, and don't trigger cache flushes automatically.

Result
The chosen workspace appears as an option in the Unified Navigation search context menu for users who have it assigned. Users can switch to the workspace's search context. For more details on using the search context menu to switch application contexts, see View and open search results using workspace applications in Next Experience Unified Navigation.

Global text search suggestions

Global text search offers two types of search suggestions.

The knowledge base and global text searches provide suggestions as you type. Type-ahead suggestions appear under the search box. Suggestions are based on similar searches that begin with the same characters.

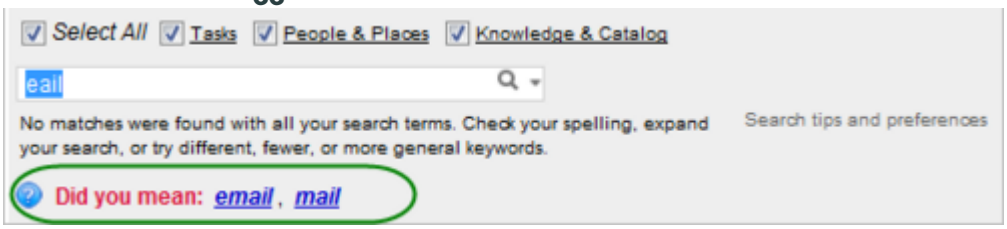
Type-ahead search suggestions



The knowledge base and global text searches also provide suggestions for alternate search terms. Suggestions appear if your original search doesn't return any results and an alternate spelling or similar recent search does. For example, if you misspell a search term (such as eail), the correct spelling (email) may appear as an alternate search suggestion. Suggestions appear beneath the search box on the results page.

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Alternate search suggestions



Note: The type-ahead search suggestions feature is only available in the UI15 interface.

Update a type-ahead suggestion

The knowledge base and global text searches provide suggestions as you type. These type-ahead suggestions are compiled on a nightly basis by a scheduled job.

Before you begin

The type-ahead search suggestions feature is only available in the UI15 interface.

Role required: admin

About this task

Use the following procedure if you need to refresh the type-ahead suggestions list before the next run of the scheduled job.

Note: Type-ahead suggestions aren't configurable. For more about how suggestions are generated and maintained, see the blog post Global Text Search Suggestions by a ServiceNow Technical Support Engineer in the ServiceNow Community.

Procedure

1. Navigate to **All** > **System Scheduler** > **Scheduled Jobs**.
2. Open **TS Search Stats**.
3. Run the scheduled job.

Configure "Did you mean?" suggestions

The Knowledge Base and global text searches can provide "Did you mean?" suggestions. Suggestions appear if a search doesn't return any results and an alternate spelling or similar recent search does. This feature is disabled by default.

Before you begin

Role required: admin

About this task

Set system properties to enable "Did you mean?" suggestions in the Knowledge Base and legacy global search tools.

Procedure

1. Navigate to **All** > **System Properties** > **Text Search**.
2. Select any of the following check boxes:
   - **Suggest alternate search spellings for knowledge or global search** (the *glide.ts.dym.enable_spell_correct* property).
   - **Suggest related searches for knowledge or global search** (the *glide.ts.dym.enable_chain_suggest* property); uses search chains, which generate suggestions by tracking occurrences of similar searches, in order, over time.

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Note: The global search references in these check boxes only apply to the legacy global search functionality. They don't apply to the global search functionality introduced in the New York release, because the "Did you mean?" functionality isn't available.

3. Select **Save**.

Zing generates search results in four phases

Generate search results by dividing documents among shards, searching shard documents, scoring shard documents, and merging scores into an index.

Zing generates search results in four phases:

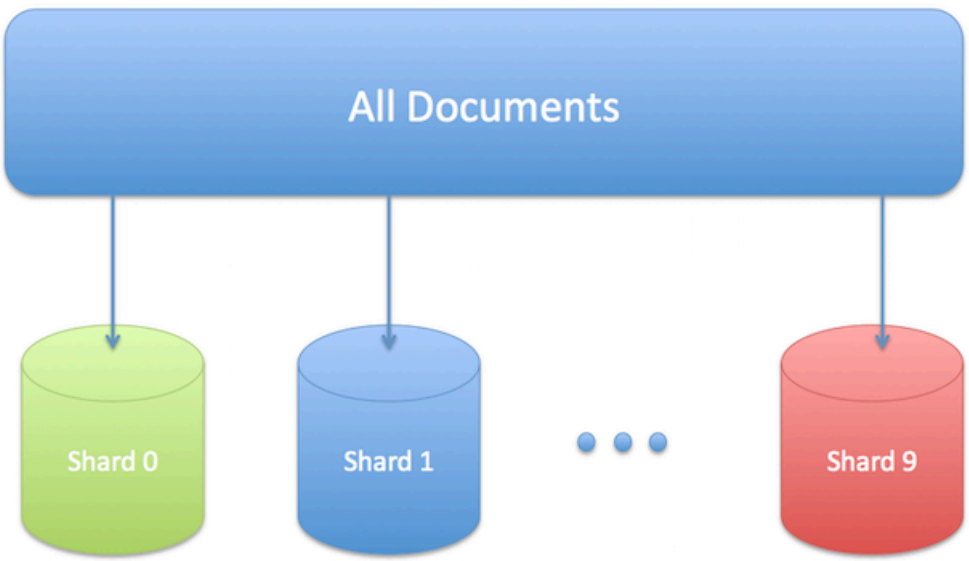
1. Divide searchable documents among index shards.
2. Search and filter shard documents.
3. Score shard documents.
4. Merge shard document scores into an index.

Phase 1: Divide searchable documents among index shards

When a search is executed, the system equally divides all searchable documents among 10 index shards. Each shard has a unique list of documents.

To maximize search efficiency, the system creates 10 query threads to simultaneously search each index shard.

Divide documents among index shards



Phase 2: Search and filter shard documents

Each query thread searches through its list of shard documents to identify documents that match the search criteria. For example, if you search for "`wifi network`," the system returns all documents containing both "`wifi`" and "`network`" in no particular order.

Note: A multiple word search is equivalent to multiple single word searches connected by an AND operator. For example, **[contains][wifi][AND][contains][network]**.

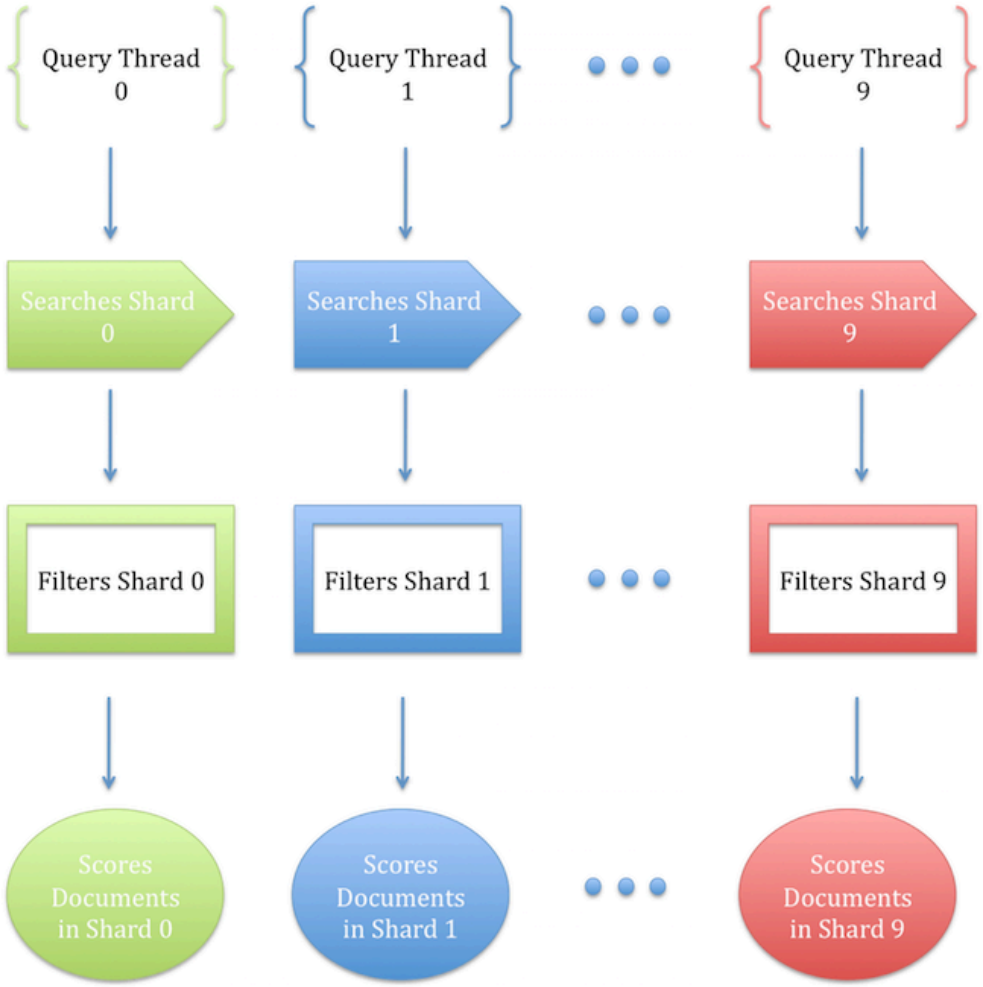
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The query thread assigns each matching document a numeric value (a document ID) to uniquely identify it. All other documents are ignored.

Phase 3: Score shard documents

The query thread scores each matching shard document.

Query threads search, filter, and score shard documents

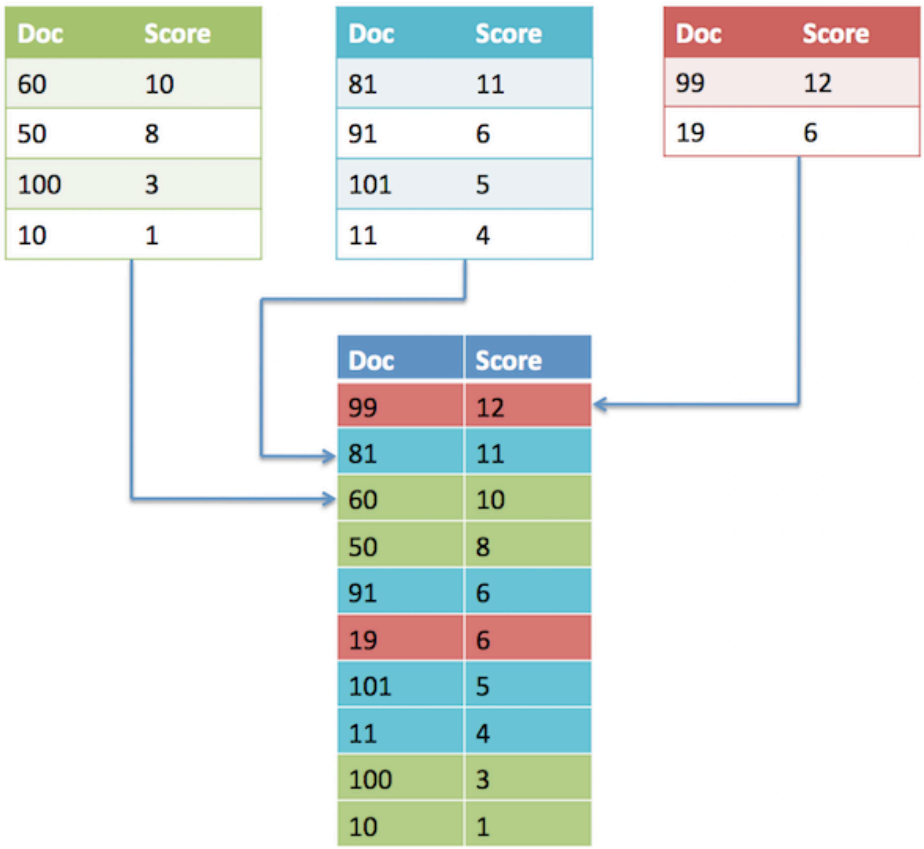


Phase 4: Merge and sort shard document scores

The system merges the document scores into a single index and sorts the documents from highest to lowest document score. The documents with the highest document score are most relevant to the search query.

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Merge and sort shard document scores

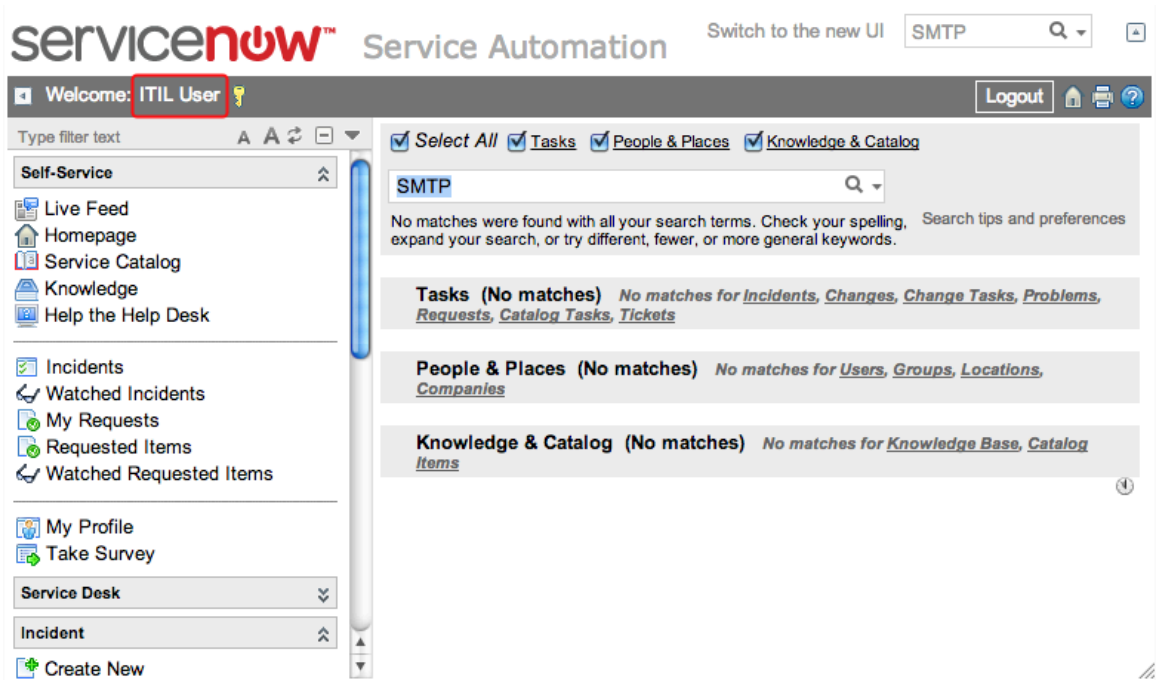


Zing filters search results with access controls

Zing filters search results to only display records the user can access.

For example, suppose you index the System Property [sys_properties] table. When the ITIL user searches for a term in the System Property table, Zing returns no search results because the ITIL user doesn't meet the ACL rule requirements.

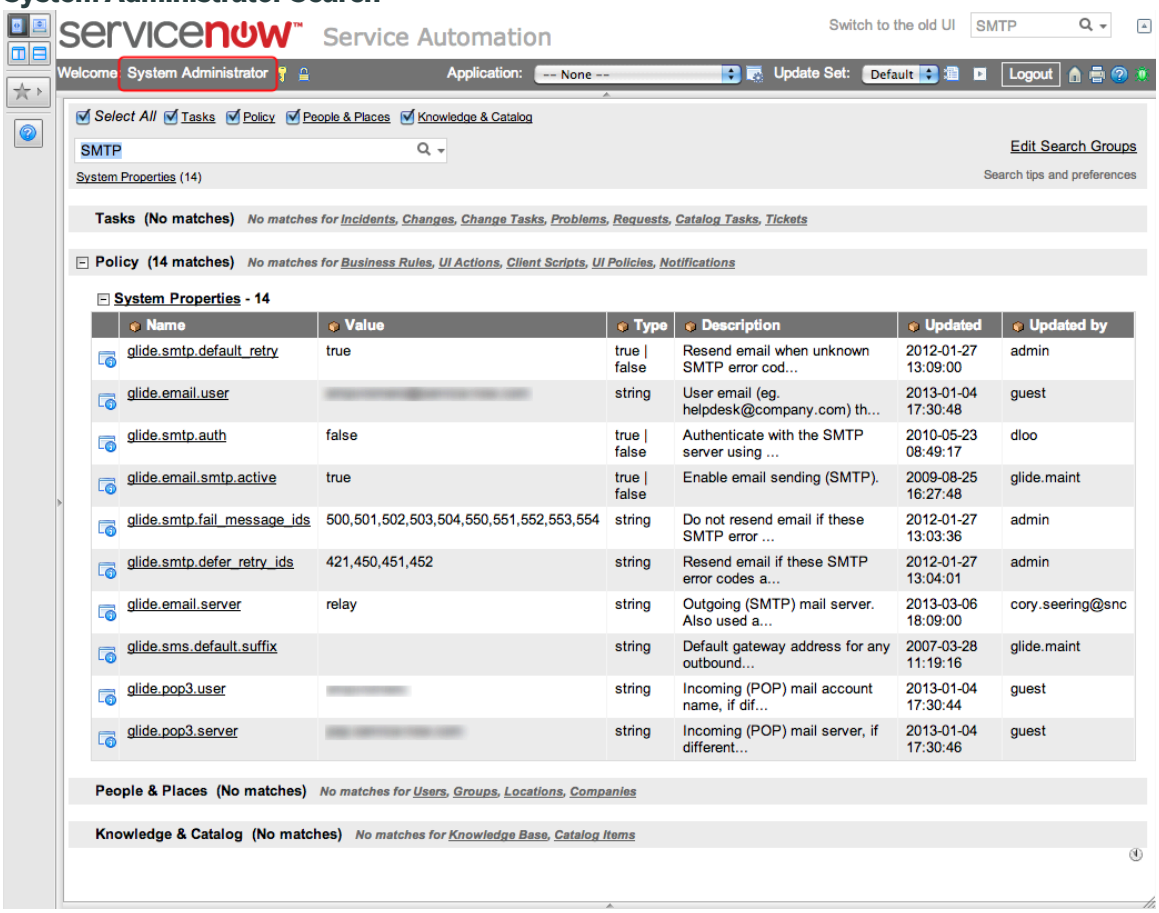
ITIL User Search



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When a system administrator searches for the same property, Zing returns search results from the System Property table because the administrator meets the ACL rule requirements.

System Administrator Search



Zing computes document scores using three components

The Zing search engine computes document scores based on the frequency, sequence, and weight of search terms in the document.

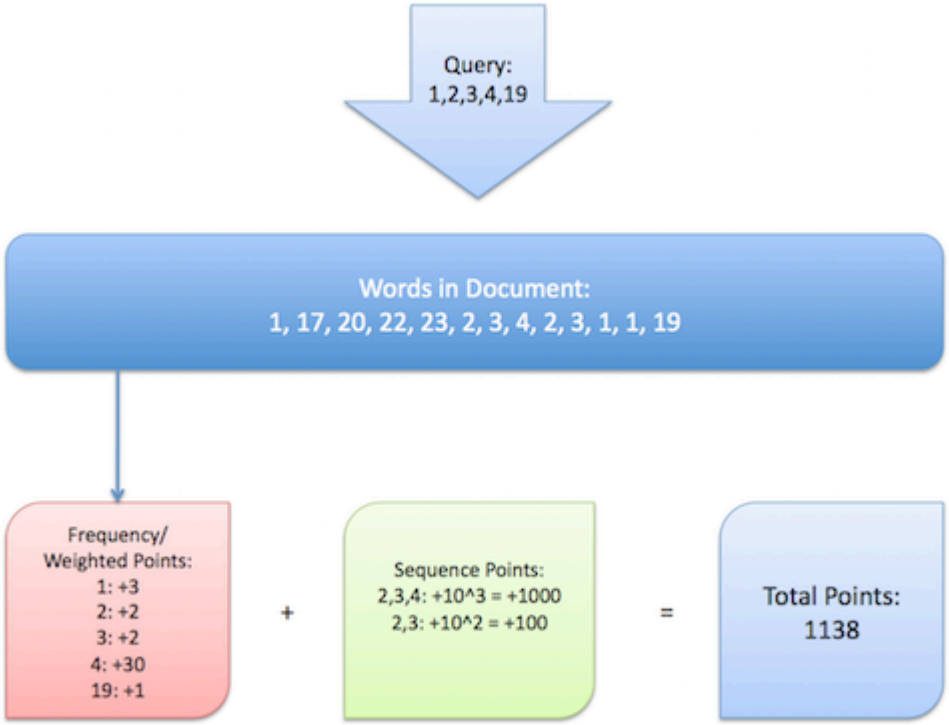
Document scores

The components of a document score for a search query are:

- Frequency: how often the search terms appear in the document.
- Sequence: how often the search terms appear in the same order as the search query.
- Weight: how heavily weighted the source field is in which the search terms appear.

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Sample document score computation



Frequency points

Zing awards one point whenever a search term appears anywhere in the document. For example, when searching for `distributed database server`, a document that contains `distributed` three times, `database` five times, and `server` 17 times would have 25 frequency points.

To increase search result scores of search terms that appear more frequently in a document, but less frequently in a document set, you can Score search terms by inverse document frequency (IDF). When TF-IDF is enabled, search term scores are calculated by multiplying the term frequency score by the inverse document frequency score. Because enabling TF-IDF increases the weight of less common search terms, search results for that table are more likely to be relevant. For example, when searching for `distributed database server`, the term `distributed` might receive a higher score than `server` if it appears frequently in one document but less frequently in the document set as a whole.

Zing applies a multiplier to frequency points based on the value of the *`ts_weight`* attribute for the field in which the search term appears. A field with a text search scoring weight of 30 (*`ts_weight=30`*) would add 30 points for each inclusion of a search term.

Sequence points

Zing awards a document more points when it contains the search terms in the same order in which they were typed. The more search terms in sequence there are, the exponentially higher the score becomes. Zing awards sequence points as 10^x, where x is the number of search terms that appear in sequence.

In the `distributed database server` search example, Zing awards a document 100 (10^2) sequence points for each time it includes the two-term string `database server`.

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Likewise, Zing awards a document 1000 (10^3) sequence points each time it includes the three-term string `distributed database server`.

Zing applies a multiplier to sequence points based on the value of the *ts_weight* attribute for the field in which the sequence appears. The sequence points use the calculation (10^x * field *ts_weight* attribute).

Field scoring weights

The system elevates the default scoring weight of Knowledge record numbers, Knowledge short descriptions and metadata, task record numbers, and task short descriptions. Default *ts_weight* attributes for these fields are as follows:

- *kb_knowledge.number = 50*
- *kb_knowledge.short_description = 10*
- *kb_knowledge.meta = 10*
- *task.number = 50*
- *task.short_description = 10*

All other fields have a default *ts_weight* attribute of 1. The maximum possible weight value is 255.

Score search terms by inverse document frequency (IDF)

Enable term frequency–inverse document frequency (TF-IDF) to increase the search result scores of search terms that appear more frequently in a document, but less frequently in the whole collection of searchable documents.

Before you begin

To enable TF-IDF scoring, a text index must be present for the table. Make sure that text indexing is enabled for the table before changing the query mode. See Configure a table for indexing and searching.

Role required: ts_admin or admin

About this task

Administrators can enable TF-IDF scoring on a table to improve search results. The Knowledge table [kb_knowledge] has TF-IDF scoring enabled by default.

Note: This task requires that you regenerate an index and therefore should be done with system performance in mind. Regenerating an index may take a while to complete depending on table size and other factors. You may notice performance degradation or incomplete search results while the system regenerates the index.

Procedure

1. Navigate to the system dictionary and open the entry for the desired table.
2. In the **Attributes** related list, select **New**.
3. In the **Attributes** field, select **Text search Enable IDF**.
4. Select **Submit**.
   The **Enable IDF Score** check box in the table's text index record can now be configured.
5. Navigate to **All** > **System Definition** > **Text Indexes**.
6. Open the text index created for the table.
7. Select **Enable IDF Score**.

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8. Under **Related Links**, select **Regenerate Document Frequency**.
   Regenerating document frequency is a one-time task. Regenerate document frequency when TF-IDF scoring is first enabled for a table.
9. Configure the desired notification and select **OK**.

Set the relative weight of a field

To improve search results, the Zing search engine assigns to each potential match a numeric score that represents its relevancy to the query.

Before you begin

Text indexing must be enabled for the table containing the fields you want to modify the relative weight for. To learn about enabling text indexing for a table, see Configure a table for indexing and searching.

Role required: admin

About this task

Administrators can control the relative importance of a match for each field in a table with the ts_weight attribute. The majority of fields have no ts_weight attribute. Zing treats these fields as having weight 1 when scoring search matches.

The following fields have ts_weight attribute values by default:

- kb_knowledge.number = 50
- kb_knowledge.short_description = 10
- kb_knowledge.meta = 10
- task.number = 50
- task.short_description = 10

When scoring records, Zing compares the relative weights of fields that produced search term matches. For example, if the **Title** field has `ts_weight=50` and the **Description** field has `ts_weight=10`, then a match in **Title** is 5 times as relevant as a match in **Description** and 50 times as relevant as a field without the ts_weight attribute.

Note: To view the complete scoring system, see Document Scoring.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Open the system dictionary record for the field's table and column.
   For example, to modify the ts_weight for the kb_knowledge.number field, open the dictionary record with **Table** "kb_knowledge" and **Column name** "number".
3. In the Dictionary Entry form's **Attributes** field, perform one of the following steps:
   - If a ts_weight attribute appears in the list of attributes, change its integer value to the relative weight you want to set for the field.
   - If no ts_weight attribute appears in the list, add a new `ts_weight=<value>` comma-separated list entry, where <value> is the relative weight you want to set for the field.
4. Select **Update**.
5. Refresh the table's text index:

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a. Open the system dictionary record for the field's table.
The table's system dictionary record is the one with the table name as its **Table** value, an empty **Column name** field, and "Collection" as its **Type** value.

b. On the Dictionary Entry form, select the **Generate Text Index** link in the Related Links section.

Result

Once Zing finishes regenerating the text index for the table, search result scoring uses your new relative weights for fields.

Zing indexes words

Index documents by dividing them into words. Depending on the languages your instance supports, a word may be a single character such as a Chinese or Japanese pictogram or a sequence of characters separated by spaces such as with Latin, Arabic, and Pinyin languages.

Zing uses spaces to define the basic unit of word separation. Zing uses the following rules to index words.

Zing word indexing rules

Rule	Behavior
Punctuation	Zing indexes some punctuation marks as part of some words to improve search results for common search terms. Zing converts any non-indexed punctuation characters to spaces. See Zing indexes punctuation as part of some words.
Pictograms	Zing supports the full range of Unicode pictogram characters. Each Chinese or Japanese pictogram is indexed as a separate word as if it were a single Latin-1 character surrounded by spaces.
Letter	Zing treats Latin-1, Arabic, and Pinyin characters as individual letters of space-separated-words. Sequences of letters define indexable words.

Zing indexes punctuation as part of some words

Zing indexes some punctuation marks as part of some words to improve search results for common search terms.

Punctuation indexed as part of a word

Punctuation	Indexed to find	Search behavior
Ampersands [&]	Company names	Zing locates terms containing punctuation characters that are common in company names: ampersands (&), plus signs (+), or hyphens (-). For example, a search for `H&R Block` locates exact matches to the search term.
Apostrophes [']	Proper names	Zing ignores trailing possessives and retains most others to find company names. For example, a search for `O'Reilly's` locates matches to O'Reilly and O'Reilly's.

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Punctuation indexed as part of a word (continued)

Punctuation	Indexed to find	Search behavior
Hyphens [-]	Company names	Zing locates terms containing punctuation characters that are common in company names: ampersands (&), plus signs (+), or hyphens (-). For example, a search for `Coca-Cola` locates exact matches to the search term.
	Product numbers	Zing locates product numbers that follow a typical pattern. To meet this pattern, search terms must contain frequent numbers and only include underscores (_), hyphens (-), or periods for punctuation. For example, a search for `PROD-10-987` locates exact matches to the search term.
Numbers [123]	Product numbers	Zing locates product numbers that follow a typical pattern. To meet this pattern, search terms must contain frequent numbers and only include underscores (_), hyphens (-), or periods for punctuation. For example, a search for `PROD10987` locates exact matches to the search term.
	Record numbers	Zing locates record numbers that follow a typical pattern. To meet this pattern, search terms must start with a recognized record number prefix. For example, a search for `INT1234567` locates exact matches to the Incident record.
Periods [.]	Acronyms	Zing locates acronyms whether they are separated by periods or not. For example, a search for `u.s.a.` locates matches to usa or u.s.a.. Note that wildcard searches may affect acronym handling. In another example, a search for `u.s.*` may yield better results than a search for `u.s*`.
	Host names	Zing locates sequences of letters and numbers separated only by periods. For example, a search for `en.myhost123.com` locates exact matches to the search term.
	IP addresses	Zing locates numbers that follow a typical IPv4 address pattern.

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Punctuation indexed as part of a word (continued)

Punctuation	Indexed to find	Search behavior
		For example, a search for `10.0.0.1` locates exact matches to the search term.
	Product numbers	Zing locates product numbers that follow a typical pattern. To meet this pattern, search terms must contain frequent numbers and only include underscores (_), hyphens (-), or periods for punctuation. For example, a search for `PROD.10.987` locates exact matches to the search term.
Plus signs [+]	Company names	Zing locates terms containing punctuation characters that are common in company names: ampersands (&), plus signs (+), or hyphens (-). For example, a search for `Google+` locates exact matches to the search term.
Underscores [_]	Product numbers	Zing locates product numbers that follow a typical pattern. To meet this pattern, search terms must contain frequent numbers and only include underscores (_), hyphens (-), or periods for punctuation. For example, a search for `PROD_10_987` locates exact matches to the search term.

Note: The punctuation handling described here doesn't affect wildcard and boolean operators. These operators provide separate Zing functions.

Zing indexes some HTML elements

Zing indexes the contents of certain HTML elements to improve document search results. This indexing is addition to the normal indexing by word.

Indexed HTML elements

HTML element	Description
Title attribute	Zing indexes the contents of the *`title`* attribute of any HTML element. This is separate from the *`title`* element, which Zing already indexes when identifying the words of the document.
Anchor link target	Zing indexes the target URL specified in the *`href`* attribute of any anchor element.
Alt text for an image	Zing indexes the alternative text of any image element.

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Configure a table for indexing and searching

Enable Zing text indexing for a table to allow users to search its records for string values. Configure the table's text indexing attributes, stop words, and synonym dictionaries to control search behavior.

Before you begin

Role required: ts_admin or admin

About this task

Enabling text indexing for a table allows users to search for string values in records on that table. You can configure attributes, stop words, and synonym dictionaries to control indexing and search behavior for an indexed table.

By default, the system creates text indexes for the tables with a Text index record (**All** > **System Definition** > **Text Indexes**). For example:

- Knowledge-related tables
- Core-data-related tables
- Connect-related tables
- Task table
- User table

Enabling text indexing for a table also enables it for all child tables. If you want to disable text indexing for a child table, see Remove the text index for a child table.

Note: Whenever you create an index table, the system also creates Access Control Roles (ACLs) for new tables.

Text indexing can be a resource-intensive task that may take a while to complete. You may notice performance degradation or incomplete search results during index generation. To estimate text indexing duration, you can view historical text indexing statistics.

Note:

New tables created by update set transfers have text indexing disabled, even if it's enabled for the tables included in the update set.

To enable users to search tables created by update set transfers, you must manually enable text indexing for those tables.

Procedure

1. Navigate to **All** > **System Definition** > **Text Index Configurations** and select **New**.
2. In **Applies to**, select **Table**.
3. In **Table**, select the table that you want to configure text indexing for.
4. **Optional:** If you intend to use the table in multi-table searches or if you want to use the BM25 scoring algorithm on the table, upgrade its indexing format to V4.

   a. If the value in **Format** isn't grayed out, select **v4**, then select **Submit** and skip to step 5.

   b. If the value in **Format** is grayed out, select **Submit**.
   The grayed-out value means that the table has already been indexed and needs its indexing upgraded to V4.

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c. Navigate to **All** > **System Definition** > **Text Index Configurations** and select the table you submitted.

d. Under **Related Links**, select **Show index name record**.

e. Under **Related Links**, select **Upgrade to V4** and select **Submit**.
The specified table's indexing is upgraded from V3 to V4. Now, this table can be part of multiple-table indexing and BM25 is used to score the table's relevance score. Optionally, select **Show Configuration** under **Related Links**to show the table indexing format on the **Text Index Configuration** page.

5. Configure indexing and search attributes on the selected table.

a. Navigate to **All** > **System Definition** > **Text Index Configurations** and select the table you configured.

b. In the Text Index Table Attribute Maps related list, select **New**.
Attributes pertain to the way Zing indexes documents and ranks documents returned in search results.

c. On the Text Index Table Attribute Maps form, fill in the fields.

Field	Description
Table	Table to define attributes for.
Attribute name	Search engine attribute. For a list of the attributes and valid values, see Zing index and search attributes.
Value	Value for attribute.

d. Repeat this procedure to define additional attributes for the table.

e. In the Related Links section, select **Generate Text Index**.

6. Configure column-level attributes.

a. Navigate to **All** > **System Definition** > **Text Index Configurations** and select a table.

b. In the Text Index Column Attribute Maps related list, select **New**.

c. On the Text Index Column Attribute Map form, fill in the fields.

Field	Description
Table	Table that contains the column you want to define attributes for. Only tables in the index group and their child tables display.
Attribute name	Attribute. For a list of the attributes and valid values, see Zing index and search attributes.

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Field	Description
Column	The name of the column in the selected table you want to apply the search attribute to.
Value	Value for attribute.

d. Select **Submit**.

e. Repeat this procedure to define additional search engine parameters for table columns in the index group.

f. In the Related Links section, select **Generate Text Index**.

7. **Optional:** Add stop words.
   Stop words are words that you don't want to index, such as `the`, `a`, or `an`. There is a global list of common stop words, so you only have to add stop words specific to your situation. To see the global list of stop words, navigate in your browser to `https://<instance name>.service-now.com/ts_stop_list.do`.
   a. On the **Index Stop Words** tab, select **New**.
   b. In **Index**, select the index to add the stop word to.
   c. In **Word**, enter a single word you don't want to index and select **Submit**.
8. **Optional:** Add a synonym dictionary.
   Specifying a synonym dictionary searches on the search term as well as synonyms of the search term, such as car, and its synonym, auto. Zing provides a default synonym dictionary.
   a. On the **Index synonym Dictionaries** tab, select **New**.
   b. In **Index**, select the index to add the stop words to.
   c. In **Synonym dictionary**, select the synonym dictionary to use on the specified table. To add a dictionary, select **New** and follow the procedure in Create synonym dictionaries.

Result

The list search *for text* option appears on the list views for the table and its child tables.

What to do next

You can search records on the indexed table using list search in form view. To learn more about using list search, see List search finds records from the current table.

You can also query the indexed table for string matches using the `GlideRecord.addQuery(name, value)` or `GlideRecord.addEncodedQuery(name, value)` methods with the `123TEXTQUERY321` reserved name. For more information about querying for string matches, see Querying tables in script.

Fields excluded from text indexing

Text indexing excludes fields that meet certain name, type, attribute, or encryption conditions. User searches don't match or return values from excluded fields.

Text indexing excludes a field if it meets any of the conditions in the following table.

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Category	Description
Field name	Text indexing includes the **sys_class_name** and **sys_tags** fields but excludes all other fields whose names begin with **sys_**.
Field type	Text indexing excludes fields of these types: • Date • Date/Time • Duration • True/False • Workflow For more information on these types, see Field types reference.
Field attributes	Text indexing excludes fields that have the **no_text_index** attribute set to **true**. For more information on this attribute, see Remove an index for a specific field.
Field encryption	Text indexing excludes fields configured for Edge Encryption. For more information on configuring fields with Edge Encryption, see Encrypt fields using encryption configurations.

Configure a text index group to search across multiple tables

Update tables to the V4 indexing format and include them in a text index group to facilitate searching across multiple tables.

Before you begin

Role required: ts_admin or admin

About this task

Text index groups enable you to index and search across multiple tables.

Performing searches across multiple tables requires normalizing the tables first so the relevance scores mean the same thing for all tables. V4 indexing provides that normalization. Zing uses the Okapi BM25 ranking function to calculate the relevancy score of search results.

The V4 table indexing format is optimized for documentation, such as knowledge base articles. You don't need to reindex tables that use this format when you change the value of an indexing attribute, such as the weight of a field. If you want to use the BM25 ranking function on a single table, you can convert it to the V4 format.

To enable search across multiple tables, you:

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1. Configure all of your chosen tables to use the V4 index format if they don't already use it.

   Note: In new instances, the Catalog Item [sc_cat_item], Knowledge [kb_knowledge], Social Q&A Questions [kb_social_qa_question], and User [sys_user] tables use the V4 index format. If you upgrade your instance from a previous release, the indexing format of these tables remains the same as it was in the older release.

2. Add the tables to a text index group so they can be indexed and searched together.

   Note: You can't add the Task [task] table or any tables that extend it to a text index group.

Procedure

1. Configure the tables that you want to include in multiple table searches to use the V4 index format.

   Note: Upgrading from V3 to V4 is easy. Downgrading from V4 to V3 is more difficult and discouraged.

   a. Navigate to **All** > **System Definition** > **Text Index Configurations**.

   b. Open the record for the table that you want to upgrade to the V4 index format.

   c. If **Format** isn't disabled, select **V4**, select **Submit**, and then skip to step 2.
   You can choose index formatting in this step because no index exists for the table.

   d. If **Format** is disabled, select the **Show index name record** related link.
   The disabled field means that an index already exists for the table and you must explicitly update the index format.
   The Text Index page displays.

   e. Select the **Upgrade to V4** related link, then select **OK**.
   The system schedules a task to upgrade the text index from V3 to V4, enabling this table to participate in multiple-table indexing.

2. Create a text index group that specifies the tables you want to index together so you can search them together.

   a. Navigate to **All** > **System Definition** > **Text Index Groups**.

   b. Select **New**.

   c. Enter the following field values:

Field	Value
Label	Name for the group of tables that you want to index and search together.
Tables	List of tables that you want to include in the text index group.

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You can add tables formatted with V3 and V4 to text index groups. If you add V3 tables, the text index group remains inactive.

d. Select **Submit**.

3. Configure the indexing and search attributes on tables in a text index group.

a. Navigate to **All** > **System Definition** > **Text Index Configurations**.

b. Select **New**.
The Text Index configuration form displays. If you already have a text index group in the list, skip to step 3.d.

c. In **Applies to**, select **Index Group**.

d. In **Index group**, select the magnifying glass and select the text index group you created, then select **Submit**.
The only text index groups that display are the ones you have already created.
The Text Index Configuration table displays.

e. Open the record for your text index group.

f. On the **Text Index Table Attribute Maps** tab, select **New**.
The Text Index Table Attribute Map form displays. Attributes pertain to the way Zing indexes or searches individual tables in the text index group.

g. In **Table**, select a table to define attributes for.
Only tables in the specified text index group and their child tables display.

h. In **Attribute name**, select the magnifying glass and select an attribute.
To see the list of attributes, enter `ts_configuration_attribute.list` in the application navigator. For attribute definitions, see Zing index and search attributes.

i. In **Value** enter a value and select **Submit**.
Valid values depend on the attribute. For information on valid values, see Zing index and search attributes.

j. Repeat this procedure to define additional search engine parameters for other tables in the text index group.

k. Under **Related Links**, select **Generate Text Index**.

4. Configure search parameters on individual table columns in the text index group.

a. Navigate to **All** > **System Definition** > **Text Index Configurations**.

b. Open the record for your text index group.

c. On the **Text Index Column Attribute Maps** tab, select **New**.
The Text Index Column Attribute Map form displays. Attributes pertain to the way Zing indexes or searches individual table columns in the text index group.

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d. In **Table**, select a table to define attributes for.
Only tables in the text index group and their child tables display.

e. In **Attribute name**, select a search engine parameter, enter a value for that parameter in **Value**, and select **Submit**.
To see the list of attributes, enter `ts_configuration_attribute.list` in the application navigator. For attribute definitions, see Zing index and search attributes.

f. In **Column**, specify the name of the column in the selected table you want to apply the search attribute to.

g. In **Value**, specify the attribute's value that governs the search.

h. Select **Submit**.

i. Repeat this procedure to define additional search engine parameters for table columns in the text index group.

j. Under **Related Links**, select **Generate Text Index**.

5. **Optional:** Add a synonym dictionary.
Specifying a dictionary enables searches on the search term and synonyms of the search term, such as `car` and its synonym `auto`. Zing provides a default synonym dictionary.

a. Navigate to **All** > **System Definition** > **Text Index Configurations**.

b. Open the record for your text index group.

c. On the **Index synonym Dictionaries** tab, select **New**.

d. In **Index**, select the table index to add the stop words to.

e. In **Synonym dictionary**, select the dictionary to use.
To add a dictionary, select **New** and follow the procedure in Create synonym dictionaries.

f. Select **Submit**.

g. Under **Related Links**, select **Generate Text Index**.

6. Select **Update**.

What to do next

You can query the tables in the text index group for string matches using the `GlideRecord.addQuery(name, value)` or `GlideRecord.addEncodedQuery(name, value)` methods with the `123TEXTINDEXGROUP321` reserved name. For more information about querying text index groups for string matches, see Querying tables in script.

Zing index and search dictionary attributes

The following dictionary attributes either affect the way Zing indexes tables or ranks search results.

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Index and search dictionary attributes

Zing uses dictionary attributes set at the table or field level to configure the following settings:

- indexing behavior
- ranking of search results
- the BM25 relevancy ranking algorithm

Zing index and search dictionary attributes

Name	Data Type	Applies To	Applies to V3 or V4	Description	Label	Needs re-indexing?	Root Table Only
attachment_index	boolean	Table	Both	If true, attachments on the table are indexed for search purposes.	Attachment Index	TRUE	FALSE
no_text_index	boolean	Both	Both	This attribute on a field prevents the field from being included in a text index.	No Text Index	TRUE	FALSE
text_index_attachment_weight	float	Table	V4	Specifies how much consideration (weight, a float value) to give a search term found in the body of an attachment. For more information on how weight value affect search result relevancy, see Zing computes document	Text Index Attachment Body Weight	FALSE	TRUE

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Zing index and search dictionary attributes (continued)

Name	Data Type	Applies To	Applies to V3 or V4	Description	Label	Needs re-indexing?	Root Table Only
				scores using three components.			
text_index_attachment	boolean t_displayed	Table	Both	Displays attachments in text search results.	Text Index Attachment Displayed	FALSE	FALSE
text_index_attachment_title_weight	float	Table	V4	Specifies how much consideration (weight, a float value) to give a search term found in the title of an attachment. For more information on how weight value affect search result relevancy, see Zing computes document scores using three components.	Text Index Attachment Title Weight	FALSE	TRUE
text_index_auto_stop	boolean	Table	Both	Automatically identifies stop words and doesn't index them. Based on the threshold specified	Text Index Auto Stop	TRUE	TRUE

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Zing index and search dictionary attributes (continued)

Name	Data Type	Applies To	Applies to V3 or V4	Description	Label	Needs re-indexing?	Root Table Only
				in text_index_auto_stop_threshold.			
text_index_auto_stop_threshold	integer	Table	Both	Threshold (integer, number of occurrences) for a word to become a stop word automatically. See text_index_auto_stop.	Text Index Auto Stop Threshold	TRUE	TRUE
text_index_default_partial_matching_rule	String	Table	Both	String for partial matching rule configuration. Input should be based on Change the query mode of an indexed table.	Text Index Default Partial Matching Rule	FALSE	TRUE
text_index_default_query_mode	String	Table	Both	String for query mode configuration. Input should be based on Change the query mode of an indexed table	Text Index Default Query Mode	FALSE	TRUE
text_index_disable_synonym	boolean	Table	Both	TRUE disables searching on synonyms as well as the search term.	Text Index Disable Synonym	FALSE	TRUE

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Zing index and search dictionary attributes (continued)

Name	Data Type	Applies To	Applies to V3 or V4	Description	Label	Needs re-indexing?	Root Table Only
text_index_enable_idf	boolean	Table	V3	TRUE enables TF-IDF scoring.	Text Index Enable IDF	FALSE	TRUE
text_index_filter_junk	boolean	Table	Both	TRUE by default, FALSE disables the junk filter for a table. By default, Zing doesn't index or search for 2-digit numbers and single character words (unless they are Chinese or Japanese characters). Regenerate the index after disabling the junk filter. This attribute results in a larger table index. For optimal performance, don't apply it unless it's required.	Text Index Filter Junk	TRUE	TRUE
text_index_filter_query	An encodedQuery on the table	Table	Both	Use this attribute when you want to index the rows	Index Filter	TRUE	FALSE

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Zing index and search dictionary attributes (continued)

Name	Data Type	Applies To	Applies to V3 or V4	Description	Label	Needs re-indexing?	Root Table Only
				matching specific filter conditions. The attribute value must be an encodedQuery on the table.			
text_index_filterable	boolean	Column	Both	If a field with this attribute set to **true** is changed, the row is evaluated for re-indexing (even if the field itself isn't indexable).	Index Filterable	TRUE	FALSE
text_index_include_stop_word	boolean	Table	Both	if you need to index stop words in this table, set this attribute to true.	Text Index Include Stop Word	TRUE	TRUE
text_index_scorer_bm25_b	Table	V4	This attribute is the b parameter used in the BM25 algorithm. See text_index_scorer_bm25_b.	bm25_b	FALSE	TRUE
text_index_scorer_bm25_k1	Table	V4	This attribute is the K1 parameter used in the BM25	bm25_k1	FALSE	TRUE

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Zing index and search dictionary attributes (continued)

Name	Data Type	Applies To	Applies to V3 or V4	Description	Label	Needs re-indexing?	Root Table Only
				algorithm. See text_index_scorer_bm25_k1.			
text_index_tags	String	Table	Both	Should be set to specific String: empty/ everyone_only/ all_shared, depending on type of tags that wants to be indexed.	Text Index Tags	TRUE	FALSE
text_index_tokenizer_language	String	Table	Both	Put "ja" (without double quote) when there is need to support tokenization in Japanese.	Text Index Tokenizer Language	TRUE	TRUE
text_index_translations	boolean	Table	Both	If present or true, forces indexes to be recalculated when translated strings are added. Requires sys-admin role to modify. Automatically set for indexed fields that are translated, and to fields that have a	Text Index Translations	TRUE	FALSE

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Zing index and search dictionary attributes (continued)

Name	Data Type	Applies To	Applies to V3 or V4	Description	Label	Needs re-indexing?	Root Table Only
				translation and are being indexed. The glide.i18n.force_index system property, which defaults to true, overrides this attribute.			
text_search_and_or_limit	integer	Table	Both	Add table level custom attribute text_search_and_or_limit that overrides the global property.	Text Search And Or Limit	FALSE	FALSE
ts_language	String	Column	Both	Added to allow for text indexing of only specific languages.	Text Search Language	TRUE	FALSE
ts_multi_value_field_splitter	String	Column	Both	If one field is a multi-value field, add the splitter in the field in this attribute to spread out index positions of the values. For example, to separate multi:value, put :	Text Search Multi-value Field Splitter	TRUE	TRUE

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Zing index and search dictionary attributes (continued)

Name	Data Type	Applies To	Applies to V3 or V4	Description	Label	Needs re-indexing?	Root Table Only
				for this attribute.			
ts_weight	int	Column	Both	Controls the relative importance of a match in the field for text search. For more information on how weight value affect search result relevancy, see Zing computes document scores using three components. To learn how to set text search weight for a field, see Set the relative weight of a field.	Text Search Weight	FALSE	FALSE

no_text_index

For Customer Service and Support guidelines on setting the **no_text_index** option for different field types, see KB0859922 on the Now Support site.

text_index_scorer_bm25_b

This dictionary attribute is part of the BM25 algorithm. The attribute impacts the importance of the length of a document in search results. If this attribute is 0, the length has no bearing. In this case, a document of two words would be valued equally as a document with 1000 words. Very short documents are often weighted lower than longer documents. The default is 0.75.

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text_index_scorer_bm25_k1

This dictionary attribute is part of the BM25 algorithm. The attribute helps determine term frequency saturation characteristics, that is, having the search term appear in a document increases the relevancy of the document, but the increase is less impactful as the numbers climb. For example, a search term occurring 10 times in a document makes it more relevant than a document that has only one occurrence. However, a document that has 100 occurrences of the search term may not be ten times more impactful than a document that has 10 occurrences. The relevance approaches a maximum effect asymptote. The higher the attribute value, the lower the maximum effect of multiple occurrences. Typical values are between 1.25 - 2.0.

Regenerate a text index for a table

You can regenerate a table text index when you change table stop words or display values.

Before you begin

The table that you want to regenerate the text index for must already be configured for indexing and searching. For details on this configuration process, see Configure a table for indexing and searching.

Role required: ts_admin or admin

About this task

By default, the system maintains text indexes on a daily schedule. Typically, you only need to manually regenerate a text index when you change these values.

- You change the list of table-specific stop words.
- You change the display value of a record such as changing a user or group name. Until you regenerate the index, text searches for old display values will still produce results and searches for the new display value won't show results.

You can also regenerate a text index if you observe incorrect search results for the indexed table. This is rare and usually only occurs if text indexing was interrupted.

Text indexing can be a resource-intensive task that may take a while to complete. You may notice performance degradation or incomplete search results during index generation. To estimate text indexing duration, you can view historical statistics.

Note: This index regeneration process purges the existing text search index for the table before it regenerates it. While it's processing, no search results are returned if you perform a text search before the regeneration is complete. An alternate method is available that doesn't impact use of text searches for the table while the regeneration is in process. See Reindex a table without impacting text search results.

Procedure

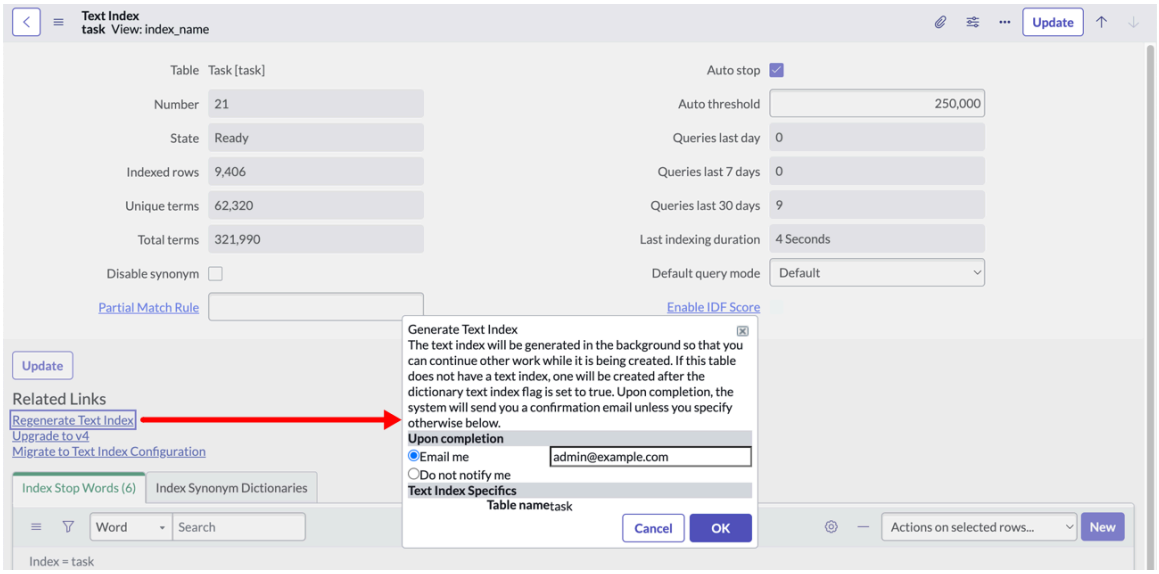
1. Navigate to **All** > **System Definition** > **Text Indexes**.
2. Open the text index for the table.

Example

For example, select **task**.
The system displays the Text Index record for the table.

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3. Select the **Regenerate Text Index** related link, then select **OK**.



Result

The system schedules the selected table for text indexing.

Reindex a table without impacting text search results

Rebuild text search indexes without adversely impacting search results. You can continue to perform text searches on a table while the index regeneration takes place.

Before you begin

The table that you want to rebuild the index for must already be configured for indexing and searching. For details on this configuration process, see Configure a table for indexing and searching.

Role required: admin

Note: If the *glide.script_processor.admin* system property's value has been changed from the default value, you need the role specified by that property value. For details on this property value and its effects, see Restrict access to background script.

About this task

This reindexing method doesn't purge the entire text search index before the rebuild takes place. It rebuilds the text search table index one record at a time, and reindexes the target table hierarchy only. For example, if you select the sc_cat_item table, only the sc_cat_item table is reindexed.

Procedure

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

   Note: If the *glide.script_processor.admin* system property's value is set to security_admin, you must elevate to that privileged role to access this module. For more information on elevating privileges, see Elevated privilege roles.

2. In the **Run script (JavaScript executed on server)** text field, enter the following background script, being sure to enclose both arguments in quotes as shown:

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```
new GlideTextIndexEvent ( ).indexUpdate('TABLE_NAME',
 'EMAIL_ADDRESS');
```

Where:

- `TABLE_NAME` is the name of the table you want to reindex.

  Note: Only the specified table and its child tables are reindexed.

- `EMAIL_ADDRESS` is the address to which an email notification should be sent when the table reindex completes. Type `null` for no email notification.

Example
For example, to regenerate the kb_knowledge table text search index, and specify that no email notification is required after the rebuild completes, create the following background script:

```
new GlideTextIndexEvent ( ).indexUpdate('kb_knowledge',
 'null');
```

The script creates an event that the index handler processes, so the script completes without blocking on completion of the reindexing job.

3. Select **Run script**.

Result
The system reindexes the text search for the specified table. For large tables, such as sys_metadata, reindexing can take a couple of hours, but you can still perform text searches on the table while the script is running.

Regenerate the text index for a single record

Update the text search index for a single record. Use this approach to quickly verify whether text indexing is the cause of a search issue without rebuilding the full text index for an entire table.

Before you begin
Identify the following:

- A search term that doesn't return the expected results
- A record containing the identified search term that isn't returned when searching for the term
- The table that includes the identified record

The identified table must already be configured for indexing and searching. For details on this configuration process, see Configure a table for indexing and searching.

Role required: admin

Note: If the *glide.script_processor.admin* system property's value has been changed from the default value, you need the role specified by that property value. For details on this property value and its effects, see Restrict access to background script.

About this task
This reindexing method rebuilds the text search index for a single record. It takes less time than rebuilding the text index for all records in a table.

You can use this method to quickly determine whether text indexing is the cause of a search issue. Doing so avoids the delay associated with rebuilding the entire table's text search index.

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Procedure

1. Copy the sys_id for the identified record by selecting **Copy sys_id** from its context menu.
2. Navigate to **All** > **System Definition** > **Scripts - Background**.

   Note: If the *glide.script_processor.admin* system property's value is set to security_admin, you must elevate to that privileged role to access this module. For more information on elevating privileges, see Elevated privilege roles.

3. In the **Run script (JavaScript executed on server)** text field, enter the following script, replacing `TABLE_NAME` with the name of the table containing the identified record and `SYS_ID` with the record's sys_id that you copied in step 1:

   ```
   var gr = new GlideRecord('TABLE_NAME');
   gr.get('SYS_ID');
   gs.eventQueue("text_index", gr,
    '[TABLE_NAME]','update','text_index');
   ```

4. Select **Run script**.
   The script creates a text_index update event for the specified table in the text_index queue.
5. Navigate to **All** > **System Policy** > **Events** > **Event Log** and wait for the new text_index update event's state to change to **processed**.
   To find the new event, you can apply a **[Name][contains][text_index]** filter and sort the Event list view by **Created** date/time in descending (z to a) order.

Result
The system updates the text index for the specified record in the specified table.

What to do next
Repeat your sample search. If this search returns the identified record, you may want to update the text index for the entire table that contains that record. For details, see Regenerate a text index for a table.

Remove an index

You can remove the index for a table if you no longer want the search engine to return results for that table. This procedure also removes the index for all tables that extend the specified table.

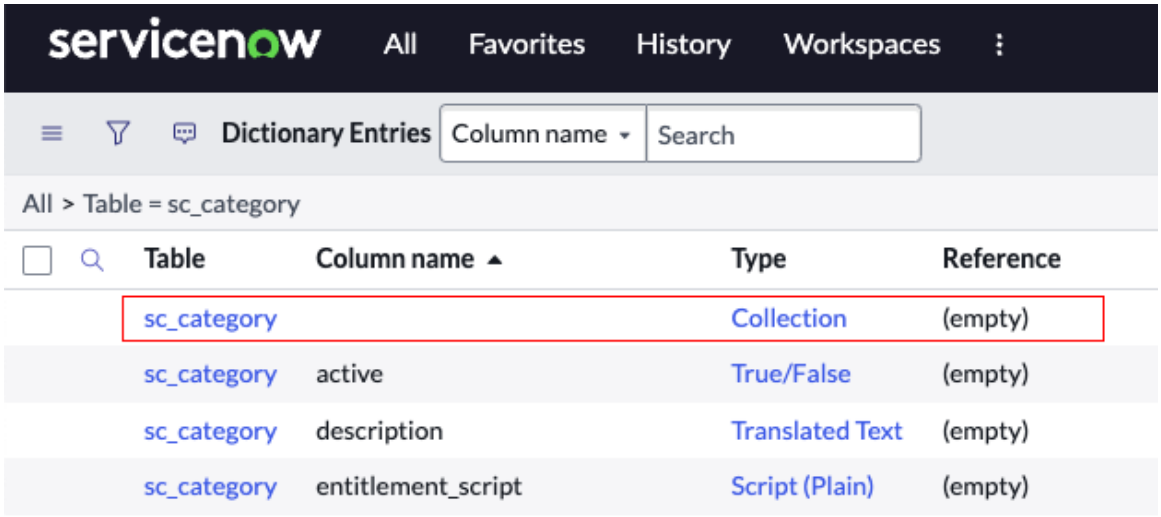
Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Open the dictionary record for the table.

   The dictionary record for a table is the record with **Table** matching the table's name, an empty column name, and a **Type** value of **Collection**, as shown in the following example image.

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3. **Optional:** If the **Text index** option field is hidden, configure the form layout to show it. For details on showing and hiding fields on a form, see Configuring the form layout.
4. Clear the record's **Text index** option, then select **Update**.

Result

The system no longer indexes text from the specified table or queries it for text search results. This change also disables text indexing and search for all tables that extend the specified table.

Remove an index for a specific field

You can remove the index for a specific field in a table if you no longer want the search engine to return results for that field.

Before you begin

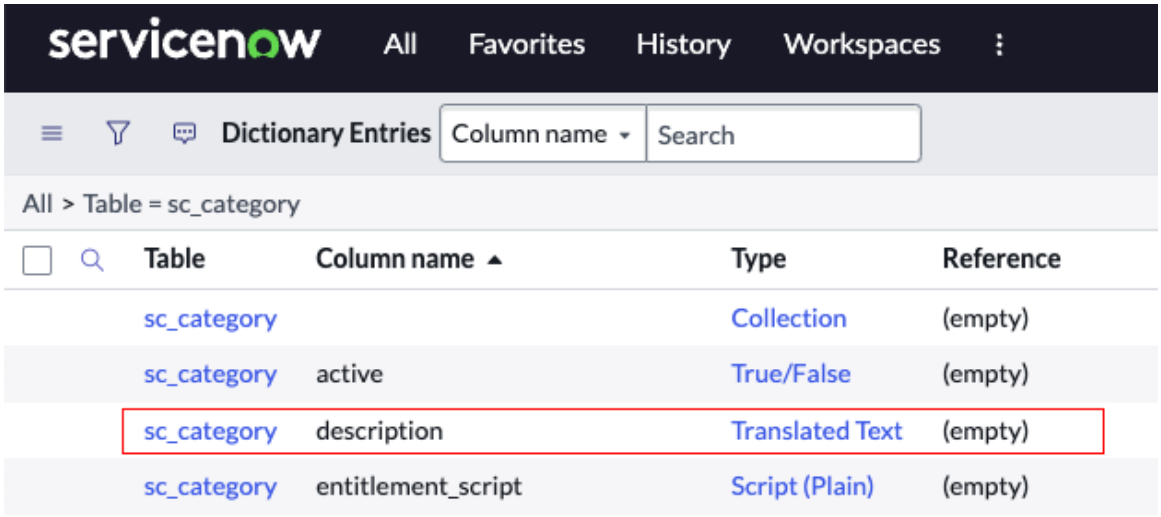
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Open the dictionary record for the table field.

   The dictionary record for a table field is the record with **Table** matching the table's name and **Column name** matching the field's name, as shown in the following example image.

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3. In the Attributes related list, select **New**.
4. On the Dictionary Attribute form, fill in the fields.

Field	Value
Attribute	No text index
Value	true

5. Select **Submit**.
6. Select **Update**.

Result

The system no longer indexes text from the specified table field or queries it for text search results. This change also disables text indexing and search for the specified field in all tables that extend the specified table.

Remove the text index for a child table

You can remove the text index for a child table if you no longer want the search engine to return results for that child table.

Before you begin

Role required: admin

About this task

The **Text index** option for a table is inherited by all of that table's child tables. Clearing this option for an individual child table has no effect.

For example, **Text index** is selected for the Task table in the base system. This setting enables text indexing for the Task table. All tables that extend Task, such as Catalog Task, Incident, and Request, inherit this option. Clearing the **Text index** option in the Incident child table doesn't disable text indexing for Incident records.

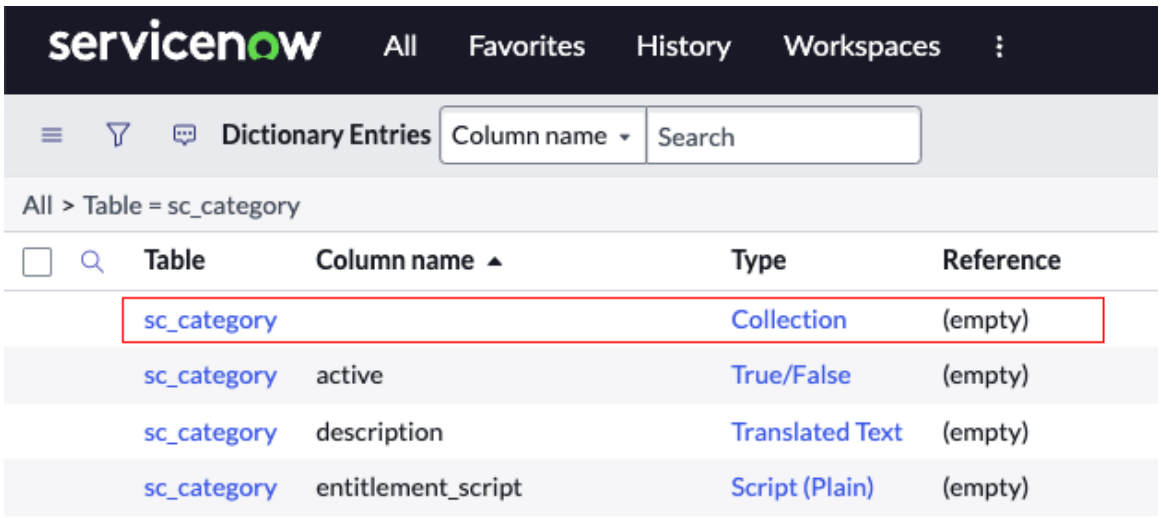
To disable text indexing for a specific child table, set that table's *No text index* attribute. This attribute overrides the table's inherited **Text index** option without affecting indexing behavior for other tables in its hierarchy.

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Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Open the dictionary record for the child table.

   The dictionary record for a table is the record with an empty column name and a **Type** value of **Collection**, as shown in the following example image.



3. In the Attributes related list, select **New**.
4. On the Dictionary Attribute form, fill in the fields:

Field	Value
Attribute	No text index
Value	true

5. Select **Submit**.
6. Select **Update**.

Result

The system no longer indexes or queries the child table for text search results. Indexing continues for other tables in the table's hierarchy.

Change the query mode of an indexed table

Set the query mode to specify whether searches on an indexed table must match all or only some of the search terms.

Before you begin

To change the query mode of an indexed table, a text index must be present for the table. Make sure that text indexing is enabled for the table before changing the query mode. See Configure a table for indexing and searching.

Role required: ts_admin or admin

About this task

Once a table is indexed, the data within the table can be searched through the global search bar. Change the query mode for the indexed table to allow global search to match all or only some of

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the searched terms. Enable a partial match rule to return results that partially match the searched terms.

Procedure

1. Navigate to **All** > **System Definition** > **Text Indexes**.
2. Select the table you want to configure from the list of indexed tables.
3. Use the combo box to select a **Default query mode**.

Option	Description
Default	The default query mode for a table is an AND query.
AND	Matches all search terms.
OR	Matches one or more search terms.
AND_OR	Matches all search terms. If no results are found, matches one or more search terms.

4. To enable partial matching of search terms, configure the partial match rule in the **Partial Match Rule** field.
   Partial match rules return results that partially match the search terms. Use a partial match rule if queries often include many keywords (if, for example, users cut and paste phrases into the global search bar).

Partial match rules

Input type	Example	Description
Integer	3	Indicates the minimum number of search terms to be matched.
Negative integer	-2	Indicates that the number of search terms, minus this number, should be matched.
Percentage	75%	Indicates the minimum percentage of search terms to be matched. The minimum number of search terms is the number computed from the percentage rounded down.
Negative percentage	-25%	Indicates that the number of search terms, minus this percentage, should be matched. The minimum number of search terms is the number computed from the percentage rounded down and subtracted from the total number of search terms.
Combination	3<70%	A positive integer, followed by a less than symbol, followed by any of the previously mentioned input types. Indicates that if the number of search terms is equal to or less than the integer, all search terms are required. If the number of search terms is greater than the integer, the specification applies. In this example: if there are 1–3 search terms, all are required. If there are 4 or more search terms, only 70% are required.

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Input type	Example	Description
Multiple combinations	3<-25%, 9<-5	Multiple conditional specifications separated by commas. In this example: if there are 1–3 search terms, all are required. If there are 4–9 search terms, all but 25% are required. If there are more than 9 search terms, all but 5 are required.

Enable indexing of text in multi-row variable sets

Make text from multi-row Service Catalog variable sets searchable in global search.

Before you begin

Role required: admin

About this task

By default, Zing doesn't index text from multi-row Service Catalog variable sets. Global search doesn't return results for text in these variable sets.

Administrators can override this default behavior by adding the *glide.ts.index.variableset* system property and setting its value to **true**. With this value set, Zing indexes text in multi-row variable sets, and global search returns results for that text.

To learn more about variable sets, see Service catalog variable sets.

Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Search the table for a system property with name *glide.ts.index.variableset*.
   - If the property already exists, change its value to **true** and skip the following steps.
   - If the property doesn't exist, go on to the following steps.
3. Select **New**.
4. On the System Property form, fill in the fields.

Field	Value
Name	glide.ts.index.variableset
Type	true | false
Value	true

5. Select **Submit**.

Result

Zing indexes text from multi-row Service Catalog variable sets so that you can find it using global search.

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What to do next

To see text from multi-row variable sets immediately in global searches, regenerate the text indexes for the affected tables. For details on this procedure, see Regenerate a text index for a table.

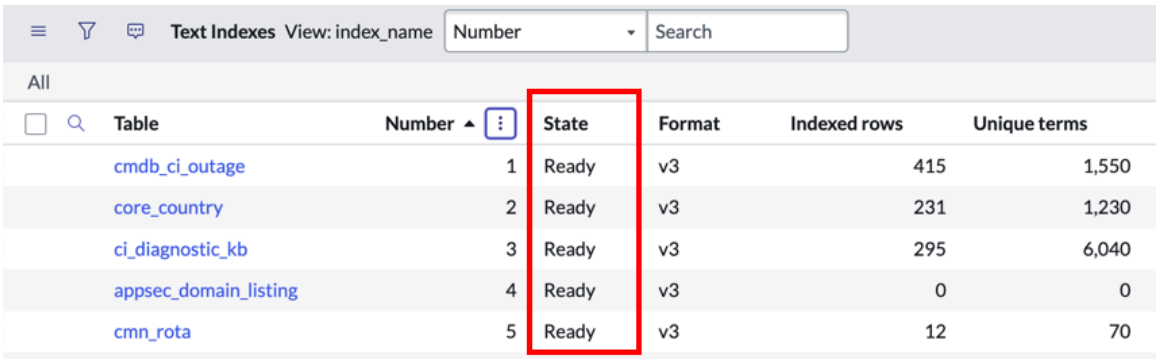
If you don't regenerate the text indexes for the affected tables, records on those tables will be reindexed as they are updated or added. Global searches will only return text from multi-row variable sets on reindexed records.

Text indexing statistics and status

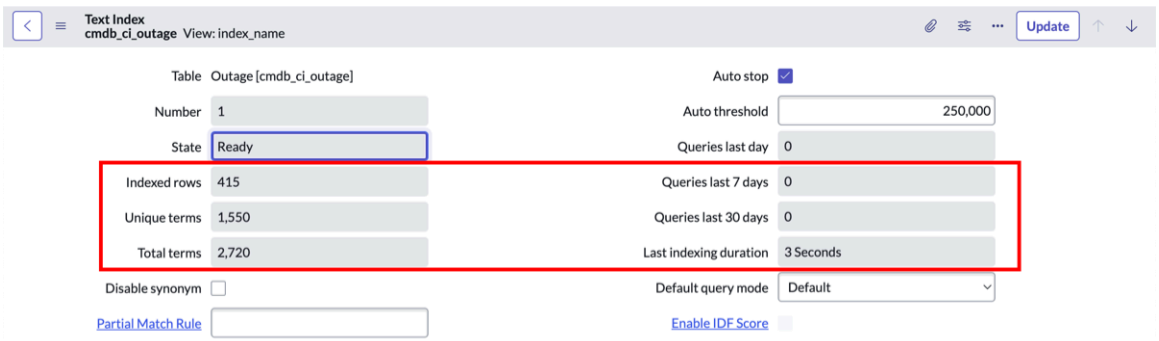
To view text indexing statistics and status, navigate to **All** > **System Definition** > **Text Indexes**.

- If text indexing is in progress, view the status of each index in the **State** field. Refresh the list to view updates. Tables are indexed one at a time.
- To see how long it takes to index a specific table, view the **Last indexing duration** field for the table entry. Although each process varies based on activity and data, historical data can provide a good estimate.
- View statistics (such as the number of indexed rows, terms, and queries in the past week) in the list or on the form for a specific table.

Text Index Status



Text Index Statistics



Configure tables to use the Japanese tokenizer

Improve search results in Japanese language searches by configuring individual tables to use the Japanese tokenizer.

Before you begin

Role required: admin

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About this task

Japanese language searches use the Kuromoji Japanese tokenizer in Zing. The Japanese tokenizer attribute is active by default, but you must configure individual tables to use it and then regenerate the text index.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. Search for the table name.
3. In the search results, open the table, which is the list item that has an empty **Column name** and a **Type** of **Collection**.
4. Scroll down the page and select the **Attributes** tab, and then select **New**.
5. Fill in the fields on the form.

Attributes fields

Field	Description
Attribute	Enter **Text index tokenizer language**.
Dictionary entry	Defaults to the name of the table.
Value	Enter **ja** for the Japanese tokenizer.

6. Select **Submit**.
7. Regenerate a text index for a table.

> **Note:** Text indexing can be a resource-intensive task that may take a while to complete. You may notice performance degradation or incomplete search results during index generation. To estimate text indexing duration, you can view historical statistics.

Result

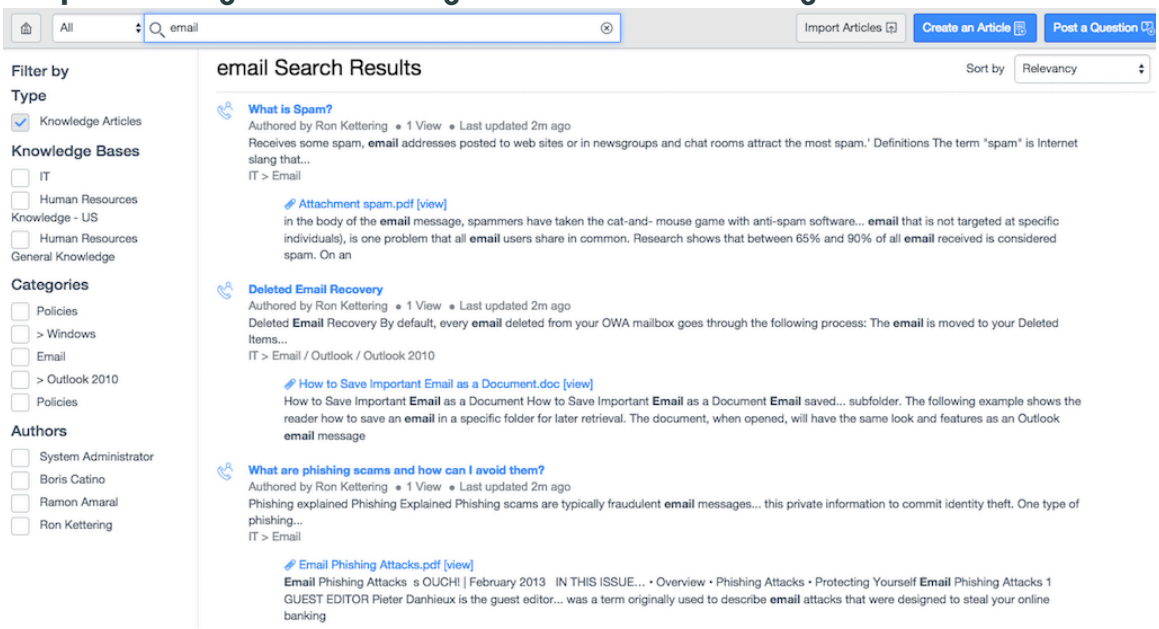
When the text index is generated and you go to the table you configured, the table now uses the Japanese tokenizer.

Zing can include attachments in search results

Search content from attachments on indexed tables. Display attachments for search results from the Knowledge [kb_knowledge] table.

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Sample Knowledge search showing attachments with matching content

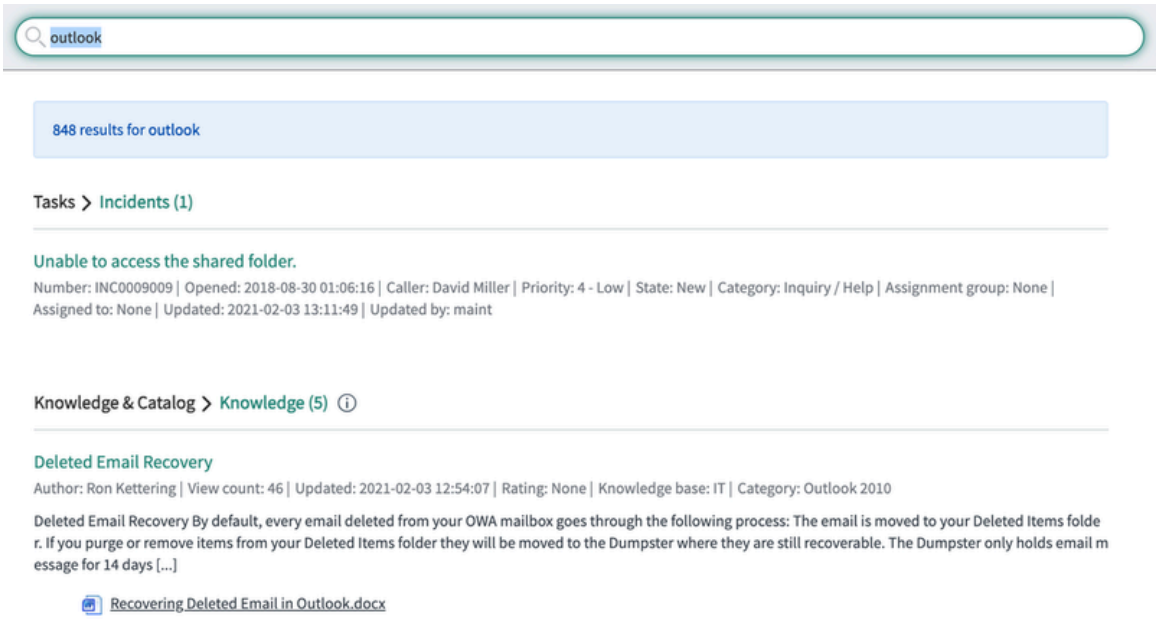


By default, search only matches content from attachments on Knowledge [kb_knowledge] records. Administrators can enable search for attachments on other tables, but doing so causes the system to re-index the selected table, its parent table, and any children of the parent table.

Warning: For large tables, such as the Task table, re-indexing can take several hours and slows down the system until complete. Re-indexing is best performed during non-peak times.

The search results page only displays attachments for search results from the Knowledge [kb_knowledge] table, even if other tables have attachment search enabled.

Global search displays attachments for Knowledge search results but not for search results from other tables



Zing supports indexing and searching these attachment file types.

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- .doc
- .docx
- .dot
- .dotx
- .htm
- .html
- .ini
- .pdf
- .pot
- .potx
- .ppt
- .pptx
- .reg
- .txt
- .xls
- .xlsx
- .xlt
- .xltx

Related topics

Index attachments on a table

Index attachments on a table

You can enable attachment indexing for a table so text searches can return matches from the record and its file attachments.

Before you begin

Role required: admin

About this task

By default, attachment indexing is enabled for the Knowledge Base. You can enable attachment indexing for other tables. Enabling attachment indexing causes the platform to reindex the selected table, its parent table, and any children of the parent table. For large tables, such as the Task table, reindexing can take several hours and slows down the system until complete. Reindexing is best performed during non-peak times.

Procedure

1. Navigate to **All** > **System Definition** > **Text Index Configurations**.
2. Edit the record for the table that you want to enable attachment indexing for.
3. In the Text Index Table Attribute Maps related list, select **New**.
4. On the Text Index Table Attribute Map form, fill in the fields.

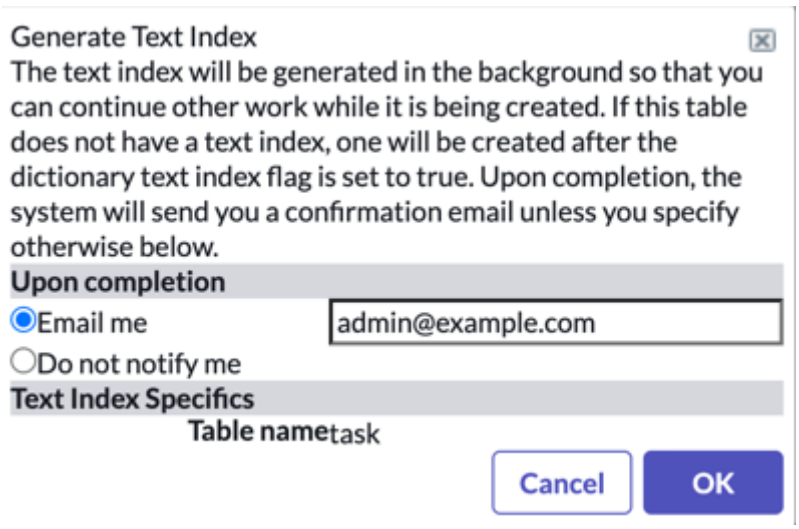
Field	Value
Table	<table name>

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Field	Value
Attribute name	Attachment index
Value	true

Note: The attachment index attribute only applies to the tables on which you explicitly add it. It does not cascade to child tables. For example, enabling indexing of attachments on the Task table does not enable indexing of attachments on the Incident table. Not all file types are supported for attachment indexing. For a list of supported file types, see Zing can include attachments in search results.

5. Select **Submit**.
   A message appears indicating that the attachment index attribute change will not take effect until you reindex the selected table.
6. Dismiss the reindexing message by selecting **OK**.
7. On the Text Index Configuration form, select the **Generate Text Index** related link.
8. In the confirmation window, perform one of these two steps:
   - To receive an email notification from the system when text indexing for the table is complete, enter your email address and select **OK**.
   - If you do not want to receive an email notification, select **Do not notify me**, then select **OK**.



9. Dismiss the confirmation message by selecting **OK**.

Result

The system begins text indexing for the table. When it is complete, attachments can be searched on that table.

Zing removes stop words from queries

Remove common words from search queries that don't produce meaningful results.

Stop words are common words that aren't indexed because they aren't meaningful in search results. Articles, conjunctions, personal pronouns, and prepositions are examples of stop words that aren't used in keyword searches. Administrators can configure stop words for all indexed tables and for specific tables.

By default, the system maintains two types of stop words.

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Types of stop words

Stop word type	Description
System-wide text index stop words	The system always ignores system-wide text index stop words when generating text indexes. Any search for a system-wide stop word returns no search results.
Table-specific stop words	The system uses the table-specific Text Index record to determine whether to index the stop word or to just remove it from keyword search queries against the table.

By default, the system has stops words for common English words. Search administrators typically create stop words from search terms that produce too many search results such as articles, conjunctions, personal pronouns, and prepositions.

Configure a global stop word

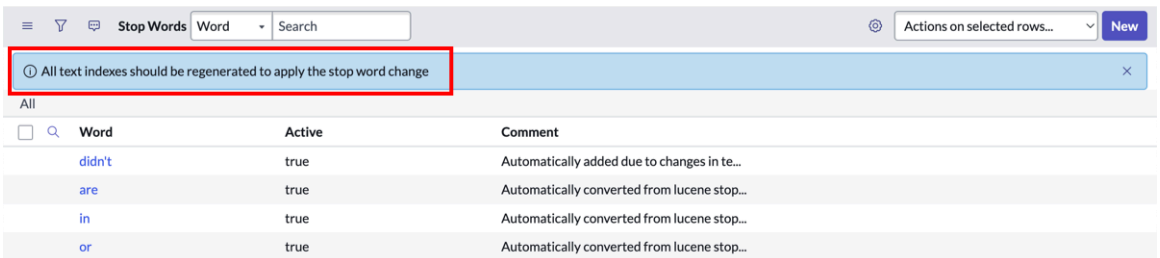
Configure stop words that shouldn't be indexed by the search.

Before you begin

Role required: ts_admin or admin

Procedure

1. Navigate to **All** > **System Definition** > **Text Index Stop Words**.
2. Add or remove stop words from the list.
3. If a message appears at the top of the list, contact Technical Support to regenerate all indexes. You must regenerate indexes whenever words may be missing from an index. For example, if you delete, inactivate, or change an active global stop word, the word may be missing from the index. An after business rule checks these conditions and generates the notification message when index regeneration is necessary.



Configure a table-specific stop word

You can configure stop words for a specific table.

Before you begin

Role required: ts_admin or admin

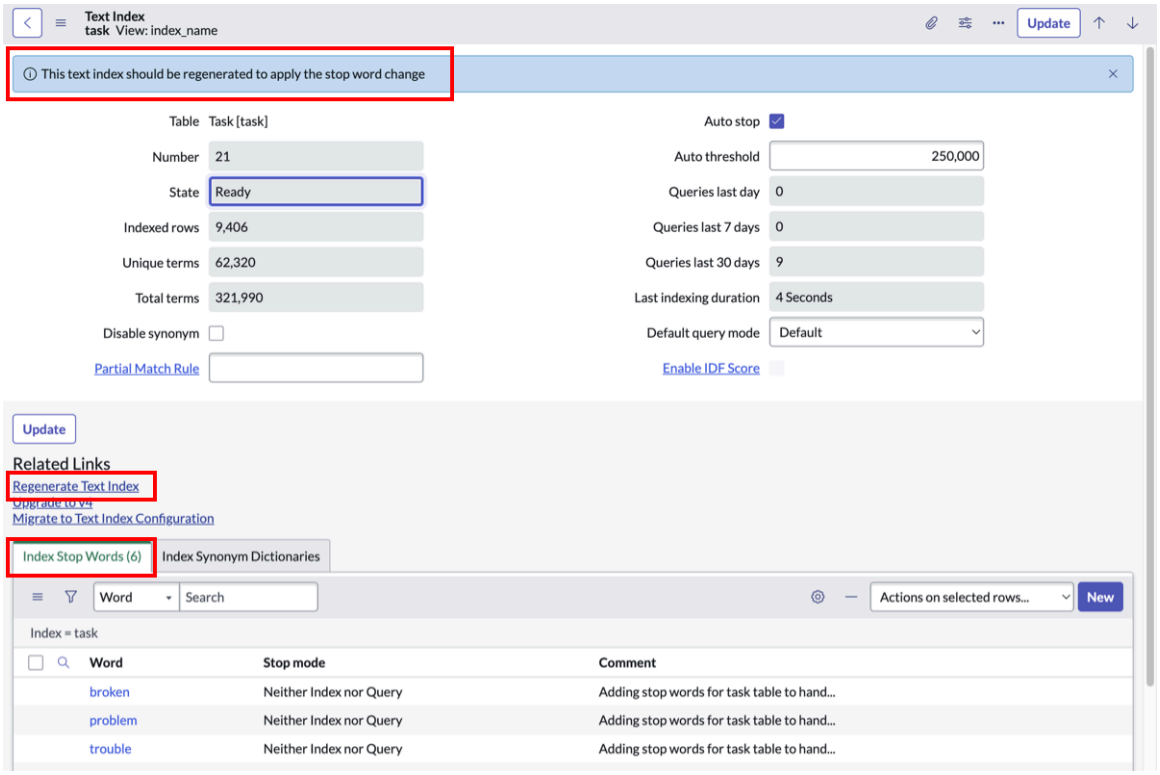
Procedure

1. Navigate to **All** > **System Definition** > **Text Indexes**.
2. Open the text index entry for the table.
3. Add or remove stop words from the **Index Stop Words** related list.
   For each word, select the desired **Stop mode** (Not a Stop Word (inactivates the stop word), Neither Index nor Query, or Index but do not Query).
4. If a message appears at the top of the form, select **Regenerate Text Index**, then select **OK**.

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You must regenerate indexes whenever words may be missing from an index. For example, if you delete or change a stop word for which the mode was Neither Index nor Query, the word may be missing from the index. An after Business rules checks these conditions and generates the notification message when index regeneration is necessary.

Note: Text search uses the global list plus the table-specific list of stop words when indexing the table.



Enable automatic stop words for a table

The system can identify and generate stop words when a search term exceeds an occurrence threshold.

Before you begin

Enable text indexing for the table.

Role required: ts_admin or admin

About this task

By default, the TS Index Stats scheduled job identifies and creates stop words for tables with text indexes on a nightly basis. Automatically adding stop words improves your search results by removing search terms that return too many search results.

Procedure

1. Navigate to **All** > **System Definition** > **Text Indexes**.
2. Open the text index entry for the table.
3. Select the **Auto stop** check box.
4. In **Auto threshold**, enter the maximum number of occurrences a search term can have in search results.
   When a search term generates more search results than the threshold, the system automatically creates a stop word for the search term.

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Example
For example, to create stop words for the task table, see the blog post Configuring auto stop words and regenerating text indexes from a ServiceNow employee on the ServiceNow Community.

5. Select **Update**.

Result
The job identifies and creates stop words for the table with a **Stop mode** value of *Index but do not Query* and inserts a **Comment** to indicate that the stop word was generated automatically.

Disable a stop word in Zing

Configure Zing to return results for text search terms that match a stop word's stemmed form.

Before you begin
Role required: admin

About this task
Zing's stemming feature can cause search to return no results for an acronym or short word if its stemmed form is defined as a stop word.

Indications that a search term may be stemmed to a stop word include:

- Text search returns no results for the affected term.
- The system displays an informational message: `Your text query contained only common words or ambiguous wildcards, please refine your search and try again.`

As an example, imagine that a user searches for the acronym `AMS`. Zing stems this search term to `am`. Because `am` is defined as a stop word, Zing ignores the search term. The user's `AMS` search returns no results, and the system displays the informational message.

To enable correct search results for an affected term, administrators can disable the relevant stop word in the global and table-specific stop word lists.

Note: Disabling a stop word can impact search performance and relevancy. Text search will return matching results for the disabled stop word as well as for its stemmed forms.

For more details on stemming in Zing, see Zing matches derived words with stemming.

Procedure
1. To disable a stop word in the global stop word list, perform the following steps:
   a. Navigate to **All** > **System Definition** > **Text Index Stop Words**.
   b. Open the record for the stop word you want to disable.
   c. On the Stop Word form, clear the **Active** option, then select **Update**.
2. To disable a stop word in table-specific stop word lists, perform the following steps for each table that includes the stop word:
   a. Navigate to **All** > **System Definition** > **Text Indexes**.
   b. Open the table's text index record.

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c. In the Index Stop Words related list, open the record for the stop word.

> **Note:** If the Index Stop Words related list isn't visible, open the form context menu and select **View** > **Default view**.

d. On the Index Stop Word form, set the stop word's stop mode to **Not a Stop Word** and select **Update**.

e. On the Text Index form, select the **Regenerate Text Index** related link.

Result

Zing no longer ignores the disabled stop word and its stemmed forms in text searches.

Zing matches derived words with stemming

Convert any multiple-character search keyword to its stem form to find derived versions of the word.

Stemming removes a variety of common word inflections, such as plurals and past tense forms. Zing treats all words with a common stem as synonyms of the original search term. Stemming doesn't apply to searches involving single-character words such as Chinese and Japanese pictograms.

Zing uses the Porter Stemming Algorithm, which is most effective for English text, but supports stemming in these languages.

- English
- French
- German

The stemming language determines how the system generates indexes of record data. The system only supports one stemming language at a time regardless of how many languages the instance supports. When you change the stemming language, the system creates any new index entries based on the new language stemming rules, but doesn't regenerate any existing index records. You must manually regenerate indexes for tables you want to use the new stemming language.

Zing can expand search results with synonyms

Expand search results to include additional search terms.

By default, Zing includes a sample synonym dictionary consisting of a list of synonym sets (synsets). Zing supports two types of synonym sets.

Synonym set types

Synonym set type	Description	Example
Synonym list	A synonym list is a list of words separated by commas. When a search uses any word from the list, Zing expands the search to include all words in the list.	Cyber,Internet,Cybercafe

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Synonym set types (continued)

Synonym set type	Description	Example
Synonym map	A synonym map is two word lists separated by the equal and greater than characters => . When a search uses any word from the list on the left, Zing expands the search to include all words from the list on the right. When a search uses a word from the list on the right, Zing doesn't expand the search to include terms from the list on the left.	IOT,Internet of Things=>Chip,Nest thermostat,RFID,IOT

Search results, synonym expansion and weighting

In search results, documents containing the original search keywords have a higher score than documents containing the search synonyms. For example, documents with the search keyword `IOT` have a higher score than documents with the synonym `Internet of Things`.

- One-way synonym expansion to/from multiple terms `(blork, cork => malork, elastic)` works as expected. `Blork` and `cork` both expand to `malork` and `elastic`.
- Multi-level one-way expansion `(blork => cork => malork)` doesn't work transitively. Neither `blork` nor `cork` expands to `malork`.
- Multi-level one-way expansion split between multiple synonym set records `(blork => cork)(cork => malork)` doesn't work transitively. Only `cork` expands to `malork`, `blork` only expands to `cork` but not `malork`.

By default, synonyms don't use the same weight as regular search terms. Synonyms are only weighted at 10% of the default search weight. Additionally, multiple instances of a synonym in a single doc/field don't increase the search weight. The weight of synonyms is controlled by the property *`glide.ts.synonym.expanded.boost`*. When this property value = 1, synonyms are weighted equally to normal search terms. 0.5 = 50% weight etc.

Wildcard characters and synonym matching

Zing doesn't expand the `%` and `*` wildcard characters when looking for synonyms that match your search term. These characters are treated as literal characters when finding matching synonyms. As an example, if you search for `issu*`, Zing doesn't find synonyms for `issue`, but it does find synonyms for `issu*`.

Enable search synonyms

Enabling text index synonyms allows Zing to expand text searches with additional search keywords.

Before you begin
Role required: ts_admin or admin

About this task
By default, text searches don't use text index synonyms.

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Procedure

1. Navigate to **All** > **System Properties** > **Text Search**.
2. Scroll down to **Enable Synonym**, and select **Yes**.

Result

Text searches use active synonym dictionaries to expand keyword searches.

Create synonym dictionaries

You can create synonym dictionaries to expand Zing text searches with additional search keywords.

Before you begin

Role required: ts_admin or admin

About this task

By default, the system provides a sample Zing synonym dictionary called **Example synonym dictionary**. You can add synonyms to this dictionary or create your own synonym dictionaries.

Procedure

1. Navigate to **All** > **System Definition** > **Text Index Synonym Dictionaries**.
2. Select **New**.
3. On the Synonym Dictionary form, fill in the fields.

Synonym Dictionary form

Field	Description
Name	Unique name for the synonym dictionary.
Active	Option to make the synonym dictionary active. Zing only uses active synonym dictionaries when expanding searches.
Global	Option to use the synonym dictionary for searches against all tables that have not been individually configured.
State	Publication state for the synonym dictionary. This field is read-only.
Order	Order of evaluation for the synonym dictionary. Zing evaluates synonym dictionaries with lower *`Order`* values before dictionaries with higher values.
Description	Description of the synonym dictionary.

4. For each set of synonyms you want to add to the synonym dictionary, insert a new Synonym Set row and fill in the fields.

Synonym set fields

Field	Description
Synset	Comma-separated set of synonym expansions. Zing expands searches

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Field	Description
	containing any one of these terms to include all of these terms. As an example, if you define the synonym set `medicalise,médicalisé` and search for `medicalise`, Zing expands your search to match records containing either `medicalise` or `médicalisé`.
Active	Option to make this synonym set active. Zing only uses active synonym sets when expanding searches.
Description	Description of the synonym set.

5. Select **Submit**.
6. Select the **Publish All Dictionaries** related link.
   A message indicates that publication of your synonym dictionaries has been scheduled. Refresh the page to see whether publication is complete. The dictionary is published when its state changes from **Draft** to **Published**.

Select synonym dictionaries for a table

Search administrators can specify one or more synonym dictionaries available to a particular table.

Before you begin
Role required: ts_admin or admin

Procedure
1. Navigate to **All** > **System Definition** > **Text Indexes**.
2. Select the table for which you want to change search behavior.
   The system displays the Text index record for the table.
3. Select the **Index Synonym Dictionaries** tab.
4. Select **New**.
5. Select a synonym dictionary in the **Synonym Dictionary** field on the **Index Synonym Dictionary** form.
6. Select **Submit**.

Result
Text searches on this table use the selected synonym dictionaries.

Disable synonyms for a table

By default, Zing uses all active synonym dictionaries when a user performs a text search. Search administrators can disable synonym dictionary usage on a per-table basis.

Before you begin
Role required: ts_admin or admin

Procedure
1. Navigate to **All** > **System Definition** > **Text Indexes**.
2. Select the table for which you want to change search behavior.

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The system displays the Text index record for the table.

3. Select **Disable synonym**, so the check appears.
4. Select **Update**.

Debug synonym searches

You can view debug messages to determine if synonym searches are working as expected.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Diagnostics** > **Session Debug** > **Debug Text Search**.
2. Perform a search using a term in a synonym dictionary.
3. View the session debug output.

> **Note:** You can only view the debug output on a table view (_list.do). You can't view it on a UI page itself.

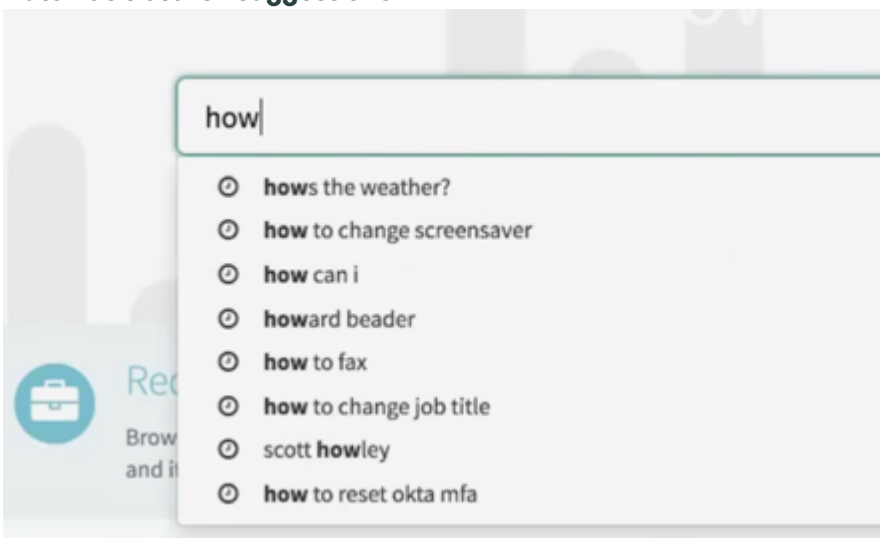
Zing displays search suggestions as users enter search terms

Display possible search query completions as users enter search terms.

To use the Search Suggestions application, activate the com.glide.search.suggestions plugin if it's not already installed. For information, see Request a plugin and Activate a plugin.

Once you enable Search Suggestions, suggestions appear automatically when users enter text into Zing search fields in the Service Portal or Now Mobile.

Automatic search suggestions



If there are any matching suggestions from the user's own previous searches, those suggestions appear first, with a clock icon. The remaining suggestions are those suggestions coming from the searches of other users.

In the Service Portal, you can use Search Suggestions or type-ahead functionality, but not both at the same time. In Now Mobile, only Search Suggestions is available. By default, new ServiceNow instances use Search Suggestions in the Service Portal. Upgraded instances use whatever was previously enabled. You can easily enable Search Suggestions on upgraded instances. To learn more, see Enable and disable Search Suggestions in Zing.

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For full details on configuration and use of the Search Suggestions application, see Search Suggestions.

Enable and disable Search Suggestions in Zing

Enable the Search Suggestions application to improve the Zing search user experience.

Before you begin

ServiceNow personnel installed and activated the com.glide.search.suggestions plugin.

Role required: admin

About this task

The Search Suggestions application is available on new instances by default. On upgraded instances, Search Suggestions is enabled for Now Mobile and disabled for Service Portal by default.

The following system properties enable and disable Search Suggestions:

- *glide.search.suggestions.enabled*: Set to **true** (default) to enable Search Suggestions in Zing, or set to **false** to disable Search Suggestions in Zing.
- *glide.service_portal.search_as_you_type_behavior*: Select **Suggestions** or **Typeahead** functionality in the Service Portal.

On new instances, the first parameter is set to **true** and the second is set to **Suggestions**. In upgraded instances, the parameters are set to whatever was previously enabled.

Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. To switch between Search Suggestions and type-ahead functionality in Service Portal, follow these steps.
   a. In the **Name** search column, enter *glide.service_portal.search_as_you_type_behavior*.
   b. On the System Property page, in the **Value** field, enter `Suggestions` to enable Search Suggestions, or `Typeahead` to enable type-ahead functionality.
   You can only enter one of these options.
3. To turn Search Suggestions on or off globally, follow these steps.
   a. In the **Name** search column, enter *glide.search.suggestions.enabled*.
   b. In the **Value** field, double-click the value and select **true** to enable suggestions, or **false** to disable Search Suggestions globally.

Set the maximum number of search suggestions Zing displays

Set the maximum number of search suggestions Zing displays when users enter search strings in search applications.

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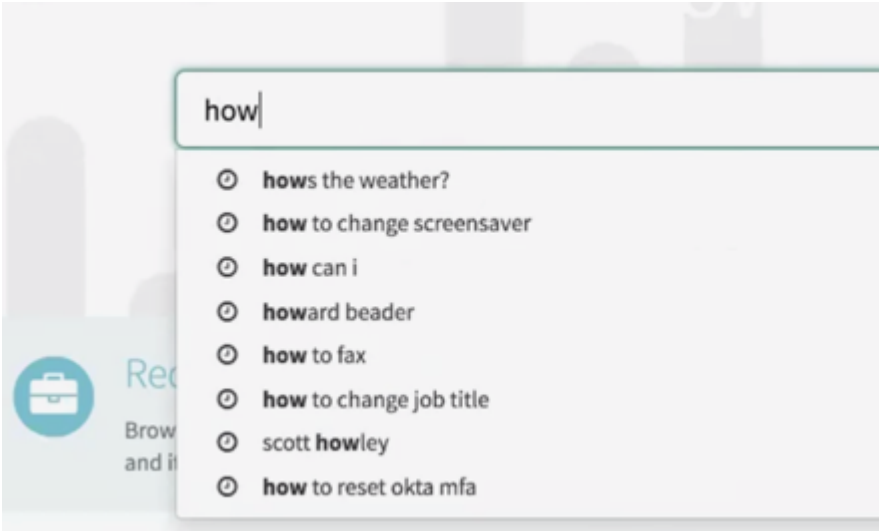
Before you begin

You must be using a search application that has Zing specified as its Search Engine in its search application configuration record. For details on search application configuration record fields, see Search Application Configuration form.

Role required: admin

About this task

Zing displays suggestions generated by the Search Suggestions application when users enter text in a search field in a supported search application. You can control the number of suggested search strings displayed by editing the search application configuration records for your search applications that use Zing.



Note: You can also configure a search suggestion limit for Knowledge and System Status searches in Service Portal by editing the instance options for the Typeahead Search widget. For details on these instance options, including the Limit option, see Typeahead Search widget. To learn how to configure instances of the Typeahead Search widget for the Knowledge and System Status portal pages, see Configure widget instances.

Procedure

Set the maximum number of search strings displayed in a search application that uses Zing.

a. Navigate to the Search Application Configurations [sys_search_context_config] table's list view by selecting **All**, entering `sys_search_context_config.list` in the navigation filter, and pressing Enter.

b. Open the Search Application Configuration record for your Zing search application.

c. If a warning message about the current application scope appears, select the link in the message to switch to the correct application scope for the record.

d. In the **Suggestions Limit** field, enter the new maximum number of search suggestions you want the application to display.

e. Select **Update**.

Verify that user roles have access to your searchable tables

Evaluate your Zing text index configurations to see whether any user roles lack access to indexed columns in your searchable tables. The checker tool provides guidance on correcting access issues for each affected table's index.

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Before you begin
Role required: ts_admin

About this task
Starting with the Brazil release, Zing text search and indexing honors column-level query_range read ACLs on table columns that are indexed for search. This change was made as part of improvements to security for search. In previous releases, Zing only honored table-level read ACLs.

This change affects searchable tables with text indexes that use the v3 legacy format and older formats. A user role may grant access to such a table without granting query_range access to all of that table's indexed columns. In this case, Zing returns no results when users with the role search the table.

The Text Search Query Range ACL Checker tool helps you see which user roles are affected by this behavior change. It shows whether Zing currently honors query_range ACLs for each of your searchable tables. You can evaluate the configuration for each table. Evaluation shows whether any user roles that grant access to the table lack query_range access to all of its indexed columns. If this is the case, the tool provides guidance on modifying your configuration to resolve the search access issue. You can also accept the configuration as is, with the understanding that doing so will impact search for users with affected roles.

You only need to perform this procedure for text indexes that use the legacy v3 format or earlier formats. Zing's v4 text index format enforces query_range read ACLs at the level of individual columns. Using the v4 format, when an indexed column is inaccessible by the search user, search ignores that column but still returns results from accessible indexed columns.

Note: To check the format for a searchable table's text index, navigate to **All** > **System Definition** > **Text Indexes**, find the record for your searchable table, and find the value of its **Format** field.

Procedure
1. In your web browser, navigate to the Text Search Query Range ACL Checker page at `https://<instance-name>.service-now.com/ts_query_range_acl_checker.do`, replacing `<instance-name>` with the name of your ServiceNow AI Platform® instance.
2. In the **Text Search V3 Tables Restricted Search Status** section, use the **Index Name** filter and **Query Range ACL enforced** drop-down menu to locate the text search index for a searchable table.
   A value of **Enabled** in the **Query Range ACL enforced** column means the table's text index currently honors column-level query_range ACLs. This configuration provides better security, but blocks searches by users with roles that lack query_range access to all of the table's indexed columns.

   A value of **Disabled** means the table's text index doesn't currently honor column-level query_range ACLs. This configuration offers less security, but doesn't block searches by users with roles that lack query_range access to all of the table's indexed columns.
3. Select **Evaluate**.
   An **Evaluation Result for <table-name>** section appears for your chosen table.
4. In the **Evaluation Result for <table-name>** section, review the list of user roles which lack access to one or more columns in the chosen table's text index.
   The entry for a user role includes a list of columns on the chosen table that are inaccessible by users with the role. It also lists the ACLs that block access to those columns. Each ACL entry is a link to the relevant record in the Access Control [sys_security_acl] table.

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5. **Optional:** In the **Options to address blocking ACLs** section, choose one of the listed options and follow the tool's guidelines to resolve the access blockage for the listed user roles.
   - Mark the inaccessible columns as unrestricted.

     Note: This option reduces security for search. Unrestricted columns can be searched by any user regardless of their role.

   - Modify the ACLs that prevent access.

     (Optional) Add the listed user roles to the existing ACLs, granting them access to the specified columns on the chosen table.

     Note: If you prefer, you can instead create additional ACLs that grant the listed roles access to the specified columns on the chosen table.

   - Upgrade the table's text index format to v4.

     (Optional) Using the v4 text index format, search ignores any blocked columns but still returns results from accessible columns, rather than returning no results if any column is blocked.

     Note: Upgrading a searchable table's text index to v4 may increase the space required for the index. The v4 index may rank results differently than the index with the previous format.

6. **Optional:** To accept the current text index configuration, select **Enable Restricted Search in <table-name>**, where `<table-name>` is the name of your chosen table.

   Note: If you haven't resolved the access blockages reported for the table, users with the listed roles will be unable to search the table once you enable restricted search.

Installed with Zing

Several types of components are installed with Zing.

Tables installed with Zing

Table	Description
Text Index [ts_index_name]	Stores the tables the system indexes.
Index Stop Word [ts_index_stop]	Stores the stop words for a specific table.
Stop Word [ts_stop]	Stores the global stop words.
Text Search Groups [ts_group]	Stores search groups for global text search.
• ts_attachment • ts_chain_summary • ts_chain • ts_deleted_doc • ts_document	System tables that support Zing. Extending or modifying these tables isn't recommended.

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Tables installed with Zing (continued)

Table	Description
• ts_index_stats • ts_phrase • ts_search_stats • ts_search_summary • ts_word_roots • ts_word	

Business rules installed with Zing

Business Rule	Description
Text Search Property Change Rationally	Ensures that valid values are entered for Zing text search properties.
Text Index Stop Reminder	Warns the user of stop word changes that require the index to be rebuilt (table-specific). The warning is issued if record is deleted that had a stop mode "neither index nor query", if record's stop mode is updated to something else and was "neither index nor query", and if record's word is updated to something else and stop mode is "neither index nor query".
Stop Word Reminder	Warns the user of stop word changes that require the index to be rebuilt (global). The warning is issued if record is deleted and it was active, if record is inactivated, and if record's word is changed and was active.

Scheduled jobs installed with Zing

Scheduled job	Description
TS Search Stats	Compiles type-ahead suggestions each night. See Update A Type-Ahead Suggestion.
TS Index Stats	Collects statistics and performs maintenance for text search and indexing. Runs nightly.
text index events process	Collects statistics and performs maintenance for text search and indexing. Runs every 30 seconds.
TS Chain Summary	Compiles search chain statistics each hour.

UI action installed with Zing

UI action	Description
Regenerate Text Index	Displays the **Regenerate Text Index** link on Text Index forms.

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Zing roles

Zing is installed with these roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

Search application administrator [search_application_admin]

Create, read, update, and delete search application configurations for Zing and AI Search.

Contains Roles

List of roles contained within the role.

- ais_admin
- personalize_dictionary

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Grant this role to users who need to configure AI Search applications.

Text search administrator [ts_admin]

Configure text indexes, text index groups, text index stop words, and text index synonyms for Zing.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

AI Search

The ServiceNow® AI Search application provides a consumer-grade search engine for ServiceNow® Service Portal, ServiceNow® Now Mobile, and ServiceNow® Virtual Agent. Intelligent query features help you quickly find the answers you need.

https://player.vimeo.com/video/1145611282?h=3133142555&badge=0&autopause=0&player_id=0&app_id=58479

Watch this short video to see how users can find answers using AI Search.

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Get started

Explore  Learn about AI Search features.	Configure  Configure searchable content, search experiences, and ServiceNow AI Platform® search applications.	Integrate  Integrate AI Search functionality into other ServiceNow AI Platform applications.
Search  Find your answers using AI Search.	Administer  Gain deeper insights into AI Search behavior.	Reference  Get details on AI Search system properties and features.
AI Search Admin console  Configure, test, and activate AI Search solutions across different types of search applications.	Advanced AI Search Management Tools  Analyze trends for search query traffic, review indexed record counts and configuration settings, and preview search query results.	External Content Connectors  Search content and metadata from supported external source systems.

Note: AI Search isn't available in personal developer instances (PDIs).

Exploring AI Search

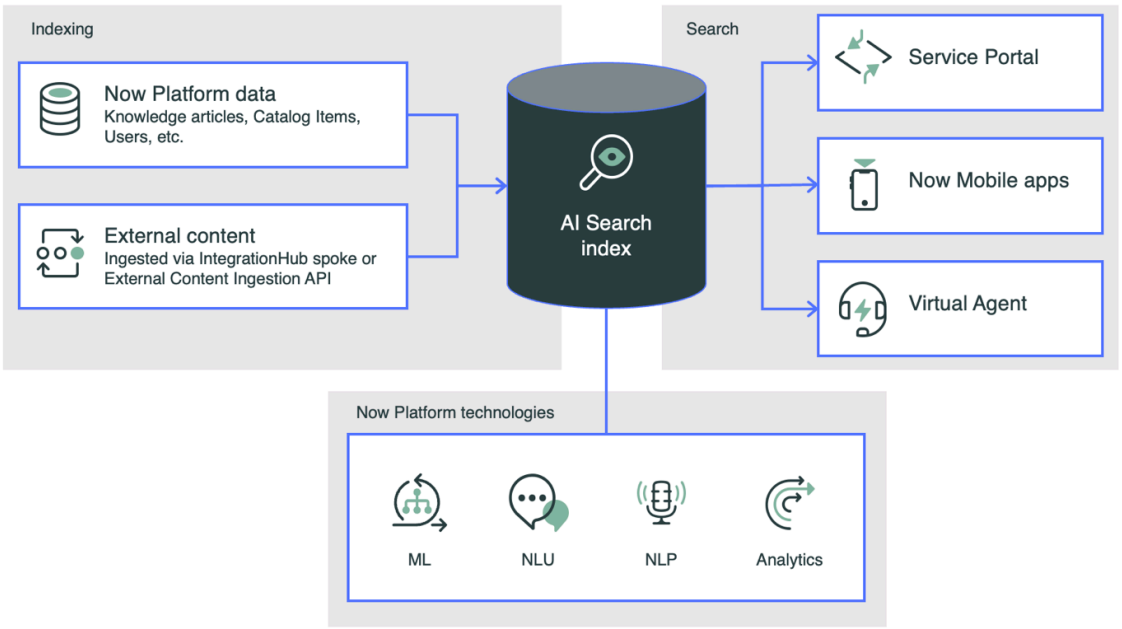
Learn about AI Search features that enable you to provide consumer-grade search experiences for your users.

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AI Search architecture

The AI Search index stores data from ServiceNow AI Platform® records or external sources and makes that data available for users to search in multiple applications. Search query features use ServiceNow AI Platform technologies to improve the search user experience.

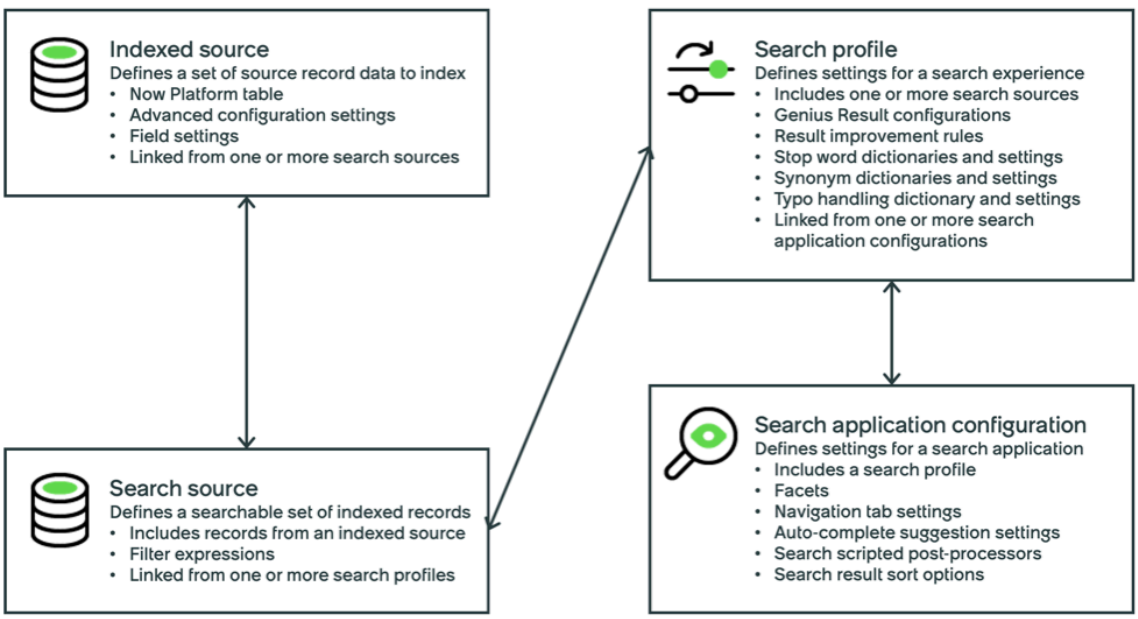
AI Search architecture diagram



AI Search configuration

Search administrators configure AI Search indexing and search settings in indexed sources, search sources, search profiles, and search application configurations.

AI Search configuration diagram



Index searchable content from ServiceNow AI Platform® tables and external sources

Make alphanumeric content from text and string fields on your records searchable by configuring an indexed source. Each indexed source retrieves data from a table and adds it to the AI Search index.

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Define an indexed source for each ServiceNow AI Platform table with records that you want to make searchable. Search administrators can configure settings for each indexed source:

- Enable indexing for child tables of the source table.
- Configure indexing of alphanumeric content from source record tags, attachments, translated fields, and referenced fields.
- Map source table fields to AI Search index fields for ease of search.

The base system includes preconfigured indexed sources for Knowledge Base articles, Catalog Items, and user records. You can create your own indexed sources to index records from other ServiceNow AI Platform tables.

To learn more about configuring and using indexed sources for ServiceNow AI Platform table records, see Indexed sources in AI Search.

Note: AI Search doesn't index Unicode characters from the High Surrogate Area (code units in the range U+D800 to U+DBFF). Characters from this range are replaced with spaces during indexing.

By activating the External Content for AI Search plugin (com.glide.ais.external_content), you can enable indexing and search for record content from external sources. Supported sources include SharePoint collections, Confluence sites, and remote tables. For more details, see Indexing and searching external content in AI Search.

Control access to searchable content using search sources

A search source defines a subset of indexed content that users can search using a search profile. Create search sources by applying filter conditions to content from indexed sources.

Search administrators link search sources to search profiles, enabling precise control of the content that users can search. For details on creating search sources, see Search sources in AI Search.

Define search experience settings in search profiles

Search profiles define search sources and settings for linguistic search query features. Each search profile represents an individual search experience that you want to offer users in a supported ServiceNow AI Platform® application.

Each search profile can include the following settings:

- One or more search sources defining content that users can search using the profile.
- Dictionaries of synonyms, stop words, and typo handling auto-correction terms applied to searches using the profile.
- Genius Result configurations applied to searches using the profile.
- Result improvement rules applied to searches using the profile.

Search administrators create search profiles, link search sources to them, configure their settings, and publish them. For information on creating, configuring, and publishing search profiles, see Search profiles in AI Search.

Enable AI Search in supported ServiceNow AI Platform® applications

Provide multiple search entry points across your organization by enabling AI Search as the search engine for search applications. The base system enables AI Search as the search engine for global and workspace search, Customer Service Management, Now Mobile, Service Portal, and Virtual Agent .

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Search administrators define search application configurations for ServiceNow AI Platform applications. Each configuration links to a search profile defining the search experience for the application. Administrators can configure the application's behavior in the following ways:

- Enable or disable typo handling auto-correction for search queries.
- Configure source facet bucket and facet filters to enable users to refine search results.
- Limit the maximum number of search suggestions and Genius Result cards the application can display for a search.
- Limit the number of search results the application displays on each result page.

To learn more about configuring and enabling AI Search in supported ServiceNow AI Platform applications, see Search application configurations and Enabling and configuring AI Search in ServiceNow AI Platform applications.

Provide users with powerful and flexible search

AI Search includes search features that help users find the answers they need.

Powerful query language

Query for indexed terms and phrases. Control query logic with Boolean operators. Match a range of indexed terms using wildcard operators.

For a complete guide to supported query language syntax and operators, see AI Search query language.

Auto-complete search queries

Display suggestions in the input field as users compose their searches. Suggestions include recent and popular search queries and results as well as entries from the user's personal search history.

Auto-complete suggestions are linguistic features that search administrators configure in search application configurations. For more information on auto-complete suggestion type settings, see Configure an auto-complete suggestion type in an AI Search application configuration.

Language-sensitive lemma and Unicode normalization of search query terms

Support natural language search by expanding search query terms to match alternate inflections and forms. AI Search supports language-specific lemma normalization for Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, French - Canada, German, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmål), Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish. It supports Unicode normalization for content in all ServiceNow AI Platform® languages.

Lemma and Unicode normalization are linguistic features that don't require configuration. For more details on normalization behavior, see Lemma and Unicode normalization.

Expand search query terms using configurable synonyms

Improve search recall by configuring language-specific dictionaries of terms with equivalent meanings or usage. When a search query includes any of these terms, AI Search expands it to include all equivalent terms, providing users with a more natural search experience.

Synonyms are linguistic features that search administrators configure in search profiles. For details on configuring synonyms and synonym dictionaries, see

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Synonyms. AI Search supports synonym dictionaries for Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, French - Canada, German, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmål), Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish.

Remove excessively frequent search terms using configurable stop words

Increase search precision by configuring language-specific dictionaries of frequently appearing terms that dilute search relevancy. AI Search removes these stop words from user search queries to exclude irrelevant results.

Stop words are linguistic features that search administrators configure in search profiles. For details on configuring stop words and stop word dictionaries, see Stop words. AI Search supports stop word dictionaries for Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French - Canada, French, German, Hebrew, Hungarian, Italian, Norwegian (Bokmål), Polish, Portuguese, Russian, Spanish, Swedish, and Turkish.

Auto-correct typos in search query terms

Automatically replace misspelled search query terms with spellings found in indexed content. Typo corrections are displayed above search results. Users can choose to repeat the search with their original query terms.

Typo handling auto-correction is a linguistic feature that search administrators configure in search profiles. For details on controlling the set of available auto-correction terms, see Typo handling. AI Search supports derivation of auto-correction terms for Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French - Canada, French, German, Hebrew, Hungarian, Italian, Norwegian (Bokmål), Polish, Portuguese, Russian, Spanish, Swedish, and Turkish.

Generate multi-content synthesized responses

Multi-content source synthesis lets AI Search gather and combine information from any indexed source in your system to provide comprehensive AI-generated responses to your questions.

By default, ServiceNow Otto for AI Search Genius Results and Virtual Assistant pull answers from four source types:

- External Content integrations
- Knowledge Base articles
- Service Catalog items
- Skills

Multi-content source synthesis expands this capability to include any indexed source in your ServiceNow instance, such as:

- Custom tables
- Documents module
- Incidents
- Microsites
- News content

When your administrator activates multi-content source synthesis, Genius Results and Virtual Assistant pull answers from all these sources, giving you faster, more complete responses in a single result.

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Administrators can activate and configure multi-source content synthesized sources. See Configure multi-content synthesized sources for more information.

Enable search result refinement filters

AI Search enables users to refine searches by filtering their results. Use source facet buckets to filter results by source, or select facets to apply filters dynamically generated from the result set.

Filter results by source using source facet buckets

Display pre-defined categories that users can select to immediately exclude unwanted search results.

Search administrators configure source facet buckets in search application configurations. For details on available settings, see Configure source facet buckets in an AI Search application configuration.

Filter results dynamically using facets

Display field value-based filter selections generated dynamically from the search query's result set. Users can select multiple facet values to narrow their area of focus. Facets only display when they produce results, so users don't need to worry about dead ends.

Search administrators define facets in search application configurations. For details on creating and configuring facets, see Create a facet in an AI Search application configuration.

Display relevant and actionable search results

AI Search provides users with clear answers for their search queries.

Hit highlighting

AI Search highlights search query terms that appear in search results. This highlighting enables users to see which query terms contributed to record matches.

Display the most relevant results first with machine learning relevancy

AI Search orders search results in decreasing order of relevancy. Machine learning automatically tunes and improves search result relevancy scoring for each search profile based on aggregated user interaction data and A/B testing evaluations of live search traffic.

Machine learning relevancy is automatically enabled and not configurable, though search administrators can exclude specific search profiles from automatic relevancy-model updates. For more details on automatic relevancy score tuning, see Machine learning relevancy in AI Search.

Display the best answers as actionable Genius Result cards

Configure Genius Results to analyze search query intent and put the best answers first. Search users can read a Knowledge article, view a user's profile or organization chart, or request a Catalog Item directly from a Genius Result answer card.

Search administrators can link Genius Results to search profiles, modify their settings, and create new configurations. To learn more about Genius Results configurations, see Genius Results.

Boost, block, or promote search results

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Define result improvement rules with configurable trigger conditions. A rule can boost search result relevancy based on the search query or user context, or can block or promote specific results for a particular search query.

Search administrators define result improvement rules in search profiles. For details on creating rules and configuring their boost, block, or promote actions, see Result improvement rules. AI Search supports result improvement rules for Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, French - Canada, German, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmål), Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish search queries.

Content security in AI Search

When indexing records, AI Search preserves their ServiceNow AI Platform® security features. At query time, AI Search filters search query results and displays only records that the user can access.

For more information on how AI Search handles security features for ServiceNow AI Platform table records, see Content security in AI Search.

Internationalization support

AI Search supports indexing and search for all languages offered by the ServiceNow AI Platform®. Search administrators can configure AI Search search features for languages activated in your instance.

For full details on language support in AI Search search features, see Internationalization support for AI Search.

Search features

The following table lists the AI Search search features available for specific ServiceNow AI Platform languages.

Search features supported by language

Language	Search features supported
Arabic, Brazilian Portuguese, Czech, Dutch, English, French, French - Canada, Hebrew, Italian, Polish, Russian, Spanish, and Turkish	• Genius Results • Language identification • Lemma and Unicode normalization • Result improvement rules • Stop words • Synonyms • Typo handling
Danish, Finnish, German, Hungarian, Norwegian (Bokmål), and Swedish	• Genius Results • Language identification • Lemma and Unicode normalization (including decompounding)

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Search features supported by language (continued)

Language	Search features supported
	• Result improvement rules • Stop words • Synonyms • Typo handling
Japanese, Simplified Chinese, and Traditional Chinese	• Language identification (including text-region and search-term identification) • Lemma and Unicode normalization • Result improvement rules • Stop words • Synonyms
Korean	• Genius Results • Language identification • Lemma and Unicode normalization (including decompounding) • Result improvement rules • Stop words • Synonyms
All other ServiceNow AI Platform languages activated in your instance	• Unicode normalization • Result improvement rules • Stop words • Synonyms

Translated content search

By default, AI Search only returns results for records with translated content, such as knowledge articles, that are in the user's ServiceNow AI Platform session language. You can modify this default behavior in the following ways:

Assign Knowledge article search languages by country

Improve multilingual search recall by defining a set of Knowledge article search languages for each user country. User searches can match Knowledge articles in any of the search languages specified for their country as well as in the language associated with their ServiceNow AI Platform session.

Configure globally searchable knowledge articles

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Define an encoded query to match knowledge articles that you want to make searchable regardless of the user's session language.

Configure a fallback language

Set a fallback language for the user's session language. AI Search returns translated content results from the selected fallback language as well as the user's session language.

Enable a global fallback locale for translated content

Configure a global fallback locale to use for all translated content searches. AI Search returns translated content results from the global fallback locale's language as well as the user's session language.

> **Note:** The global fallback locale works best if you need to make all English-language records globally searchable.

Use AI Search for global search and configurable workspace search in Next Experience

AI Search is the default search engine for Unified Navigation searches in Next Experience, including global search and configurable workspace search.

Search administrators can configure global search and configurable workspace search settings using the AI Search for Next Experience application.

> **Note:** The AI Search for Next Experience application is automatically installed and enabled in new Brazil instances. If you upgrade to Brazil from a previous release, your administrators can manually install and enable the application.

For details on AI Search for Next Experience, including configuration steps and a usage guide, see AI Search for Next Experience.

Deflect incidents in Service Portal with the AI Search Assist widget

Improve incident deflection for Service Portal users by displaying the most relevant search results within a record producer.

AI Search Assist can help an agent or user find the most relevant items in a search on your portal. For example:

- An agent working on an Incident record can use AI Search Assist to find and attach knowledge articles, order a catalog item on behalf of the caller, or search for an article and link it to a related incident or problem.
- A user creating an Incident via the Service Portal can see related Catalog Items that they can order. The user can also view related knowledge articles to help them resolve the issue on their own without involving the service desk operators.

AI Search Assist helps with incident deflection for the following areas:

- Incident record producers: Deflect incidents by helping end users resolve issues before they raise an incident.
- Incident forms: Help service desk staff resolve incidents quickly by providing relevant knowledge.
- Incident email notifications: Help end users resolve their incidents themselves without requiring manual intervention from service desk staff.

To learn more about configuring and using the AI Search Assist widget in Service Portal, see AI Search Assist record producer integration for Service Portal.

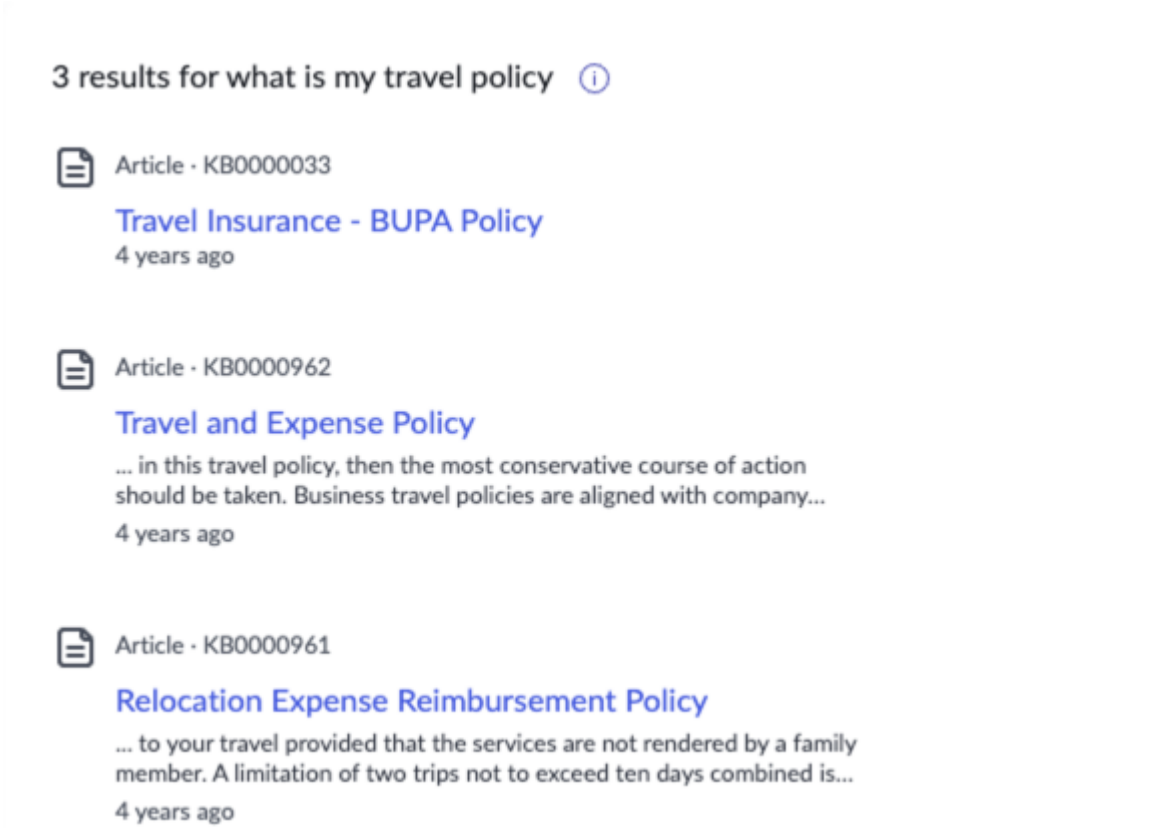
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Search result disparities between AI Search and ServiceNow Otto® search features

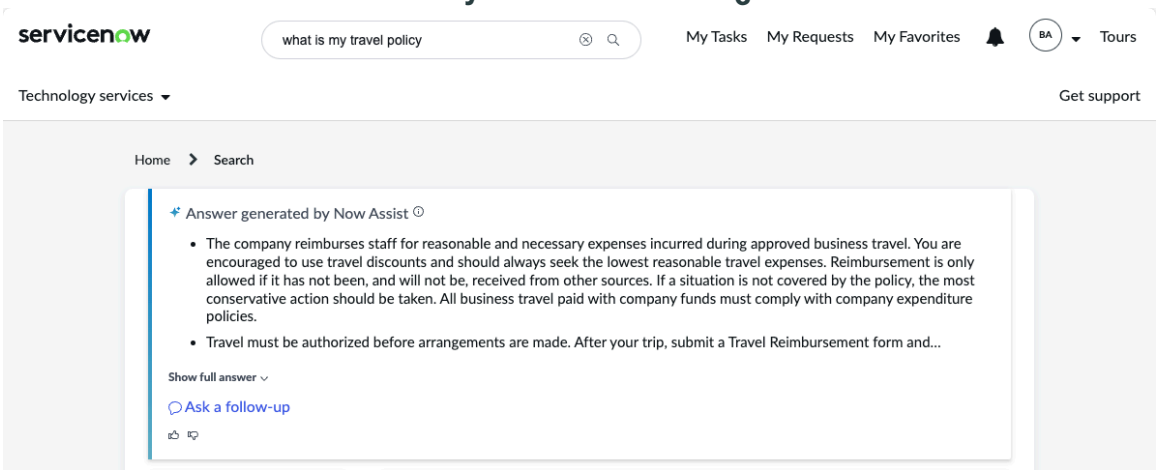
The ServiceNow AI Platform® offers a variety of search tools, which may return different answers for the same or similar searches. This disparity in results is expected. It occurs because each tool uses a different approach and architecture to find results and generate answers that match your search.

As an example of the same search returning different answers in different search tools, consider these results that might be displayed to a user searching for `what is my travel policy`:

Search results from AI Search in Employee Center

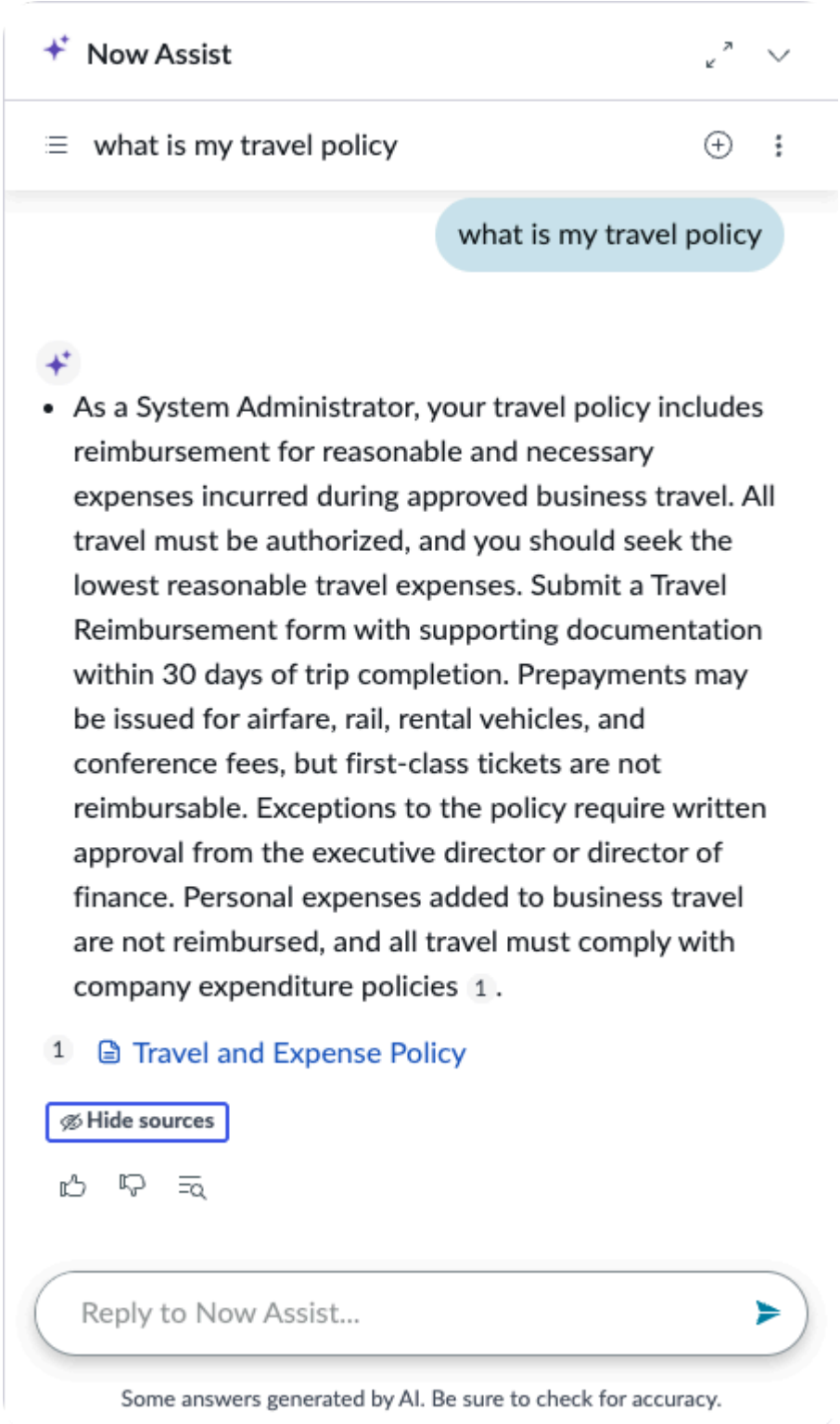


Genius Result answer from Summary Genius Result configuration



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Chat answer from ServiceNow Otto for Virtual Agent



In this example, each search tool returns a different answer even though the user's search (or question) is the same in all three tools. This is expected behavior, since the search tools all handle searches differently.

AI Search

The AI Search engine uses keyword search, meaning that it looks for the best matches for your search terms in its indexed source data. Search features such as lemma and Unicode

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normalization, synonyms, stop words, and typo handling may modify the set of terms that AI Search considers matches for your search, but the matching is always done on a per-term basis.

Keyword search should return consistent results for the same search until your source data is updated. Machine learning relevancy can affect the exact order in which your results appear over time, though, so even if your data doesn't change, your search may not return exactly the same result set today as it did the previous month.

ServiceNow Otto Genius Results

The ServiceNow Otto Genius Result configurations offered in ServiceNow Otto for AI Search use a hybrid search mode. This mode blends keyword search with semantic vector search to find results in the AI Search index based on the intention and meaning of your search as well as on the best term matches.

The most relevant matching results are merged into a prompt that's sent to a large language model (LLM) for answer generation. Because LLMs aren't deterministic, they don't always produce the same output even when given the same input. As a result of the non-deterministic behavior of the LLM, ServiceNow Otto Genius Results are likely to return varying results for the same search, even when submitted at the same time.

Note: For more information on how LLMs introduce variations into their results, see Discrepancies when using different AI search tools.

Between the non-deterministic LLM behavior and the difference in search matching modes, ServiceNow Otto Genius Result answers can be expected to vary significantly from results returned by AI Search for the same search terms, even when using the same search configuration in both tools. This variance is expected because the two search tools take such different approaches when finding and generating answers for your search.

ServiceNow Otto for Virtual Agent

ServiceNow Otto for Virtual Agent uses hybrid search to find matching results in the AI Search index, like the ServiceNow Otto Genius Result configurations do.

Unlike those Genius Result configurations, however, ServiceNow Otto for Virtual Agent has its own agentic AI back-end architecture for generating responses. This architecture doesn't rely on sending a single prompt to the LLM for answer creation the way the ServiceNow Otto Genius Result architecture does.

Because of this architectural difference, results from ServiceNow Otto for Virtual Agent searches can vary from those returned by ServiceNow Otto Genius Results, even when processing the same search and using the same search configuration. Similarly, ServiceNow Otto for Virtual Agent results may vary from the results returned by AI Search keyword searches.

Note: If you're seeing different results for the same search in ServiceNow Otto for Virtual Agent than you are in AI Search and ServiceNow Otto Genius Results, it's worth checking that your ServiceNow Otto for Virtual Agent chat assistant uses the same search configuration as your portal's search field does. For details on copying an existing search configuration to a chat assistant, see Assign search sources to a chat assistant.

As previously described, using the same search configuration in the portal and your chat assistant doesn't guarantee that you will see exactly the same search results in ServiceNow Otto for Virtual Agent as you see in the portal using AI Search, but it does remove one possible source of difference.

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Summary of differences between search tools

The following table summarizes some of the key differences between AI Search, ServiceNow Otto Genius Results, and ServiceNow Otto for Virtual Agent.

Search tool	Search mode	Interaction	LLM usage
AI Search	Keyword search	Query-based (search field)	None
ServiceNow Otto Genius Results	Hybrid (blend of keyword and semantic vector) search	Query-based (search field)	Most relevant search results sent to LLM in a single prompt for answer generation
ServiceNow Otto for Virtual Agent	Hybrid (blend of keyword and semantic vector) search	Conversation-based (chat)	Agentic AI which maintains conversational context when submitting prompts to LLM

Related topics

- Lemma and Unicode normalization
- Synonyms
- Stop words
- Typo handling
- Machine learning relevancy in AI Search
- Semantic vector search in AI Search
- Hybrid search in AI Search
- Summary Genius Results
- Knowledge base articles Genius Results
- Actions Genius Results

Configuring AI Search

Plan and configure your AI Search implementation.

AI Search configuration overview

Configuration stage	Description
Assign roles to AI Search administrators and users	Assign the ais_admin role to users who need to create, read, update, and delete content indexing and search settings for AI Search. Assign the ais_high_security_admin elevated privilege role to users who need to access High Security settings for AI Search. Assign the search_application_admin to users who need to create, read, update, and delete search application configurations.
Define indexed sources	Create and configure an indexed source for each ServiceNow AI Platform® table that has content you want to make searchable. Index source tables to add their searchable content to the AI Search index.

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Configuration stage	Description
	The base system includes pre-configured indexed sources for the Catalog Item, Knowledge, and User tables.
Define search sources	Apply filter conditions to indexed sources to define search sources that users can access in your search experiences. The base system includes pre-configured search sources that reference the default indexed sources.
Define search profiles	Create and publish a search profile for each distinct search experience that you want to offer in search applications. Specify the data that users can search by linking search sources to the search profile. Control search behavior by configuring synonyms, stop words, typo handling settings, Genius Results, and result improvement rules. The base system includes pre-configured search profiles for use with Service Portal, Now Mobile, and the AI Search Assist Service Portal widget.
Define search application configurations	Create a configuration for each ServiceNow AI Platform application that supports AI Search. Select a search profile for the application to use. Configure application-specific search settings. The base system includes pre-configured search application configurations for Service Portal, Virtual Agent, and the AI Search Assist Service Portal widget.
Enable and configure AI Search in ServiceNow AI Platform applications	Specify AI Search as the search engine in supported ServiceNow AI Platform applications. Select a search application configuration for each application to use and configure available search UX settings.
Create a custom search matcher for global search	Optionally configure exact-match global searches that only match results from a specified column (field) on a particular ServiceNow AI Platform table.

Using guided setup to implement AI Search

Guided setup provides a sequence of tasks that help you configure AI Search on your ServiceNow instance. To open AI Search guided setup, navigate to **All** > *AI Search* > **Guided Setup**.

For more information about using the guided setup interface, see Using guided setup.

Assign roles to AI Search administrators and users

Grant users the ais_admin, ais_external_content, ais_high_security_admin, and search_application_admin roles so they can configure and manage settings and content for AI Search and search applications.

Before you begin
Role required: admin

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About this task

Users with the following roles can access and configure settings and content for the AI Search application.

Role	Description
AI Search administrator [ais_admin]	Manages configuration settings for the AI Search application, including the following: • Creates, reads, updates, and deletes indexed sources • Creates, reads, updates, and deletes search sources • Creates and deletes mappings between search sources and search profiles • Creates, reads, updates, and deletes search profiles • Creates, reads, updates, and deletes synonym and stop word dictionaries • Creates and deletes mappings between dictionaries and search profiles • Reads and updates typo handling auto-correction dictionaries linked to search profiles • Creates, reads, updates, and deletes Genius Result configurations • Creates and deletes mappings between Genius Result configurations and search profiles • Creates, reads, updates, and deletes result improvement rules • Creates and deletes mappings between result improvement rules and search profiles
AI Search high security administrator [ais_high_security_admin]	Accesses High Security settings for AI Search, including the following: • Bypasses all search filters from search sources and content security in the Search Preview UI, viewing all search query results available in the AI Search index • Reads external content user mapping import history records • Reads indexed content item records in the index inspector tool for External Content Connectors This is an elevated privilege role. Elevated privilege roles aren't assigned to users or groups, and must be used by elevation. For more information on elevated privilege roles, see Elevated privilege roles. To learn about elevation, see Elevate to a privileged role. The Instance Security Center **Users with High Privilege Roles** user metric displays the count of users assigned this role. For more details, see .
Search application administrator [search_application_admin]	Creates, reads, updates, and deletes search application configurations for Zing and AI Search.

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Role	Description
	This role includes the ais_admin and personalize_dictionary roles.
AI Search external content API user [ais_external_content]	Accesses endpoints for AI Search external content APIs, including the following: • Feeds external documents for AI Search to index as search results, or deletes records for external documents from the index, using the External Content Ingestion API. • Imports user mappings for external content security using the AI Search External User Mapping API. Assign this role to non-interactive users and integration users who require access to external content API endpoints. For more information on non-interactive users, see Non-interactive sessions. For details on integration users, see Mark service accounts as internal integration users. Users with the admin role don't need this role to access external content API endpoints.

Assign these roles to users and groups to enable them as search administrators or external content API users for AI Search.

Procedure

- Assign a role to a user
- Assign a role to a group

Activate the Platform Multimodal Service plugin

Enable automatic generation of searchable descriptive captions for images, tables, charts, and other visual elements found in indexed attachments.

Before you begin
Role required: admin

About this task
AI Search offers optional automatic multimodal generation of searchable descriptive captions for images, tables, charts, and other visual elements found in attachments that you index for search. These generated captions improve search recall, allowing you to find attachments using search keywords that match generated terms.

As an example, an attachment might include an image that yields the generated caption `man on bicycle`. Searches for `man` or `bicycle` can match the caption terms. Such searches return the attachment as a search result even if its text doesn't otherwise contain either of those terms.

To use the automatic multimodal caption generation feature, you must activate the Platform Multimodal Service (com.glide.platform_mm_service) plugin.

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Note: Multimodal captioning is only supported for Knowledge [kb_knowledge] table records from the Knowledge Table indexed source and for content retrieved by external content connectors.

The multimodal captioning feature has been validated and tested for English-language content. For content in other languages, it may function but hasn't been evaluated for caption quality or accuracy. Multimodal captioning for non-English content is not currently supported.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Platform Multimodal Service (com.glide.platform_mm_service) plugin 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.

What to do next

With the plugin activated, administrators have additional configuration options available, as follows:

- AI Search administrators can activate multimodal captioning for individual AI Search indexed sources. For details on this procedure, see Activate multimodal captioning for attachments from an indexed source.
- Connector administrators can activate multimodal captioning in the crawl settings for an external content connector. To learn about configuring crawl settings for external content connectors, see Configuring crawl settings for external content connectors.
- AI Search administrators can select the VLM (visual learning model) provider and model used by the Platform Multimodal Service. For details on this process, see Configure multimodal captioning for AI Search.

Indexed sources in AI Search

Indexed sources designate ServiceNow AI Platform® tables and external document sets with alphanumeric text and string field content that you want to make searchable. AI Search ingests text and string fields from table records or external documents and stores their searchable alphanumeric content in its search index.

For instructions on creating an indexed source, see Create an indexed source.

Indexed source types

AI Search supports the following indexed source types.

Internal indexed source

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An internal indexed source retrieves alphanumeric content and metadata from text and string fields on ServiceNow AI Platform records. It includes a unique name and a reference to a ServiceNow AI Platform table with records that you want to make searchable. AI Search extracts and indexes searchable alphanumeric content and metadata from text and string fields on records in this table and in any of its child tables that you configure for indexing.

AI Search excludes some ServiceNow AI Platform tables from indexing. You can't define indexed sources for these excluded tables or their derived tables. For a list of excluded tables, see ServiceNow AI Platform tables excluded from AI Search indexing.

You can't index remote tables with internal indexed sources. To index content from a remote table, create an external indexed source.

External indexed source

An external indexed source retrieves alphanumeric content and metadata from text and string fields of documents in an external repository or a remote table. It includes a unique name and a reference to an external content schema table instead of a ServiceNow AI Platform table. For more details on configuring indexed sources for external content, see Indexing and searching external content in AI Search.

Note: AI Search doesn't index Unicode characters from the High Surrogate Area (code units in the range U+D800 to U+DBFF). Characters from this range are replaced with spaces during indexing.

Search performance considerations for indexing

Search performance for AI Search is affected by several customer-controlled factors related to content indexing. Changes to these factors can impact search performance as follows.

Index size

Indexing more content produces a larger index, which takes more time to search. Avoid indexing content that isn't needed for search.

Indexing large source tables, such as the Task [task] table and tables that extend it, can add significant numbers of records to the AI Search index.

Number of indexed sources

An index with more indexed sources takes longer to search than one with fewer indexed sources. This is true even if the two indexes are the same size.

Number of indexed fields

Increasing the number of fields you index across your indexed sources makes the system take longer to find search results. This effect is independent of index size and number of indexed sources.

Indexing frequency

The more often your indexed content is synchronized and updated, the more often search will compete with indexing for compute resources, increasing search response time. This is especially pertinent for indexed sources with frequently modified fields.

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Indexed source retention policies and filter conditions

To limit the size of your index and the frequency of index updates, you can define retention policies and filter conditions for your indexed sources.

As an example, you can define a retention policy for an indexed source to exclude records that are more than two years old. This policy keeps your search results more current and reduces the size of your index. Changes made to the excluded records don't trigger index updates, so this policy also reduces indexing frequency.

Similarly, you can define a filter condition for an indexed source that excludes source table records with a specific status, such as Open. This filter condition reduces the number of records indexed from the source table, which in turn reduces the total amount of data you index. Excluding open records that have frequent updates also reduces indexing frequency.

AI Search also uses your retention policy and filter condition settings to automatically purge stale records from the index, reducing its size.

To learn more about creating retention policies and filter conditions for your indexed sources, see Indexed source retention policies and filter conditions.

Note: Retention policies are required for indexed sources that index records from the Task [task] table or tables that extend it. They are optional for other indexed sources.

Indexed source attributes and field settings

You can configure attributes and field settings for an indexed source to control indexing behavior for source records. Attributes control the indexed source's behavior at the record level, while field settings define its behavior for individual fields on indexed records. For more information, including lists of available attributes and field settings, see Indexed source attributes for AI Search and Field settings for AI Search.

Indexing content from an indexed source

After you define an indexed source, AI Search begins automatically indexing to reflect changes to records in the selected source table and its specified child tables. The results of all record create, update, and delete operations in these tables are reflected in the search index. AI Search doesn't index content from unmodified records in these tables until you perform a full table index. For more information on indexing behavior, including steps for full table indexing, see Indexing content from AI Search indexed sources.

Note: The pre-configured indexed sources included with AI Search only index content from text and string fields on source records. When searching records from these indexed sources, you can use numeric fields to facet or filter your search results, but you can't find records using their numeric field values. To search on a record's numeric field values, copy them into a text or string field so they can be indexed.

Indexing content from knowledge articles

When indexing content from records in the Knowledge [kb_knowledge] table, AI Search defaults to including content defined in knowledge blocks. Administrators can override this default behavior and configure AI Search to exclude content from knowledge blocks when indexing knowledge articles. For details on making this change, see Exclude knowledge block content from the AI Search index.

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Multiple indexed sources for the same ServiceNow AI Platform table

You can't create more than one indexed source for a single ServiceNow AI Platform table. However, plugins and applications may define duplicate indexed sources for a ServiceNow AI Platform table. For example, the base system includes an indexed source defined for the User [sys_user] table, but a plugin or application might define a second indexed source for this table under a different name.

Note: Only one indexed source can be active at a time for a given ServiceNow AI Platform table. The system makes duplicate indexed sources for a table inactive by default. Before you can make one of these duplicate sources active, you must edit the currently active source and make it inactive. AI Search only indexes content and metadata from active indexed sources.

Create an indexed source

Define an indexed source to make content and metadata from ServiceNow AI Platform® table records searchable using AI Search.

Before you begin

Role required: ais_admin

About this task

When you create an indexed source, you specify a ServiceNow AI Platform table. AI Search indexes alphanumeric content and metadata from text and string fields found on records in the specified source table, making that content and metadata available for inclusion in search sources.

Note: AI Search doesn't index Unicode characters from the High Surrogate Area (code units in the range U+D800 to U+DBFF). Characters from this range are replaced with spaces during indexing.

By default, AI Search indexes alphanumeric content and metadata from all text and string fields found on records in the specified source table. You can limit which records are indexed by configuring a retention policy and filter conditions for the indexed source. For more information about retention policies and filter conditions, see Indexed source retention policies and filter conditions.

Note: Retention policies are required for indexed sources that index records from the Task [task] table or tables that extend it. They are optional for other indexed sources.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Select **New**.
3. On the Indexed Source form, fill in the fields.

   For a description of the field values, see Indexed Source form.

   Note: You can't create more than one indexed source for a single ServiceNow AI Platform table.

4. Select **Submit**.
   The new indexed source appears in the AI Search Indexed Sources list with the **State** set to **New**. If the new indexed source requires manual indexing, an informational message and an alert triangle icon ⚠ appear.

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5. **Optional:** To configure indexing for child tables of the selected source table, open the new indexed source and create a related list record for each child table:

   a. In the Child Tables related list, select **New**.

   b. On the Child Table form, fill in the fields.
   For a description of the field values, see Child Table form.

   c. Select **Submit**.
   The new child table appears in the Child Tables related list.

What to do next

To control how your new indexed source processes source records and fields during indexing, configure its indexed source attributes and field settings. For more information, see Indexed source attributes for AI Search and Field settings for AI Search.

To make content from source records searchable, perform a full table index for your new indexed source. For details on this procedure, see Perform a full table index or reindex for a single AI Search indexed source.

Indexed source retention policies and filter conditions

To limit the set of records indexed from source tables, you can configure retention policies and filter conditions for your indexed sources. AI Search also uses these settings to automatically purge stale records from the index, optimizing search performance.

Indexed source retention policies

Indexing large source tables, such as the Task [task] table and tables that extend it, can add significant numbers of records to the AI Search index. To limit the set of source table records indexed based on the time since they were last updated, select a retention policy for your indexed source.

AI Search only indexes source records updated within the time period defined for the retention policy. For example, if you select a two-year retention policy, AI Search excludes source records that were last updated more than two years ago.

When the time since a source record's last update exceeds the limit from the indexed source's retention policy, AI Search marks the corresponding indexed record as stale.

Note: Retention policies are required for indexed sources that index records from the Task [task] table or tables that extend it. They are optional for other indexed sources.

Indexed source filter conditions

To limit the set of records indexed from a source table, define filter conditions for your indexed source. AI Search only indexes records that match all defined filter conditions.

Adding filter conditions can reduce the number of records indexed from a source table and reduce indexing frequency. As an example, if you exclude frequently updated open records based on their status, AI Search doesn't index data from those records. Excluding these records reduces your index size and the compute resources needed to index changes from the source table.

When a source record no longer satisfies the indexed source's filter conditions, AI Search marks the corresponding indexed record as stale.

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Note: Adding filter conditions doesn't reduce the number of AI Search indexing events generated for the indexed source. The system generates indexing events for every change to an indexed source table, unless the change is to a column that has a *no_text_index* field setting defined in the indexed source. The filter condition can reduce the number of records indexed for each event, however.

Purging stale records

AI Search automatically purges stale records from the index daily. Users with the admin role can manually purge stale records. For details on this procedure, see Purge stale records from the AI Search index.

Purge stale records from the AI Search index

Execute a scheduled job to delete stale records from the AI Search index.

Before you begin

Role required: admin

Note: If the *glide.script_processor.admin* system property's value has been changed from the default value, you need the role specified by that property value. For details on this property value and its effects, see Restrict access to background script.

About this task

If either of these conditions is satisfied for a record in the AI Search index, AI Search marks the record as stale.

- The time since the record's last update exceeds the age limit from its indexed source's retention policy
- The record no longer satisfies the filter conditions defined for its indexed source

AI Search automatically purges stale records from the index daily. Administrators can purge records manually by running a background script.

For more information on running background scripts, see Background scripts.

Procedure

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

   Note: If the *glide.script_processor.admin* system property's value is set to security_admin, you must elevate to that privileged role to access this module. For more information on elevating privileges, see Elevated privilege roles.

2. In the **Run script (JavaScript executed on server)** text field, enter one of the following background scripts.
   - To purge stale records indexed from a specific table, enter this script, replacing `TABLE_NAME` with the name of your chosen table:

     ```
     new sn_ais.IndexEvent().purgeFilteredDocuments('TABLE_NAME');
     ```

     For example, to purge all stale records indexed from the Knowledge Table indexed source, replace `TABLE_NAME` with `kb_knowledge` in the script.
   - To purge all stale records in the index, regardless of which table they were indexed from, enter this script:

     ```
     new sn_ais.IndexEvent().purgeFilteredDocuments();
     ```

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3. Select **Run script**.
   The script creates an event that the index handler processes, so the script completes without blocking on completion of the purge job.

Result
The background script executes, deleting stale records from the AI Search index.

Indexed source guardrails

Reduce index size and increase search performance with guardrails that limit the number of task and alert source records indexed from indexed sources.

Guardrails overview

The Task [task] and Alert [em_alert] tables and their child tables contain large numbers of records. Indexing the full set of records from these tables for search increases the size of the AI Search index and can impact performance for indexing and search.

To reduce index size and preserve indexing and search performance, AI Search applies guardrails when indexing records from these tables. These guardrails limit the maximum number of records that can be indexed from the Task and Alert tables.

Guardrails are enabled in the base system for the Task and Alert tables and their child tables. By default, AI Search indexes a maximum of 10 million records for each of these tables.

How guardrails work

When guardrails are enabled, AI Search first checks the Guard Rail Limit for Indexed Data Sources [`ais_guard_rail_limit_data_source`] table to see whether a record exists for the indexed source (defining the maximum number of records to index for that indexed source). If no table entry exists, AI Search checks the `glide.ais.ingestion.guard_rails_enabled_datasources` system property value to see whether a limit is defined there for the indexed source. If no limit is found in either place, AI Search doesn't apply guardrail limits to the indexed source.

Guardrail limits on the number of records indexed are applied after the set of source records is limited by the indexed source's filter conditions and retention policy. For details on indexed source filter conditions and retention policies, see Indexed source retention policies and filter conditions.

AI Search indexes the most recently modified records from the indexed source table. If indexing causes the record count for the table to exceed the guardrail limit, AI Search discards older records from the index to make room for the newer records.

Modifying guardrail settings

A ServiceNow® employee can modify guardrail settings for your instance as follows:

- Override the base system record-count limits for the Task and Alert table guardrails
- Create custom guardrails to limit the maximum number of records indexed from other source tables
- Disable guardrails

Note: Changes to your instance's guardrail settings may take up to 24 hours to be reflected in AI Search's indexing behavior.

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Search performance considerations for indexing

Search performance for AI Search is affected by several customer-controlled factors related to content indexing. Changes to these factors can impact search performance as follows.

Index size

Indexing more content produces a larger index, which takes more time to search. Avoid indexing content that isn't needed for search.

Indexing large source tables, such as the Task [task] table and tables that extend it, can add significant numbers of records to the AI Search index.

Number of indexed sources

An index with more indexed sources takes longer to search than one with fewer indexed sources. This is true even if the two indexes are the same size.

Number of indexed fields

Increasing the number of fields you index across your indexed sources makes the system take longer to find search results. This effect is independent of index size and number of indexed sources.

Indexing frequency

The more often your indexed content is synchronized and updated, the more often search will compete with indexing for compute resources, increasing search response time. This is especially pertinent for indexed sources with frequently modified fields.

Indexed source retention policies and filter conditions

To limit the size of your index and the frequency of index updates, you can define retention policies and filter conditions for your indexed sources.

As an example, you can define a retention policy for an indexed source to exclude records that are more than two years old. This policy keeps your search results more current and reduces the size of your index. Changes made to the excluded records don't trigger index updates, so this policy also reduces indexing frequency.

Similarly, you can define a filter condition for an indexed source that excludes source table records with a specific status, such as Open. This filter condition reduces the number of records indexed from the source table, which in turn reduces the total amount of data you index. Excluding open records that have frequent updates also reduces indexing frequency.

AI Search also uses your retention policy and filter condition settings to automatically purge stale records from the index, reducing its size.

To learn more about creating retention policies and filter conditions for your indexed sources, see Indexed source retention policies and filter conditions.

Note: Retention policies are required for indexed sources that index records from the Task [task] table or tables that extend it. They are optional for other indexed sources.

Semantic index configuration for indexed sources

The AI Search generalized RAG (Retrieval-Augmented Generation) framework offers a streamlined way to configure semantic indexing settings for records indexed from ServiceNow AI Platform® tables.

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Semantic index configuration overview

AI Search admins can configure semantic indexing settings for an indexed source. These settings specify how AI Search indexes content from the indexed source for use with semantic vector search. The group of semantic indexing settings for a particular indexed source is called a semantic index configuration.

Each semantic index configuration includes the following elements:

Indexed source

A reference to an existing indexed source with field values or attachments that you want indexed for semantic vector search.

For more information on indexed sources, see Indexed sources in AI Search. To learn more about semantic vector search, see Semantic vector search in AI Search.

Embedding models

A list of one or more embedding models for the system to use when indexing content from the indexed source for semantic vector search.

An embedding model specifies how information found in your indexed content is encoded in a vector map. Semantic vector search uses the encoded information from the vector map to find search results that have meanings similar to those of your search terms.

Chunking strategy and related parameters

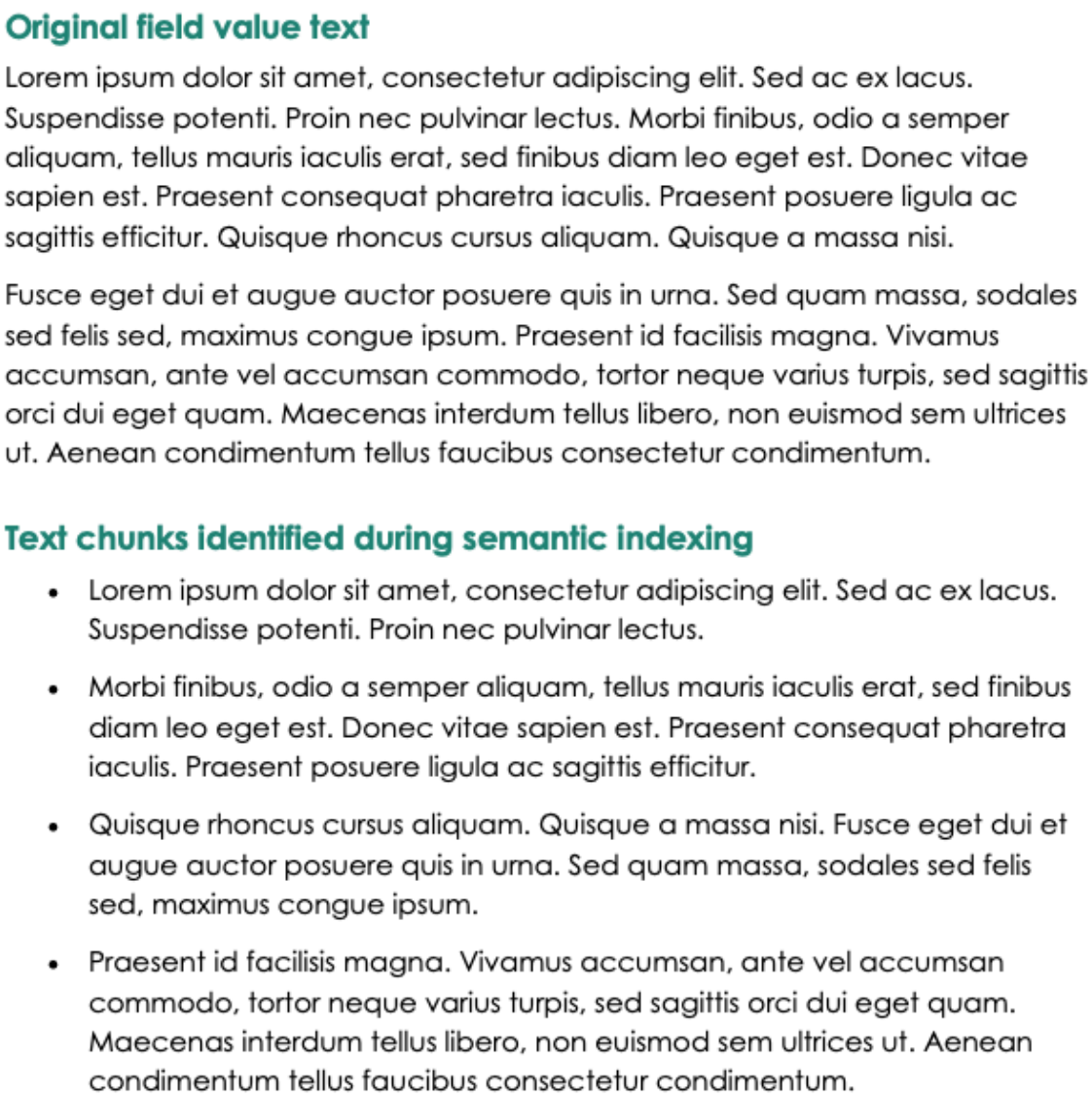
A chunking strategy and related parameter values that together determine how content from the indexed source's selected fields and attachments is handled during indexing for semantic vector search.

Chunking is the process of breaking text down into smaller portions (called chunks) during indexing. By chunking your content, AI Search reduces search load and improves context and relevancy for semantic vector matches.

The following image shows how a two-paragraph block of sample field value text might be broken into chunks for semantic indexing. As shown, chunks can

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contain multiple sentences and may span paragraph breaks found in the original



text.

Semantic index fields

References to one or more semantic index fields that provide semantic indexing settings for content from the indexed source.

Each semantic index field defines semantic indexing settings for a single field from the indexed source table, or for attachments from that table. You can specify the order in which semantic index fields are evaluated when indexing content from the indexed source for semantic vector search.

Note: You can define multiple semantic index configurations for an indexed source, but each configuration after the first imposes an additional performance cost at indexing time.

Activating semantic index configuration

Semantic index configuration functionality is provided by the AI Search Semantic Controller plugin (com.glide.ais.semantic_search). This plugin is automatically activated for your instance when you install any ServiceNow Otto® application.

You can verify whether semantic index configuration is activated by navigating to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources** and selecting an indexed source record. If

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you see the Semantic Index Configuration related list on the Indexed Source form, the plugin is activated.

Configure semantic indexing settings for an indexed source

Specify the semantic indexing configuration settings you want to apply when AI Search indexes records from your indexed sources.

Before you begin

The AI Search Semantic Controller plugin (com.glide.ais.semantic_search) must be active on your instance. This plugin is automatically activated when any ServiceNow Otto® application is installed on your instance.

Role required: ais_admin

About this task

As an AI Search admin, you can perform this task to choose the fields from and indexed source's table that you want the system to index for semantic vector search. You can also choose the embedding models and content chunking strategy to use for semantically indexed content from the source table.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Select the indexed source that you want to configure semantic indexing settings for.
   The selected indexed source opens in Indexed Source form view.
3. In the Semantic Index Configuration related list, select **New**.

   Note: If you don't see the Semantic Index Configuration related list on the Indexed Source form, check with your administrator to make sure that your instance has at least one ServiceNow Otto application installed. Installing any ServiceNow Otto application activates the AI Search Semantic Controller plugin (com.glide.ais.semantic_search), which is required for semantic index configuration.

4. On the Semantic Index Configuration form, fill in the fields.
   For a description of the field values, see Semantic Index Configuration form.
5. Select **Submit**.
   If you're updating an existing semantic index configuration, select **Update** instead.
   The Semantic Index Configuration form reloads and displays your selected field values and the Semantic Index Fields related list.
6. In the Semantic Index Fields related list, create a record for each field with content that you want to include in the semantic index for the specified indexed source.

   a. Select **New**.

   b. On the Semantic Index Field form, fill in the fields.
   For a description of the field values, see Semantic Index Field form.

   c. Select **Submit**.
   The new semantic index field record appears in the Semantic Index Fields related list.

What to do next

After changing the semantic index configuration settings for an indexed source, you must reindex content from that indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.

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Note: Indexing content for semantic vector search is typically slower than indexing for keyword search. Your indexed source may take more time to reindex once you have defined a semantic index configuration for it.

AI Search RAG (Retrieval-Augmented Generation)

The AI Search RAG (Retrieval-Augmented Generation) capability provides a framework that enhances the search accuracy of AI Search results by narrowing the focus of your large language model (LLM) to a specific, contextual data set, instead of the vast, general data it was trained on.

AI Search RAG overview

RAG (Retrieval Augmented Generation) technology helps enhance search capabilities of your AI Search application by combining information retrieval with text generation. It includes the following steps:

Indexing

Prepare and organize data to make it searchable. It includes the ais_datasource table and semantic indexing configurations. For more information, see Indexed sources in AI Search.

Searching

Find the most relevant results from the indexed data using a query. It includes RAG retrieval API to run search on indexed data of the search profile, and RAG capability that manages the RAG process, including retriever and re-ranker to deliver relevant results.

Components of AI Search RAG

The AI Search RAG capability orchestrates the complete RAG process using components, such as query rewrite, retriever, and re-ranker to deliver the most relevant results.

- Query Rewrite: Rewrites the complex or long queries into concise, short form to avoid truncation issues with the embedding model's token limit.
- Retriever: Uses the rewritten query to retrieve the most relevant results from indexed sources.
- Re-ranker: Uses LLM to further refine the ranking of retrieved results.
- Final Response: The output of the re-ranker is returned as the final response.

The following diagram shows how AI Search RAG components work together.

The AI Search RAG system works by first organizing data into a searchable format using specific indexing configurations. When a user asks a question, the system processes it and may rephrase the query for better understanding. It then searches for relevant information with the help of retriever and the re-ranker uses AI to arrange them in the most useful order. All of these steps work together under the guidance of a search profile to produce an accurate and context-rich answer for the user.

Embedding model in AI Search RAG

AI Search RAG uses the advanced search methods, such as semantic or vector search to find relevant and more context-oriented information from the configured indexed sources. The semantic search further uses embedding model to retrieve the most relevant data based on the user search query for embedding generation. This retrieved information along with the search query then prompts the LLM model to generate the relevant response.

An embedding model is the engine behind RAG that helps it to search and retrieve the correct information from the indexed sources and embed that information into vector map before sending it to the LLM model. ServiceNow AI Search RAG uses the default ServiceNow

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Embedding (E5) model and it also supports additional third-party embedding models, such as Azure OpenAI Embedding and Gemini Text Embedding. You can also bring your own third-party hosted custom embedding model to create embeddings for your RAG use case.

Activating AI Search RAG (Retrieval-Augmented Generation)

AI Search RAG (Retrieval-Augmented Generation) functionality is provided by the AI Search RAG plugin (sn_ais_rag). This plugin is automatically activated for your instance when you install Generative AI Controller or any ServiceNow Otto® application.

Configuring your embedding model

Connect and configure your external or custom embedding model to enable it generate embeddings.

ServiceNow AI Search RAG application offers a Bring Your Own Model (BYOM) feature that you can use to create your own custom embedding model. It also supports third-party embedding models such as Azure OpenAI Embedding model and Gemini Text Embedding model for generating embeddings. You can use the default connection and credential aliases provided for the Azure OpenAI and Gemini embedding models. These aliases can be configured based on your requirements to authenticate and enable integration between your instance and the selected embedding model.

The end-to-end configuration for your preferred third-party embedding model includes:

- Setting up connection and credentials for third-party embedding model
- Activating the third-party embedding model

The end-to-end configuration for your custom embedding model includes using the BYOM capability. For more information see, Configuring bring your own model (BYOM).

Set up connection and credential alias for third-party embedding model

Set up connection and credential record for your aliases to authenticate an integration between your ServiceNow instance and third-party embedding model.

Before you begin

Role required: admin

About this task

The system provides the default connection and credential alias for Azure OpenAI Embedding model (text-embedding-3-large) and Gemini Text Embedding model (text-embedding-004). Set up these default aliases to manage the secure connection of your ServiceNow instance with either of the embedding model. A connection and credential alias includes the endpoint URL of the models and the login details, such as OAuth token or API keys to tell the system how to connect to these third-party models.

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.
2. Select an alias that you want to set up.
   - To set up the embedding model alias for Azure OpenAI Embedding, select **Azure OpenAI**.
   - To set up the embedding model alias for Google Gemini Text Embedding, select **Google Gemini API**.
3. Create a connection record for your alias.

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Option	Procedure
Update the existing connection record	**a.** In the Connections related list, select a connection from the connection alias list. ▪ Select **Azure OpenAI Connection** for the Azure OpenAI alias. ▪ Select **Google gemini API connection** for the Google gemini API alias. **b.** Update the **Name** and **Connection URL** fields based on your requirement. **c.** Select **Update**.
Create a new connection record	**a.** In the Connections related list, click **New**. **b.** On the form, fill in the fields. For a description of the field values, see **c.** Select **Submit**.

The connection record is created.

4. Create a credential record for your alias.

Option	Procedure
Update the existing credential record	**a.** In the Connections related list, select a connection record from the connection alias list. ▪ Select **Azure OpenAI Connection** for the Azure OpenAI alias. ▪ Select **Google gemini API connection** for the Google gemini API alias. **b.** In the Credentials field, select the Preview this record icon and then select **Open Record**. The API Key Credentials record opens. **c.** Update the **API Key** field. **d.** Select **Update**. **e.** Select **Update**.

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Option	Procedure
Create a new credential record	**a.** In the Connections related list, select a con nection record from the connection alias list. ▪ Select **Azure OpenAI Connection** for the Azure OpenAI alias. ▪ Select **Google gemini API connection** for the Google gemini API alias. **b.** In the Credentials field, select the search icon and then select **New**. **c.** From the list of credentials, select a creden tial type. ▪ To create a credential record for Azure OpenAI alias, select **API Key Creden tials**. ▪ To create a credential record for Google Gemini API alias, select **OAuth 2.0 Cre dentials**. **d.** On the form, fill in the fields. For a description of the field values, see [illegible] or OAuth 2.0 creden [illegible]. **e.** Select **Submit**. **f.** Select **Update**.

The credential record is created.

What to do next

Activate the embedding model to start using it. For more information, see Activate the third-party embedding model.

Activate the third-party embedding model

Activate your preferred embedding model so that your AI Search RAG application knows which model to use for generating embeddings.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** and then enter `ais_semantic_embedding_model.list` in the filter.
2. Select an embedding model from the list of AI Search Semantic Embedding Models.
   The selected AI Search Semantic Embedding Model page opens.
3. Select the **Active** option to turn on the embedding model.
4. Select **Update**.

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5. **Optional:** Select the **Validate** button to run a quick check if everything is setup correctly.

> **Note:** You must validate the embedding model if you make any changes to its configuration.

Result
The preferred embedding model ready to use in the AI Search RAG application.

What to do next
Add your embedding model to the semantic index configuration to enable content ingestion using that model. For more information, see Configure semantic indexing settings for an indexed source.

Configuring bring your own model (BYOM)

As an administrator, you can create your own custom embedding model to use in AI Search RAG application to generate embeddings for semantic indexing.

The end-to end configuration for onboarding a bring your own custom embedding model includes:

1. Create a connection and credential alias for the embedding model and complete its setup. For more information, see Create a connection and credential alias for a custom embedding model.
2. Configure a custom embedding model
3. Set a provider for embedding model
4. Connect your custom embedding model with Generative AI
5. Enable the custom embedding model for semantic indexing
6. Configure semantic indexing settings for an indexed source

Create a custom embedding model

Create your custom embedding model in the Generative AI Model Configuration table so that your AI Search RAG application can use it to generate embeddings for semantic indexing. This setup ensures the model is recognized and properly connected to send and receive requests.

Before you begin
You must create a connection and credential alias for your embedding model. For more information, see Create a Connection & Credential alias

Role required: admin

Procedure
1. Navigate to **All**, and then enter `sys_generative_ai_model_config.list` in the filter to go to the Generative AI Model Configuration [sys_generative_ai_model_config] table.
2. Select **New**.
3. On the form, fill in the fields.

Generative AI Model Configuration

Field	Description
Active	Option to activate the embedding model.
Model	A unique name for your embedding model.

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Field	Description
Domain	Domain you want to associate the model with. For example, AI Search RAG.
External	Option to make this model available for external use.
Connection and Credential Alias	Connection and credential alias that you created on your own for the custom embedding model.
Supported Language	Languages supported for this model. By default, the supported language is English.
Model Type	The type of model used for a specific purpose. For example Embedding Model.
Vector Dimension	The value shouldn't exceed 4096. This field appears only if you have selected `Embedding Model` in the **Model Type** field.
Application	Name of the application this model is configured for.
Provider	Name of the Generative AI provider mapping.
Max Tokens	Maximum limit to generate embeddings.

4. Select **Submit**.

Result
The new embedding model is created.

What to do next
Set a provider for an embedding model.

Set a provider for embedding model

Determine which AI provider to use for your embedding model to work in the AI Search RAG application.

Before you begin
Configure a connection and credential alias for your preferred provider. See Create a Connection & Credential alias.

Role required: admin

Procedure
1. Navigate to **All**, and then enter `sys_one_extend_capability.list` in the filter to go to the OneExtend Capabilities table.
2. Select the **Bring Your Own Embedding Model** capability to configure.
3. In the OneExtend Capability Definitions related list, select **New**.
4. In the **Name** field, enter the name of the capability definition.
5. In the **API type** field, select **system**.
6. In the **API** field, select the search icon to select the document.

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a. In the **Table name** field, select One API System Executor [one_api_system_executor].

b. In the **Document** field, select **Generic Embedder**.

c. Select **OK**.

7. In the Connection And Credential Alias, select the alias that you want to integrate with your custom embedding model.

8. Select the **Advanced** option.

9. Write pre-processing and post-processing scripts.
To have AI Search RAG application understand the format of the inputs and outputs of your embedding model, you must write pre-processing and post-processing scripts. These scripts depend on the expected request and response objects that are interpreted by your model.

For example, the Azure OpenAI request structure looks like the following script:

```
{"messages": [{"role":"user", "content":"Summarize the
 following text: <<content>>"}], "max_tokens": 800,
 "temperature": 0.7}
```

The preprocessor script for that request structure is the following script:

```
(function(inputs) {
    /* write code here to transform capability input to
 definition input.*/

 inputs = JSON.parse(inputs);

 return inputs;
})(inputs);
```

The response structure from Azure OpenAI looks like this script:

```
{
    "choices": [{
    "finish_reason": "stop",
    "index": 0,
    "message": {
        "content": "<<response>>",
        "role": "assistant"
        }
    }],
    "created": 1714994995,
    "id": "chatcmpl-9LqpXeLVXDAi6kciPfLeIDjmALeea",
    "model": "gpt-35-turbo-16k",
    "object": "chat.completion",
    "usage": {
        "completion_tokens": 47,
        "prompt_tokens": 70,
        "total_tokens": 117
    }
}
```

Because of that response structure, the response postprocessor script looks like this script:

```
(function(inputs) {
    /* write code here to transform definition output to
 capability output.*/ to transform the llm response into an
 array of text responses, using the inputs object
    inputs structure: {
```

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```
        inputs = JSON.parse(inputs);

 return inputs;

})(inputs);
```

10. Select **Submit**.

Connect your custom embedding model with Generative AI

Integrate a capability definition with your custom embedding model.

Before you begin

Role required: admin

Procedure

1. Navigate to **All**, and then enter `sys_generative_ai_config.list` in the filter to go to the Generative AI Configurations [sys_generative_ai_config] table.
2. Select **New**.
3. Verify that **Definition Table** field is prepopulated with sys_one_extend_capability_definition.
4. In the **Definition** field, select the search icon to select the definition document.
   a. In the **Table name** field, select One API System Executor [one_api_system_executor].
   b. In the **Document** field, select the OneExtend capability definition that you want to integrate with the embedding model.
   c. Select **OK**.
5. In the **Model** field, select an embedding model of your choice.
6. Select the **Active** option.
7. Populate the **Additional Configurations** field.
   - In the **Name** field, enter `resource_path`.
   - In the **Value** field, enter the end point path of the connection alias URL, the one you created for your embedding model. For example, deployments/text-embedding-3-large/embeddings?api-version=2023-05-15.
8. Select **Submit**.

Create error handler extension point

Create a scripted extension point to handle embedding generation errors that occur when custom embedding models generate semantic vectors. Using extension point enables you to create a primary ticket type as per the extension point definition.

Before you begin

Role required: admin

About this task

The `BYOMEmbeddingGenerationErrorHandler` script enables you to control retry logic, batch failure handling, and passage modification during embedding generation. These flexible strategies improve the robustness of large-scale semantic indexing pipelines.

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Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** field, search and select the **BYOMEmbeddingGenerationErrorHandler** extension point.
3. From Related Links, select **Create implementation**.
4. On the Script Include form, update the script as required.

   a. To handle the embedding generation errors by a custom embedding model, defines a process(inputParams) method in the extension point script. This method must return a structured response based on predefined error categories:

```
var BYOMEmbeddingGenerationErrorHandler = Class.create();
BYOMEmbeddingGenerationErrorHandler.prototype = {
    initialize: function() {},

    process: function(inputParams) {
        var responseStatus = inputParams.responseStatus;
        var responseErrorCode =
 parseInt(inputParams.responseErrorCode);
        var responseBody = inputParams.responseBody;
        var responseHeaders = inputParams.responseHeaders;
        var responseErrorMessage =
 inputParams.responseErrorMessage;
        var passages = inputParams.passages;
        var maxTokens = inputParams.maxTokens;
        var additionalParams = {};

        var response = BYOMEmbeddingUtil.buildErrorResponse(
            BYOMEmbeddingUtil.ErrorCodeEnum.UNKNOWN_ERROR,
            "unknown error",
            additionalParams
        );
```

   b. To categorize errors, use the following `BYOMEmbeddingUtil.ErrorCodeEnum` codes:

```
BYOMEmbeddingUtil.ErrorCodeEnum = {
    REQUEST_SIZE_TOO_LARGE_ERROR: "RequestSizeTooLargeError",
        // Reduce batch size and retry
    RATE_LIMIT_ERROR: "RateLimitError",
        // Retry without reducing batch size
    PASSAGE_SIZE_TOO_LARGE_ERROR: "PassageSizeTooLargeError",
        // Retry with reduced passage size
    UNKNOWN_ERROR: "UnknowError",
         // Ignore this run; retry in next job
    SKIP_BATCH_ERROR: "SkipBatchError",
        // Skip the entire batch, no retry
    UPDATE_PASSAGE_CONTENT_ERROR:
 "UpdatePassageContentError",       // Retry with updated
 passage content
    RETRY_SKIP_ON_FAIL_ERROR: "RetrySkipOnFailError"
        // Retry with backoff; skip on failure
};
```

   c. Allowed Fields for `buildErrorResponse` includes:

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```
var allowedFieldsByErrorCode = {
    REQUEST_SIZE_TOO_LARGE_ERROR: ['error_code',
 'error_message'],
    RATE_LIMIT_ERROR: ['error_code', 'error_message',
 'retry_after_seconds'],
    PASSAGE_SIZE_TOO_LARGE_ERROR: ['error_code',
 'error_message', 'passages'],
    UNKNOWN_ERROR: ['error_code', 'error_message'],
    SKIP_BATCH_ERROR: ['error_code', 'error_message'],
    UPDATE_PASSAGE_CONTENT_ERROR: ['error_code',
 'error_message', 'passages'],
    RETRY_SKIP_ON_FAIL_ERROR: ['error_code', 'error_message']
};
```

d. Retry Behavior by Error Code includes:

Error Code	Description	Retry Strategy
REQUEST_SIZE_TOO_LARGE_ERROR	Batch too large	Reduces batch size, retries exponentially.
RATE_LIMIT_ERROR	Rate limit reached	Waits for `retry_after_seconds`, then retries.
PASSAGE_SIZE_TOO_LARGE_ERROR	Passage too large	Reduces passage length (usually half), then retries.
UNKNOWN_ERROR	Unknown issue	Skips retry this run, automatically retried in the next scheduled job.
SKIP_BATCH_ERROR	Irrecoverable issue with batch	Skips entire batch without retry.
UPDATE_PASSAGE_CONTENT_ERROR	Retry with corrected content	Uses corrected passages from response and retries.
RETRY_SKIP_ON_FAIL_ERROR	Retry then skip	Retries with exponential back off, marks as failed after max retries.

5. Select **Update**.

Enable the custom embedding model for semantic indexing

Add your newly created embedding model in the semantic indexing table.

Before you begin

Role required: admin

Procedure

1. Navigate to **All**, and then enter `ais_symantic_embedding_model.list` in the filter to go to the AI Search Semantic Embedding Models [sys_generative_ai_config] table.
2. Select **New**.
3. In the **Name** field, enter a unique name.

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4. In the Model Id field, enter a unique id.
5. In the **One Extend Capability Definition** field, select a BYOM capability definition you created to set a provider for embedding model.
6. In the **Model Config** field, select a configured embedding model.
7. Select the **Active** option.
8. Select the **Batching Supported** option if you want to configure batching for your embedding model.
9. In the **Minimum Batch Size** and **Maximum Batch Size** fields, enter the required values.
10. In the **Error Handler Extension Instance** field, select an error handler instance.
    For more information, see Create error handler extension point.
11. Select **Submit**.

What to do next

Add your embedding model to the semantic index configuration to enable content ingestion using that model. For more information, see Configure semantic indexing settings for an indexed source.

Exclude knowledge block content from the AI Search index

Prevent AI Search from indexing content found in your knowledge blocks.

Before you begin

Role required: admin

About this task

AI Search includes content specified in your published knowledge blocks when it indexes content and metadata from your knowledge articles.

Administrators can override this default behavior and exclude your knowledge block content from the search index by setting the value of the *glide.ais.disable_kbb* system property. If this system property's value is set to **true**, AI Search ignores knowledge block content when indexing content and metadata from your knowledge articles.

To learn more about creating and publishing knowledge blocks for reference in your knowledge articles, see Using knowledge blocks.

Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Search for a system property record with name *glide.ais.disable_kbb*.
   - If a system property record with this name exists, open the record by selecting it.
   - If no system property record with this name exists, select **New**, then enter `glide.ais.disable_kbb` in the System Property form's **Name** field.
3. In the System Property form's **Value** field, enter *true*.
4. Save the modified System Property record by selecting **Submit** or **Update**.

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What to do next
To make the new setting take effect, reindex the Knowledge Table indexed source. For details on reindexing, see Perform a full table index or reindex for a single AI Search indexed source.

Activate indexing of catalog variable content on Catalog Item records

Activate indexing of searchable content from variables on Catalog Item records. Configure the set of Catalog Items eligible for catalog variable indexing and the set of variables to index.

Before you begin
Role required: admin

About this task
AI Search supports indexing of searchable content from variables on records in the Catalog Item [sc_cat_item] table and tables that extend it. By default, this functionality is not active. Administrators can activate indexing of catalog variable content and configure the set of Catalog Items and catalog variables to index content from.

For details on the catalog variable types that AI Search can index content from, see Variable types supported by AI Search indexing.

Procedure
1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Activate indexing of searchable content from catalog variables that are accessible to all users.
   a. Locate and open the *glide.ais.ingestion.index_catalog_variables* system property record.
   If this system property record doesn't exist, select **New**, then enter *glide.ais.ingestion.index_catalog_variables* as the new record's name and select *true | false* as its type.
   b. Set the record's value to *true*.
   c. Select **Update**.
   If you created a new system property record, select **Submit** instead.

   AI Search indexes content from catalog variables that don't require any role to read.
3. **Optional:** Activate indexing of searchable content from catalog variables that require specific roles for read access.

   Note: This step has no effect if *glide.ais.ingestion.index_catalog_variables* is set to *false*.

   a. Open the *glide.ais.ingestion.ignore_catalog_variables_read_roles* system property record.
   If this system property record doesn't exist, select **New**, then enter *glide.ais.ingestion.ignore_catalog_variables_read_roles* as the new record's name and select *true | false* as its type.
   b. Set the record's value to *true*.

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c. Select **Update**.
If you created a new system property record, select **Submit** instead.

AI Search indexes content from catalog variables that are only readable by users with specific roles.

4. **Optional:** Filter the set of Catalog Item records from which AI Search indexes catalog variables.

Note: This step has no effect if *glide.ais.ingestion.index_catalog_variables* is set to *false*.

a. Open the *glide.ais.ingestion.catalog_variables_filter_query* system property record.
If this system property record doesn't exist, select **New**, then enter *glide.ais.ingestion.catalog_variables_filter_query* as the new record's name and select *string* as its type.

b. In the **Value** field, enter an encoded query string to restrict the set of Catalog Item records that AI Search indexes catalog variables from.
As an example, enter *active=true* if you only want AI Search to index catalog variables from active Catalog Item records. For details on creating encoded query strings, see Encoded query strings.

c. Select **Update**.
If you created a new system property record, select **Submit** instead.

What to do next

After changing the values of these system properties, reindex content from the Catalog Item Table indexed source and any indexed sources for tables that extend the Catalog Item [sc_cat_item] table. For details on reindexing content from indexed sources, see Perform a full table index or reindex for a single AI Search indexed source and Perform a full table index or reindex for multiple AI Search indexed sources.

Indexed source attributes for AI Search

An indexed source attribute defines indexing behavior for all records from an indexed source.

Examples of how you might use indexed source attributes include the following.

- Define a filter to limit the set of records indexed from the source table
- Modify default indexing behavior for attachments or tags found on source table records
- Specify whether to index translated fields from source table records

An indexed source's attributes appear in its Advanced Configuration related list.

Create an indexed source attribute in AI Search

Define an indexed source attribute to configure the AI Search content indexing behavior for all records on a source table.

Before you begin

Role required: ais_admin

About this task

For details on available indexed source attributes and values, see List of AI Search indexed source attributes.

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Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Open the indexed source that you want to define an attribute for.
3. In the Advanced Configuration related list, select **New**.
4. On the Indexed Source Attribute form, fill in the fields.
   For a description of the field values, see Indexed Source Attribute form.
5. Select **Submit**.

Result
The new indexed source attribute appears in the Advanced Configuration related list.

What to do next
To make the new indexed source attribute take effect, perform a full table reindex for the indexed source. For details on this procedure, see Perform a full table index or reindex for a single AI Search indexed source.

Enable indexing of tags for an AI Search indexed source

Configure an indexed source attribute to enable indexing of content from tags found on records from an indexed source.

Before you begin
Role required: ais_admin

About this task
By default, AI Search indexing ignores tags from source records. You can enable indexing of tags for all records from an indexed source. Choose whether to index all shared and globally visible tags or only globally visible tags. Private tags are not indexed.

For more general instructions on defining indexed source attributes, see Create an indexed source attribute in AI Search.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Open the indexed source that you want to enable tag indexing for.
3. In the Advanced Configuration related list, select **New**.
4. On the Indexed Source Attribute form, fill in the fields.
   a. In the **Attribute** field, enter `index_tags`.
   b. In the **Value** field, enter one of the following options:

Option	Description
everyone_only	Only tags shared with everyone are indexed.
all_shared	All shared tags (**Everyone**, **Groups and Users**) are indexed.

   For a description of the field values, see Indexed Source Attribute form.
5. Select **Submit**.

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Result
The new *index_tags* indexed source attribute appears in the Advanced Configuration related list.

What to do next
To make the new *index_tags* attribute take effect, perform a full table reindex for the indexed source. For details on this procedure, see Perform a full table index or reindex for a single AI Search indexed source.

Enable indexing of attachments for an AI Search indexed source

Configure an indexed source attribute to enable indexing of content from attachments found on records from an indexed source.

Before you begin
Role required: ais_admin

About this task
By default, AI Search indexes searchable content and metadata (such as file size and date) for attachments found on source table records. Indexing supports the following attachment file formats:

- Active Server Page Extended (`.aspx`)
- Email Message (`.eml`, `.msg`)
- Extensible Markup Language (`.xml`)
- Hypertext Markup Language (`.html`, `.htm`)
- Microsoft Excel (`.xls`, `.xlsx`)
- Microsoft PowerPoint (`.pot`, `.potx`, `.ppt`, `.pptm`, `.pptx`)
- Microsoft Word (`.doc`, `.docx`, `.dot`, `.dotx`)
- Plain Text (`.txt`)
- Portable Document Format (`.pdf`) with searchable text

Note: The maximum file size for binary files is 25 MB. Keyword indexing processes up to the first 1MB of text. Use semantic search to index data containing between 1MB and 25 MB of text.

AI Search provides limited support for encrypted record attachments:

- When indexing an encrypted attachment, AI Search extracts metadata such as the attachment file's size and date, but it doesn't extract searchable content.
- The encrypted attachment's MIME type is detected as `application/octet-stream`.
- No feedback for the encrypted attachment appears in ingestion log messages.

Attachment indexing is controlled by an indexed source's *index_attachments* attribute:

- true (default value): Attachments are indexed for records from the indexed source.
- false: Attachments aren't indexed for records from the indexed source.

The following procedure explains how to make sure this attribute is set to **true** for an indexed source. For more general instructions on defining indexed source attributes, see Create an indexed source attribute in AI Search.

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Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Open the indexed source that you want to verify or change attachment indexing for.
3. In the Advanced Configuration related list, check for an *index_attachments* attribute with value *false*.

   Note: If no *index_attachments* attribute exists in the related list, or the attribute exists with value *true*, attachment indexing is already enabled for the indexed source. No further steps are required.

4. Open the *index_attachments* attribute and change its value from *false* to *true*.

Result
Attachment indexing is enabled for the indexed source.

What to do next
If you changed the *index_attachments* attribute's value from *false* to *true*, reindex content for the indexed source. For details on reindexing, see Perform a full table index or reindex for a single AI Search indexed source.

Activate multimodal captioning for attachments from an indexed source

Generate descriptive captions for images, tables, charts, and other visual elements in attachments from records in an indexed source table. You can find these attachments by searching for terms from their generated captions.

Before you begin
An administrator must have activated the Platform Multimodal Service plugin on your instance. For details on this procedure, see Activate the Platform Multimodal Service plugin.

Note: An AI Search administrator can select the VLM (visual learning model) provider and model used by the Platform Multimodal Service. For details on this process, see Configure multimodal captioning for AI Search.

Role required: ais_admin

About this task
By default, when indexing attachments for search, AI Search includes the attachment's text but ignores its images. For tables, charts, and other visual elements, indexing extracts text but doesn't necessarily preserve the context of that text.

To improve search recall, you can configure the Platform Multimodal Service to automatically generate descriptive captions for images, tables, charts, and other visual elements in attachments found on records from an indexed source table. With the service activated, you can find indexed source content attachments with these entity types by searching for terms that match the generated captions.

As an example, an attachment might include an image that yields the generated caption `woman in office`. Searches for `woman` or `office` can match the caption terms. Such searches return the attachment as a search result even if its text doesn't otherwise contain either of those terms.

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Note: Multimodal captioning is only supported for Knowledge [kb_knowledge] table records from the Knowledge Table indexed source and for content retrieved by external content connectors.

The multimodal captioning feature has been validated and tested for English-language content. For content in other languages, it may function but hasn't been evaluated for caption quality or accuracy. Multimodal captioning for non-English content is not currently supported.

Multimodal captioning runs as a separate process after text indexing is completed for the attachment in question. Records with attachments that contain images, tables, charts, and other visual elements won't show generated captions until multimodal captioning completes.

Note: Activating multimodal captioning for attachments found in an indexed source has no effect if the *index_attachments* attribute is set to *false* for that indexed source. Make sure this attribute is set to *true* if you want to index attachments and generate captions for their content.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Open the indexed source that you want to activate multimodal captioning for.

   Note: Multimodal captioning is currently only supported for the Knowledge Table indexed source that indexes records on the Knowledge [kb_knowledge] table.

3. In the Advanced Configuration related list, check for an existing *index_mms_attachments* attribute.
   - If an *index_mms_attachments* attribute already exists with value *false*, change its value to *true*. No further steps are needed.
   - If an *index_mms_attachments* attribute exists with value *true*, multimodal captioning is already enabled for the indexed source. No further steps are needed.
   - If no *index_mms_attachments* attribute exists, continue with the following steps.
4. In the Advanced Configuration related list, select **New**.
5. On the Indexed Source Attribute form, fill in the following fields.

Field	Value
Attribute	index_mms_attachments
Value	true

6. Select **Submit**.

Result

The new *index_mms_attachments* indexed source attribute appears in the Advanced Configuration related list.

What to do next

To make the new indexed source attribute take effect, perform a full table reindex for the indexed source. For details on this procedure, see Perform a full table index or reindex for a single AI Search indexed source.

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List of AI Search indexed source attributes

You can adjust indexing behavior for an AI Search indexed source by configuring indexed source attributes and values.

For instructions on defining AI Search indexed source attributes, see Create an indexed source attribute in AI Search.

Attribute	Description
filter	Specify a filter condition that applies on the indexed source table and all of its child tables configured for indexing. Indexing ignores source records that don't pass this filter condition. If you change the value of this attribute for an indexed source, the change doesn't take effect until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.
index_attachments	Control indexing behavior for attachments from indexed records. Supported values: • *true*: Enable indexing of attachments for records on this table. • *false*: Disable indexing of attachments for records on this table. Default value: *true* If you change the value of this attribute for an indexed source, the change doesn't take effect until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.
index_mms_attachments	Control multimodal generation of searchable descriptive captions for images, tables, charts, and other visual elements found in attachments on records from this table. To learn more about multimodal caption generation, see Activate multimodal captioning for attachments from an indexed source. Supported values: • *true*: Activate multimodal captioning for attachments on records from this table. • *false*: Deactivate multimodal captioning for attachments on records from this table.

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Attribute	Description
	Default value: *true* This attribute has no effect if *index_attachments* is set to *false* for the indexed source. If you change the value of this attribute for an indexed source, the change doesn't take effect until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.
index_tags	Control indexing behavior for tags from indexed records. Supported values: • *all_shared*: Index shared tags and globally visible tags. • *everyone_only*: Only index globally visible tags. • *none*: Disable indexing of tags. Default value: *none* **Note:** Search results display indexed tags based on the visibility of the result record instead of the visibility of the tag. If you change the value of this attribute for an indexed source, the change doesn't take effect until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.
index_translated_fields	Control indexing behavior for translated fields from indexed records. Supported values: • *true*: Enable indexing of translated fields for this table. • *false*: Disable indexing of translated fields for this table. Default value: *false* **Note:** For tables with manually mapped records, such as kb_knowledge, indexing ignores this attribute and honors the manual mapping.

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Attribute	Description
	If you change the value of this attribute for an indexed source, the change doesn't take effect until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.
index_translated_reference_fields	Control indexing behavior for translated reference fields from indexed records. Supported values: • *true*: Enable indexing of translated reference fields for this table. • *false*: Disable indexing of translated reference fields for this table. Default value: *true* If you change the value of this attribute for an indexed source, the change doesn't take effect until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.
user_read_takes_precedence_over_group_deny	Control precedence of external user read access permissions and external group deny access permissions for external document search results from the indexed source. Supported values: • *true*: External user read access permissions take precedence over external group deny access permissions for external document search results from the indexed source. • *false*: External group deny access permissions take precedence over external user read access permissions for external document search results from the indexed source. Default value: *true* on indexed sources for external content schema tables. Not set on indexed sources for internal tables. **Note:** This attribute only applies to indexed sources for external content schema tables. If you apply this attribute to an indexed source for an internal table, it has no effect.

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Note: Indexed source attributes are records on the AI Search Configuration Attribute [ais_configuration_attribute] table that have Table as their **Applies To** field value. Records on this table that have Column as their **Applies To** field value are Field settings for AI Search.

Field settings for AI Search

A field setting controls indexing behavior for a specified field (column) on all records from an indexed source.

Examples of how you might use field settings include the following.

- Disable text indexing or searchability for a field found on source table records
- Modify default mappings between source table fields and fields in the AI Search index
- Add a referenced table field to the index by dot-walking from a reference field on source table records

An indexed source's field settings appear in its Field Settings & Mapping related list.

Create a field setting for an AI Search indexed source

Define an indexed source field setting to configure AI Search content indexing behavior for a specific field on source table records.

Before you begin
Role required: ais_admin

About this task
For details on available field settings and values, see List of AI Search indexed source field settings.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Open the indexed source that you want to define a field setting for.
3. In the Field Settings & Mapping related list, select **New**.
4. On the Field Setting form, fill in the fields.
5. Select **Submit**.

Result
The new field setting appears in the Field Settings & Mapping related list.

What to do next
To make the new field setting take effect, perform a full table reindex for the indexed source. For details on this procedure, see Perform a full table index or reindex for a single AI Search indexed source.

Enable indexing of referenced table fields for an AI Search indexed source

Configure an indexed source to index field values from tables referenced by fields in the source table. You can index these field values for use in filters and EVAM search result configurations, index them for search, or both.

Before you begin
You must have an indexed source configured for the source table. For details on creating an indexed source for a table, see Create an indexed source.

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Role required: ais_admin

About this task

When an indexed source table includes a reference field, AI Search defaults to indexing values for the reference field but not for other fields on the table that it references. To index values from these referenced table fields, you can create *dot_walk_fields* and *searchable_dot_walk_fields* field settings on your indexed source table.

- To use field values from referenced tables in search source filters, facet filters, and EVAM search result configurations, create a *dot_walk_fields* field setting.
- To make field values from referenced tables searchable, create a *searchable_dot_walk_fields* field setting.

As the value for either of these field settings, list the names of the referenced table fields you want to index, separated by commas. For example, to index the **name** and **city** fields from the table referenced by the **company** field on the indexed source table, select the **company** field and enter value `name,city`.

To dot-walk across multiple tables, you can enter field name values with dot-separated reference field prefixes. For example, enter value `company.contact.name` to index the **name** field in the table referenced by the **contact** field on the table referenced by the indexed source table's **company** reference field.

Note: Each dot-walk reference level imposes a performance impact on indexing. Avoid using multi-level references unless necessary.

You can create both *dot_walk_fields* and *searchable_dot_walk_fields* field settings for the same reference field.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. In the Field Settings & Mapping related list, select **New**.
3. On the Field Setting form, enter the field values shown for your use-case.
   - To index field values from referenced tables for use in search source filters, facet filters, and EVAM search result configurations, enter the following field values.

Field	Value
Attribute	dot_walk_fields
Field	<name of indexed source table reference field that you want to use to dot-walk to another table>
Value	<comma-separated list of names for fields that you want to index from the referenced table>

   - To index field values from referenced tables as searchable text, enter the following field values.

Field	Value
Attribute	searchable_dot_walk_fields

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Field	Value
Field	<name of indexed source table reference field that you want to use to dot-walk to another table>
Value	<comma-separated list of names for fields that you want to index from the referenced table>

Note: If the *dot_walk_fields* and *searchable_dot_walk_fields* attributes don't appear in the **Attribute** selection list, ensure that your **Field** selection is a reference field.

4. Select **Submit**.
   The attribute and value appear in the Field Settings & Mapping related list.

List of AI Search indexed source field settings

You can adjust indexing behavior for source record fields in an AI Search indexed source by configuring field setting attributes and values.

For more information on creating field settings, see Create a field setting for an AI Search indexed source.

Attribute	Description
dot_walk_fields	Index reference and display values from fields on the selected reference field's source table for use in search source filters, facet filters, and EVAM search result configurations. AI Search automatically updates the indexed field values to reflect changes made to the referenced table's field values. For more information about search source filters, see Search sources in AI Search. For details on facet filters, see Create a facet in an AI Search application configuration. • Field: Name of the reference field on your indexed source table. As an example, if your indexed source table contains a **company** reference field that references the Company [core_company] table, and you want to index field values from that table's **name** and **city** fields, you'd set `company` as the field. • Type: string • Value: Comma-separated list of referenced table fields to index values from. As an example, if your indexed source table contains a **company** reference field that references the Company [core_company] table, and you want to index field values from that table's **name** and **city** fields, you'd set `name,city` as the value. **Note:** You can't search field values indexed with this field setting. To index field values from referenced tables for search, create a *searchable_dot_walk_fields* field setting. You can create both *dot_walk_fields* and *searchable_dot_walk_fields* field settings for the same reference field.

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Attribute	Description
	If you change the value of this setting for an indexed source's field, the change doesn't take effect until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.
index_calculated_field	Option to enable indexing of searchable content from calculated field values. If your indexed source contains a calculated field, set this field setting to *true* for that field to correctly index its values. With a field setting value of *false* or no value, AI Search ignores values from the calculated field when indexing content. • Field: Name of a calculated field from the indexed source table. (If you specify a non-calculated field, the system rejects the field setting submission and displays a warning message.) • Type: true | false • Supported values: ○ *true*: Apply special handling to correctly index calculated field values from the selected field. ○ *false*: Don't apply special handling when indexing field values from the selected field. Calculated field values aren't indexed. If you change the value of this setting for an indexed source's field, the change doesn't take effect until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.
map_to	Map the selected field from the indexed source table to an AI Search index field. When indexing records from the source table, AI Search populates the specified index field with the value of the selected source field. For example, the base system's Knowledge Table indexed source maps the **kb_knowledge.short_description** source field to the **title** index field. When AI Search indexes a record from the Knowledge [kb_knowledge] table, it populates the indexed record's searchable title with the value from the source record's **short_description** field. • Field: Name of a field from the indexed source table. • Type: string • Value: Name of the AI Search field that you want to map the selected field's display values to. For details on AI Search index fields, see AI Search index fields. **Note:** You can only define one **map_to** field setting for an indexed source field. If you try to define multiple **map_to** settings for the same field, the system displays an error message. If you change the value of this setting for an indexed source's field, the change doesn't take effect until you reindex content

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Attribute	Description
	from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.
no_text_index	Option to disable indexing of searchable content from the selected field on records from the indexed source. • Field: Name of a field from the indexed source table. • Type: true | false • Supported values: ○ *true*: Disable searchable content indexing for the selected field. Search and filters can't match the field's value. AI Search doesn't generate an index event when the field is updated. ○ *false*: Enable searchable content indexing for the selected field. Search and filters can match the field's value. AI Search generates an index event when the field is updated, adding the affected record to its indexing queue. • Default value: *false* If you change the value of this setting for an indexed source's field, the new value immediately affects index event generation for updates to that field, but it doesn't affect searches or filters for previously indexed records until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source. ⚠ **Warning:** Don't set this option to *true* for the sys_updated_on field on the Task [task] table, tables that extend Task, or any other tables that you've configured retention policies for. The retention policies for these tables rely on indexing of sys_updated_on field values. For more information on retention policies, see Indexed source retention policies and filter conditions. For Customer Service and Support guidelines on setting the **no_text_index** option for different field types, see KB0859922 on the Now Support site.
not_searchable	Option to disable search matching for content indexed from the selected field. • Field: Name of a field from the indexed source table. • Type: true | false • Supported values: ○ *true*: Disable search matching for content indexed from the selected field. Search can't match the field's value. Filters (such as those for content security, source facet buckets, and facets) can still match the field's value. ○ *false*: Enable search matching for content indexed from the selected field. Search and filters can match the field's value. • Default value: *false*

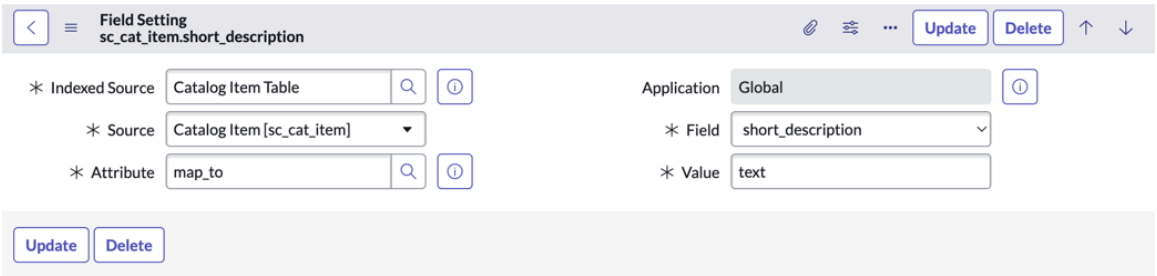
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Attribute	Description
	If you change the value of this setting for an indexed source's field, the change doesn't take effect until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.
searchable_dot_walk_fields	Index reference and display values from fields on the selected reference field's source table as searchable text. AI Search doesn't automatically update the indexed field values to reflect changes made to the referenced table's field values. To update the indexed field values, you must reindex the indexed source. For details on this procedure, see Perform a full table index or reindex for a single AI Search indexed source. • Field: Name of the reference field on your indexed source table. As an example, if your indexed source table contains a **company** reference field that references the Company [core_company] table, and you want to index searchable text from that table's **name** and **city** fields, you'd set `company` as the field. • Type: string • Value: Comma-separated list of referenced table fields to index as searchable content. As an example, if your indexed source table contains a **company** reference field that references the Company [core_company] table, and you want to index searchable text from that table's **name** and **city** fields, you'd set `name,city` as the value. **Note:** You can't use field values indexed with this field setting in search source filters. To index field values from referenced tables for use in search source filters, create a *dot_walk_fields* field setting. You can create both *dot_walk_fields* and *searchable_dot_walk_fields* field settings for the same reference field. If you change the value of this setting for an indexed source's field, the change doesn't take effect until you reindex content from the indexed source. For reindexing steps, see Perform a full table index or reindex for a single AI Search indexed source.

Note: Field settings are records on the AI Search Configuration Attribute [ais_configuration_attribute] table that have Column as their **Applies To** field value. Records on this table that have Table as their **Applies To** field value are Indexed source attributes for AI Search.

This example shows how the base system's Catalog Item Table indexed source maps **short_description** field values from the Catalog Item [sc_cat_item] table to the AI Search index's **text** field for indexed records.

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Security for searchable referenced table field values in AI Search

When a user searches referenced table field values that you have indexed for search with the *searchable_dot_walk_fields* field setting, only field values that the user can view appear in the search results. The system uses a field value's role-based access control list rules (ACLs) to determine whether the search user can view that field value.

Searchable referenced table field values that have condition-based or script-based ACLs or user criteria don't appear in search results.

For searchable field values indexed through multiple dot-walk reference levels, the system only considers role-based ACLs on the final field value. As an example, if you index `company.contact.name` referenced table field values for search, user access to **name** field values isn't affected by role-based ACLs on **contact** field values.

To bypass all ACLs and allow users to search for all searchable referenced table field values, you can set the *glide.ais.query.allow_indexlookup_for_dotwalk* system property to true. This bypasses ACL evaluation for field values indexed via the *dot_walk_fields* and *searchable_dot_walk_fields* field settings.

For more details on ACL types and configuration, see Access control list rules.

Indexing content from AI Search indexed sources

AI Search indexes records on indexed source tables to make their content searchable.

After you define an indexed source, AI Search begins automatically indexing to reflect changes to records in the selected source table and its specified child tables. The results of all record create, update, and delete operations in these tables are reflected in the search index. AI Search doesn't index content from unmodified records in these tables until you perform a full table index.

Indexing content from referenced tables

When an indexed source table includes a reference field that stores a reference to another table, AI Search defaults to indexing values for the reference field but not for other fields on the referenced table. For example, the User [sys_user] table includes a **company** reference field that stores a reference to the Company [core_company] table. When indexing records from the User table, AI Search indexes values for the **company** reference field, but doesn't index values for other Company table fields such as **city** or **website**.

To index additional fields from referenced tables, you can configure *dot_walk_fields* and *searchable_dot_walk_fields* field settings for reference fields on your indexed source table.

- To use field values from referenced tables in search source filters, facet filters, and EVAM search result configurations, create a *dot_walk_fields* field setting.
- To make field values from referenced tables searchable, create a *searchable_dot_walk_fields* field setting.

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You can create both *dot_walk_fields* and *searchable_dot_walk_fields* field settings for the same reference field.

For instructions on configuring *dot_walk_fields* and *searchable_dot_walk_fields* field settings, see Enable indexing of referenced table fields for an AI Search indexed source. For more information on field settings, see Field settings for AI Search. To learn about search source filters, see Search sources in AI Search. For details on facet filters, see Create a facet in an AI Search application configuration. To understand EVAM configurations, see Entity View Action Mapping.

Indexing content from source record attachments

By default, AI Search indexes searchable content and metadata (such as file size and date) for attachments found on source table records. Indexing supports the following attachment file formats:

- Active Server Page Extended (`.aspx`)
- Email Message (`.eml`, `.msg`)
- Extensible Markup Language (`.xml`)
- Hypertext Markup Language (`.html`, `.htm`)
- Microsoft Excel (`.xls`, `.xlsx`)
- Microsoft PowerPoint (`.pot`, `.potx`, `.ppt`, `.pptm`, `.pptx`)
- Microsoft Word (`.doc`, `.docx`, `.dot`, `.dotx`)
- Plain Text (`.txt`)
- Portable Document Format (`.pdf`) with searchable text

Note: The maximum file size for binary files is 25 MB. Keyword indexing processes up to the first 1MB of text. Use semantic search to index data containing between 1MB and 25 MB of text.

AI Search provides limited support for encrypted record attachments:

- When indexing an encrypted attachment, AI Search extracts metadata such as file size and date, but doesn't extract searchable content.
- The encrypted attachment's MIME type is detected as `application/octet-stream`.
- No feedback for the encrypted attachment appears in ingestion log messages.

Attachment indexing is controlled by an indexed source's *index_attachments* attribute. To verify that attachment indexing is enabled for an indexed source, see Enable indexing of attachments for an AI Search indexed source.

Indexing content from source record tags

AI Search can index tags found on source table records. Search results display indexed tags based on the visibility of the result record instead of the visibility of the tag.

By default, indexing ignores tags from source records. You can enable indexing of tags for each indexed source. Choose whether to index all shared and globally visible tags or just globally visible tags.

For details on enabling tag indexing for an indexed source, see Enable indexing of tags for an AI Search indexed source.

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Indexing content from the Task table and its child tables

When defining an indexed source that indexes records from the Task table or any of its child tables, you must specify a retention policy. For details on retention policies, see Indexed source retention policies and filter conditions.

Reindexing content

You must perform a full table reindex for an indexed source under the following circumstances:

- After you add, modify, or delete an indexed source attribute or a field setting for the indexed source.
- To update indexed values for fields on tables referenced by source table records. As an example, the **company** field on the User [sys_user] table stores a reference to the Company [core_company] table. If you configure indexing for values for fields on the referenced Company table, such as **city** or **website**, you must reindex the User table to update those indexed Company table field values. For details on configuring indexing of referenced table fields, see Enable indexing of referenced table fields for an AI Search indexed source.

Perform a full table index or reindex for a single AI Search indexed source

Make content from an internal indexed source searchable by performing a full table index. This procedure indexes existing records from the source table and any child tables configured for indexing. You can manually reindex content from an internal indexed source by repeating this procedure.

Before you begin

Your indexed source must be active and internal (referring to a ServiceNow AI Platform® table). To index content from an indexed source for external documents, see Indexing and searching external content in AI Search.

Role required: ais_admin

About this task

After you define an indexed source, AI Search begins automatically indexing to reflect changes to records in the selected source table and its specified child tables. The results of all record create, update, and delete operations in these tables are reflected in the search index. AI Search doesn't index content from unmodified records in these tables until you perform a full table index.

Use this procedure to index searchable content from existing records in an indexed source, or to manually reindex existing content for an indexed source that has already been indexed.

If an indexed source contains unindexed records, the Indexed Sources list displays an informational message and marks the new source with an alert triangle icon ⚠. A similar informational message appears on the Indexed Source form. Make sure to perform a full table index for each indexed source that displays the alert triangle icon.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Open the indexed source with content that you want to make searchable.
3. Select **Index All Tables**.
   The Generate Text Index dialog box appears.
4. **Optional:** If you want AI Search to allow indexing of updates to individual records in the source table while the table indexing event is running, select the **Non blocking index** option.

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Note: With this option deselected, AI Search defers indexing of updates to individual records in the source table until after the table indexing event finishes. The index may not reflect the latest contents for updated records until the deferred record indexing events finish.

5. Select **OK**.
   The Indexed Source History page appears. A message reports that AI Search has queued an indexing task for the indexed source.
6. **Optional:** To monitor the progress of the indexing task, refresh the Indexed Source History form page.
   When the task completes, the **Ingestion State** field shows *indexed*.
7. To return to the list of indexed sources, select the back icon .

Result

AI Search indexes content from existing records in the indexed source. Indexing continues on a scheduled basis. You don't need to repeat this task for the indexed source unless you want to reindex its content before the next scheduled indexing run.

What to do next

Define search sources to make searchable content from the indexed source available in user search experiences. For details on creating search sources, see Create a search source for AI Search.

Perform a full table index or reindex for multiple AI Search indexed sources

Make content from multiple internal indexed sources searchable by performing a full table index. This procedure indexes existing records from the source tables and any child tables configured for indexing. You can manually reindex content from internal indexed sources by repeating this procedure.

Before you begin

Your indexed sources must be active and internal (referring to ServiceNow AI Platform® tables). To index content from indexed sources for external documents, see Indexing and searching external content in AI Search.

Role required: ais_admin

About this task

After you define an indexed source, AI Search begins automatically indexing to reflect changes to records in the selected source table and its specified child tables. The results of all record create, update, and delete operations in these tables are reflected in the search index. AI Search doesn't index content from unmodified records in these tables until you perform a full table index.

Use this procedure to index searchable content from existing records in indexed sources, or to manually reindex content for indexed sources that have already been indexed.

If an indexed source contains unindexed records, the Indexed Sources list displays an informational message and marks the new source with an alert triangle icon ⚠. A similar informational message appears on the Indexed Source form. Make sure to perform a full table index for each indexed source that displays the alert triangle icon.

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Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Select the indexed sources with content that you want to make searchable.
   To select all indexed sources on the page, follow the instructions for your list version in Perform actions on selected items in a list.
3. In the **Actions on selected rows...** menu, select **Index All Tables**.
   The Indexed Source History page for the last selected index appears. A message reports that AI Search has queued an indexing task for the indexed source.
4. **Optional:** Refresh the Indexed Source History form page to monitor the progress of the indexing task.
   When the task completes, the **Ingestion State** field shows *indexed*.
5. To return to the list of indexed sources, select the back icon.

Result

AI Search indexes content from existing records in the indexed sources. Indexing continues on a scheduled basis. You don't need to repeat this task for the indexed sources unless you want to reindex their content before the next scheduled indexing run.

What to do next

Define search sources to make searchable content from indexed sources available in user search experiences. For details on creating search sources, see Create a search source for AI Search.

Search sources in AI Search

Define search sources to make your searchable content available in search experiences. Choose an indexed source and configure optional filter conditions to limit the content that users can search.

Search source structure

A search source includes two elements:

- A reference to an indexed source. By default, search queries using the search source can return all records from the referenced indexed source. For more information on indexed sources, see Indexed sources in AI Search.
- An optional set of filter conditions applied to the indexed source's records. Indexed source records must pass all of these filter conditions to be returned as search results for queries using the search source.

You can define multiple search sources that reference the same indexed source, specifying distinct filter conditions for each.

Filter conditions

To limit the set of indexed source table records that AI Search returns as search results, you can apply filter conditions to your search source.

Note: Search source filter conditions can only operate on source record fields that are indexed. Fields on referenced records aren't indexed by default. To use a referenced record field in a search source filter condition, you must first configure indexing for the field in the indexed source. For details on this procedure, see Enable indexing of referenced table fields for an AI Search indexed source.

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You can use static and dynamic filter conditions to filter search source records. As an example, you could apply a dynamic **[Assigned to] [is (dynamic)] [Me]** user filter to your search source. With this filter applied, the search source only returns search results for indexed source table records that are assigned to the search user.

Search sources don't support any of the following filter options:

- Filters that reference fields from child tables of the indexed source table. As an example, suppose you create an indexed source for the Task [task] table. Search sources for that indexed source can't use filters to reference fields from the Incident [incident] table because the Incident table is a child of the Task table.
- Dynamic filters with scripts that use the *current* keyword or global variable
- Dynamic filters with scripts that reference any global business rules
- Dynamic filters with scripts that use script includes

For more information on filter conditions, see Filters. To learn about relationships between parent and child tables, see Table extension and classes. For details on dynamic filter options and their associated scripts, see Create a dynamic filter option.

Linking search sources to search profiles

To make your search source's content available to users, link it to one or more search profiles. You can link multiple search sources to a single search profile.

For more information, see Link a search source to a search profile.

Unlinking search sources from search profiles

If you delete a search source that's linked to one or more search profiles, it's not automatically unlinked from those search profiles. You must manually unlink the search source from each search profile that it's linked to. For details on this procedure, see Unlink a search source from a search profile.

Viewing search sources

You can view or edit search sources from any of the following application modules:

- To view all defined search sources, navigate to **All** > *AI Search* > **Search Experience** > **Search Sources**.
- To view search sources that reference a particular indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. Open the indexed source and select its Search Source Mappings related list.
- To view search sources linked to a particular search profile, navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**. Open the search profile and select its Search Sources related list.

Create a search source for AI Search

Make searchable content from an indexed source available in user search experiences by defining a search source.

Before you begin

You must have an indexed source defined. For more details on setting up indexed sources, see Create an indexed source.

Role required: ais_admin

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About this task

Define at least one search source for each of your indexed sources. You can define multiple search sources that reference the same indexed source, specifying distinct filter conditions for each.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. In the Search Source Mappings related list, select **New**.
3. On the Search Source form, fill in the fields.
   For a description of the field values, see Search Source form.
4. Select **Submit**.
   The new search source appears in the Search Sources related list.

Preview matching records for an AI Search search source

View the ServiceNow AI Platform® table records that match a search source's indexed source table and filter conditions.

Before you begin

Role required: ais_admin

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Sources**.
2. Open the search source that you want to preview matching records for.
3. On the Search Source form, select the **preview** link in the informational message that reports the number of matching records.
   For a description of the field values, see Search Source form.

Result

The ServiceNow AI Platform table specified in the search source's indexed source appears, with filter conditions applied to match conditions from the search source. This filtered view displays all records that are searchable through the search source.

Note: Preview uses the saved conditions from the search source. If you change a search source's conditions, preview doesn't reflect your changes until you save them.

Search profiles in AI Search

Search profiles contain settings for a search experience, including synonyms, stop words, typo handling, Genius Results, and result improvement rules. Define a search profile for each unique search experience that you want to offer in a ServiceNow AI Platform® application. Publish search profiles to make them available in your search applications.

A search profile contains settings that determine how AI Search generates search results for a given search experience. Publishing a search profile makes it available so you can link it to one or more search application configurations.

A search application configuration specifies a search profile to use, and also determines how generated search results are displayed in the application. To learn about search application configuration display settings, see Search application configurations.

The following table describes the search experience settings that you can configure in a search profile.

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Search profile settings

Setting	Description
Search sources	Link one or more search sources to a search profile. Search sources give administrators precise control over the searchable content available to users.
Synonyms	Define language-specific dictionaries of terms that AI Search treats as equivalent in search queries. Synonyms improve search recall and provide a more natural search experience for users.
Stop words	Define language-specific dictionaries of common terms for AI Search to remove from search queries. Stop words improve search precision and result relevancy by discarding irrelevant matches.
Typo handling	Configure settings for derivation of auto-correction terms from search source indexed content. AI Search replaces misspelled search query terms with auto-correction terms.
Genius Results	Analyze search query intent and display the best answers as Genius Result answer cards. Genius Results enable users to act directly on their search results.
Result improvement rules	Define rules with configurable triggers to modify search results for specific search queries. Result improvement rules enable administrators to boost, block, or promote records in a search query's result set.

Publishing search profile settings

To make a search profile's settings active in search queries, you must publish it. Publishing propagates the following settings to search application configurations that reference the search profile.

- The set of synonym and stop word dictionaries linked to the search profile
- Settings, blocked terms, and derived auto-correction terms for typo handling dictionaries linked to the search profile
- Result improvement rules and actions defined in the search profile

A search profile can have one of these states:

- **New**: The search profile has never been published.
- **Draft**: The search profile is saved with unpublished changes.
- **Published**: The search profile is saved with all changes published.

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In the **All** > *AI Search* > **Search Experience** > **Search Profiles** list, search profiles with the *New* state display an alert triangle icon ⚠. An informational message notifies you to publish these search profiles.

Create a search profile

Create a new search profile to store search experience settings for a search application.

Before you begin
Role required: ais_admin

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Select **New**.
3. On the Search Profile form, fill in the fields.
   For a description of the field values, see Search Profile form.
4. Select **Submit**.

Result
The new search profile appears in the AI Search Search Profiles list with **State** set to *New*. An informational message and an alert triangle icon ⚠ indicate that the new search profile has never been published.

What to do next
To make content searchable using your new search profile, link one or more search sources to it. For instructions on linking search sources, see Link a search source to a search profile.

Your new search profile includes sample synonym and stop word dictionaries and a default typo handling dictionary. For more details on configuring and populating these dictionaries, see Synonyms, Stop words, and Typo handling.

Clone a search profile

Create a copy of an existing search profile. The cloned search profile retains search sources, stop word and synonym dictionaries, Genius Result configurations, and result improvement rules from the original search profile.

Before you begin
Role required: ais_admin

About this task
Multiple search applications can link to the same search profile. For example, in the base system, Service Portal and Virtual Agent both link to the **Service Portal search profile** record.

As a search administrator, you may wish to configure separate search profiles for two applications that share a search profile. Cloning the existing search profile enables you to create a new record with the same search sources, stop word and synonym dictionaries, Genius Result configurations, and result improvement rules. This approach saves time if you want the two applications to use similar or identical search experience settings.

Note: Cloning a search profile doesn't preserve its existing typo handling dictionary settings or blocked terms.

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Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Select the record for the search profile that you want to clone.
   If the system prompts you to change the application scope so that you can edit the record, select the provided link.
3. Select **Clone**.
4. In the Set Profile Label dialog box, enter a label for your new search profile record, then select **OK**.
5. **Optional:** Make changes to the cloned search profile's settings.
   For details on search profile settings, see Create a search profile, Synonyms, Stop words, Typo handling, Genius Results, and Result improvement rules.
6. Publish your cloned search profile by selecting **Publish**.
   For more information on the effects of publishing a search profile, see Publish an AI Search search profile.

Result
Your cloned search profile record appears in the Search Profile table.

What to do next
Edit the search application configuration record of your choice and link it to your cloned search profile. For details on search application configurations, see Search application configurations.

Publish an AI Search search profile

Publish a search profile to make pending changes to its settings take effect in linked search applications.

Before you begin
Role required: ais_admin

About this task
To make a search profile's settings active in search queries, you must publish it. Publishing propagates the following settings to search application configurations that reference the search profile.

- The set of synonym and stop word dictionaries linked to the search profile
- Settings, blocked terms, and derived auto-correction terms for typo handling dictionaries linked to the search profile
- Result improvement rules and actions defined in the search profile

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.

   Note: Search profiles with the *New* state display an alert triangle icon ⚠. An informational message notifies you to publish these search profiles.

2. Open the search profile that you want to publish.
3. Select **Publish**.

Result
The search profile appears in the AI Search Search Profiles list with **State** set to *Published*.

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Link a search source to a search profile

Link search sources to a search profile to specify the content users can search through that profile.

Before you begin
You must have already created at least one search source. For instructions on creating search sources, see Create a search source for AI Search.

Role required: ais_admin

About this task
Linking a search source to a search profile makes its filtered content available for searches using that search profile. AI Search only uses content from the search profile's linked search sources when finding and generating standard search results and Genius Result answers.

When linking a search source to a search profile, you can specify options that control how the search source's content is accessed for searches using that search profile. You can exclude the search source's content from being considered when finding standard search results, or prevent it from being considered during Genius Result answer generation. For a search source that includes internal content (from a ServiceNow AI Platform® table), you can also exclude indexed attachment content from being considered during Genius Result answer generation.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to link the search source to.
3. In the Search Sources related list, select **Link Existing**.
4. On the Search Profile - Search Source Mapping form, fill in the fields.
   For a description of the field values, see Search Profile - Search Source Mapping form.
5. Select **Submit**.

Result
The new search source appears in the Search Sources related list. Search query results immediately reflect changes to the set of records searchable through the search profile.

What to do next
Derived auto-correction term lists for the search profile's typo handling dictionary don't automatically update to reflect changes to the set of searchable records. To update these auto-correction term lists, publish the search profile you edited. For details on publishing a search profile, see Publish an AI Search search profile.

Unlink a search source from a search profile

Unlink search sources from a search profile to prevent their content from being searchable through that profile. Deleted search sources aren't automatically unlinked from search profiles.

Before you begin
Role required: ais_admin

About this task
Unlinking a search source from a search profile prevents its filtered content from being searchable through that search profile.

When you delete a search source, the system doesn't automatically unlink it from search profiles. In this case, you must manually unlink the search source from each search profile it's linked to.

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Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to unlink the search source from.
3. In the Search Sources related list, select the search source that you want to unlink from the search profile.
4. Select **Unlink Selected**.

Result

The search source no longer appears in the Search Sources related list.

What to do next

To make the search source change take effect, publish the search profile you edited. For details on publishing a search profile, see Publish an AI Search search profile.

Synonyms

Synonyms expand search queries to include additional terms with equivalent meaning or usage. Improve search recall by configuring synonym dictionaries and defining synonyms.

To define synonyms, modify the default synonym dictionary for a search profile or create a new synonym dictionary linked to one or more search profiles. Create and publish synonyms for each dictionary. Publish the dictionary to make your synonyms take effect for searches that use linked search profiles.

You can delete synonym dictionaries that aren't linked to any search profiles.

Synonym usage in search

When a search query includes a term defined in a synonym, AI Search expands the search to include all equivalent terms defined in the synonym.

For example, a synonym might expand the search query term `vacation` to `vacation OR holiday OR pto`. The expanded query returns records that contain any of the three equivalent terms.

Conditions for synonym eligibility

To be eligible for expanding a search query's terms, a synonym must satisfy the following conditions:

- It must be active.
- The synonym dictionary that includes it must be published.
- Its length doesn't exceed the dictionary term-length limit.

The system locates eligible synonyms in synonym dictionaries as follows:

Condition	Result
The search profile specified for the search query links to a published synonym dictionary for the search query's language.	The system only considers synonyms from the linked synonym dictionary. As an example, suppose a search application's search profile links to a French synonym dictionary. When a user searches in French in this application, only synonyms from the linked

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Condition	Result
	French synonym dictionary are eligible to expand search query terms.
The search profile specified for the search query doesn't link to a published synonym dictionary for the search query's language.	The system only considers synonyms from the default (English) synonym dictionary. As an example, suppose a search application's search profile has no linked Spanish synonym dictionary. When a user searches in Spanish in this application, only synonyms from the default (English) synonym dictionary are eligible to expand search query terms.

For more details on language support in synonym dictionaries, see Language dependence.

Synonym terms and payloads

Each synonym includes two or more equivalent terms, defined in two fields. The **Term** field contains one term designated as the synonym's label. The **Payload** field contains the remaining equivalent terms, formatted as a JSON array.

Synonym term expansion is bidirectional. AI Search treats all terms defined in the **Term** and **Payload** fields as equivalent, as illustrated in the following table.

Use case	Synonym expansion behavior
Search query term matches the term from a synonym's **Term** field	AI Search expands the search query term to match all equivalent terms from the **Payload** field.
Search query term matches a term from the **Payload** field	AI Search expands the search query term to match the term from the **Term** field and all remaining equivalent terms from the **Payload** field.

Dictionary term-length limit

By default, AI Search ignores synonym terms that exceed 256 characters in length. You can override this default limit by adding the *`query.maxDictionaryTermLength`* system property. The integer value of this system property indicates the maximum allowable character length for stop word and synonym dictionary terms.

For information on adding a system property, see Add a system property.

⚠ **Warning:** Exercise caution when increasing the dictionary term-length limit beyond its default value. Processing long dictionary terms increases AI Search's memory usage, and in some cases search queries may fail with out-of-memory errors.

Multi-word phrases

A synonym term can include either a single word or a multi-word phrase. AI Search expands multi-word phrases when the search query terms exactly match the order and proximity of the phrased words in the synonym definition. If a user searches with these words in a different arrangement, no expansion occurs.

For example, the following table describes AI Search expansion behavior for a synonym that includes the single word `401k` and the multi-word phrase `retirement account`.

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Search query terms	Synonym expansion behavior
401k	AI Search expands the search query to match either `401k` or `retirement account`.
retirement account	AI Search expands the search query to match either `401k` or `retirement account`.
retirement account bank	AI Search expands the search query to match either `401k` or `retirement account` in addition to `bank`.
account retirement	AI Search doesn't expand the search query terms.
retirement bank account	AI Search doesn't expand the search query terms.

When search query terms match a multi-term synonym, AI Search treats those terms as a quoted phrase. For example, if you define `401k` and `retirement account` as synonyms and a user searches for the unquoted terms `retirement account`, AI Search returns results that match the quoted phrase `"retirement account"`.

Case sensitivity

By default, synonym expansion ignores letter case when comparing synonyms with search query terms. You can enable case sensitivity for a synonym dictionary. This option affects all synonyms defined in the dictionary.

When case sensitivity is enabled, synonyms in the dictionary only match search query terms or phrases that include the same combination of uppercase and lowercase letters.

For example, if you define a synonym including the word CASE and the phrase `Computer-Aided Software Engineering`, AI Search expands searches for CASE but not searches for `case`.

Punctuation sensitivity

By default, synonym expansion ignores punctuation when comparing synonyms with search query terms. You can enable punctuation sensitivity for a synonym dictionary. This option affects all synonyms defined in the dictionary.

When punctuation sensitivity is enabled, synonyms in the dictionary only match search query terms or phrases that include the same punctuation.

For example, suppose you define a synonym equating `U-S-A` with `University of South Australia` and another synonym equating `U.S.A.` with `United States of America`. Without punctuation sensitivity enabled, a search for `U.S.A.` expands to match both `University of South Australia` and `United States of America`. When punctuation sensitivity is enabled, the same search only expands to match `United States of America`.

Language dependence

Synonym expansion is language-dependent. You specify a language for each synonym dictionary, and this language applies to all synonyms defined in the dictionary. Synonyms from dictionaries with the same language as the search query are eligible for expansion.

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Note: If the search profile specified for a search query has no linked synonym dictionary for the search query language, AI Search uses the default (English) synonym dictionary as a fallback.

AI Search supports synonym dictionaries for all languages activated in your instance. For the list of languages you can activate, see Activate a language.

Interaction with other search features

The following table describes interactions between synonyms and other search features.

Feature	Interaction with synonyms
Genius Results	Synonym expansion terms can't trigger Genius Result configurations with Term trigger conditions. When computing Q&A Genius Results for a search query, AI Search expands synonyms in the query.
Lemma and Unicode normalization	If a search query term is defined as a synonym, AI Search doesn't normalize it.
Result improvement rules	By default, a synonym expansion term can activate a result improvement rule if it matches the rule's Query trigger. You can prevent synonym expansion terms from activating a rule with a Query trigger by clearing the **Expand Synonyms For Query Conditions** option that appears when you define the Query trigger. **Note:** Starting with the Xanadu release, AI Search uses synonyms to expand user context field values when applying boost actions from result improvement rules. As an example, if the user context location is `Paris` and you define a synonym that defines `Paris` and `France` as equivalent, your result improvement rule boosts documents containing `France` as well as those containing `Paris`. For more details on boost actions, see Boost search results using a result improvement rule.
Stop words	If a synonym definition includes a term defined as a stop word, AI Search retains that term when checking whether the synonym expands a search query. For example, suppose you define `as` and `a` as stop words and SAAS↔`#software as a service` as a synonym. • If you search for `saas`, AI Search retains the `as` and `a` terms in the synonym expansion. As a result, the search query matches the following records: ○ records that contain the original search query term `saas` ○ records that contain the synonym expansion phrase `software as a service` • If you search for `software as a service`, AI Search retains the `as` and `a` query terms when checking for synonym expansions. As a result, the search query matches the following records: ○ records that contain the phrase `software as a service` ○ records that contain the synonym expansion term `saas`

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Feature	Interaction with synonyms
Typo handling	If a misspelled search query term is defined as a synonym, AI Search expands that synonym without auto-correcting it.

Publishing synonym dictionaries

Publishing a synonym dictionary makes its settings and active synonyms take effect in all linked search profiles.

Publishing a search profile updates the profile's synonym dictionary links but doesn't update the dictionary's settings or active synonyms in AI Search.

Create a synonym dictionary linked to a search profile

Define a new synonym dictionary and link it to a search profile.

Before you begin
Role required: ais_admin

About this task
To make a synonym dictionary affect search behavior, you must link it to a search profile, either at creation time or afterward. To learn about linking a saved dictionary to a search profile, see Link a synonym dictionary to a search profile.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to link the new synonym dictionary to.
3. In the Synonyms related list, select **Create and Link**.
4. On the Dictionary form, fill in the fields.
   For a description of the field values, see Dictionary form.
5. Select **Submit**.

Result
The new synonym dictionary appears in the Synonyms related list.

What to do next
To make new or updated synonym dictionary settings take effect, publish the search profile that you edited. For details on publishing a search profile, see Publish an AI Search search profile.

Create synonyms

Define terms to treat as equivalent in search queries.

Before you begin
Role required: ais_admin

About this task
You must have already created a synonym dictionary. For information on creating synonym dictionaries, see Create a synonym dictionary linked to a search profile.

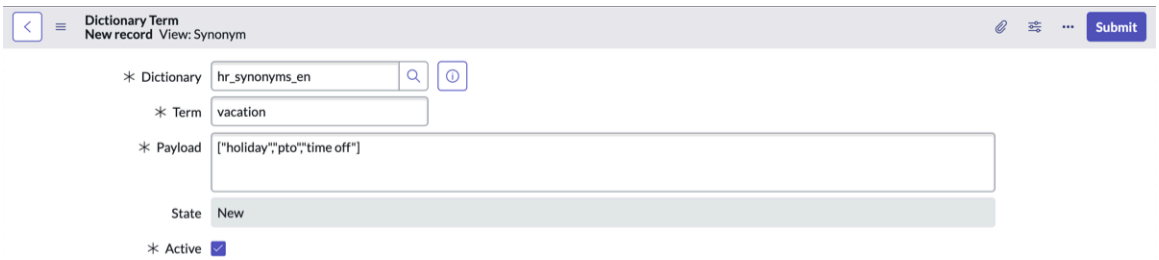
Procedure
1. Navigate to **All** > *AI Search* > *AI Search* **Engine** > **Dictionaries**.
2. Open the synonym dictionary that you want to add the new synonym to.
3. In the AI Search Dictionary Terms related list, select **New**.

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4. On the Dictionary Term form, fill in the fields.
   For a description of the field values, see Dictionary Term form.
5. Select **Submit**.
   The new synonym appears in the AI Search Dictionary Terms related list.
6. **Optional:** Repeat the preceding steps for each additional synonym that you want to create.
7. Choose one of the following actions.
   - To save the modified dictionary and refresh its active synonyms in all linked search profiles, select **Publish**.
   - To save the modified dictionary without refreshing its active synonyms in all linked search profiles, select **Update**.

Example: Define a synonym with equivalent words and phrases

This example shows a synonym defining `vacation`, `holiday`, PTO, and the phrase `time off` as equivalent.



Clone a synonym dictionary

Create a copy of an existing synonym dictionary.

Before you begin
Role required: ais_admin

About this task
Cloning a synonym dictionary copies the source dictionary's settings and all of its defined synonym terms. This process can save you time when you need multiple synonym dictionaries that have many synonym terms in common.

Procedure

1. Navigate to **All** > *AI Search* > **Search Query Settings** > **Dictionaries**.
2. Expand the Synonym record group if necessary and open the synonym dictionary that you want to clone.
3. Select **Clone**.
4. In the Set Dictionary Label dialog box, enter a label for the new synonym dictionary in the **Cloned dictionary label** field and select **OK**.

Result
The new synonym dictionary form opens. All synonym terms defined in the source dictionary appear in the AI Search Dictionary Terms related list.

Link a synonym dictionary to a search profile

Link an existing synonym dictionary to one or more search profiles.

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Before you begin
Role required: ais_admin

About this task
You can link a single synonym dictionary to multiple search profiles.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to link the synonym dictionary to.
3. In the Synonyms related list, select **Link Existing**.
4. On the Search Profile - Dictionary Mapping form, select the synonym dictionary and search profile to link.
   a. Select the reference lookup icon for the **Dictionary** field.
   b. Select the synonym dictionary that you want to link to the search profile.
   c. Select **Submit**.
   For a description of the field values, see Search Profile - Dictionary Mapping form.

Result
The selected synonym dictionary appears in the search profile's Synonyms related list.

What to do next
To make the new synonym dictionary linking take effect, publish the search profile. For more information on publishing a search profile, see Publish an AI Search search profile.

Unlink a synonym dictionary from a search profile

Remove a synonym dictionary from a search profile.

Before you begin
Role required: ais_admin

About this task
Unlinking a synonym dictionary from a search profile doesn't delete the dictionary. To delete a synonym dictionary, you must first unlink it from all search profiles. For steps to delete a synonym dictionary, see Delete a synonym dictionary.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to unlink the synonym dictionary from.
3. In the Synonyms related list, select the option for the synonym dictionary that you want to unlink from the search profile.
4. Select **Unlink Selected**.

Result
The selected synonym dictionary disappears from the search profile's Synonyms related list.

What to do next
To make the change in synonym dictionary linking take effect, publish the search profile. For more information on publishing a search profile, see Publish an AI Search search profile.

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Delete a synonym dictionary

Remove a synonym dictionary that isn't linked from any search profile.

Before you begin

Role required: ais_admin

Procedure

1. Navigate to **All** > *AI Search* > **Search Query Settings** > **Dictionaries**.
   The AI Search Dictionaries list appears with a **[Type] [!=] [Spell Check]** filter condition applied and records grouped by dictionary type.
2. Expand the Synonym record group if necessary and open the synonym dictionary that you want to delete.
3. Select **Delete**.

> **Note:** If the synonym dictionary is still linked to any search profiles, deletion fails and an error message lists the linked profiles. Unlink the dictionary from these search profiles, then repeat the preceding steps. For details on unlinking a synonym dictionary from a search profile, see Unlink a synonym dictionary from a search profile.

Result

The selected synonym dictionary disappears from the AI Search Dictionaries list.

Stop words

Stop words remove search query terms that don't produce meaningful results. Improve search precision and relevancy by configuring stop word dictionaries and defining stop words.

Stop words are common terms that appear on a large proportion of indexed records. Examples of such terms can include articles, conjunctions, personal pronouns, and prepositions. By defining these terms as stop words, you can improve search precision and result relevancy for users.

You can define stop words in the default stop word dictionary for a search profile, or create your own stop word dictionaries linked to search profiles. Create and publish stop words for each dictionary. Publish the dictionary to make your stop words take effect for searches that use linked search profiles.

You can delete stop word dictionaries that aren't linked to any search profiles.

Stop word usage in search

When a search query includes a term defined as a stop word, AI Search removes the term from the search query.

For example, a stop word might remove the term `my` from a search query for `upgrade my laptop`. This modified search query only matches records containing the more relevant terms `upgrade` and `laptop`.

Conditions for stop word eligibility

To be eligible for removal from a search query's terms, a stop word must satisfy the following conditions:

- It must be active.
- The stop word dictionary that includes it must be published.
- Its length doesn't exceed the dictionary term-length limit.

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The system locates eligible stop words in stop word dictionaries as follows:

Condition	Result
The search profile specified for the search query links to a published stop word dictionary for the search query's language.	The system only considers stop words from the linked stop word dictionary. As an example, suppose a search application's search profile links to a French stop word dictionary. When a user searches in French in this application, only stop words from the linked French stop word dictionary are eligible for removal from the search query terms.
The search profile specified for the search query doesn't link to a published stop word dictionary for the search query's language.	The system only considers stop words from the default (English) stop word dictionary. As an example, suppose a search application's search profile has no linked Spanish stop word dictionary. When a user searches in Spanish in this application, only stop words from the default (English) stop word dictionary are eligible for removal from the search query terms.

For more details on language support in stop word dictionaries, see Language dependence.

Dictionary term-length limit

By default, AI Search ignores stop word terms that exceed 256 characters in length. You can override this default limit by adding the *`query.maxDictionaryTermLength`* system property. The integer value of this system property indicates the maximum allowable character length for stop word and synonym dictionary terms.

For information on adding a system property, see Add a system property.

⚠ **Warning:** Exercise caution when increasing the dictionary term-length limit beyond its default value. Processing long dictionary terms increases AI Search's memory usage, and in some cases search queries may fail with out-of-memory errors.

Multi-word phrases

A stop word can include either a single word or a multi-word phrase. AI Search removes multi-word phrases from the search query when the query terms exactly match the order and proximity of the phrased words in the stop word definition. If a user searches with these words in a different arrangement, no term removal occurs.

For example, the following table describes AI Search stop word removal behavior for a stop word that includes the multi-word phrase `retirement account`.

Search query terms	Stop word removal behavior
my retirement account	AI Search removes the terms `retirement account` from the search query.
my bank retirement account	AI Search removes the terms `retirement account` from the search query.
my account retirement	AI Search doesn't remove any terms from the search query.

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Search query terms	Stop word removal behavior
my retirement bank account	AI Search doesn't remove any terms from the search query.

Case sensitivity

By default, AI Search ignores letter case when comparing stop words with search query terms. You can enable case sensitivity for a stop word dictionary. This option affects all stop words defined in the dictionary.

When case sensitivity is enabled, stop words in the dictionary only match search query terms or phrases that include the same combination of uppercase and lowercase letters.

For example, if you define a `RAID` stop word in a dictionary with case sensitivity enabled, AI Search ignores the search query term `RAID` but treats the search query term `raid` normally.

Punctuation sensitivity

By default, AI Search ignores punctuation when comparing stop words with search query terms. You can enable punctuation sensitivity for a stop word dictionary. This option affects all stop words defined in the dictionary.

When punctuation sensitivity is enabled, stop words in the dictionary only match search query terms or phrases that include the same punctuation.

For example, if you define a `one-half` stop word in a dictionary with punctuation sensitivity enabled, AI Search removes the search query term `one-half` but doesn't remove the search query term `one half`.

Language dependence

Stop word removal is language-dependent. You specify a language for each stop word dictionary, and this language applies to all stop words defined in the dictionary. Stop words from dictionaries with the same language as the search query are eligible for removal.

Note: If the search profile specified for a search query has no linked stop word dictionary for the search query language, AI Search uses the default (English) stop word dictionary as a fallback.

AI Search supports stop word dictionaries for all languages activated in your instance. For the list of languages you can activate, see Activate a language.

You can only link one stop word dictionary per language to a given search profile.

Interaction with other search features

The following table describes interactions between stop words and other search features.

Feature	Interaction with stop words
Genius Results	If a search query term that matches a Genius Result configuration's Term trigger is defined as a stop word, AI Search evaluates the trigger before removing that stop word from the search query. When computing Q&A Genius Results for a search query, AI Search ignores stop words in the query.

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Feature	Interaction with stop words
Lemma and Unicode normalization	If a search query term is defined as a stop word, AI Search removes that term without normalizing it.
Result improvement rules	If a search query term that matches a result improvement rule's Query trigger is defined as a stop word, AI Search evaluates the rule trigger before removing the stop word from the search query.
Synonyms	If a synonym definition includes a term defined as a stop word, AI Search retains that term when checking whether the synonym expands a search query. For example, suppose you define `as` and `a` as stop words and SAAS↔`#software as a service` as a synonym. • If you search for `saas`, AI Search retains the `as` and `a` terms in the synonym expansion. As a result, the search query matches the following records: ○ records that contain the original search query term `saas` ○ records that contain the synonym expansion phrase `software as a service` • If you search for `software as a service`, AI Search retains the `as` and `a` query terms when checking for synonym expansions. As a result, the search query matches the following records: ○ records that contain the phrase `software as a service` ○ records that contain the synonym expansion term `saas`
Typo handling	If a misspelled search query term is defined as a stop word, AI Search auto-corrects that term normally instead of removing it. AI Search ignores terms defined as stop words when determining an auto-correction for a misspelled search query term. For example, if you define `email` as a stop word, AI Search doesn't offer `email` as an auto-correction when you search for `emial`.
Wildcard operators	When expanding search terms that contain `%` or `*` wildcard operators, AI Search ignores terms defined as stop words. For example, suppose you define `the` and `their` as stop words. A search for `the*` won't expand to match `the` or `their`, but will still match non-stop word terms such as `there` and `these`.

Publishing stop word dictionaries

Publishing a stop word dictionary makes its settings and active stop words take effect in all linked search profiles.

Publishing a search profile updates the profile's stop word dictionary links but doesn't update the dictionary's settings or active stop words in AI Search.

Create a stop word dictionary linked to a search profile

Define a new stop word dictionary and link it to a search profile.

Before you begin
Role required: ais_admin

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About this task

To make a stop word dictionary affect search behavior, you must link it to a search profile, either at creation time or afterward. You can only link one stop word dictionary per language to a given search profile. To learn about linking a saved stop word dictionary to a search profile, see Link a stop word dictionary to a search profile.

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to link the new stop word dictionary to.
3. In the Stop Words related list, select **Create and Link**.
4. On the Dictionary form, fill in the fields.
   For a description of the field values, see Dictionary form.
5. To save the new stop word dictionary and link it to the specified search profile, select **Submit.**

Result

The new stop word dictionary appears in the Stop Words related list.

What to do next

To make new or updated stop word dictionary settings take effect, publish the search profile that you edited. For details on publishing a search profile, see Publish an AI Search search profile.

Create stop words

Define terms to remove from search queries.

Before you begin

Role required: ais_admin

About this task

You must have already created a stop word dictionary. For information on creating stop word dictionaries, see Create a stop word dictionary linked to a search profile.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Engine** > **Dictionaries**.
2. Open the stop word dictionary that you want to add the new stop word to.
3. In the AI Search Dictionary Terms related list, select **New**.
4. On the Dictionary Term form, fill in the fields.
   For a description of the field values, see Dictionary Term form.
5. Select **Submit**.
   The new stop word appears in the AI Search Dictionary Terms related list.
6. **Optional:** Repeat the preceding steps for each additional stop word that you want to create.
7. Choose one of the following actions.
   - To save the modified dictionary and refresh its active stop words in all linked search profiles, select **Publish**.
   - To save the modified dictionary without refreshing its active stop words in all linked search profiles, select **Update**.

Clone a stop word dictionary

Create a copy of an existing stop word dictionary.

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Before you begin
Role required: ais_admin

About this task
Cloning a stop word dictionary copies the source dictionary's settings and all of its defined stop word terms. This process can save you time when you need multiple stop word dictionaries that have many stop word terms in common.

Procedure
1. Navigate to **All** > *AI Search* > **Search Query Settings** > **Dictionaries**.
2. Expand the Stop Word record group if necessary and open the stop word dictionary that you want to clone.
3. Select **Clone**.
4. In the Set Dictionary Label dialog box, enter a label for the new stop word dictionary in the **Cloned dictionary label** field and select **OK**.

Result
The new stop word dictionary form opens. All stop word terms defined in the source dictionary appear in the AI Search Dictionary Terms related list.

Link a stop word dictionary to a search profile

Link an existing stop word dictionary to one or more search profiles.

Before you begin
Role required: ais_admin

About this task
You can link a single stop word dictionary to multiple search profiles. You can only link one stop word dictionary per language to a given search profile.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to link the stop word dictionary to.
3. In the Stop Words related list, select **Link Existing**.
4. On the Search Profile - Dictionary Mapping form, select the stop word dictionary and search profile to link.
   a. Select the reference lookup icon  for the **Dictionary** field.
   b. Select the stop word dictionary that you want to link to the search profile.
   c. Select **Submit**.
   For a description of the field values, see Search Profile - Dictionary Mapping form.

Result
The selected stop word dictionary appears in the search profile's Stop Words related list.

What to do next
To make the new stop word dictionary linking take effect, publish the search profile. For more information on publishing a search profile, see Publish an AI Search search profile.

Unlink a stop word dictionary from a search profile

Remove a stop word dictionary that isn't linked from any search profile.

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Before you begin
Role required: ais_admin

About this task
Unlinking a stop word dictionary from a search profile doesn't delete the dictionary. To delete a stop word dictionary, you must first unlink it from all search profiles. For steps to delete a stop word dictionary, see Delete a stop word dictionary.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to unlink the stop word dictionary from.
3. In the Stop Words related list, select the option for the stop word dictionary that you want to unlink from the search profile.
4. Select **Unlink Selected**.

Result
The selected stop word dictionary disappears from the search profile's Stop Words related list.

What to do next
To make the change in stop word dictionary linking take effect, publish the search profile. For more information on publishing a search profile, see Publish an AI Search search profile.

Delete a stop word dictionary

Remove a stop word dictionary that isn't linked from any search profile.

Before you begin
Role required: ais_admin

Procedure
1. Navigate to **All** > *AI Search* > **Search Query Settings** > **Dictionaries**.
   The AI Search Dictionaries list appears with a **[Type] [!=] [Spell Check]** filter condition applied and records grouped by dictionary type.
2. Expand the Stop Word record group if necessary and open the stop word dictionary that you want to delete.
3. Select **Delete**.

> **Note:** If the stop word dictionary is still linked to any search profiles, deletion fails and an error message lists the linked profiles. Unlink the dictionary from these search profiles, then repeat the preceding steps. For details on unlinking a stop word dictionary from a search profile, see Unlink a synonym dictionary from a search profile.

Result
The selected stop word dictionary disappears from the AI Search Dictionaries list.

Typo handling

AI Search replaces misspelled search query terms with auto-correction terms derived from indexed content. Configure typo handling dictionary settings to control derivation of auto-correction terms.

To define auto-correction terms for a search profile, modify settings in the profile's linked typo handling dictionary. The typo handling dictionary derives a list of auto-correction terms from indexed content found in search sources linked to its search profile. Update the typo handling

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dictionary to save its settings. Publish the linked search profile to make auto-correction terms available for searches that use the profile.

AI Search automatically creates a typo handling dictionary for a search profile when you link search sources to that profile. You can't delete a typo handling dictionary, unlink it from its search profile, or link it to any other search profile.

To disable typo handling auto-correction for a search application, deselect the **Enable Typo Handling** option in the search application configuration. For more details on search application configuration settings, see Create a search application configuration for AI Search.

Conditions for auto-correction term eligibility

When deriving its list of auto-correction terms, the typo handling dictionary only considers indexed terms that satisfy the following conditions:

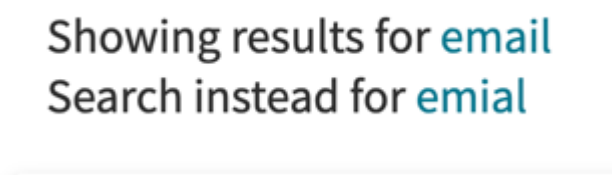
- The term includes at least 3 characters and no more than 255 characters.
- The term appears at least once in indexed records from the search profile's linked search sources.

Auto-correction of search query terms

When a search query includes a term not present in the typo handling dictionary, AI Search looks for terms in the dictionary with similar spelling. If it finds a good match, it automatically replaces the original search query term with the dictionary term.

For example, a search for `emial`, which isn't present on any indexed record, might auto-correct to the similarly spelled term `email` which exists on multiple indexed records and thus appears in the typo handling dictionary.

A notification message displays the auto-corrected term. Users can select the link in this message to repeat their search with the original query term.



Terms excluded from auto-correction

Auto-correction ignores search query terms that satisfy any of the following conditions:

Condition	Description
Search query term includes only 1 or 2 characters	Auto-correction ignores search query terms below 3 characters in length. For example, AI Search doesn't auto-correct the search query term `gi`.
Search query term includes only uppercase letters	To enable search for abbreviations, auto-correction ignores search query terms that contain only uppercase letters.

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Condition	Description
	For example, AI Search doesn't auto-correct the search query term `PINN`, even if it auto-corrects the lowercase form `pinn` to `pin`.
Search query term includes one or more numeric digits	To enable search for numbers and alphanumeric identifiers, auto-correction ignores search query terms that include numeric digits. For example, AI Search doesn't auto-correct the search query term `402K`.
Search query term excluded from typo handling dictionary	Auto-correction ignores search query terms excluded from the typo handling dictionary. For instructions on excluding terms from a typo handling dictionary, see Exclude a term from a typo handling dictionary.

Automatic refresh of auto-correction term lists

Each typo handling dictionary automatically refreshes its list of auto-correction terms after a set interval. The refresh operation has the same effect as republishing the dictionary's linked search profile.

By default, typo handling dictionaries refresh every 24 hours. If you want the term list refreshed less frequently, you can increase this interval in the dictionary settings.

Language dependence

Typo handling is language-dependent. AI Search derives a separate list of auto-correction terms for each supported language found in the search sources' indexed content.

AI Search supports derivation of auto-correction terms for Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French - Canada, French, German, Hebrew, Hungarian, Italian, Norwegian (Bokmål), Polish, Portuguese, Russian, Spanish, Swedish, and Turkish. Typo handling auto-correction term derivation isn't supported for Japanese, Korean, Simplified Chinese, or Traditional Chinese.

Interaction with other search features

The following table describes interactions between typo handling and other search features.

Feature	Interaction with typo handling
Genius Results	Auto-corrected search query terms can't trigger Genius Result configurations with Term trigger conditions. When computing Q&A Genius Results for a search query, AI Search corrects terms in the query.
Lemma and Unicode normalization	AI Search performs lemma and Unicode normalization on auto-corrected search query terms.

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Feature	Interaction with typo handling
Result improvement rules	An auto-corrected search query term can trigger a result improvement rule if it matches the rule's Query trigger.
Stop words	If a misspelled search query term is defined as a stop word, AI Search auto-corrects that term normally instead of removing it. AI Search ignores terms defined as stop words when determining an auto-correction for a misspelled search query term. For example, if you define `email` as a stop word, AI Search doesn't offer `email` as an auto-correction when you search for `emial`.
Synonyms	If a misspelled search query term is defined as a synonym, AI Search expands that synonym without auto-correcting it.

Modify settings for a typo handling dictionary

Modify typo handling dictionary settings for a search profile.

Before you begin

Role required: ais_admin

About this task

Each typo handling dictionary is linked to a search profile. For more information about search profiles, see Search profiles in AI Search.

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that contains the typo handling dictionary that you want to modify.
3. In the Typo Handling related list, open the record for the typo handling dictionary.
4. On the AI Search Dictionary form, update the fields.
   For a description of the field values, see Dictionary form.
5. Select **Update**.

What to do next

To make updated settings for a typo handling dictionary take effect, publish the search profile linked to the dictionary. For details on publishing a search profile, see Publish an AI Search search profile.

Exclude a term from a typo handling dictionary

Prevent AI Search from auto-correcting a term in user search queries by excluding the term from a typo handling dictionary.

Before you begin

You must have already defined a search profile with one or more linked search sources.

Role required: ais_admin

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to exclude a typo handling term for.

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3. In the Typo Handling related list, open the typo handling dictionary.
4. In the AI Search Dictionary Terms related list, select **New**.
5. On the Dictionary Term form, fill in the fields.
   For a description of the field values, see Dictionary Term form.
6. Select **Submit**.
   The new term appears in the AI Search Dictionary Terms related list with the **State** set to *New*.
7. **Optional:** Repeat the preceding steps for each additional term that you want to exclude.
8. Select **Publish**.
   The typo handling dictionary appears in the Typo Handling related list with the **State** set to *Published*.

What to do next

To make updated typo handling settings take effect, publish the search profile that you edited. For details on publishing a search profile, see Publish an AI Search search profile.

Genius Results

Optionally display the best answers for a search query as actionable Genius Result cards included with search results.

A Genius Result configuration includes a trigger condition and logic for creating answers. The trigger condition determines whether the Genius Result configuration activates for a search query. When activated, the configuration checks for search results with extremely high relevancy. If it finds any, its answer logic populates one or more Genius Result cards with information and actions derived from these results. The Genius Result cards appear alongside normal search results, giving the user immediate access to the most relevant answers and actions.

To use a Genius Result configuration in searches, link it to one or more of your search profiles. For details on this procedure, see Link a Genius Result configuration to a search profile.

Genius Result evaluation order and result limit

AI Search evaluates active Genius Result configurations for a search profile in an order determined by their numeric **Order** field values, as defined in the search profile's Genius Results related list. Genius Result configurations with lower **Order** field values are evaluated before those with higher field values. As an example, a Genius Result configuration with **Order** 100 is evaluated before one with **Order** 200. To learn how to change the evaluation order, see Set the evaluation order for Genius Result configurations in a search profile.

> **Note:** **Order** field values for linked Genius Result configurations are set separately for each search profile. A Genius Result configuration that's linked to multiple search profiles can have a different **Order** field value in each profile. For instance, you might set an **Order** value of 100 for the Q&A Genius Result configuration in one search profile but set a value of 750 for the same Genius Result configuration in a second search profile that it's linked to.

A search application configuration's **Genius Results Limit** field value specifies the maximum number of Genius Result cards the application can display. For more details on search application configuration settings, see Search Application Configuration form.

Genius Result trigger conditions

You can select any one of the following trigger conditions for a Genius Result configuration:

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- *Always*: The Genius Result configuration activates for all search queries.
- *NLU*: The Genius Result configuration activates when the search query's detected intent matches a specified Natural Language Understanding (NLU) model intent. For more information on NLU models and intents, see Natural Language Understanding.
- *Term*: The Genius Result configuration activates when the search query consists of a single specified term or phrase.

Note: A Genius Result configuration can trigger and still not return answers. Genius Result answers only display when AI Search has extremely high confidence that there's a correct response for the search query. You should typically expect to see Genius Result answers for a small percentage of search queries.

Genius Result answer types

A Genius Result configuration can include either of the following answer types:

- *Search*: When triggered, displays Genius Result cards for results from a search query. The search query must be defined in a server-side script included in the Genius Result configuration. Each search result displays as a separate Genius Result card, to a maximum of three cards. If the search query returns no results, no Genius Result card is displayed.
- *Script*: When triggered, displays a Genius Result card containing key-value pairs. The object containing these key-value pairs must be defined in a server-side script included in the Genius Result configuration. The script can use methods from any ServiceNow AI Platform® public API to construct this object.

Language support

In the base system, Genius Results only support English search queries.

Table record limit for Genius Result configurations with NLU trigger conditions

If an NLU model includes a table vocabulary source that references a table containing more than 100,000 records, sync fails for the vocabulary source. When sync fails, the model can't be successfully trained, and Genius Result configurations that use the model in their NLU trigger conditions don't operate correctly.

Warning: Don't activate the People Genius Result configuration if your instance has more than 100,000 records in any of the following tables:

- Catalog Item [sc_cat_item]
- Department [cmn_department]
- Location [cmn_location]
- User [sys_user]

These tables are configured as vocabulary sources in the Default AI Search Genius Results Model specified in the People configuration's NLU trigger condition. If your instance has more than 100,000 records in any of the listed tables, training will fail for the NLU model and the People Genius Result configuration won't operate correctly.

For more information on NLU vocabulary sources, see NLU vocabulary.

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Genius Result review feedback

You can review individual Genius Result answers and provide feedback about their accuracy. To provide review feedback on a Genius Result answer, select one of the thumb icons shown on the answer card:

- If the answer answers your question accurately, select the thumbs up icon  .
- If the answer answers your question inaccurately, select the thumbs down icon  .

Your feedback helps ServiceNow improve future versions of Genius Result configurations.

Interaction with other search features

The following table describes interactions between Genius Results and other search features.

Feature	Interaction with Genius Results
Lemma and Unicode normalization	Search query terms added by lemma or Unicode normalization can't trigger Genius Result configurations with Term trigger conditions.
Stop words	If a search query term that matches a Genius Result configuration's Term trigger is defined as a stop word, AI Search evaluates the trigger before removing that stop word from the search query.
Synonyms	Synonym expansion terms can't trigger Genius Result configurations with Term trigger conditions.
Typo handling	Auto-corrected search query terms can't trigger Genius Result configurations with Term trigger conditions.

Genius Result configurations in the base system

Preconfigured AI Search Genius Result configurations display concise, actionable answers derived from high-relevancy search results. These configurations return Genius Result answers for Catalog Items, tables, users, and Knowledge articles that match your search.

The base system includes multiple Genius Result configurations.

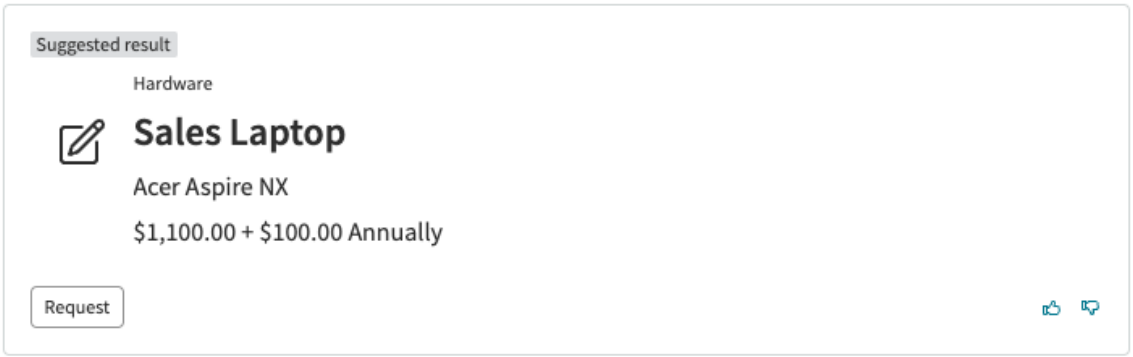
Note: You can link the base system's Genius Result configurations to your own search profiles. You can't modify these Genius Result configurations, but you can clone them and modify the cloned configurations.

Catalog Item Genius Results

Catalog Item Genius Results display top search results from the Catalog Item [sc_cat_item] table. Each answer card shows a single Catalog Item record. You can create a request for the Catalog Item directly from the answer card.

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Sample Catalog Item Genius Result answer card



Select **Request** to create a new request for the specified Catalog Item.

Catalog Item Genius Results only support English searches.

NLQ Genius Results

NLQ (Natural Language Query) Genius Results use NLQ processing to surface relevant results from tables that match your search query. Each NLQ Genius Result answer card displays a preview of records from matching tables. You can navigate to a matching table's list view or the CMDB workspace directly from the Genius Result answer card.

NLQ Genius Results don't use indexed sources when finding tables that match your query. You don't need to define a table as an indexed source to make it eligible to appear in NLQ Genius Result answers.

When computing NLQ Genius Result answers, AI Search identifies tables that match your search using the following NLQ query types:

- Natural language queries similar to the ones made using Analytics Overview. To learn more about Analytics Overview table query capabilities, see Platform Analytics overview.
- Natural language queries similar to the ones made using the Configuration Management Database (CMDB). These CMDB queries only match tables that aren't defined as indexed sources. For more information about CMDB table query capabilities, see Configuration Management.

AI Search combines the results from these query types when creating NLQ Genius Result answer cards. A single NLQ Genius Result answer card may contain tables returned by Analytics Overview queries, CMDB queries, or both.

For more information about NLQ processing, see Natural Language Query.

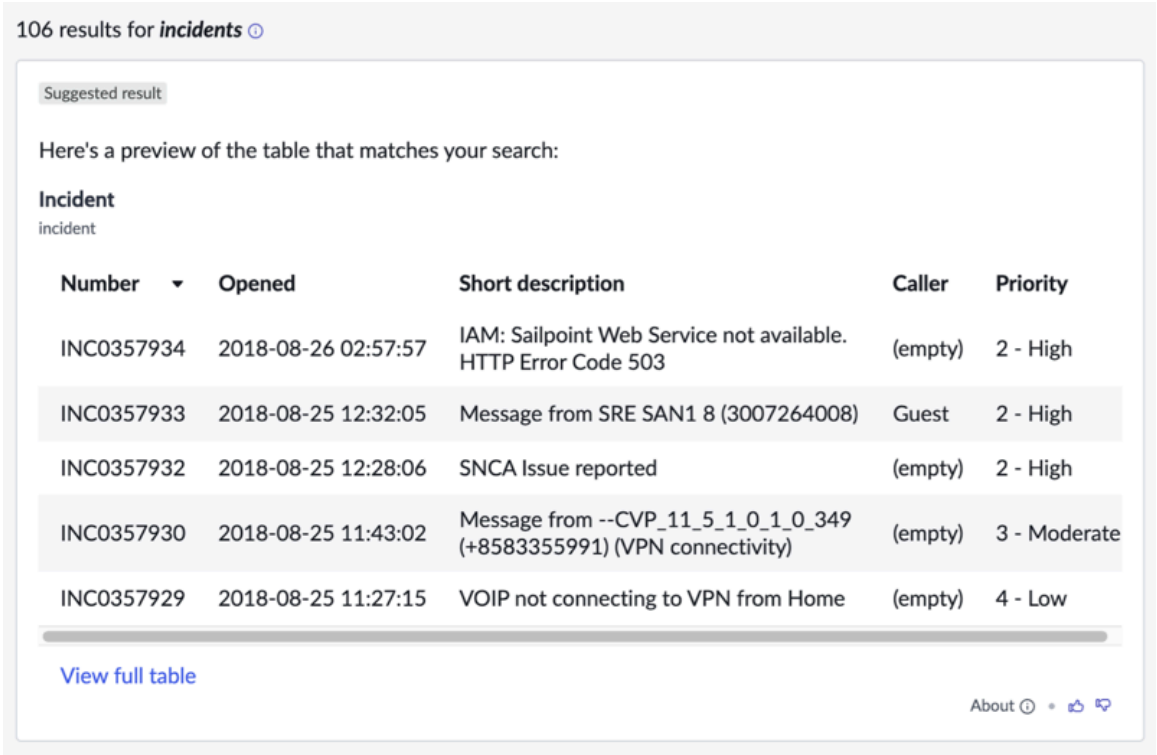
Answer card format

The NLQ Genius Result answer card shows different results depending on how many tables your search matched.

Search matches a single table

When your search only matches one table, the answer card's preview list displays up to five records from that table. To see more records from the table, select **View full table**.

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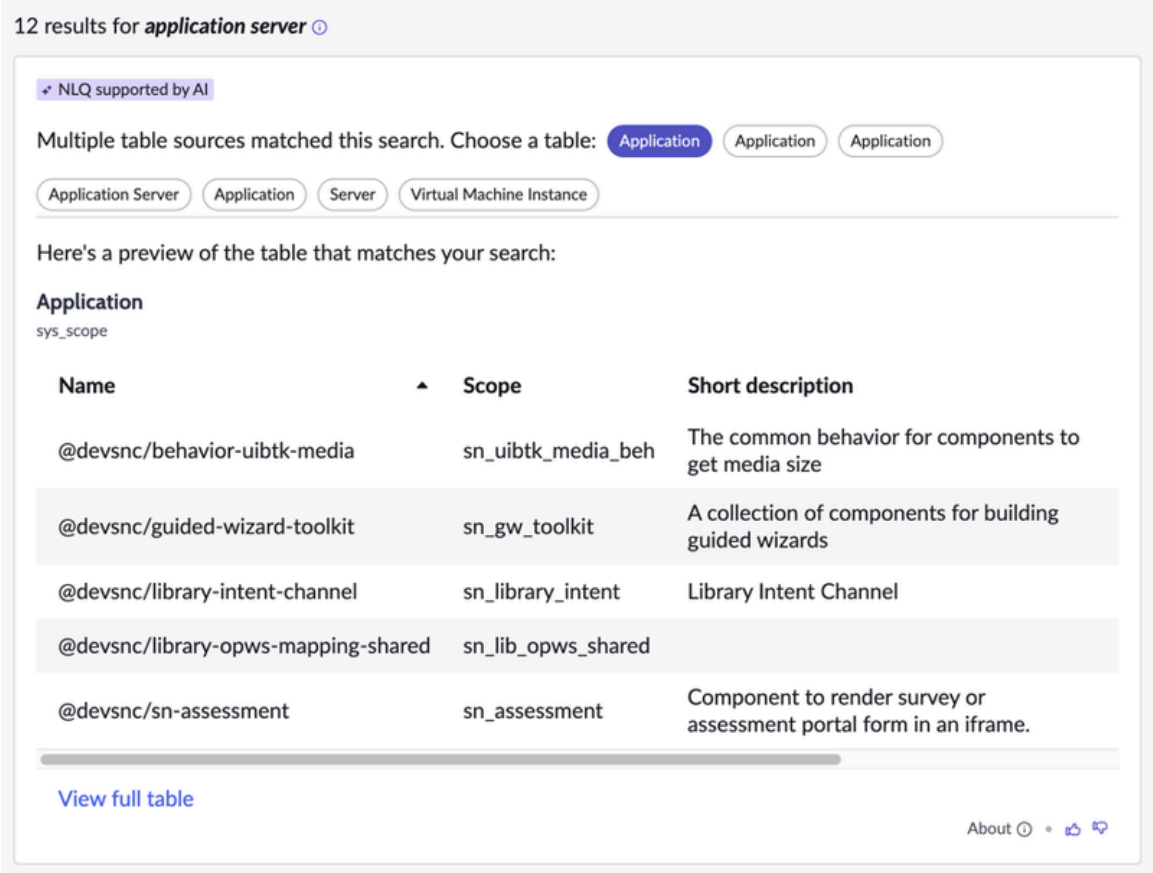


Search matches multiple tables

When your search matches multiple tables, the answer card displays the matching tables as pills or as entries in a drop-down list. You can select any of the matching tables to preview.

The preview list displays up to five records from the selected table. To see more records from the table, select **View full table**.

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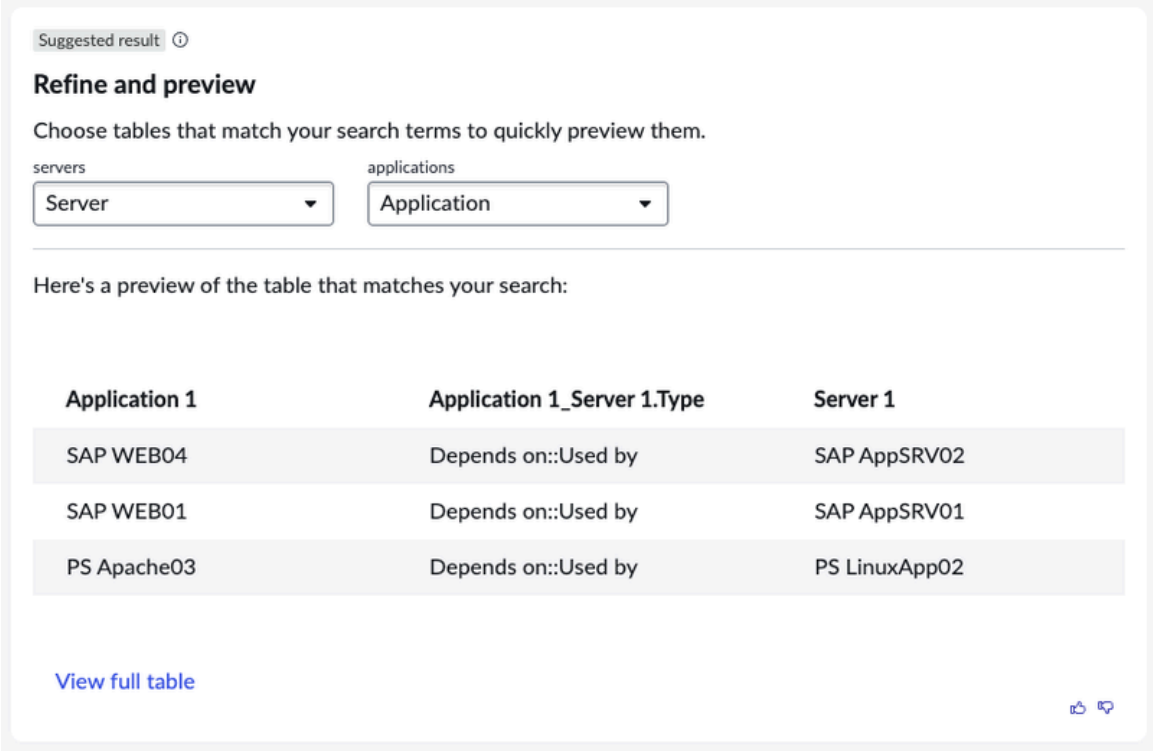


Multiple search terms match CMDB tables

When multiple terms in your search match CMDB tables, the answer card displays **Refine and preview** controls. A drop-down list appears for each search term that matches one or more CMDB tables. Use the drop-down lists to refine your results by selecting a CMDB table for each matching search term.

The preview list displays records from a CMDB workspace smart search for the selected tables, including their connecting relationships. To see more records from the chosen tables, select **View full table**.

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Viewing full tables

When you select **View full table** in an NLQ Genius Result answer card, the action performed depends on how the matching table was found. The default actions are as follows.

- If the table was found by an Analytics Overview table query, the system displays it in list view.
- If the table was found by a CMDB table query, the system displays it in the CMDB Workspace.

Search administrators can customize these actions. For more information, see the Configure navigation actions for NLQ Genius Result answer cards section.

Review feedback

Some NLQ Genius Result answers show *NLQ supported by AI* as their answer type, indicating that they used artificial intelligence to help find tables that matched your search query. Because these answers are automatically generated, you should review them for accuracy.

To provide review feedback on an NLQ Genius Result answer, select one of the thumb icons shown on the answer card. If the answer's information is accurate, select the thumbs up icon. If the answer's information isn't accurate, select the thumbs down icon.

Your feedback helps ServiceNow improve future versions of this Genius Result configuration.

Limitations

Like the other base system Genius Result configurations, NLQ Genius Results only support searches in English.

NLQ Genius Results rely on Natural Language Query processing, which can increase the time required to return results on the first search for a given set of terms. Consider this performance impact before enabling NLQ Genius Results in any of your AI Search applications.

NLQ Genius Results don't support the following table query options:

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- Grouping of table query results
- Rendering of table query results as pie charts or bar charts
- Trend and single score visualizations
- Keywords that return results in non-list formats, such as `total`, `count`, or `average`

Display NLQ Genius Result answers in Service Portal search applications

Configure the system to display search result preview lists for NLQ Genius Result answers in Service Portal search applications.

Before you begin

Only perform this task if you want to use NLQ Genius Results in your Service Portal search applications. If you only use NLQ Genius Results in Next Experience search applications, you don't need to perform this task.

Role required: admin

About this task

The *glide.service_portal.ais_nlq_enabled* system property determines whether the system displays search result preview lists for NLQ Genius Result answers in Service Portal search applications.

Administrators should set this system property's value to *true* if the NLQ Genius Result configuration is active in any Service Portal application.

Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Select **New**.
3. On the System Property form, enter these values.

Field	Value
Name	glide.service_portal.ais_nlq_enabled
Type	true | false
Value	true

   For details on this system property's values, see the System properties for NLQ Genius Results section.

4. Press **Submit**.
   The new *glide.service_portal.ais_nlq_enabled* record appears in the System Property [sys_properties] table list view.

Configure navigation actions for NLQ Genius Result answer cards

Configure the navigation actions that trigger when a user selects **View full table** on an NLQ Genius Result action card. Each navigation action includes a redirection payload and can optionally include filters for a table's name, the NLQ source that returned the table, or the search profile used by the search application.

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Before you begin
Role required: ais_admin

About this task
When you select **View full table** on an NLQ Genius Result answer card, the action performed depends on how the matching table was found. The default actions are as follows.

- For a table found by an Analytics Overview table query, the table displays in list view.
- For a table found by a CMDB table query, the CMDB workspace opens.

As a search administrator, you can customize the actions available for NLQ Genius Result answer cards.

Procedure
1. Navigate to the AI Search NLQ Navigation [ais_nlq_navigation] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `ais_nlq_navigation.list`.
   c. Press Enter.
2. Edit an existing navigation record or create a new one by selecting **New**.
3. On the AI Search NLQ Navigation form, fill in the fields for your navigation action.

Field	Description
Source	Optional NLQ source filter for the navigation action. The action only operates for tables that satisfy this source filter. When this field is left empty, the navigation action operates for tables from any NLQ source that isn't specified in another navigation action's **Source** field. As an example, suppose you have two navigation actions: one with **Source** set to `CMDB_WS` and a second one with no **Source** field value. ○ When an NLQ Genius Result answer card previews a table returned by the CMDB NLQ source, selecting **View full table** triggers the first navigation action because the table name satisfies the action's NLQ source filter. ○ When an NLQ Genius Result answer card previews a table from the Analytics Overview NLQ source, selecting **View full table** instead triggers the second navigation action because the table's NLQ source doesn't satisfy the first action's NLQ source filter. ○ Type: string ○ Default value: none. ○ Supported values: ▪ *AC*: The navigation action only operates for tables returned by the Analytics Overview NLQ source. ▪ *CMDB_WS*: The navigation action only operates for tables returned by the CMDB NLQ source.
Action Payload	JSON payload for the navigation action. This field's value determines where AI Search redirects when you select **View full table** on an NLQ Genius Result answer card.

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Field	Description
	When submitting the JSON payload for redirection, AI Search replaces the following references with relevant values: ○ *${logID}*: Replaced with the NLQ transaction's ID as shown in system logs. ○ *${query}*: Replaced with the query filter from the original search query that triggered the NLQ Genius Result. ○ *${table}*: Replaced with the name of the table previewed on the NLQ Genius Result answer card. ○ *${utterance}*: Replaced with the original search query that triggered the NLQ Genius Result. As an example, the default navigation action that opens a table in the CMDB workspace specifies this action payload that makes use of all four references: `{ "external": { "url": "now/cmdb/home/sub/smart-search-results/${table}/${utterance}/params/encoded-query/${query}/nlq-query-log/${logID}", "target": "_self" } }` ○ Type: JSON ○ Default value: none
Profile	Optional reference to a search profile record. The navigation action only operates in search applications that use the referenced search profile. When this field is left empty, the navigation action operates for any search application that doesn't use a search profile referenced in another navigation action's **Profile** field. As an example, suppose you have two navigation actions: one with **Profile** referencing the `Service Portal Default Search Profile` record and a second one with no **Profile** reference field value. ○ When you search in an application that uses the Service Portal Default Service Profile, selecting **View full table** on an NLQ Genius Result answer card triggers the first navigation action because the search profile in use is the one referenced in the action. ○ When you search in any other search application, selecting **View full table** instead triggers the second navigation action because the search profile in use isn't referenced in the first navigation action. ○ Type: reference ○ Default value: none
Action	Name for the navigation action. ○ Type: string ○ Default value: none
Table	Optional table filter for the navigation action. The action only operates for the table whose name matches this filter. When this field is left empty, the navigation action operates for any table that doesn't have its name specified in another navigation action's **Table** field.

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Field	Description
	As an example, suppose you have two navigation actions: one with **Table** set to `my_custom_table` and a second one with no **Table** field value. ○ When an NLQ Genius Result answer card previews your custom table, selecting **View full table** triggers the first navigation action because the table name satisfies the action's table filter. ○ When an NLQ Genius Result answer card previews any other table, selecting **View full table** instead triggers the second navigation action because the table name doesn't satisfy the first action's table filter. ○ Type: table_name ○ Default value: none

4. Select **Update** if you're editing an existing navigation action record, or **Submit** if you're creating a new one.

System properties for NLQ Genius Results

A system property determines whether the system displays search result preview lists for NLQ Genius Result answers in Service Portal search applications.

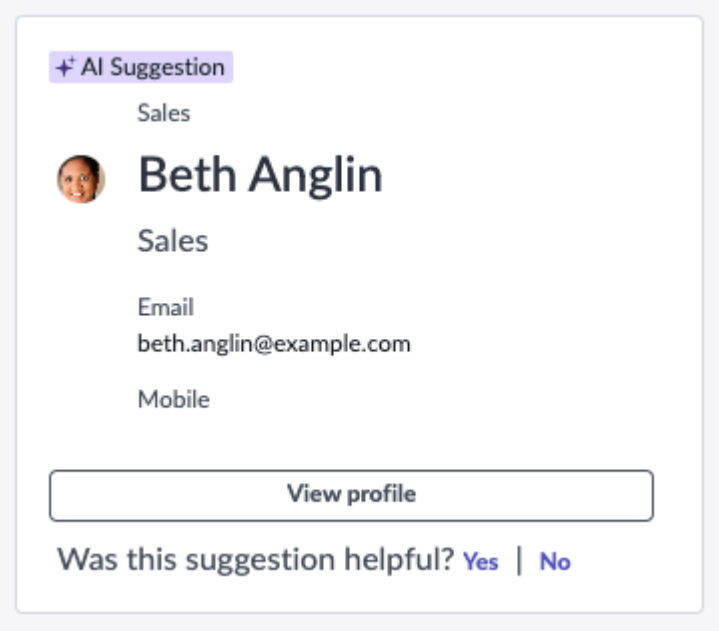
Property	Description
glide.service_portal.ais_nlq_enabled	Specifies whether the system displays search result preview lists for NLQ Genius Result answers in Service Portal search applications. If you activate the NLQ Genius Result configuration in any Service Portal search application, set this system property's value to *true*. • Type: true | false • Default value: false • Location: System Property [sys_properties] table • Supported values: ○ *true*: The system displays search result preview lists for NLQ Genius Result answers in Service Portal search applications. ○ *false*: The system doesn't display search result preview lists for NLQ Genius Result answers in Service Portal search applications. ⚠ **Warning:** This value prevents NLQ Genius Result answers from displaying in Service Portal search applications.

People Genius Results

People Genius Results display top search results from the User [sys_user] table. Each People Genius Result answer card shows a single user record. You can view the user's full profile directly from the answer card.

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Sample People Genius Result answer card



Select **View profile** to see the user's profile.

People Genius Results only support English searches.

The People Genius Result configuration is inactive in the base system. To learn how to activate it, see Activate People Genius Results.

Warning: Don't activate the People Genius Result configuration if your instance has more than 100,000 records in any of the following tables:

- Catalog Item [sc_cat_item]
- Department [cmn_department]
- Location [cmn_location]
- User [sys_user]

These tables are configured as vocabulary sources in the Default AI Search Genius Results Model specified in the People configuration's NLU trigger condition. If your instance has more than 100,000 records in any of the listed tables, training will fail for the NLU model and the People Genius Result configuration won't operate correctly.

Activate People Genius Results

Enable AI Search's People default Genius Result configuration for use in your search profiles.

Before you begin
Role required: ais_admin

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Warning: Don't activate the People Genius Result configuration if your instance has more than 100,000 records in any of the following tables:

- Catalog Item [sc_cat_item]
- Department [cmn_department]
- Location [cmn_location]
- User [sys_user]

These tables are configured as vocabulary sources in the Default AI Search Genius Results Model specified in the People configuration's NLU trigger condition. If your instance has more than 100,000 records in any of the listed tables, training will fail for the NLU model and the People Genius Result configuration won't operate correctly.

About this task

The People default Genius Result configuration is inactive in the base system. To use this Genius Result configuration in your search profiles, you must activate it.

Note: If you upgraded from the Quebec release, this Genius Result configuration is already activated. You don't need to perform the steps from this task.

As part of activation, you need to run a scheduled job that trains and publishes the Default AI Search Genius Results Model. This *NLU* model contains intents used by the People configuration's *NLU* trigger.

For more information on the People default Genius Result configuration, see People Genius Results.

Procedure

1. Train and publish the Default AI Search Genius Results Model.
   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
   b. Open the *AI Search* **Create Train Model** job.
   c. Select **Execute Now**.
   d. Check the publication status of the NLU model by navigating to **All** > *AI Search* > **Search Query Settings** > **Search Intents**.
   When a **Last Published** field value is displayed, the NLU model is trained and published. You can now activate the People default Genius Result configuration.
2. Activate the People default Genius Result configuration.
   a. Navigate to **All** > *AI Search* > **Search Query Settings** > **Genius Results**.
   b. Open the People Genius Result configuration.
   c. On the AI Search Genius Result Configuration form, select **Change Active State**.
   For a description of the field values, see AI Search Genius Result Configuration form.
   The Genius Result configuration's **Active** field value changes to *true*.

Result

The People Genius Result configuration is available for use in search profiles.

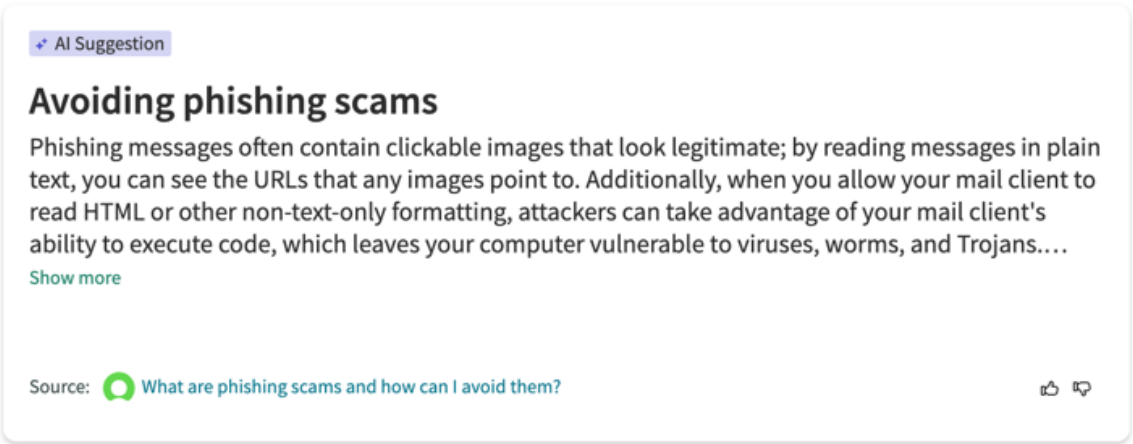
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Q&A Genius Results

Q&A Genius Results display top search results extracted from HTML fields of records on the Knowledge [kb_knowledge] table and tables that extend it. Each Q&A Genius Result answer card shows a topic snippet and an answer snippet extracted from a single Knowledge article. You can view the full article directly from the answer card.

A snippet is a short, typically paragraph-length, section of text that contains useful and relevant information. A Genius Result answer's topic snippet indicates the subject for the answer, while the answer snippet provides details on that subject.

Sample Q&A Genius Result answer card



Select **View Article** to view the full Knowledge article.

Note: Knowledge search property settings don't affect Q&A Genius Results. For more information on these settings, see Knowledge search properties.

Q&A Genius Results only support English searches.

Because the Q&A implementation is based on deep neural networks that are continually improving, Q&A results for specific queries may vary from release to release. Articles boosted or promoted by result improvement rules are more likely to appear as Q&A Genius Results, but aren't guaranteed to appear.

Topic and answer snippet extraction for Q&A Genius Results

By default, AI Search automatically determines which elements of a Knowledge article's HTML field values to extract as the Q&A topic and answer snippets. You can't configure the criteria for this extraction behavior.

Topic and answer snippet extraction behavior varies depending on the source table for the Knowledge article:

Knowledge article source	Q&A topic and answer snippet extraction
FAQ [kb_template_faq] table	AI Search extracts the Q&A topic snippet from the Knowledge article record's **Question** HTML field. It extracts the Q&A

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Knowledge article source	Q&A topic and answer snippet extraction
Note: This table is enabled when you activate the Knowledge Management Advanced plugin (com.snc.knowledge_advanced). For more information, see Activate the Knowledge Management Advanced plugin	answer snippet from the record's **Answer** HTML field.
Knowledge [kb_knowledge] table and all other tables that extend it	AI Search extracts the Q&A topic and answer snippets from the Knowledge article record's HTML fields.

Because the default extraction behavior favors search precision, it may not extract all desired Q&A topic and answer snippets. You can override the extraction behavior for a Knowledge article by manually designating topic and answer snippets in that article's HTML fields. Manually designating snippets increases the likelihood that they will appear as Q&A results, but doesn't guarantee that they will.

To manually designate snippets for an article, set the following HTML classes on elements in the article's HTML fields.

HTML Class	Description
`class="sn_snippet_topic"`	Set this class on the HTML field element that contains text that you want to designate as the Q&A Genius Result topic snippet for the Knowledge article.
`class="sn_snippet_answer"`	Set this class on the HTML element that contains text that you want to designate as the Q&A Genius Result answer snippet for the Knowledge article. **Note:** Answer snippets should be from 250 to 300 characters in length. Longer answer snippets may be cut off when displayed on the Q&A Genius Results card.

Machine reading comprehension model

AI Search uses a machine reading comprehension (MRC) model to validate extracted answer snippets. The MRC model analyzes each extracted snippet to determine whether it answers your question. An answer snippet must pass this validation filter step before it can be displayed as a Q&A Genius Result answer.

When you enable factoid extraction for Q&A Genius Results, the MRC model also finds the exact span of text within the extracted snippet that represents the answer to your question.

You can't configure settings for MRC models or choose which model to use for Q&A Genius Results. AI Search performs A/B testing with different search query parameter values to automatically select the best MRC model for you. For more details on this A/B testing process, see Search query parameter evaluation framework.

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Knowledge Management and Q&A Genius Results

When you activate the Knowledge Management Advanced plugin (com.snc.knowledge_advanced), Q&A Genius Results can return answers from records on the FAQ [kb_template_faq] table as well as records on the Knowledge [kb_knowledge] table and its child tables.

Additionally, if a search query satisfies one of the following conditions, AI Search bypasses the usual Q&A routines and returns the FAQ record's **Answer** field value as a Q&A Genius Result answer:

- The user's search query exactly matches the **Question** field value from the FAQ record.
- A result improvement rule promotes the FAQ record to be the first result for the user's search

As an example, suppose you create an FAQ record with **Question** `How do I reset my password?`. When a user searches for `how do I reset my password`, AI Search returns a Q&A Genius Result card with an answer snippet extracted from the FAQ record's **Answer** field value.

Interaction with other search features for Q&A Genius Results

The following table describes interactions between Q&A Genius Results and other search features.

Feature	Interaction with Q&A Genius Results
Result improvement rules with block actions	When computing Q&A Genius Results for a search query, AI Search ignores blocked search results.
Stop words	When computing Q&A Genius Results for a search query, AI Search ignores stop words in the query.
Synonyms	When computing Q&A Genius Results for a search query, AI Search expands synonyms in the query.
Typo handling	When computing Q&A Genius Results for a search query, AI Search corrects terms in the query.

Factoid extraction for Q&A Genius Results

Factoid extraction uses the machine reading comprehension (MRC) model to find the exact span of text within a longer extracted snippet that represents the answer to your question.

Enabling factoid extraction

To enable factoid extraction for Q&A Genius Results, set the *`glide.ais.genius_result.qna_mode`* system property to **sentence** or **snippet**.

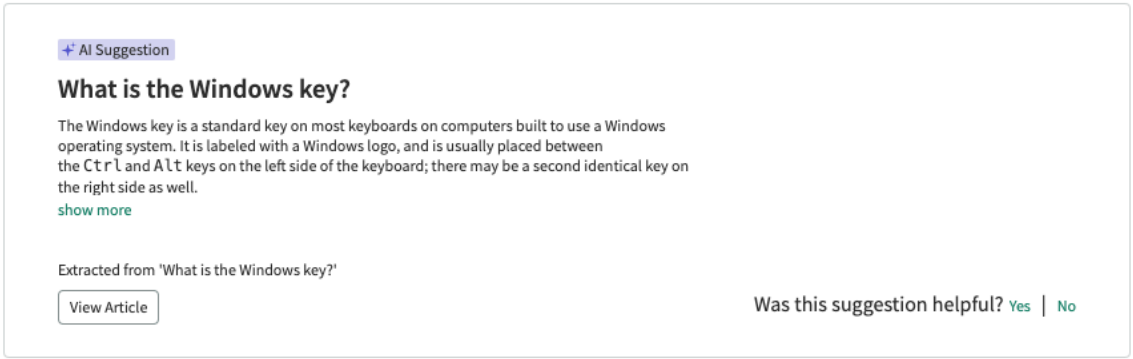
For details on setting this system property, see the Set the factoid extraction mode for Q&A Genius Results section. To learn about the effects of this system property's values, see the System properties for factoid extraction in Q&A Genius Results section.

Examples of factoid extraction

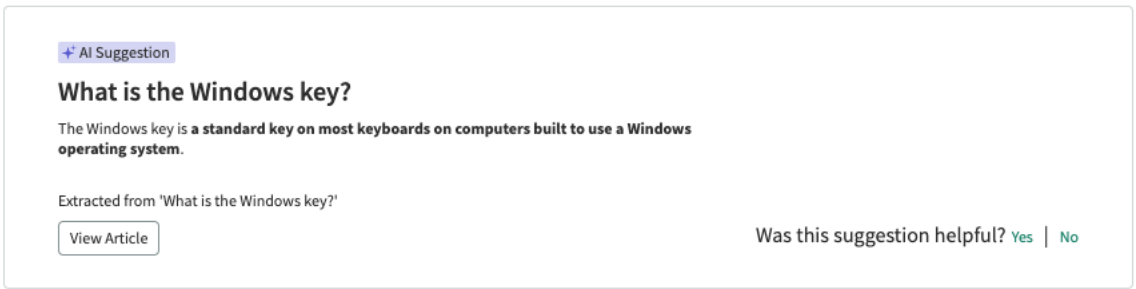
The following images illustrate how the *`glide.ais.genius_result.qna_mode`* system property setting affects the display of Q&A Genius Result answer cards for a sample `What is the Windows key?` search in Service Portal.

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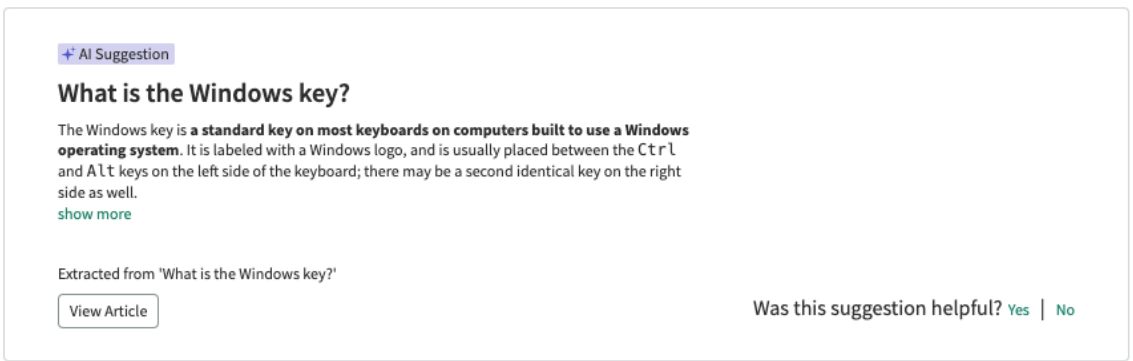
- With the system property set to *none*, the Q&A Genius Result answer card displays the full extracted text snippet with no highlighting:



- With the system property set to *sentence*, the Q&A Genius Result answer card displays only the sentence containing the factoid, and highlights the factoid:



- With the system property set to *snippet*, the Q&A Genius Result answer card displays the full extracted text snippet and highlights the factoid:



Set the factoid extraction mode for Q&A Genius Results

Specify how you want factoid extraction to display and highlight answers for Q&A Genius Results.

Before you begin

Role required: ais_admin

About this task

As a search administrator, you can specify the factoid extraction mode for Q&A Genius Results by setting the value of the *glide.ais.genius_result.qna_mode* system property. This system property does not exist in the base system, so you may have to add it.

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Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Search for a system property record with name *`glide.ais.genius_result.qna_mode`*.
   - If a system property record with this name exists, open the record by selecting it.
   - If no system property record with this name exists, select **New**, then enter `glide.ais.genius_result.qna_mode` in the System Property form's **Name** field.
3. In the System Property form's **Value** field, enter one of the following values:
   - *`none`* to disable factoid extraction and highlighting for Q&A Genius Results.
   - *`sentence`* to make Q&A Genius Result answer cards display only the sentence containing the factoid (and to highlight the factoid).
   - *`snippet`* to make Q&A Genius Result answer cards display the full extracted text snippet containing the factoid (and to highlight the factoid).

   For details on these system property values, see the System properties for factoid extraction in Q&A Genius Results section.
4. Save the modified System Property record by selecting **Submit** or **Update**.

System properties for factoid extraction in Q&A Genius Results

A system property determines how the system extracts factoids from knowledge articles when computing Q&A Genius Results.

Property	Description
glide.ais.genius_result.qna_mode	Specifies the factoid extraction mode that you want Q&A Genius Results to use. For more information on factoid extraction, see the Factoid extraction for Q&A Genius Results section. • Type: string • Default value: *`none`* • Location: System Property [sys_properties] table • Supported values: ○ *`none`*: Q&A Genius Result answer cards display the full extracted snippet from the source HTML article without highlighting. ○ *`sentence`*: Q&A Genius Result answer cards display the sentence from the source HTML article that contains the factoid, with the factoid highlighted if possible. ○ *`snippet`*: Q&A Genius Result answer cards display the full extracted snippet from the source HTML article, with the factoid highlighted if possible.

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Link a Genius Result configuration to a search profile

Link a Genius Result configuration to one or more search profiles.

Before you begin
Role required: ais_admin

About this task
To use a Genius Result configuration, link it to a search profile. AI Search evaluates the Genius Result configuration for all searches made with the search profile.

You can link a single Genius Result configuration to multiple search profiles. A search profile can include multiple Genius Result configuration links.

AI Search evaluates active Genius Result configurations for a search profile in an order determined by their numeric **Order** field values, as defined in the search profile's Genius Results related list. Genius Result configurations with lower **Order** field values are evaluated before those with higher field values. As an example, a Genius Result configuration with **Order** 100 is evaluated before one with **Order** 200.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to link the Genius Result configuration to.
3. In the Genius Results related list, select **Link Existing**.
4. On the Search Profile - Genius Result Mapping form, fill in the fields.
   For a description of the field values, see Search Profile - Genius Result Mapping form.
5. Select **Submit**.

Result
The new Genius Result configuration link appears in the search profile's Genius Results related list.

Set the evaluation order for Genius Result configurations in a search profile

Change the order in which AI Search evaluates Genius Result configurations linked to a search profile.

Before you begin
Role required: ais_admin

About this task
AI Search evaluates active Genius Result configurations for a search profile in an order determined by their numeric **Order** field values, as defined in the search profile's Genius Results related list. Genius Result configurations with lower **Order** field values are evaluated before those with higher field values. As an example, a Genius Result configuration with **Order** 100 is evaluated before one with **Order** 200.

> **Note:** **Order** field values for linked Genius Result configurations are set separately for each search profile. A Genius Result configuration that's linked to multiple search profiles can have a different **Order** field value in each profile. For instance, you might set an **Order** value of 100 for the Q&A Genius Result configuration in one search profile but set a value of 750 for the same Genius Result configuration in a second search profile that it's linked to.

A search application configuration's **Genius Results Limit** field value specifies the maximum number of Genius Result cards the application can display. For more details on search application configuration settings, see Search Application Configuration form.

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Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to set the Genius Result configuration evaluation order for.
3. In the Genius Results related list, edit the **Order** field values for Genius Result configurations linked to the search profile.
   For details on editing field values in the related list, see Use the list editor.

What to do next

To make changes in the **Order** field values take effect, publish the search profile. For more information on publishing a search profile, see Publish an AI Search search profile.

Create a Genius Result configuration

Create a Genius Result configuration, set its trigger condition, and configure the results displayed on its answer card.

Before you begin

Role required: ais_admin

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to link the new Genius Result configuration to.
3. In the Genius Results related list, select **Create and Link**.
4. On the AI Search Genius Result Configuration form, fill in the fields.
   For a description of the field values, see AI Search Genius Result Configuration form.
5. Select **Submit**.
   The new Genius Result configuration appears in the Genius Results related list.
6. **Optional:** Open the **Order** for the new Genius Result configuration to control its display order for the search profile.

What to do next

Changes to Genius Result configurations take effect in search as soon as you save them. You don't need to publish the linked search profile to make the new configuration take effect.

If you selected an *NLU* trigger condition, you must link an NLU model and its intents to your Genius Result configuration. For instructions, see Link an NLU model and intents to a Genius Result configuration.

Link an NLU model and intents to a Genius Result configuration

Specify the NLU model and intents to use for a Genius Result configuration with an NLU trigger condition.

Before you begin

Role required: ais_admin

Procedure

1. Navigate to **All** > *AI Search* > **Search Query Settings** > **Genius Results**.
2. Open the Genius Result configuration that you want to link an NLU model to.
3. In the NLU Model related list, select **Link Existing**.

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4. On the AI Search Genius Result Configuration NLU Model Mapping form, fill in the fields.
5. Select **Submit**.

Result
The NLU model and its selected intents appear in the NLU Models related list.

What to do next
For an NLU trigger condition to function, the NLU model must be published. You can verify NLU model status by navigating to **All** > *AI Search* > **Search Query Settings** > **Search Intents**.

Result improvement rules

Define rules with configurable trigger conditions to boost, block, or promote search results for specific searches. You can also boost search results for documents matching elements of the user context, such as a user's country, OS, or device type.

Result improvement rules with boost actions override the default search result order produced by the AI Search machine learning relevancy feature. Rules with block or promote actions override the default result set for a search query.

Rule structure

A result improvement rule consists of these parts:

- A set of conditions that determine when the rule activates.
- A set of boost, block, or promote actions that determine how the rule modifies the search query's results when activated. The rule can only include actions of a single type, but can include multiple actions of that type.

Rule conditions include the following:

- A date range bounded by start and end dates. The rule can only activate during the specified date range.
- A language. The rule can only activate if this language matches the search query's language.
- Optionally, a set of one or more trigger conditions. Triggers can operate on individual search query keywords, the full search query, or elements of the search user's context such as their department, language, or browser version. The rule can only activate if all of its trigger conditions are met.

Rule actions include the following types:

- *Boost*: Increase the relevancy scores for search results from an indexed source that satisfy your specified conditions. You can select any of the following options:
  - Boost relevancy for all search results from the indexed source.
  - Boost relevancy for search results from the indexed source that include field values matching a dynamically populated value from the user context.
  - Boost relevancy for search results from the indexed source that include field values matching a static string value that you specify.
  - Boost relevancy for search results from the indexed source that include field values matching synonyms from one of your synonym dictionaries.
- *Block*: Exclude specific results from the search query's results list.
- *Promote*: Display specific results at the start of the search query's results list.

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Each result improvement rule can only perform actions of a single type when activated. You can define multiple actions of the same type for a rule.

Block actions take precedence over other actions. For example, if two result improvement rules block and promote the same search result, AI Search excludes the search result from the search query's results list.

Language dependence

Result improvement rule activation is language-dependent. You specify a language for each result improvement rule.

AI Search supports result improvement rules for all languages activated in your instance. For the list of languages you can activate, see Activate a language.

Interaction with other search features

The following table describes interactions between result improvement rules with Query triggers and other search features.

Feature	Interaction with result improvement rules
Lemma and Unicode normalization	A search query term added by lemma or Unicode normalization can trigger a result improvement rule if it matches the rule's Query trigger.
Stop words	If a search query term that matches a result improvement rule's Query trigger is defined as a stop word, AI Search evaluates the rule trigger before removing the stop word from the search query.
Synonyms	By default, a synonym expansion term can activate a result improvement rule if it matches the rule's Query trigger. You can prevent synonym expansion terms from activating a rule with a Query trigger by clearing the **Expand Synonyms For Query Conditions** option that appears when you define the Query trigger.
Typo handling	An auto-corrected search query term can trigger a result improvement rule if it matches the rule's Query trigger.

Create a result improvement rule

Create a rule to boost, block, or promote search results or to block Genius Results. Specify the conditions that activate your rule and choose the action it performs when activated.

Before you begin
Role required: ais_admin

About this task
You can configure activation conditions and triggers for a result improvement rule. Additional topics cover steps for configuring boost, block, or promote actions for your rule.

Note: Each result improvement rule can only perform actions of a single type when activated. You can define multiple actions of the same type for a rule.

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the search profile that you want to add the result improvement rule to.
3. In the Result Improvement Rules related list, select **Create**.

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4. On the AI Search Results Improvement Rule form, fill in the fields.
   For a description of the field values, see AI Search Results Improvement Rule form.
5. Select **Submit**.
   The Actions related list appears.
6. Choose the action that you want the result improvement rule to perform when activated, and see the appropriate topic for configuration steps:
   - To increase the relevancy scores of search result records that include specific field values, see Boost search results using a result improvement rule.
   - To prevent specific records from appearing in the search results, see Block search results and Genius Results using a result improvement rule.
   - To make specific records appear first in the search results, see Promote search results using a result improvement rule.

What to do next

To make new or updated result improvement rule settings take effect, publish the search profile that you edited. For details on publishing a search profile, see Publish an AI Search search profile.

Boost search results using a result improvement rule

Increase the relevancy scores for search results that satisfy a custom set of conditions.

Before you begin

Create your result improvement rule first to define your trigger conditions. For steps to create a result improvement rule, see Create a result improvement rule.

Role required: ais_admin

About this task

Boost actions define relevancy changes applied by result improvement rules. When a result improvement rule with a boost action activates, AI Search modifies the relevancy scores for search results from an indexed source specified in the action. You can choose one of these boost types:

- Boost all search results from the specified indexed source.
- Boost only search results from the specified indexed source with a field value that matches a dynamically populated field value from the searcher's user context.
- Boost only search results from the specified indexed source with a field value that matches a static string value specified in the action.
- Boost only search results from the specified indexed source with a field value that matches a synonym defined in a synonym dictionary.

You can specify a boost weight for each boost action. This is an integer value that AI Search uses to alter the relevancy scores for search results affected by your boost action. Boost weights can be positive or negative.

Positive boost weights increase the relevancy scores for boosted search results. Each boost weight of 1 increases a boosted search result's relevancy score by 0.1% of its original value. For example, if you set a boost weight of 100, you increase each boosted search result's relevancy by +10%, so a search result with an original relevancy score of 60 gets a final relevancy score of 66. Setting a boost weight of 1000 adds +100%, doubling the relevancy scores for boosted search results.

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Negative boost weights reduce the relevancy scores for boosted search results. Each boost weight of –1 reduces a boosted result's relevancy score by 0.1% of its original value. As an example, if you set a boost weight of –150, you reduce a boosted search result's relevancy by 15%, so a search result with an original relevancy score of 100 gets a final relevancy score of 85. Any boost weight of –1000 or lower reduces a boosted search result's relevancy score to 0, causing it to appear at the end of the search result list.

When a single search result is affected by multiple boost actions, AI Search adds the individual boost weights together to determine the total relevancy score modifier. For example, a search result boosted by three rules with boost weights 100, 150, and –25 has a total boost weight of 225, increasing its final relevancy score by 22.5% of its original value.

Note: Boost actions don't change the set of results returned for your search, so you can't boost a record that doesn't match your search. If you want to add a search result into your results whether or not it matches your search, try using a promote action instead. For details on this action, see Promote search results using a result improvement rule.

Procedure

1. In the Actions related list, select **Create Boost Action**.
2. On the Rule - Action Mapping form, set the boost weight and fill in the other fields.
3. Select **Submit**.
4. **Optional:** Edit the **Order** values for the result improvement rule's boost actions.

What to do next

To make new or updated result improvement rule settings take effect, publish the search profile you edited. For details on publishing a search profile, see Publish an AI Search search profile.

List of result improvement rule boost types

This list describes the types of search result relevancy boost that you can apply using a result improvement rule.

Boost action types

Type	Description
Boost All Documents In Indexed Source	Applies relevancy boost to every search result from the selected indexed source. As an example, you might boost all results from the Knowledge Table indexed source.
Boost By User Context (dynamic)	Applies relevancy boost to search results from the selected indexed source if they include a value for the selected field that matches a field value specified in the dynamically populated user context. As an example, you might boost all results from the Knowledge Table indexed source with Short description field values that contain matches for the city specified in the current search user's location, as set in their user context. This configuration could end up boosting different records when you search from Paris than when you search from New York City.

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Boost action types (continued)

Type	Description
	Note: Starting with the Xanadu release, AI Search expands user context field values using published, active synonyms defined in dictionaries linked to the current search profile. As an example, if the user context location is `Paris` and you define a synonym that defines `Paris` and `France` as equivalent, your result improvement rule boosts documents containing `France` as well as those containing `Paris`. For more details on synonym expansion, see Synonyms.
Boost By Field Match (static)	Applies relevancy boost to search results from the selected indexed source if they include a value for the selected field that matches a specified static value. As an example, you might boost all results from the Knowledge Table indexed source that have Short description field values matching the static value `Dealing with Spyware and Viruses`.
Boost By Synonym Dictionary	Applies relevancy boost to search results from the selected indexed source if they include a value for the selected field that matches any synonym defined in a selected synonym dictionary. As an example, you might create a custom synonym dictionary named Boost Synonyms. You could then configure a result improvement rule to boost all results from the Knowledge Table indexed source which have Short description field values containing matches for synonyms in that dictionary. If the dictionary includes a synonym that defines `laptop` and `computer` as equivalent, this result improvement rule boosts knowledge article search results with short descriptions that include `laptop` or `computer` (or both). The selected synonym dictionary must be published, active, and linked to the current search profile. AI Search only checks for matches against published and active synonyms in the dictionary. For more details on synonyms and synonym dictionaries, see Synonyms.

Block search results and Genius Results using a result improvement rule

Configure a result improvement rule to prevent specific documents from appearing as Genius Results or search results.

Before you begin

Create your result improvement rule first to define your trigger conditions. For steps to create a result improvement rule, see Create a result improvement rule.

Role required: ais_admin

About this task

Block actions hide selected search results from the result set. When a result improvement rule with a block action activates, its effect depends on the result improvement rule's **Apply only to Genius Results** option setting:

- If this option is selected, the block action prevents selected documents from appearing as Genius Result answers. Selected documents can still appear as search results.
- If this option is cleared, the block action prevents the selected documents from appearing as Genius Result answers or search results.

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Procedure

1. In the Actions related list, select **Block Documents**.
2. In the Select Documents To Block dialog box, search for results that you want to block.
3. To add a search result to the selected results pane, select the plus sign next to it.
4. After selecting all the results that you want to block, select **Add Documents and Close**.
5. **Optional:** Edit the **Order** values for the result improvement rule's block actions.

What to do next

To make new or updated result improvement rule settings take effect, publish the search profile that you edited. For details on publishing a search profile, see Publish an AI Search search profile.

Promote search results using a result improvement rule

Configure a result improvement rule to make specific records appear first in results for a search.

Before you begin

Create your result improvement rule first to define your trigger conditions. For steps to create a result improvement rule, see Create a result improvement rule.

Role required: ais_admin

About this task

Promote actions define search results to spotlight in the result set. When a result improvement rule with a promote action activates, it displays search results specified in the action ahead of other results for the search query.

Note: Promote actions can spotlight results that wouldn't otherwise match your search. Spotlighted results are added to the search results set if they're not already present in it.

Procedure

1. In the Actions related list, select **Promote Documents**.
2. In the Select Documents To Promote dialog box, search for the results that you want to promote.
3. To add a search result to the selected results pane, select the plus sign next to it.
4. After selecting all the results that you want to promote, select **Add Documents and Close**.
5. **Optional:** Edit the **Order** values for the result improvement rule's promote actions.
   The **Order** field only accepts integer values. AI Search evaluates promote actions with lower **Order** values before promote actions with higher values. As an example, a promote action with **Order** 150 is evaluated before one with **Order** 200.

What to do next

To make new or updated result improvement rule settings take effect, publish the search profile that you edited. For details on publishing a search profile, see Publish an AI Search search profile.

Share result improvement rules between search profiles

Make your search experiences more consistent by configuring a search profile to mirror result improvement rules from other search profiles.

Before you begin

You must have ServiceNow Otto for AI Search installed.

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Role required: ais_admin

About this task

Result improvement rules are specific to the search profile they're created in, and can't be copied between search profiles. As a search administrator, however, you can configure a search profile to use the set of result improvement rules defined in another search profile. This approach lets you define your result improvement rules in one place while making them available in multiple different search experiences.

This procedure is called mirroring, since your affected search profile reflects result improvement rules defined in another search profile. The search profile that includes your result improvement rules is called the mirror source, and the search profile that uses those rules is called the mirror target.

Note: You can link multiple mirror source search profiles to a single mirror target search profile. Similarly, you can link a single mirror source search profile to multiple mirror target search profiles.

When you modify result improvement rules in a mirror source search profile and then publish that search profile, AI Search checks all mirror target search profiles that link to that mirror source.

- If the mirror target search profile is published, AI Search republishes it so that it reflects your result improvement rule changes.
- If the mirror target search profile isn't published, an informational message reminds you to publish it so that it can reflect your result improvement rule changes.

This check keeps result improvement rule changes in sync across your search profiles.

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the record for the mirror target search profile.
   As an example, if you've defined result improvement rules in the Service Portal Default Search Profile and now want to mirror those rules in the ESC Portal Default Search Profile, open the ESC Portal Default Search Profile record.
3. To add another search profile as a mirror source for result improvement rules, create a link to it.
   a. In the Mirrored Result Improvement Rules related list, select **Link Search Profile**.
   b. On the Mirrored Result Improvement Rule form, in the **Mirror Source** field, enter the name of the search profile that you want to mirror result improvement rules from, or use the Lookup using list icon to populate the field.
   c. Select **Submit**.
   The new mirror source search profile appears in the Mirrored Result Improvement Rules related list.
   d. **Optional:** Repeat the linking procedure for each additional search profile you want to add as a mirror source.
4. To remove one or more search profiles as mirror sources for result improvement rules, unlink them:

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a. In the Mirrored Result Improvement Rules related list, select the row checkbox for each mirror source that you want to remove.

b. Select **Unlink Selected**.
The selected mirror source search profiles are removed from the Mirrored Result Improvement Rules related list.

5. To make your mirror source changes take effect, publish your modified mirror target search profile.
For details on publishing a search profile, see Publish an AI Search search profile.

Search application configurations

A search application configuration specifies the search engine and settings to use for search in a ServiceNow AI Platform® application. When you choose AI Search as an application's search engine, you can select a search profile for the application and configure its search result display and refinement settings.

A search application configuration contains a reference to a search profile, along with settings that affect how search results are displayed to users of the application. The search profile specifies settings that determine how AI Search generates search results for a given search. To learn more about search profile configuration settings, see Search profiles in AI Search.

Some ServiceNow AI Platform applications install their own AI Search application configurations when you activate them. For example, activating the Customer Service Management (CSM) application installs AI Search application configurations for the Customer Service Portal and Consumer Service Portal.

AI Search includes search application configurations for use in the following ServiceNow AI Platform applications:

- Employee Center
- Virtual Agent
- Service Portal

You can modify existing search application configurations, or create and configure your own search application configurations with AI Search specified as the search engine.

For details on enabling AI Search and specifying search application configurations in supported applications, see Enabling and configuring AI Search in ServiceNow AI Platform applications.

Note: When you view or edit search application configuration records, the system may display a warning message telling you to reindex one or more indexed sources. This reindexing process (a one-time process for each indexed source listed) is required to correctly populate search-based auto-complete suggestions. For more details on auto-complete suggestions, see Auto-complete suggestions in AI Search applications.

Create a search application configuration for AI Search

Create a search application configuration to specify AI Search as the search engine for a ServiceNow AI Platform® application. Select a search profile for the application to use. Configure the application's settings for refinement and display of search results.

Before you begin

Role required: search_application_admin

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Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Select **New**.
3. On the Search Application Configuration form, fill in the fields.
   For a description of the field values, see Search Application Configuration form.
4. Select **Submit**.

Result

The new search application configuration record appears in the Search Application Configurations list.

What to do next

To use your new search application configuration, select it in the configuration for a ServiceNow AI Platform application that supports AI Search. For more information on these ServiceNow AI Platform applications, see Enabling and configuring AI Search in ServiceNow AI Platform applications.

Grouping attachment search results with their parent search results

Search application administrators can control whether attachment search results appear grouped with their parent search results or whether they display on their own. By default, AI Search displays attachments grouped with their parent search results.

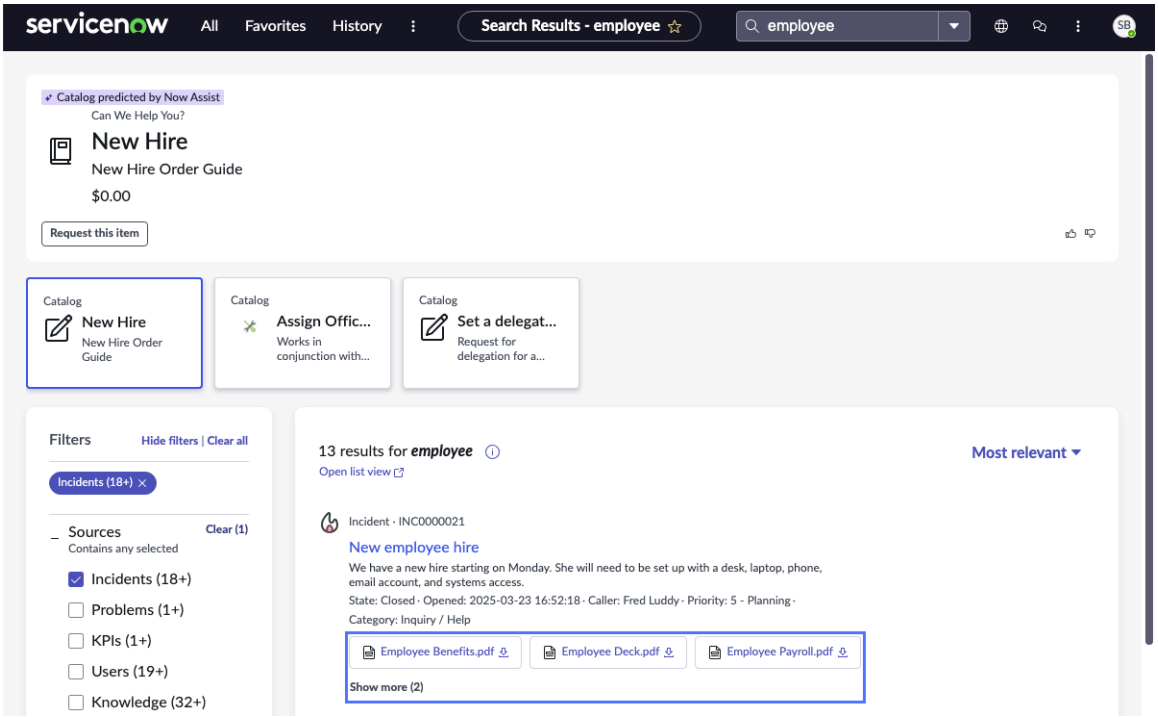
By default, AI Search displays separate search results for the parent record and each of its attachments that matches the user's search. Search administrators can enable grouping of attachment search results with the results for their parent records. With this option enabled, search results for attachments that match a user's search display inline with the search results for their parent record.

The maximum number of attachments per parent search result is set by the **Attachment Limit** field in the search application's configuration record. For details on this field, see Search Application Configuration form.

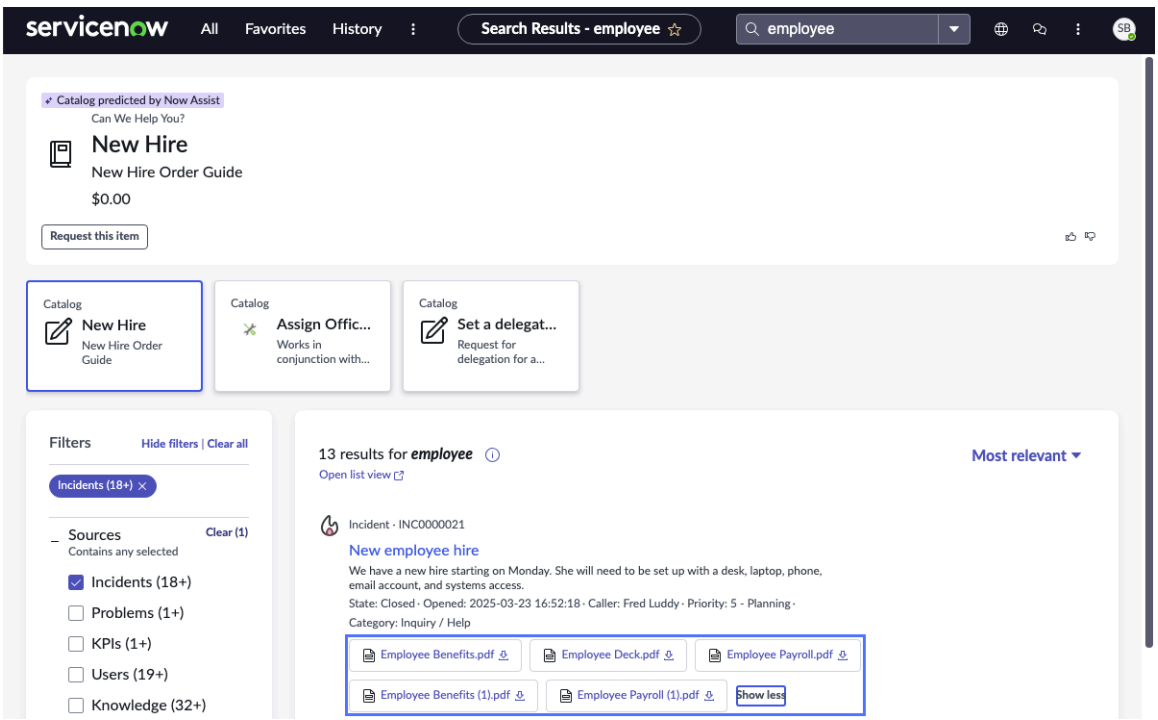
Grouped attachments in the search results UI

If the parent record itself or any of its attachments matches the user's search, the parent record appears in the search result list. Grouped attachments that match the search appear in collapsed form, in descending relevancy order within the search result for their parent record.

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By default, a parent search result shows up to three attachments in collapsed format. If it has more than three attachments, a **Show more** link appears, with a number indicating how many attachments are hidden in the current view. When you select this link, the hidden attachments appear and the link name changes to **Show less**. Selecting this link hides the overflow attachments again.



Viewing or downloading attachment search results

Selecting an attachment search result downloads the original attachment to your web client, or opens the original attachment in Document Viewer if all of these conditions are met:

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- Document Viewer is active on your instance.
- Document Viewer is enabled for the attachment's source table.
- The *useAttachmentViewer* EVAM property is set to *true* for the parent search result.

For details on activating and enabling Document Viewer, see Enable Document Viewer.
To learn more about EVAM property settings for search results, see Configure EVAM display settings for search results in AI Search applications.

Relevancy and click rank for grouped attachment search results

When attachment grouping is in use, AI Search computes relevancy scores for the parent record and each of its grouped attachments. The final relevancy score of the grouped search result is the highest of these individual relevancy scores.

Note: When you select a grouped attachment search result, AI Search logs click rank signal data for the parent record search result. All other search signal data is specific to the selected attachment record. For more details on search signal logging, see Search signal tables.

Group attachment search results with their parent results

Configure your AI Search applications to display attachment search results grouped with the results for their parent records.

Before you begin

The **index_attachments** attribute can't be set to **false** for any indexed source used in the AI Search application. For details on creating and editing attributes for indexed sources, see Indexed source attributes for AI Search.

Note: If you remove a **index_attachments** attribute value of **false** from an indexed source, perform a full reindex for the indexed source before continuing with this procedure. To learn how to reindex content for an indexed source, see Perform a full table index or reindex for a single AI Search indexed source.

Role required: search_application_admin

About this task

Attachment grouping is enabled by default for new search application configuration records. You only need to perform this procedure to enable attachment grouping for existing search application configuration records after upgrading from a previous release.

For details on how attachment grouping appears in the search results list and how you can interact with grouped attachment search results, see Grouping attachment search results with their parent search results.

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Select the record for the AI Search application that you want to enable attachment grouping for.
3. Select the **Show parent for results that are attachments** option.
4. Select **Update**.
   If any indexed source used in the search application doesn't have the **index_attachments** attribute set to **true**, the system displays a warning message. For each affected indexed source, set the **index_attachments** attribute to **true**, then perform a full reindex.

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Result
AI Search groups matching attachment search results with their parent record results on the search application results page.

Create a facet in an AI Search application configuration

Define facets to refine your searches using categories dynamically generated from the current search results.

Before you begin
Role required: search_application_admin

About this task
Create a facet to populate a refinement filter for search results based on indexed source field values. The facet initially displays filter options for all field values found in the current search result set. Selecting a field value refines the search result set, displaying only those results that satisfy the filter logic for the facet.

Note: If AI Search applies late binding security to any results from an indexed source used by a facet, the list of available filter selections for the facet changes. When this happens, the facet only displays field values found in the current page of search results. For more information on late binding security, see Content security in AI Search.

Facets can have any one of the following types. Each facet type has its own filter logic.

Single Select

In a Single Select facet, you can only select a single field value as a facet refinement filter.

When you select a field value from a Single Select, AI Search filters the search results list, displaying only results that contain your chosen field value.

A Single Select facet only allows you to select field values that are found in the current result set.

Multi Select And

In a Multi Select And facet, you can select multiple field values as facet refinement filters.

When you select a field value from a Multi Select And facet, AI Search filters the search results list, displaying only results that contain all of the field values you've selected from the facet.

A Multi Select And facet only allows you to select field values that are found in the current result set.

Multi Select Or

In a Multi Select Or facet, you can select multiple field values as facet refinement filters.

When you select a field value from a Multi Select Or facet, AI Search filters the search results list, displaying only results that contain any of the field values you've selected from the facet.

A Multi Select Or facet initially only allows you to select field values that are found in the current result set. All field values that are available when you make your first selection remain available for selection.

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As an example, suppose you have a Multi Select Or facet for a custom **Color** field with blue, green, and red field values. If your search returns only green and red results, the **Color** facet only displays **green** and **red** field values. When you select the **red** field value, AI Search keeps the **green** field value available for selection because it was available before you made any **Color** selection.

Warning: Applying multiple filters from a Multi Select And or Multi Select Or facet makes your search query URL longer. Test your multi-select facet configurations to ensure that search query URLs with facet filters don't exceed the maximum URL length limit for your web browser. (Different web browsers have different URL length limits.)

Facets work best when created from fields of the following types with relatively few unique values:

- Choice
- Reference
- String
- String (Full UTF-8)
- True/False

When sorting facet refinement filters by name, AI Search uses collation-based sort following the rules for the ServiceNow AI Platform® session language.

For tables other than Knowledge [kb_knowledge], facets display appropriate field translations for the current user session. Facets don't display translated versions of kb_knowledge translated fields.

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Open the search application configuration that you want to configure a facet for.
3. In the Facets related list, select **New**.
4. On the Facet form, fill in the fields.
   For a description of the field values, see Facet form.
5. Select **Submit**.

Result

The new facet appears in the Facets related list.

Show search result counts for facets on the results page for a search application

Display search result counts for facets on the results page for AI Search applications that use Seismic components. Search result counts for facets show the number of matching search results for each source facet bucket.

Before you begin

The search application configuration must not have hybrid search enabled. When hybrid search is activated in a search application configuration, search result counts for facets aren't displayed in that search application configuration. For more information on hybrid search, see Hybrid search in AI Search.

Role required: search_application_admin

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About this task

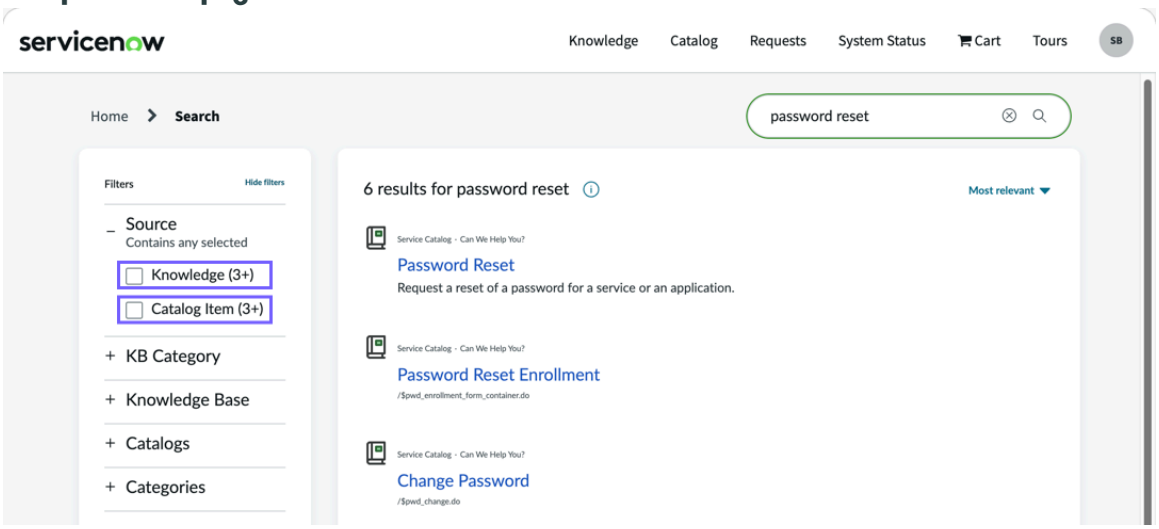
Search administrators can enable display of search result counts for facets in AI Search applications that use Seismic components. With this option enabled, the results page for the search application shows the number of matching search results for each search source displayed as a source facet bucket.

Because the late binding security implementation may have removed some search results that aren't accessible, search result counts are shown as a minimum value. As an example, a count of 6+ on a source facet bucket means that there are at least six search results from the specified source, but that there may be more.

Note: Source facet buckets with 1,000 or more matching search results display **1000+** as their result count. When search result counts for facets are enabled, source facet buckets with 0 matching search results aren't shown on the search results page.

To learn more about content security in AI Search and how the late binding security implementation can affect search result counts, see Content security in AI Search.

Sample results page with results counts



Note: Search result counts for facets indicate the number of results that matched the user's search. Late binding security can remove results after they're counted, causing the actual number of displayed results to be lower than the count. For more information on late binding security, see Content security in AI Search.

Search result counts for facets are supported in search applications that use Seismic components. You can display search result counts for facets in these search applications:

- Service Portal
- Employee Service Center (ESC)
- AI Search for Next Experience global and workspace search
- Custom UI Builder applications that use Seismic UI components

Other search applications, such as Virtual Agent and Now Mobile, don't use Seismic components and so don't support display of search result counts for facets. For best results, don't enable search result counts for facets in these search applications.

Search result counts for facets are enabled by default for new search application configuration records. You only need to perform this procedure to enable search result counts for facets in existing search application configuration records after upgrading from a previous release.

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Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Select the record for the AI Search application that you want to display result counts for.
3. Select the **Show counts for facets** option.
4. Select **Update**.

Result

AI Search displays source facet bucket result counts on the results page for the selected search application.

Clear facet filters when selecting a new source facet bucket

Specify whether AI Search applications should preserve existing facet filters when you select a new source facet bucket.

Before you begin

Role required: admin

About this task

By default, AI Search preserves your facet filter selections when you select a new source facet bucket. As an example, suppose that you narrow your search results by selecting the Email field value from the **KB Category** facet displayed on the **All** source facet bucket. If you then select the **Knowledge** source facet bucket, the **KB Category** facet retains your Email selection and still filters your search results accordingly.

Administrators can override this default behavior by setting the value of the *glide.ais.facets.cross_tab_persistence* system property. When this system property value is set to **false**, selecting a new source facet bucket removes all facet filters. In the preceding example, selecting the **Knowledge** source facet bucket would remove your **KB Category** facet filter.

This option is global and applies to all AI Search applications on your instance.

Note: If an existing facet filter cannot be applied to search results from a selected source facet bucket, AI Search ignores the facet filter. This behavior only occurs in search applications where you've disabled search result counts for facets. For more details on search result counts for facets, see Show search result counts for facets on the results page for a search application.

Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Open the record for the *glide.ais.facets.cross_tab_persistence* system property.
3. Enter the system property value according to the behavior that you want:
   - To preserve existing facet filters when a new source facet bucket is selected, set the system property value to **true**.
   - To remove all facet filters when a new source facet bucket is selected, set the system property value to **false**.

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The default property value is **true**.

4. Select **Update**.

Result
All AI Search applications preserve or discard existing facet filters when a new source facet bucket is selected.

Configure source facet buckets in an AI Search application configuration

Define settings for source facet buckets in a search application configuration. Users of the application can select source facet buckets to refine their search query results by search source.

Before you begin
Role required: search_application_admin

About this task
AI Search automatically defines source facet buckets for search application configurations. Each bucket is tied to a search source linked to the search application configuration's search profile. You can't create or delete these source facet buckets.

Use this procedure to configure display settings for source facet buckets in your search application configuration.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Open the search application configuration that you want to configure source facet buckets for.
3. In the Source Facet Buckets related list, open the source facet bucket that you want to configure.
4. On the Source Facet Bucket form, fill in the fields.
   For a description of the field values, see Source Facet Bucket form.
5. Select **Update**.

Result
The source facet bucket appears with updated settings in the Source Facet Buckets related list.

Auto-complete suggestions in AI Search applications

Automatically display intelligent suggestions in your search application's input field, helping users formulate their searches or jump directly to relevant results. Suggestions can include relevant search results, popular queries, recent queries from the user's personal history, and popular search results.

When you create a search application configuration, AI Search automatically populates it with auto-complete suggestion types. The settings for these suggestion types control the appearance of auto-complete suggestions when users interact with its input field.

Each auto-complete suggestion type includes default settings that you can configure to suit your application's needs. It also includes one or more search suggestion readers, which generate search query and search result suggestions.

You can remove an unwanted suggestion type from your search application configuration. If you want to restore a removed suggestion type, you can relink it to your search application configuration. You can only link one auto-complete suggestion source of each type to any given search application configuration.

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Auto-complete suggestions are generated by the Search Suggestions application. For full details on configuration and use of the Search Suggestions application, see Search Suggestions.

AI Search uses a dedicated relevancy model to rank records for display as auto-complete suggestions in the search field. This relevancy model scores records based on their freshness and on search query term matches in their **title** fields. The system doesn't train this auto-complete suggestion relevancy model. For more details on relevancy models, see Machine learning relevancy in AI Search.

List of auto-complete suggestion types for AI Search applications

AI Search provides multiple types of auto-complete suggestions that you can configure for display to users in the search field.

The following auto-complete suggestion types are available for linking to search application configurations that specify AI Search as their search engine.

Note: Not all auto-complete suggestion types are available for the search application configurations included in the base system.

Auto-complete suggestion type	Description
Popular Search Reader Group for <application name>	Displays search query suggestions based on searches submitted by all users of the search application. When you create a search application configuration, this suggestion reader group isn't linked to it by default. Default section header: `Popular searches` Readers: Popular Query Reader
Recent Search Reader Group for <application name>	Displays search query suggestions based on the user's previous searches. Default section header: `Recent searches` Included readers: User History Reader
Search-based Suggested Results Reader Group for <application name>	Displays titles and tables for search result suggestions based on a search for the terms entered in the search field. This search applies search source filters, stop word and synonym dictionaries, and result improvement rules from the search application's linked search profile. AI Search treats the last term in the search field specially, as follows: • If the last term in the search field is followed by a space, AI Search treats it as a literal search term. As an example, `act` followed by a space matches results containing the term `act`.

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Auto-complete suggestion type	Description
	• If the last term in the search field isn't followed by a space, AI Search treats it as a wildcard search prefix. For example, `act` without following space matches results containing the terms `act`, `action`, `activated`, `actuated`, and so on. Selecting a suggested search result opens it as follows: • Catalog Item results open in Service Catalog. • Knowledge article results open in Knowledge. • Other results open in form view. **Note:** If the suggested search result is an attachment, selecting it opens its parent record in form view. Default section header: `Suggested` Included readers: Search Based Suggestion Reader
Suggested Query Reader Group for <application name>	Displays a mix of search query suggestions (based on the user's previous searches) and search result suggestions (based on results the user selected for previous searches). Default section header: none Included readers: Popular Query Reader, User History Reader, User Search Term Reader
Suggested Result Reader Group for <application name>	Displays search result suggestions based on results the user selected for previous searches. When you create a search application configuration, this suggestion reader group isn't linked to it by default. Default section header: `Suggested results` Included readers: Personal Click Reader
User History Reader Group for <application name>	Displays the user's current search query, plus search query and result suggestions from the user's previous search activity that match the current input. When you create a search application configuration, this suggestion reader group isn't linked to it by default.

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Auto-complete suggestion type	Description
	Default section header: `Recently viewed` Included readers: User History and Click Reader, User Search Term Reader

Note: A search application configuration can't link to multiple search suggestion types that include the same reader and have the same click-in mode. If you try to link a second suggestion type with the same reader and click-in mode to a search application configuration, the system displays an error message.

Configure an auto-complete suggestion type in an AI Search application configuration

Modify default settings for display of auto-complete suggestions of a selected type in your search application's input field.

Before you begin
Role required: search_application_admin

About this task
When you define a new search application configuration, AI Search automatically populates it with auto-complete suggestion types. You can alter the default settings for these auto-complete suggestion types.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Open the search application configuration that contains the auto-complete suggestion type that you want to modify.
3. In the Autocomplete Suggestions related list, open the auto-complete suggestion type that you want to modify settings for.
4. On the Suggestion Reader Group form, fill in the fields.
   For a description of the field values, see Suggestion Reader Group form.
5. Select **Update**.

Result
The updated settings for the auto-complete suggestion type appear in the search application configuration's Autocomplete Suggestions related list.

Remove an auto-complete suggestion type from an AI Search application configuration

Disable the display of auto-complete suggestions of a selected type in your search application's input field.

Before you begin
Role required: search_application_admin

About this task
When you define a search application configuration, AI Search automatically populates it with auto-complete suggestion types. You can remove unwanted auto-complete suggestion types from the search application configuration.

Note: Removing an auto-complete suggestion type from your search application configuration doesn't delete it. To relink the removed suggestion type to your search application configuration, see Relink an auto-complete suggestion type to an AI Search application configuration.

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Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Open the search application configuration that contains the auto-complete suggestion type you want to remove.
3. In the Autocomplete Suggestions related list, open the auto-complete suggestion type that you want to remove.
4. On the Suggestion Reader Group form, select **Remove from Search Application**.
   For a description of the field values, see Suggestion Reader Group form.

Result

The selected auto-complete suggestion type no longer appears in the search application configuration's Autocomplete Suggestions related list.

Relink an auto-complete suggestion type to an AI Search application configuration

Re-enable the display of auto-complete suggestions of a selected type in your search application's input field.

Before you begin

Role required: search_application_admin

About this task

When you define a search application configuration, AI Search automatically populates it with auto-complete suggestion types. If you removed one of these auto-complete suggestion types from the search application configuration, you can relink it.

Note: A search application configuration can't link to multiple search suggestion types that include the same reader and have the same click-in mode. If you try to link a second suggestion type with the same reader and click-in mode to a search application configuration, the system displays an error message.

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Open the search application configuration that you want to relink the auto-complete suggestion type to.
3. In the Autocomplete Suggestions related list, select **Add Existing**.
4. In the Suggestion Reader Groups list, open the auto-complete suggestion type that you want to relink to your search application configuration.
5. On the Suggestion Reader Group form, enter or look up the search application configuration by name in the **Search Application** field.
   For a description of the field values, see Suggestion Reader Group form.
6. Select **Update**.

Result

The selected auto-complete suggestion type appears in the search application configuration's Autocomplete Suggestions related list.

Using search scripted post-processors in AI Search application configurations

Use scripted post-processors to modify search result records for display in a search application.

For example, a search scripted post-processor can modify search result date or currency field values to display in the user's regional formats.

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Create a search scripted post-processor

Define a script to post-process AI Search search results before displaying them to the user.

Before you begin

Role required: search_application_admin

Procedure

1. **Optional:** Copy code from an existing post-processor script to use as a starting point for your own script.
   a. Select **All**.
   b. In the Filter field, enter `sys_search_scripted_processor.list`.
   c. Press Enter.
   d. Open a post-processor script of your choice.
   e. Copy the code from the **Post processing script** field.
2. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
3. Open the search application configuration that you want to configure a scripted post-processor for.
4. In the Search Scripted Post-processors related list, select **New**.
5. On the Search Scripted Post-processors form, fill in the fields.
   For a description of the field values, see Search Scripted Post-processors form. If you copied code from an existing post-processor script in step 1.e, paste it into the new script's **Post processing script** field and modify it as needed.
6. Select **Submit**.

Result

The new search scripted post-processor appears in the search application configuration's Search Scripted Post-processors related list.

What to do next

To make your new search scripted post-processor take effect, link it to the search application configuration for the application whose results you want to post-process.

Link a search scripted post-processor to an AI Search application configuration

Link a search scripted post-processor to an AI Search search application configuration. The search application executes the linked script for each search result before displaying it to the user.

Before you begin

Role required: search_application_admin

You must have already created the search script post-processor that you want to link to the search application configuration.

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Open the search application configuration that you want to link a search scripted post-processor to.
3. In the Search Scripted Post-processors related list, select **New**.

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4. On the Search Scripted Post-processors form, select the reference lookup icon for the **Search scripted processor** field and select the search scripted post-processor that you want to link to the search application configuration.
   For a description of the field values, see Search Scripted Post-processors form.
5. Select **Submit**.

Result
The new search scripted post-processor appears in the Search Scripted Post-processors related list.

Search result sort options in AI Search application configurations

A search result sort option enables users to display search results in an order determined by their field values. Applying a search result sort option overrides the default AI Search relevancy-based result order. You can define custom search result sort options for your AI Search applications.

When sorting search results on a string field, AI Search uses collation-based sort following the rules for the ServiceNow AI Platform® session language.

For details on how users apply search result sort options, see Change the sort order for your search results.

Create a search result sort option in an AI Search application configuration

Define a sort option to enable users of an AI Search application to order their search results using field values.

Before you begin
Role required: search_application_admin

About this task
A search result sort option enables users to sort their search results on a field, overriding the default AI Search relevancy-based result order. Each search result sort option specifies a field to sort results on, and a sort order (ascending or descending) order for the sort.

The sort menu in an AI Search application displays all active search result sort option defined for that application, plus the default **Most relevant** option.

Note: If no search result sort options are active for an AI Search application, the sort menu doesn't display for users of that application and results are automatically sorted by relevance.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Open the search application configuration that you want to create a search result sort option for.
3. In the Sort Options related list, select **New**.
4. On the Sort Option form, fill in the fields.
   For a description of the field values, see Sort Option form.
5. Select **Submit**.

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Result
The new search result sort option appears in the search application's Sort Options related list, and its title displays in the sort menu for users of the search application. Users can select the new option from the sort menu to apply the defined sort to their search results.

Remove a search result sort option from an AI Search application configuration

Remove a search result sort option from the sort menu in an AI Search application. The removal of the search result sort option prevents users of the application from selecting that option to reorder their search results with.

Before you begin
Role required: search_application_admin

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**.
2. Open the search application configuration that you want to disable a search result sort option for.
3. In the Sort Options related list, open the search result sort option that you want to disable.
4. On the Sort Option form, clear the **Active** option and select **Update**.
   For a description of the field values, see Sort Option form.

Result
The selected search result sort option no longer appears in the search application's sort menu.

Note: If no search result sort options are active for an AI Search application, the sort menu no longer displays for users of that application and results are automatically sorted by relevance.

Activate fuzzy numeric search in AI Search

Activate fuzzy numeric search to let users find indexed records by their Number field values without needing to enter alphabetic prefixes or leading zeroes.

Before you begin
Role required: admin

About this task
This task is optional. You only need to perform it if you need to activate the fuzzy numeric search feature in AI Search.

Fuzzy numeric search allows numerical search terms to match indexed ServiceNow AI Platform® records by their Number field values. The fuzzy matching compares the numeric search term with each indexed record's Number, ignoring its alphabetical prefix and any leading zeroes. As an example, if you index knowledge article and problem records, a search for `23583` might return knowledge article KB00023583 and problem PRB00023583 as search results.

When fuzzy numeric search is activated, AI Search checks all-numeric search terms for fuzzy numeric matches when you search and when computing auto-complete suggestions for your search terms. For details on implementing and using auto-complete suggestions, see Auto-complete suggestions in AI Search applications.

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Important:

Fuzzy numeric search only searches records from numbered tables. These are tables with Number fields that have prefixes defined in the Number [sys_number] table. To learn about record numbering and the Number table, see Record numbering.

Child tables that inherit the Number field from their parent table can't be searched using fuzzy numeric search. Only tables that have their own Number field defined work with this feature.

Fuzzy numeric search only finds numeric field values in predefined fields named **number**. It doesn't search custom fields or predefined fields with other names.

To learn more about searching with fuzzy numeric search, see Fuzzy numeric search in AI Search.

Fuzzy numeric search includes an indexing component which is activated by default and a query-time component which is deactivated by default. Admins can activate the query-time component by changing the value of the *glide.ais.query.enable_fuzzy_number_match* system property.

Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Search for a system property record with name *glide.ais.query.enable_fuzzy_number_match*.
   - If a system property record with this name exists, open the record by selecting it.
   - If no system property record with this name exists, select **New**, then enter `glide.ais.query.enable_fuzzy_number_match` as the new system property's **Name** and select `true | false` as its **Type**.
3. In the System Property form's **Value** field, enter *true*.
4. Save the modified System Property record by selecting **Submit** or **Update**.

Result

Fuzzy numeric search is activated for users in all of your instance's AI Search applications.

Configure EVAM display settings for search results in AI Search applications

Customize display settings for Search Result EVAM (Entity View Action Mapping) cards in portal and non-portal AI Search applications.

Before you begin

Role required: evam_admin

About this task

EVAM administrators can modify settings on Search Result EVAM cards to customize the appearance and layout of search results in AI Search applications.

String fields on Search Result EVAM cards can be populated with literal text or with values from AI Search indexed fields.

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Procedure

1. Open the EVAM Definition record associated with your chosen AI Search application.
   - For portal applications, navigate to **All** > **Service Portal** > **Portals**, select the search application's portal record from the list, then use the Preview this record icon to preview and open the portal record's linked Search Results Configuration record.
   - For non-portal applications, navigate to **All** > *AI Search* > **Search Experience** > **Search Applications**, select the search application's configuration record from the list, then use the Preview this record icon to preview and open the search application configuration record's linked EVAM Definition record.
2. In the EVAM View Config Bundle M2Ms related list, select the record for the EVAM definition's config bundle.
3. In the EVAM View Configs list, select the record for the specific Search Result category that you want to customize.
   The record name should include `Search Result`. Don't select a record with `Genius Result` in its name, as Genius Results have different display settings than standard search results do.
4. Use the Preview this record icon to preview and open the EVAM View Config record's linked View Template record.
5. In the Template field, edit the JSON for the Search Result card properties you want to customize.
   For details on available properties and their supported values, see List of Search Result EVAM card properties.
6. Select **Update**.

Result

Changes made to Search Result EVAM card settings take effect immediately in AI Search applications.

List of Search Result EVAM card properties

You can customize the appearance of standard search results in your AI Search application by changing these properties in the application's Search Result EVAM (Entity View Action Mapping) cards.

To learn about configuring properties for Search Result EVAM cards, see Configure EVAM display settings for search results in AI Search applications.

Note: The following properties are only supported for EVAM cards with `component` property value `sn-search-result-evam-card`. Don't set these properties for EVAM cards with any other `component` value.

Property	Description
avatarURL	Defines the URL for the image you want to show on the Search Result card when **imageType** is set to **avatar**. • Type: string • Default value: (no value)

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Property	Description
	Note: To specify literal text for this property, include the property in the `staticValues` object and specify the text as its `key` value. To populate this property with the current search result's value from an AI Search indexed field, include the property in the `mappings` object with the field name as its value. For a list of AI Search indexed field names, see AI Search index fields.
customIcon	Specifies the name of an image from the Images [db_image] table that you want to show as a custom icon for the Search Result card. If specified, this property overrides the icon setting from the **icon** property. **Note:** This property only has an effect if **imageType** is set to *icon*. If **imageType** is set to any other value, the **customIcon** setting is ignored. Custom icon images should be either 24 × 24 pixels or 32 × 32 pixels in size. • Type: string • Default value: (no value)
customIconSize	Specifies the size of the image specified as the **customIcon** property. The specified size should match the size of the custom icon image in the Images [db_image] table. • Type: string • Default value: 24px • Supported values: ○ *24px*: Render the custom icon image as 24 × 24 pixels in size. ○ *32px*: Render the custom icon image as 32 × 32 pixels in size.
detailLabelOne, detailLabelTwo, detailLabelThree, detailLabelFour, detailLabelFive, detailLabelSix, detailLabelSeven, detailLabelEight, detailLabelNine, and detailLabelTen	Defines label content for the Search Result card's detail label-value pairs. You can show up to 10 label-value pairs on the Search Result card. • Type: string • Default value: (no value) **Note:** To specify literal text for one of these properties, include the property in the `staticValues` object and specify the text as its `key` value. To populate one of these properties with the current search result's value from an AI Search indexed field, include the property in the `mappings` object with the field name as its value. For a list of AI Search indexed field names, see AI Search index fields. To define value content for these label-value pairs, see **detailValueOne** through **detailValueTen**. **detailValueOne** sets the value for **detailLabelOne**, **detailValueTwo** sets the value for **detailLabelTwo**, and so on up through **detailValueTen** and **detailLabelTen**

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Property	Description
	For additional configuration of how a search result's details are shown on the Search Results card, see **detailLabelType**, **detailLabelSeparator**, and **detailPosition**.
detailLabelSeparator	Defines the character used to separate inline label-value pairs. Only applies when **detailLabelType** is set to **inline**. • Type: string • Default value: (no value) **Note:** To specify literal text for this property, include the property in the `staticValues` object and specify the text as its `key` value. To populate this property with the current search result's value from an AI Search indexed field, include the property in the `mappings` object with the field name as its value. For a list of AI Search indexed field names, see AI Search index fields.
detailLabelType	Defines how to render label-value pairs on the Search Result card. • Type: choice list • Default value: inline • Supported values: ○ *`inline`*: Render label-value pairs using the Label-value component, with each label appearing on the same line as its value string. ○ *`stacked`*: Render label-value pairs using the Label value stacked component, with each label appearing on a separate line from its value string.
detailPosition	Defines where search result detail label-value pairs are shown relative to the Search Result card's summary field. • Type: choice list • Default value: below • Supported values: ○ *`above`*: Search result details are shown above the summary field. ○ *`below`*: Search result details are shown below the summary field.
detailValueOne, detailValueTwo, detailValueThree, detailValueFour, detailValueFive, detailValueSix, detailValueSeven, detailValueEight,	Defines value content for the Search Result card's detail label-value pairs. You can show up to 10 label-value pairs on the Search Result card. • Type: string • Default value: (no value)

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Property	Description
detailValueNine, and detailValueTen	**Note:** To specify literal text for one of these properties, include the property in the `staticValues` object and specify the text as its `key` value. To populate one of these properties with the current search result's value from an AI Search indexed field, include the property in the `mappings` object with the field name as its value. For a list of AI Search indexed field names, see AI Search index fields. To define label content for these label-value pairs, see **detailLabelOne** through **detailLabelTen**. **detailLabelOne** sets the label for **detailValueOne**, **detailLabelTwo** sets the label for **detailValueTwo**, and so on up through **detailLabelTen** and **detailValueTen** For additional configuration of how a search result's details are shown on the Search Results card, see **detailLabelType**, **detailLabelSeparator**, and **detailPosition**.
forceNewTab	Defines whether you want the search result to open in a new browser tab or the current browser tab when you select the link in the Search Result card. • Type: true | false • Default value: true • Supported values: ○ *`false`*: Open the search result in the current browser tab when you select the link in the Search Result card. ○ *`true`*: Open the search result in a new browser tab when you select the link in the Search Result card.
hideIcon	Defines whether you want to show or hide the icon on the Search Result card. • Type: true | false • Default value: false • Supported values: ○ *`false`*: Show the configured icon on the Search Result card. ○ *`true`*: Don't show an icon on the Search Result card.
icon	Defines the icon you want to show on the Search Result card when **imageType** is set to **icon**. This icon is also shown as a fallback when **imageType** is set to **image** but no **imageURL** value is provided. • Type: string • Default value: (no value)

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Property	Description
	Note: To specify literal text for this property, include the property in the `staticValues` object and specify the text as its `key` value. To populate this property with the current search result's value from an AI Search indexed field, include the property in the `mappings` object with the field name as its value. For a list of AI Search indexed field names, see AI Search index fields. For the set of available icon names, see the Icon Gallery in the Next Experience reference section on the ServiceNow® Developer Site.
iconSize	Defines the size of the icon or avatar image shown on the Search Result card. • Type: choice list • Default value: xl (if **imageType** is set to **icon**) or md (if **imageType** is set to **avatar**) • Supported values: ○ *sm*: Show a small icon or avatar image on the Search Result card. ○ *md*: Show a medium-sized icon or avatar image on the Search Result card. ○ *lg*: Show a large icon or avatar image on the Search Result card. ○ *xl*: Show an extra-large icon or avatar image on the Search Result card.
imageType	Defines the type of marker you want to show on the Search Result card. Supported values: • avatar • icon • image
imageURL	Defines the URL for the image you want to show on the Search Result card when **imageType** is set to **image**. • Type: string • Default value: (no value) **Note:** To specify literal text for this property, include the property in the `staticValues` object and specify the text as its `key` value. To populate this property with the current search result's value from an AI Search indexed field, include the property in the `mappings` object with the field name as its value. For a list of AI Search indexed field names, see AI Search index fields.
summary	Defines the content of the Search Result card's summary field.

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Property	Description
	• Type: string • Default value: (no value) **Note:** To specify literal text for this property, include the property in the `staticValues` object and specify the text as its `key` value. To populate this property with the current search result's value from an AI Search indexed field, include the property in the `mappings` object with the field name as its value. For a list of AI Search indexed field names, see AI Search index fields.
summaryFontSize	Defines the font size for the Search Result card's summary field. • Type: choice list • Default value: sm • Supported values: ○ *sm*: Show the Search Result card's summary field in small font size. ○ *md*: Show the Search Result card's summary field in medium font size. ○ *lg*: Show the Search Result card's summary field in large font size. ○ *xl*: Show the Search Result card's title summary in extra-large font size.
textHeaderLabelOne, textHeaderLabelTwo, and textHeaderLabelThree	Defines the content of the Search Result card's text header labels. If you specify multiple text header labels, they appear separated by a pipe | character. • Type: string • Default value: (no value) **Note:** To specify literal text for one of these properties, include the property in the `staticValues` object and specify the text as its `key` value. To populate one of these properties with the current search result's value from an AI Search indexed field, include the property in the `mappings` object with the field name as its value. For a list of AI Search indexed field names, see AI Search index fields.
titleFontSize	Defines the font size for the Search Result card's title field. • Type: choice list • Default value: lg • Supported values: ○ *sm*: Show the Search Result card's title field in small font size. ○ *md*: Show the Search Result card's title field in medium font size.

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Property	Description
	○ *lg*: Show the Search Result card's title field in large font size. ○ *xl*: Show the Search Result card's title field in extra-large font size.
titleLabel	Defines the content of the Search Result card's title field. • Type: string • Default value: (no value) **Note:** To specify literal text for this property, include the property in the `staticValues` object and specify the text as its `key` value. To populate this property with the current search result's value from an AI Search indexed field, include the property in the `mappings` object with the field name as its value. For a list of AI Search indexed field names, see AI Search index fields.
useAttachmentViewer	Option to use Document Viewer to display grouped attachments shown on the Search Result card in collapsed format. To learn more about Document Viewer, see Enable Document Viewer. For more information on grouped attachments and how they're shown on the Search Result card, see Grouping attachment search results with their parent search results. • Type: true | false • Default value: false • Supported values: ○ *true*: Use Document Viewer to display attachments selected from the Search Result card. **Note:** If Document Viewer is not active on your instance, or not enabled for the search result's source table, selecting an attachment from the Search Result card shows a message indicating that the attachment can't be viewed. ○ *false*: Download attachments selected from the Search Result card.

Show borders between search result cards

Display borders between search result cards in portal search and in global and workspace search.

Before you begin
Role required: admin

About this task
By default, AI Search doesn't show borders between search result cards. You can configure AI Search to display borders between search result cards by creating a *glide.search.show_result_card_border* system property with value **true**.

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This system property controls search result card borders in portal search and in global and workspace search.

Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Select **New**.
3. On the System Property form, fill in the fields.

Field	Value
Name	glide.search.show_result_card_border
Type	true | false
Value	true

4. Select **Submit**.

Result

AI Search shows borders between search result cards in portal search and in global and workspace search.

Enabling and configuring AI Search in ServiceNow AI Platform® applications

Configure and use the AI Search engine in the Customer Service Management, Now Mobile, Service Portal, and Virtual Agent applications.

For each supported ServiceNow AI Platform application that you want to use AI Search in, define a search application configuration and specify AI Search as the search engine. To learn more about search application configurations, see Search application configurations.

Some applications support additional configuration for AI Search, as described in the following sections.

Customer Service Management (CSM)

Customer Service Management enables you to provide service and support for external customers through communication channels such as web, email, chat, telephone, and social media. The CSM application includes Customer and Consumer Service Portals that support AI Search.

For details on configuring the Customer and Consumer Service Portals to use AI Search, see Configure AI Search for the Customer and Consumer Service Portals. To activate AI Search widgets so that guest users on these portals can use AI Search, see Enabling AI Search in the Customer and Consumer Service Portals for unauthenticated users.

Now Mobile

Enable your users to submit incidents and requests, manage tasks, and access company resources from anywhere using the Now Mobile app.

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For details on configuring and using AI Search as the Now Mobile search engine, see AI Search in mobile.

Service Portal

Service Portal is a portal framework that enables administrators to build a mobile-friendly self-service experience for users. It interacts with parts of the ServiceNow AI Platform, so users can access specific platform features using Service Portal.

For details on enabling and using AI Search as the Service Portal search engine, see Enable and configure AI Search in Service Portal.

Virtual Agent

Virtual Agent is a platform for providing user assistance through conversations within a messaging interface. Use Virtual Agent to design and build automated conversations that help your users quickly obtain information, make decisions, and perform common work tasks.

For information on how Virtual Agent uses AI Search, see Improving the user experience with AI Search.

AI Search for Next Experience

The AI Search for Next Experience ServiceNow® Store application enables administrators to configure AI Search as the search engine for Unified Navigation searches in Next Experience, including global search and configurable workspace search.

For more information on how you can configure and use AI Search for Next Experience in global search and configurable workspace search, see AI Search for Next Experience.

Create a custom search matcher for global search

Customize the global search experience to return exact match search results from a specified table and column (field). You can configure custom search matchers for search terms with prefixes followed by numbers, such as `INT470271`, or for numeric search terms with delimiter characters, such as `525-326-3827` or `2016/01/08`.

Before you begin

You must have Next Experience enabled.

AI Search must be configured as the search engine for global search. For details on configuring AI Search as the search engine for global search, see AI Search for Next Experience.

Note: If your instance was originally created running Utah or a later family release, AI Search is automatically configured as the search engine for global search.

Role required: ais_admin

About this task

To customize exact-matching behavior in global search, you can define a custom search matcher. The matcher specifies a Java regular expression pattern that AI Search compares search queries to, plus a table and a column (field) from that table. When a search query exactly matches the regular expression pattern, the custom matcher triggers and global search only returns exact-match results from the specified table and column.

Custom search matchers take precedence over the default AI Search exact match functionality for tables with prefixes defined in the Number [sys_number] table. If a global search query doesn't match any custom search matcher's regular expression pattern, AI Search falls back to evaluating the query for exact matches in tables with defined prefixes.

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Note: Users with the admin role can disable this fallback behavior by setting the value of the *glide.ais.custom_matcher.legacy_fallback_enabled* system property to *false*. With this value set, if a search query doesn't match any custom search matcher's regular expression patterns, AI Search treats it as a normal full-text search, ignoring exact matches in tables with defined prefixes.

To learn how AI Search evaluates global search queries for exact matches, see Using global search with AI Search for Next Experience.

Procedure

1. Navigate to *AI Search* > **Search Experience** > **Global Search Custom Matchers**.
2. Select **New**.
3. On the Custom Matcher form, fill in the **Name**, **Table**, and **Column** fields.
   For a description of the field values, see Custom Matcher form.
4. Populate the form's **Regex** field.
   a. Select **Generate Regex**.
   b. In the pop-up window, select the option that more closely matches the values you expect to see in the specified **Column**.
   c. When prompted, enter the value prefix or select the value numeric delimiter.
   d. Close the pop-up window by selecting **Submit**.
5. Select **Submit.**
6. Navigate to the Custom matchers for Search Applications table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `m2m_search_context_config_custom_matcher.list`.
   c. Press Enter.
   The Custom matchers for Search Application [m2m_search_context_config_custom_matcher] table opens in list view.
7. For each search application that you want to use your custom matcher with, including global search, link the matcher to the application.
   a. Select **New**.
   b. On the Custom matchers for Search Application form, fill in the fields.

Field	Description
Custom matcher	The name of your custom search matcher.
Order	Evaluation order for your custom search matcher in the context of the specified AI Search application. Matchers with lower **Order** values are evaluated first.
Search context config	The name of the search application configuration record for the AI Search application that you want to link your custom search matcher to.

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Field	Description
	For global search, select the **[AIS] Next Experience Search Configuration** record.

c. Select **Submit**.
A linkage record for your custom search matcher and the selected AI Search application appears in the Custom matchers for Search Application [m2m_search_context_config_custom_matcher] table.

Result

Global searches performed with AI Search use your new custom search matcher. When a search query exactly matches the specified regular expression pattern, the custom matcher triggers and the search only returns exact-match results from the specified table and column.

Domain separation and AI Search

Domain separation is unsupported for the AI Search application tables, but user search queries respect domain restrictions from indexed ServiceNow AI Platform® table records. 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.

Note: Refer to the Overview and following sections for details on how AI Search search queries respect domain settings from indexed records.

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.

AI Search domain separation overview

AI Search enables users to index and search content from records in ServiceNow AI Platform tables. The AI Search application tables and properties don't support domain separation, but user search queries respect domain settings from indexed content as described in the following sections.

Domain separation in indexed content and search queries

When indexing searchable content from a ServiceNow AI Platform table, AI Search stores the sys_domain field values for records on the source table and referenced tables.

If domain separation is enabled, AI Search applies a filter for the current session domain to every search query. This filter excludes records that aren't visible in the session domain. Only records visible in the session domain appear as search query results.

For child tables that have the *domain_master* attribute set, both indexing and search use the appropriate reference field to derive the child record domain from a referenced parent record.

Restrictions apply to referenced records in search queries, as summarized in the following table.

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Condition	Behavior
Referenced record isn't visible in current session domain	• Search queries don't match content from the referenced record • Filtering on the reference field has no effect on search results • Faceting on the reference field has no effect
Referenced record domain differs from parent record domain	Search result records don't display the reference field

Indexing changes to record domains

AI Search automatically updates indexed domains for records in tables configured as indexed sources.

AI Search doesn't automatically update indexed domains for referenced tables. You can update the indexed domain for a referenced table in either of the following ways.

Use case	Action
Perform a one-time update of domain field values for a referenced table	Perform a full table reindex for the indexed source that includes the affected table. For details on this procedure, see Perform a full table index or reindex for a single AI Search indexed source.
Enable automatic updating of domain field values for a referenced table	Create a *dot_walk_fields* field setting for the reference field, specifying the `sys_domain,sys_domain_path` domain fields as the attribute value. For full steps for this task, see Enable automatic domain updates for a referenced table.

Related topics

Domain separation for service providers

Enable automatic domain updates for a referenced table

Configure a field setting to automatically index domain field value updates for records from a referenced table.

Before you begin

Role required: ais_admin

About this task

This topic provides steps for configuring a *dot_walk_fields* field setting to enable automatic indexing of domain field values for records in referenced tables. For more general instructions on defining field settings, see Create a field setting for an AI Search indexed source.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Open the indexed source that you want to define a field setting for.

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3. In the Field Settings & Mapping related list, select **New**.
4. On the Field Setting form, enter the following field values.

Field	Value
Attribute	dot_walk_fields
Field	<reference field>
Value	sys_domain,sys_domain_path

For a description of the field values, see Field Setting form.

5. Select **Submit**.

Result
The new *dot_walk_fields* field setting appears in the Field Settings & Mapping related list.

What to do next
To make the new *dot_walk_fields* attribute take effect, perform a full table reindex for the indexed source. For details on this procedure, see Perform a full table index or reindex for a single AI Search indexed source.

Indexing and searching external content in AI Search

With a subscription for the External Content for AI Search plugin, you can enable AI Search users to search content and metadata from documents in external repositories and remote tables.

The External Content for AI Search plugin enables you to index documents located outside of your ServiceNow AI Platform® instance, such as those stored in SharePoint collections, Confluence sites, and remote tables. Indexing these documents makes their content and metadata searchable in AI Search.

AI Search displays search results for indexed external documents just as it does for indexed ServiceNow AI Platform records. Users don't need to perform any special searches to match content and metadata from external documents.

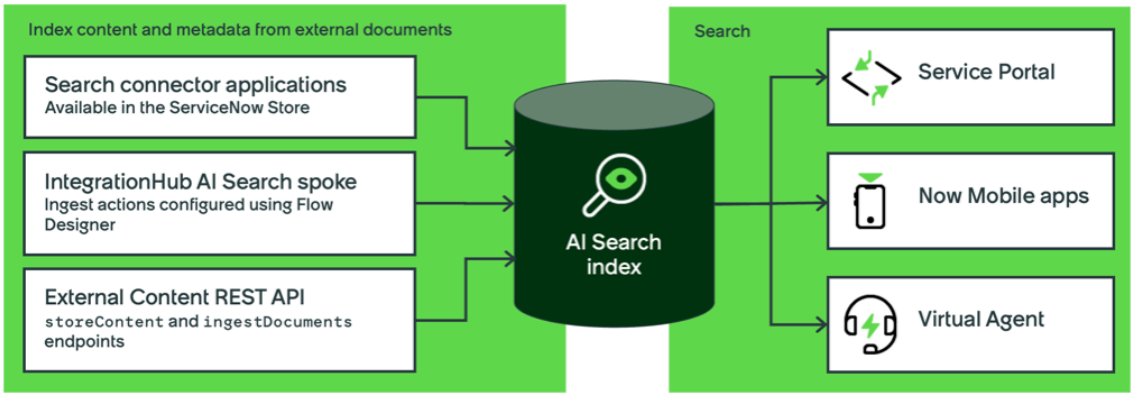
Indexing doesn't duplicate external documents as records in your ServiceNow AI Platform instance. When a user selects an external document search result, they are directed to the source document in its original location.

External content indexing tools

The following diagram illustrates how AI Search provides indexing and search for external document content and metadata:

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AI Search external content architecture diagram



As shown in the architecture diagram, you can index content and metadata from external documents using any or all of the following tools:

External content indexing tool	Description
Search connector applications	Search connector applications available in the ServiceNow Store provide simple tools for indexing content and metadata from documents in supported external sources. They handle some of the configuration work, such as creation of external content schema tables, for you. Each search connector application supports a specific external document source (or set of sources). For example, the SharePoint Online Search Connector only supports documents in SharePoint collections, while the Raytion Connector Hub for AI Search supports multiple document sources. If no search connector application is available for your external document source, you must use the Integration Hub AI Search spoke or the External Content REST API to index content and metadata for documents from that source. Search connector applications provide the most straightforward way to index document content and metadata from supported external sources.
Integration Hub AI Search spoke	The Integration Hub AI Search spoke provides Workflow Studio actions that you can use to ingest external documents for indexing: • *`Ingest Document`*: Define property name-value pairs for an external document and submit the document to AI Search for indexing. • *`Ingest Document Using Download URL`*: Specify an external document's URL and have AI Search download it for indexing. You can specify security principal access permissions for documents ingested using these actions. To learn more about access permissions and security for external document content, see External content security for AI Search. For the full list of Workflow Studio actions provided by the AI Search spoke, see AI Search spoke. The Integration Hub AI Search spoke combines flexible configuration and handling with the simple drag-and-drop Workflow Studio interface.

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External content indexing tool	Description
External Content REST API	The External Content REST API provides endpoints that you can use to index content and metadata from external documents: • Send external document text content and metadata to AI Search for indexing using the `ingestDocuments` API endpoint. • Upload external document binary content to AI Search using the `storeContent` API endpoint. You can associate the stored binary content with a document fed using the `ingestDocuments` endpoint. **Note:** To access the External Content REST API endpoints, you need either the ais_external_content role or the admin role. You can specify security principal access permissions for documents ingested using the `ingestDocuments` endpoint. To learn more about access permissions and security for external document content, see External content security for AI Search. For full descriptions of the External Content REST API endpoints, see External Content Ingestion REST API. The External Content REST API is the most complex tool for indexing content and metadata from your external documents, but it offers the most flexibility.

External content search prerequisites

Before you can index external document content and metadata for search in AI Search, you must satisfy the following requirements. Except as noted in the table, these requirements apply regardless of which external content indexing tools you use.

Requirement	Description
Have an active subscription for the External Content for AI Search plugin (com.glide.ais.external_content)	The External Content for AI Search plugin provides functionality for indexing content from external data sources. For instructions on purchasing a subscription for the plugin and activating it, see Request the External Content for AI Search plugin.
Define an external content schema table for the external document source	An external content schema table doesn't store external document content in the database. Instead, its columns serve as a map of AI Search index fields to populate when you index content from external data sources. For instructions on creating a new external content schema table, see Create an external content schema table. When documents from multiple external data sources share the same set of fields and have unique document identifiers, you can use a single external content schema table for all of them. To avoid data loss, the external data sources must satisfy these conditions:

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Requirement	Description
	• All documents in the external data sources must include the same fields, matching the columns defined in the content schema table. • Every document in the external data sources must have a unique identifier so that documents don't overwrite one another in the AI Search index. If the external data sources can't satisfy these conditions, create a separate external content schema table for each data source. **Note:** Search connector applications from the ServiceNow Store automatically create external content schema tables as needed. You only need to create your own external content schema tables when indexing external documents using the Integration Hub AI Search spoke or the External Content REST API.
Create an indexed source with your external content schema table specified as the table to index	The indexed source sends external documents' content and metadata to the AI Search index. For instructions on creating an indexed source, see Create an indexed source.
Create one or more search sources for the indexed source	Each search source specifies a subset of external documents from the indexed source whose content you want to make searchable in AI Search. For instructions on creating search sources, see Create a search source for AI Search.

Request the External Content for AI Search plugin

Request activation of the External Content for AI Search plugin (com.glide.ais.external_content) to enable indexing of searchable content and metadata from records in external data sources.

Before you begin

You must purchase a paid subscription before requesting activation of the plugin. For details on purchasing a paid subscription for a plugin, see ServiceNow plugins.

Role required: admin

About this task

You can't activate the External Content for AI Search plugin from your instance or the ServiceNow Store. Use this procedure to submit a Now Support request for activation of the plugin for your instance.

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.

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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.

Create an external content schema table

Define a schema table with columns corresponding to fields on records from an external data source. AI Search uses the schema when indexing content from the external data source.

Before you begin

Role required: ais_admin

About this task

An external content schema table doesn't store data in the database. Instead, its columns serve as a map of AI Search index fields to populate when you index content from external data sources.

When you index or delete records associated with this content schema using endpoints from the External Content Ingestion REST API, you must specify the schema table name as a path parameter.

Procedure

1. Navigate to **All** > *AI Search* > **External Content** > **Create Schema**.
2. Enter a name for your new external source schema table.
3. Select **Submit**.
   The new external content schema table opens in list view.

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4. **Optional:** If you need to define additional field mappings for records from the external data source, add a new column for each field.

   a. In the Columns related list, select **New**.

   b. On the Dictionary Entry form, fill in the fields.
   For descriptions of these form fields, see Dictionary Entry form.

   > **Note:** When filling in the **Type** field, select **String**, **Date**, **Date/Time**, or **Integer**. AI Search doesn't support other column types on external content schema tables.

   c. Select **Submit**.

5. If you modified the default column set, select **Update** to save your changes.

What to do next

Create a new indexed source with your external content schema table defined as its source. For instructions on creating an indexed source, see Create an indexed source

External content security for AI Search

AI Search preserves user and group security access permissions specified for documents indexed from external sources. You can control access to external content search results by mapping these externally defined users and groups to ServiceNow AI Platform® users.

For an overview of AI Search content security, see Content security in AI Search.

Requirements

To use external content security, include the following two steps in your ingestion and indexing process for external documents:

Step	Description
Specify access permissions on each external document fed for ingestion	Access permissions for an external document can allow or deny access to the document globally (for all users), or can include lists of specific externally defined users and groups who are allowed or denied access to the document. AI Search preserves the external document's security access permissions during indexing. Additional information: • For an overview of specifying access permissions on external documents, see Defining access permissions for external documents. • To learn about the set of access permissions supported for external content security, see External content access permissions. • For details on special access permissions granted by certain user roles, see Special external content access permissions by role. • To learn how to reverse the default precedence of *`users.read`* and *`groups.deny`* access permissions for an external content indexed source, see Change the precedence of user read and group deny permissions for an external content indexed source.
Define user mappings in	A user mapping specifies externally defined user and group aliases for a ServiceNow AI Platform user. Link these user mappings to indexed sources

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Step	Description
tables linked to external content indexed sources	for external content. AI Search uses an indexed source's user mappings in conjunction with indexed records' access permissions to determine ServiceNow AI Platform user access for search results from the indexed source. Additional information: • For an overview of user mappings, see Mapping external users and groups to ServiceNow AI Platform users. • To learn about the set of externally defined security principal types supported in user mappings, see External user mapping security principal types. • For instructions on creating a table to store your user mappings, see Create a user mapping table. • For instructions on linking your user mapping tables to external content indexed sources, see Link a user mapping table to an external content indexed source. • To learn about importing user mappings via the AI Search External User Mapping API, see Importing user mappings. • For instructions on viewing user mapping import history records to confirm that user mappings imported correctly, see View history records for user mapping import operations.

Security implementation for search queries

When a user's search query matches an indexed record created from an external document, AI Search performs these steps:

1. Examines the user mappings linked to the record's indexed source and retrieves the set of all externally defined users and groups aliased to the current ServiceNow AI Platform user's account.
2. Compares the mapped set of externally defined user and group aliases with the access permissions on the indexed search result record to see whether the ServiceNow AI Platform user should be allowed to view the search result.

Defining access permissions for external documents

You can specify access permissions for externally defined users and groups when ingesting external documents. AI Search preserves these permissions during indexing so that user content security filters can operate on them at search time.

For details on including access permissions for externally defined users and groups in ingested external documents, see the `POST /ais/external_content/ingestDocument/{schema_table_name}` endpoint of the External Content Ingestion API.

External content access permissions

External content security includes permissions that describe user and group access for an external document. When indexing an external document, AI Search stores these permissions so that content security filters can limit user access to the indexed search result.

Access permissions

AI Search supports the following access permissions on ingested external documents.

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Security principal	Description
everyone	Boolean option that indicates whether access to the external document is allowed for all users. AI Search applies this global access permission to the indexed record created from the document. Set this permission for an ingested document via the `[array].principals.everyone` request body parameter in a request to the `POST /ais/external_content/ingestDocument/{schema_table_name}` endpoint of the External Content Ingestion API. When set to **true**, this permission overrides all **groups** and **users** permissions. This permission is mutually exclusive with **none**. Only one of these two permissions can be set to **true** for any external document.
groups.deny	List of externally defined groups that are denied access to the external document. ServiceNow AI Platform® users mapped to any of these external groups can't view the indexed search result record created from the document. Set this permission for an ingested document via the `[array].principals.groups.deny` request body parameter in a request to the `POST /ais/external_content/ingestDocument/{schema_table_name}` endpoint of the External Content Ingestion API. This permission takes precedence over **groups.read**. If the same group has both read and deny access permissions for a document, AI Search denies members of the group access to the indexed record. By default, **users.read** takes precedence over this permission. To reverse this precedence order for an indexed source, see Change the precedence of user read and group deny permissions for an external content indexed source.
groups.read	List of externally defined groups that are allowed access to the external document. ServiceNow AI Platform users mapped to any of these external groups can view the indexed search result record created from the document. Set this permission for an ingested document via the `[array].principals.groups.read` request body parameter in a request to the `POST /ais/external_content/ingestDocument/{schema_table_name}` endpoint of the External Content Ingestion API. **groups.deny** permission takes precedence over this permission. If the same group has both read and deny access permissions for a document, AI Search denies members of the group access to the indexed record.
none	Boolean option indicating whether access to the external document is denied for all users. AI Search applies this global denial permission to the indexed record created from the document. Set this permission for an ingested document via the `[array].principals.none` request body parameter in a request to the `POST /ais/external_content/ingestDocument/{schema_table_name}` endpoint of the External Content Ingestion API. When set to **true**, this permission overrides all **groups** and **users** permissions.

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Security principal	Description
	This permission is mutually exclusive with **everyone**. Only one of these two permissions can be set to **true** for any external document.
users.deny	List of externally defined users that are denied access to the external document. ServiceNow AI Platform users mapped to any of these external users can't view the indexed search result record created from the document. Set this permission for an ingested document via the *[array].principals.users.deny* request body parameter in a request to the *POST /ais/external_content/ingestDocument/{schema_table_name}* endpoint of the External Content Ingestion API. This permission takes precedence over **users.read**. If the same user has both read and deny access permissions for a document, AI Search denies that user access to the indexed record.
users.read	List of externally defined users that are allowed access to the external document. ServiceNow AI Platform users mapped to any of these external users can view the indexed search result record created from the document. Set this permission for an ingested document via the *[array].principals.users.read* request body parameter in a request to the *POST /ais/external_content/ingestDocument/{schema_table_name}* endpoint of the External Content Ingestion API. **users.deny** takes precedence over this permission. If the same user has both read and deny access permissions for a document, AI Search denies that user access to the indexed record. By default, this permission takes precedence over **groups.deny**. To reverse this precedence order for an indexed source, see Change the precedence of user read and group deny permissions for an external content indexed source.

Precedence order for principal permissions

The precedence order for *[array].principals* permissions on an ingested external document depends on the value of the *user_read_takes_precedence_over_group_deny* attribute for the document's indexed source.

Attribute value	Precedence order for principal permissions
true	From highest precedence to lowest: **1.** *everyone* and *none* **2.** *users.deny* **3.** *users.read* **4.** *groups.deny* **5.** *groups.read*

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Attribute value	Precedence order for principal permissions
	Note: This is the default attribute value for external content indexed sources.
false	From highest precedence to lowest: **1.** *everyone* and *none* **2.** *users.deny* and *groups.deny* **3.** *users.read* and *groups.read* **Note:** For instructions on setting this attribute value, see Change the precedence of user read and group deny permissions for an external content indexed source.

For details on how content security permissions from certain user roles interact with these external content security principals, see Special external content access permissions by role.

Special external content access permissions by role

Certain user roles provide special access permissions for external content indexed records.

Role	Permissions
AI Search administrator [ais_admin]	An AI Search administrator can access all external content indexed records in a search application. **Note:** To bypass all search source and content security filtering in the Search Preview UI, you also need the impersonator and AI Search high security administrator [ais_high_security_admin] roles. For details on this procedure, see Diagnose search result access issues using the Search Preview UI.
Guest user [public]	Non-authenticated guest users can only access external content indexed records that have the *everyone* permission set to *true*.
Self-registered external user [snc_external]	Self-registered external users that belong to groups can access external content indexed records based on their group memberships. External users that don't belong to any group can only access external content indexed records that have the *everyone* permission set to *true*. For more details on self-registered external users, see Self-register to ServiceNow instance.

Change the precedence of user read and group deny permissions for an external content indexed source

Make external group deny access permissions take precedence over external user read access permissions for all external documents ingested through an indexed source.

Before you begin

The External Content for AI Search plugin (com.glide.ais.external_content) must be activated in your instance.

The source table for the indexed source must be an external content schema table.

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Role required: ais_admin

About this task

By default, external user read access permissions (*users.read*) on an external document take precedence over external group deny access permissions (*groups.deny*) on the same document.

For example, suppose you ingest external content through an indexed source with a user mapping that maps ServiceNow AI Platform® user *beth.anglin@example.com* to external user *ad|beth-anglin* and external group *report-users*. If an external document grants read access to *ad|beth-anglin* and denies access to *report-users*, AI Search allows *beth.anglin@example.com* to view the indexed search result record for the external document.

To reverse this default behavior for an indexed source, making external group deny permissions take precedence over external user read permissions for all of its indexed records, change the value of the indexed source's *user_read_takes_precedence_over_group_deny* attribute. In the preceding example, making this change would prevent *beth.anglin@example.com* from viewing the indexed search result record for the external document.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Edit the record for the indexed source you want to change the permissions precedence for.
3. In the Advanced Configuration related list, select **New**.
4. On the Indexed Source Attribute form, enter the following field values.

Field	Value
Attribute	user_read_takes_precedence_over_group_deny
Value	false

   For a description of the field values, see Indexed Source Attribute form.

5. Select **Submit**.
   The attribute and value appear in the Advanced Configuration related list.

Result

The change in permission preference takes effect for search results from the external content indexed source.

Mapping external users and groups to ServiceNow AI Platform® users

AI Search external user mappings enable you to configure externally defined user and group aliases for ServiceNow AI Platform users. AI Search uses these aliased security principals to apply content security filters that control user access to search results indexed from external documents.

You can use mapped external user and group names when defining access permissions for external documents that you ingest for indexing via the External Content Ingestion API.

External content security user mapping overview

To configure user mappings for external content security, you must perform the following steps:

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1. Create one or more user mapping tables. For instructions on this procedure, see Create a user mapping table.
2. Link a user mapping table to each of your external content indexed sources. For details on this task, see Link a user mapping table to an external content indexed source.

   Note: If no mapping is found for the current ServiceNow AI Platform user, AI Search only allows the user to view search results for external documents that have the *everyone* permission set to **true**. This can occur if no user mapping table is linked to a search result's indexed source, or if no mapping for the current ServiceNow AI Platform user exists in the indexed source's linked user mapping table.

3. Import user mappings into your user mapping tables with the AI Search External User Mapping API.

Users with the ais_high_security_admin role can review history records for import operations to verify that user mappings imported correctly. For instructions on this procedure, see View history records for user mapping import operations.

External user mapping security principal types

AI Search user mapping aliases can include externally defined group and user security principals.

Mapped security principal type	Description
Externally defined group	The ServiceNow AI Platform® user specified in the user mapping inherits group-level access permissions for all aliased external groups. For example, if you define external group *report-users* as an alias for ServiceNow AI Platform user *beth.anglin@example.com*, AI Search allows *beth.anglin@example.com* to view indexed search results for external documents that include read access permission for *report-users*.
Externally defined user	The ServiceNow AI Platform user specified in the user mapping inherits user-level access permissions for all aliased external users. For example, if you define external user *ad|abel-tuter* as an alias for ServiceNow AI Platform user *abel.tuter@example.com*, AI Search allows *abel.tuter@example.com* to view indexed search results for external documents that include read access permission for *ad|abel-tuter*.

Create a user mapping table

Define a table to store externally defined user and group aliases for ServiceNow AI Platform® users.

Before you begin

The External Content for AI Search plugin (com.glide.ais.external_content) must be activated in your instance.

Role required: ais_admin

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About this task

User mapping tables store user mappings for use with external documents that have access permissions. Each mapping specifies externally defined user and group aliases for an individual ServiceNow AI Platform user. AI Search uses the mappings linked to an external document's indexed source to determine whether a ServiceNow AI Platform user can view the indexed record for the document.

All user mapping tables extend the AI Search External Search User Mapping Base [ais_external_search_user_mapping] table.

Procedure

1. Navigate to **All** > *AI Search* > **External Content** > **Create User Mapping**.
2. Enter a name for your user mapping table.
3. Select **Submit**.
   The dictionary form for your new user mapping table appears.

What to do next

Import user mappings into your new user mapping table. For an overview of this process, see Importing user mappings. For details on the relevant API endpoint, see AI Search External User Mapping API.

Link a user mapping table to an external content indexed source

Specify the user mapping table you want AI Search to use for external documents ingested through an indexed source.

Before you begin

The External Content for AI Search plugin (com.glide.ais.external_content) must be activated in your instance.

The source table for the indexed source must be an external content schema table.

Role required: ais_admin

About this task

A user mapping table linked to an indexed source defines external user and group aliases for ServiceNow AI Platform® users. AI Search uses these aliases to determine a user's effective access permissions when their search matches a record from the indexed source.

A user mapping table can be linked to any number of indexed sources.

Note: If no mapping is found for the current ServiceNow AI Platform user, AI Search only allows the user to view search results for external documents that have the *everyone* permission set to **true**. This can occur if no user mapping table is linked to a search result's indexed source, or if no mapping for the current ServiceNow AI Platform user exists in the indexed source's linked user mapping table.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Open the indexed source record that you want to link a user mapping to.
3. In the AI Search External Search User Mapping Table Data Source Relationships related list, create a new relationship record for the user mapping table that you want to link to the indexed source:

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a. Select **New**.

b. On the AI Search External Search User Mapping Table Data Source Relationship form, fill in the fields.

c. Select **Submit**.
The user mapping table's name appears in the related list.

Importing user mappings

You can use the AI Search External User Mapping API to import mappings between ServiceNow AI Platform® users and externally defined users and groups.

To define a user mapping for import, you need the following information:

- The email address that uniquely identifies a ServiceNow AI Platform user in the User [sys_user] table.
- The list of externally defined groups that you want to alias to the ServiceNow AI Platform user. This list can be empty.
- The list of externally defined users that you want to alias to the ServiceNow AI Platform user. This list can be empty.

For more information on importing user mappings, see AI Search External User Mapping API.

View history records for user mapping import operations

Review the results for your user mapping import operations, including data, log messages, and any errors. Use this procedure to verify that your user mappings are imported correctly.

Before you begin

Role required: ais_admin, ais_high_security_admin, and import_transformer.

About this task

AI Search creates an import set for each batch of user mappings that you import via the AI Search External User Mapping API. The transform histories for these import sets provide insight into the results of your user mapping import operations.

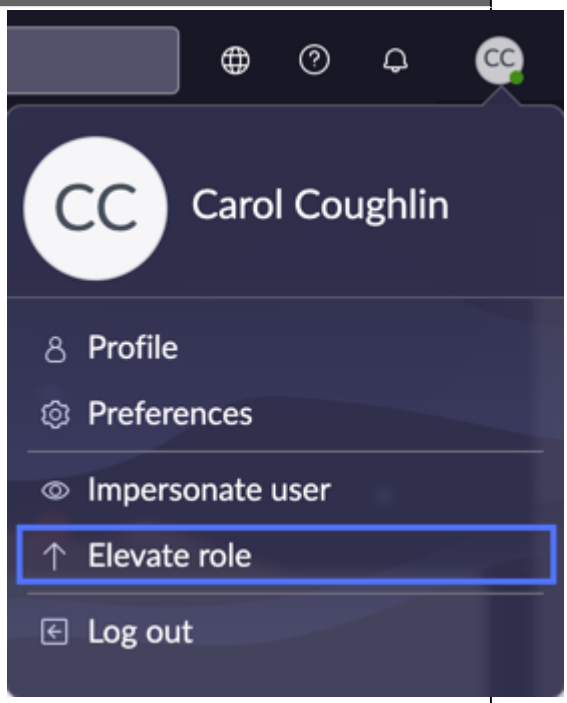
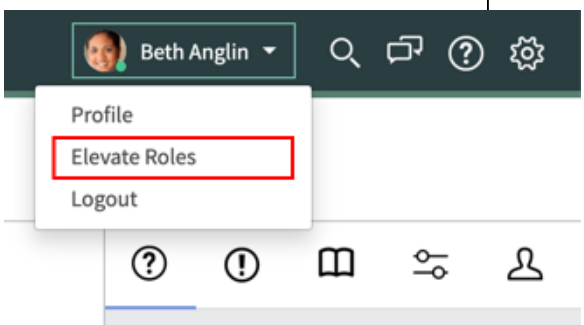
Procedure

1. Elevate to the ais_high_security_admin role:

   a. Perform the appropriate action for your version of the UI:

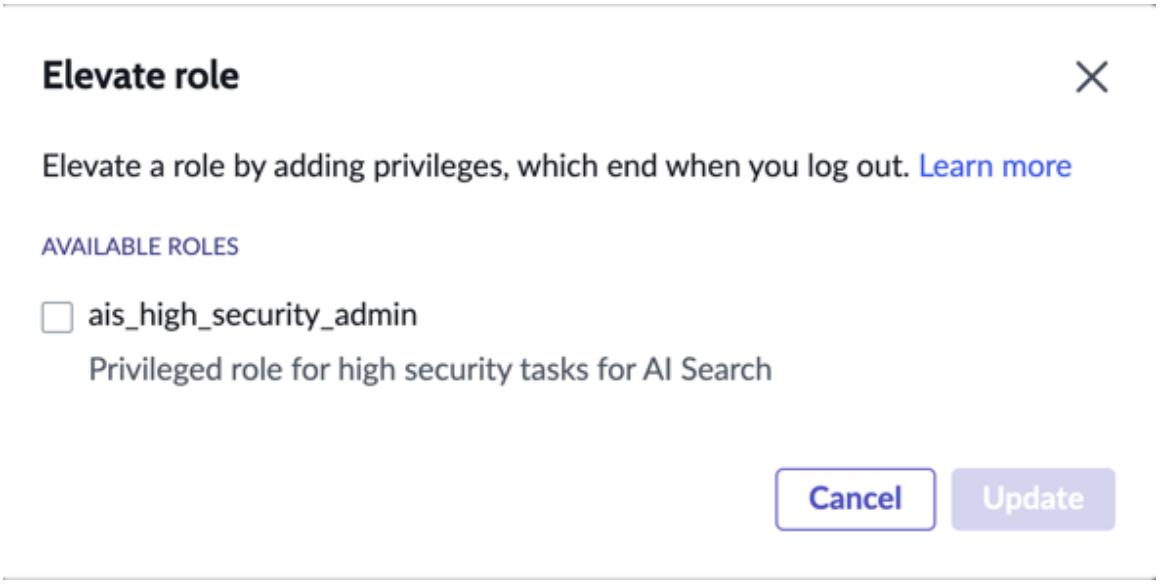
UI version	Action
Next Experience UI	In the banner frame, select the icon for your account to open the user menu, then select **Elevate role**.

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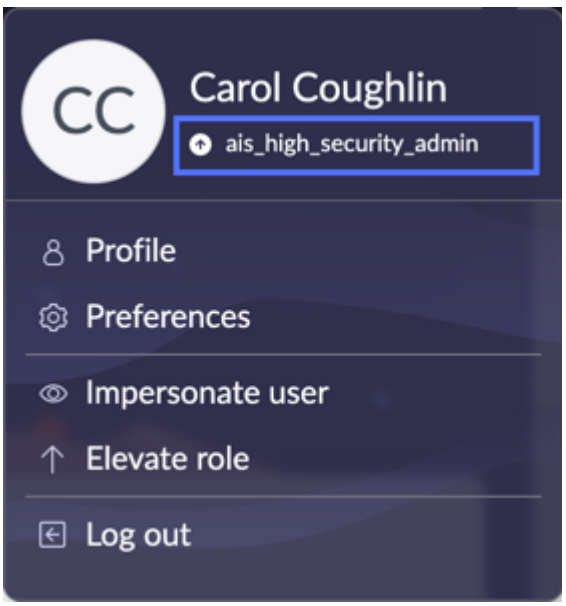
UI version	Action
	
Core UI	In the banner frame, select your name to open the user menu, then select **Elevate Roles**. 

A dialog box appears, displaying a checklist of your available privileged roles.

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b. In the dialog box, select the **ais_high_security_admin** option, then select **Update** (in Next Experience UI) or **OK**.
The page reloads and an elevated role indicator appears next to your user name in the user menu. In Next Experience UI, this indicator displays the names of the active privileged roles.
In Core UI, the indicator displays the elevated role icon .



Note: When the page reloads, any unsaved edits are lost.

2. Navigate to **All** > *AI Search* > **External Content** > **User mapping import history**.

3. Review each user mapping import history record that you're interested in.

a. Open the user mapping import history record.

b. On the AI Search External Content User Mapping History Record form, select the **Show Transform History** related link.
The Transform History [sys_import_set_run] table opens, with a filter applied for the import set from the selected user mapping import history record.

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c. Open the transform history record.

d. Review import set results on the form, errors in the Import Set Row Errors related list, and log messages in the Import Log related list.

Components installed with External Content for AI Search

When you activate the External Content for AI Search plugin (com.glide.ais.external_content), the system creates a new virtual table.

Tables installed

Table	Description
AI Search External Search Content [v_ais_external_search_content]	Stores the base set of field mapping columns for inclusion in external content schema tables. **Note:** All user-created external content schema tables extend this table.
AI Search External Search User Mapping Table Data Source Relationship [ais_external_search_user_mapping_data_source_m2m]	Stores links between user mapping tables and indexed sources.

Integrating AI Search into other ServiceNow AI Platform® applications

AI Search integrates with other ServiceNow AI Platform applications. Populate your UI Builder pages with search components and customize display of search results and Genius Results with EVAM definitions. Improve incident deflection in Service Portal by configuring AI Search Assist for record producers.

UI Builder search components

AI Search provides components for search input, search results, search facets, and source facet bucket filters. You can add these components to your pages in UI Builder.

The AI Search components are described in detail on the Developer Site:

- Search facets
- Search input
- Search results
- Tab filter

For details on adding components to your pages in UI Builder, see Add and configure components.

Entity View Action Mapping (EVAM) definitions

Entity View Action Mapping (EVAM) is a ServiceNow AI Platform application that standardizes how different data sources display records in cards and lists.

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AI Search provides EVAM configurations that you can use to customize display of search results and Genius Results in Service Portal and your UI Builder pages.

You can customize EVAM settings to display AI Search results as a card grid view or as a list view. Users can page through large data sets of search results and see different views based on filtering.

For details on EVAM definitions, configurations, templates, and configuration bundles, see Entity View Action Mapping (EVAM).

Service Portal record producer integration

AI Search Assist is a Service Portal widget that uses AI Search to improve incident deflection by displaying the most relevant set of related search results within a record producer. You can use AI Search Assist instead of Contextual Search.

For more details on the AI Search Assist widget, see AI Search Assist record producer integration for Service Portal.

AI Search Assist record producer integration for Service Portal

AI Search Assist is a Service Portal widget that uses AI Search to improve incident deflection by displaying the most relevant set of related Catalog Item and knowledge article search results within a record producer. You can use AI Search Assist instead of Contextual Search.

AI Search Assist overview

AI Search Assist can help a user find the most relevant Catalog Items and knowledge articles in a search on your portal. For example, a user who creates an Incident via the Service Portal can see related Catalog Items that they can order. The user can also view related knowledge articles to assist them to resolve the issue on their own without involving the service desk.

AI Search Assist helps with incident deflection for incident record producers, deflecting incidents by helping end users resolve issues before they raise an incident.

AI Search Assist supports ServiceNow mobile.

Note: AI Search Assist doesn't support external users. If an external user tries to use an Assist UI action, the system returns an error.

Activation information

The AI Search Assist plugin (com.snc.ai_search_assist) is a ServiceNow AI Platform® application that is activated by default when AI Search is active.

Configure AI Search Assist for a record producer

Configure AI Search Assist settings for a record producer to help users view related Catalog Item and knowledge article search results.

Before you begin
Role required: aisa_admin or admin

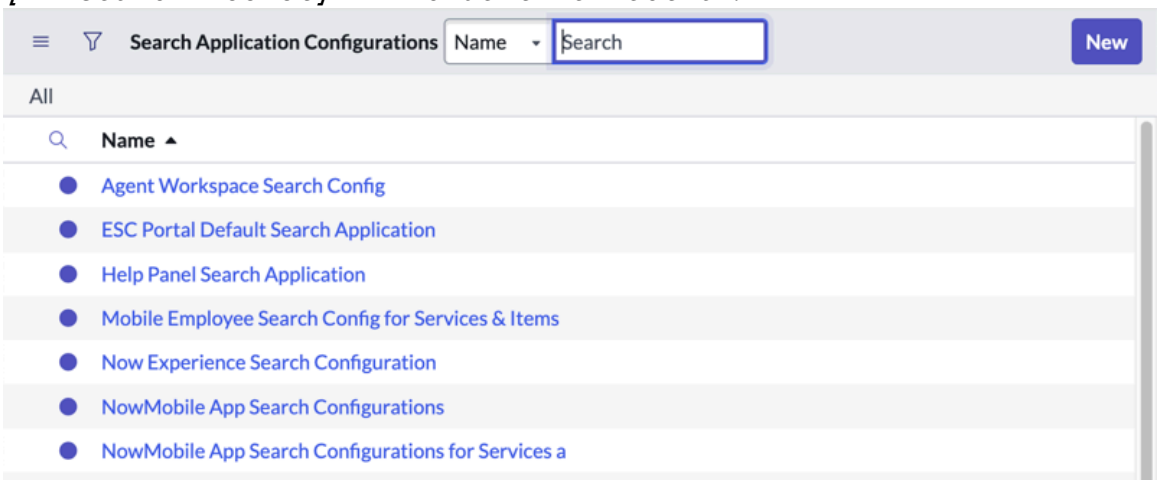
About this task
AI Search Assist is a Service Portal widget that displays relevant Catalog Item and knowledge article search results within a record producer configuration.

Note: If both AI Search Assist and Contextual Search are configured for the same record producer, see *Results* at the end of this task for how to control which one is displayed.

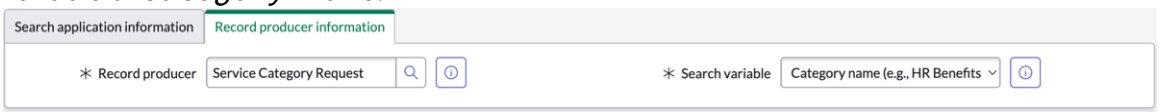
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Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Assist** > **Record Producer Configuration**.
2. Select **New** and fill in the form to create a configuration for Catalog Item and knowledge article search results.
3. On the **Search application information** tab, select a Search application configuration.
   You can choose from a list of pre-defined configurations for specific features. For example, *[AI Search Assist] - Incident Deflection*.



4. On the **Record producer information** tab, select a Record producer and Search variable.
   For example, *Service Category Request* as a record producer can have a search variable of *Category name*.



5. **Optional:** To adjust the visibility of your card or detail view, select **Show UI Actions** under the new Record Producer Configuration record's related links.
   AI Search Assist *UI actions* can hide from view using a simple condition or advanced condition via a script.
6. Select **Submit**.

Result

AI Search Assist is active.

Note: AI Search Assist doesn't support external users. If an external user tries to use an Assist UI action, the system returns an error.

If Contextual Search has been configured for the same record producer, and is showing results instead of AI Search Assist, check the following conditions:

- The *Enable AI Search* flag on the Portal (sp_portal) is active
- The AI Search Assist record configuration is active
- The AI Search Profile is active and published
- The record producer variable for AI Search Assist is created for the associated record producer and the variable is active

If these conditions aren't all met, then Contextual Search is the fallback for the same record producer to make sure you see related search results.

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AI Search Assist roles

AI Search Assist includes the following roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

AI Search Assist administrator [aisa_admin]

Configure and manage AI Search Assist settings.

- Manages AI Search Assist on record producers, including the associated UI actions
- Adds variables to a record producer
- Administers AI Search Assist capability

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

AI Search Assist properties

The AI Search Assist properties determine when searching begins based on characters entered and the time that has elapsed. These properties reduce the impact of searches for systems with many Catalog Items or Knowledge articles.

AI Search Assist properties

Property	Description
com.snc.ai_search_assist.min_length	The minimum number of characters entered before a search initiates. The default is 3.
com.snc.ai_search_assist.wait_time	The time elapsed after the user finishes entering characters in the search field before the search begins. **Note:** If you set the time to '-1', the search begins when the user leaves the search field. This behavior is known as 'Search on tab'.

Domain separation and AI Search Assist

Domain separation is supported for AI Search Assist. 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.

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AI Search Assist overview

The goal of AI Search Assist is to give a Service Portal record producer AI Search capabilities, which improve search results over time. Domain separation is enabled in AI Search Assist.

How domain separation works in AI Search Assist

Domain separation for AI Search Assist is set in the record producer configuration. A related link for each record producer configuration enables you to expand or collapse the domain scope. If you expand the domain scope, any child domain record producer configurations can override a global or parent domain record configuration.

Related topics

Domain separation for service providers

Searching in AI Search

See how AI Search displays search results, refinement filter options, and Genius Result answers. Learn how to search using the AI Search query language. Understand when and how AI Search automatically resubmits queries.

Note: For more details on using AI Search features in global and workspace search, see Using global search with AI Search for Next Experience.

AI Search query language

Learn how to construct search queries using terms, phrases, and AI Search query operators.

Search query terms and phrases

Specify terms and quoted phrases in the search query to find records that contain the same terms or phrases.

Search query terms	Description
`conference`	Single-term search. Finds records that contain the term `conference`. **Note:** Search terms don't match substrings of indexed terms. As an example, searching for `exam` finds records that contain the term `exam`, but not records that contain the term `example`. To search for substring matches, you can use the `%` or `*` wildcard matching operators.
`conference room`	Conjunctive multi-term search. Finds records that contain both of the terms `conference` and `room` (an intersection of sets). The search terms can appear in any order or proximity in the record and may appear in different fields. **Note:** If you set the **Boolean search operator to use when a search query includes multiple terms** (*`glide.ais.query.search_operator`*) system property to *`OR query`*, this search finds records that contain either of the terms `conference` or `room` (a union of sets).
`"conference room"`	Quoted phrase search. Finds records that contain the term `conference` followed immediately by the term `room`. The search terms must appear in this order and in the same field.

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Search query terms	Description
	Note: Quoting a phrase doesn't disable linguistic features (such as normalization, synonym expansion, and stop word removal) or wildcard operators. For example, a search for the quoted phrase `"email acc*"` expands the wildcard operator normally to find records that contain `email account` and `email access`.

AI Search ignores letter case for search query terms and phrases. For example, searching for `PIN` finds records containing `PIN` and `pin`.

Note: When processing search query terms, AI Search automatically strips out HTML and XML content by removing strings that start with < and end with >. As an example, if you enter `user <beth.anglin@example.com>` as your search terms, AI Search only searches for `user`. If you search for `<abel.tuter@example.com>`, AI Search treats the search as empty and returns no results. This behavior isn't configurable.

Boolean search operators

Separate query terms and phrases with Boolean operators to override the default matching logic for the search query.

Operator	Description
`OR`	Boolean disjunction operator. Finds records that contain any of the terms or phrases separated by `OR`. For example, searching for `"conference room" OR suite` finds records that contain the phrase `conference room` and records that contain the term `suite`. **Note:** If you set the **Boolean search operator to use when a search query includes multiple terms** (*`glide.ais.query.search_operator`*) system property to *`OR query`*, this operator has no effect because search already treats all query terms and phrases as though separated by the `OR` operator.
hyphen (`-`)	Boolean negation operator. Excludes records containing the term or phrase that immediately follows the hyphen. For example, searching for `email -"email signature"` finds records that contain the term `email` but don't contain the phrase `email signature`.

Wildcard matching operators

Use wildcard operators to find records that contain indexed terms matching a wildcard pattern.

Operator	Description
`%`	Single-character wildcard operator. Include `%` in a search query term to match any one character in an indexed term. As an example, searching for `the%e` finds results containing wildcard matches such as `theme`, `there`, or `these`.

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Operator	Description
	AI Search also evaluates the search with the wildcard operator ignored, to look for literal matches. The non-wildcard operator parts of the search term are treated as a phrase, meaning that they must appear in the same order in the result as they do in the search. As an example, a search for `5000%000` returns results that contain `5000` followed by `000` as well as results that contain wildcard matches like `50007000`. **Note:** The `%` operator must follow a string of three or more non-wildcard characters. For search query terms that don't satisfy this condition, AI Search only returns literal matches. As an example, if you search for `99%`, with only two non-wildcard characters preceding the `%` operator, AI Search only returns results with literal matches for `99`.
`*`	String wildcard operator. Include `*` in a search query term to match any string of zero or more characters in an indexed term. As an example, searching for `acc*` finds results containing wildcard matches such as `access`, `account`, `accrue`, `accumulate`, and `accuracy`. AI Search also evaluates the search with the wildcard operator ignored, to look for literal matches. The non-wildcard operator parts of the search term are treated as a phrase, meaning that they must appear in the same order in the result as they do in the search. As an example, a search for `753*268` returns results that contain `753` followed by `268` as well as results that contain wildcard matches like `7539268`. **Note:** The `*` operator must follow a string of three or more non-wildcard characters. For search query terms that don't satisfy this condition, AI Search only returns literal matches. As an example, if you search for `ad*`, with only two non-wildcard characters preceding the `*` wildcard operator, AI Search only returns results with literal matches for `ad`.
`***`	Universal wildcard operator. Specify `***` as a search query to find all indexed terms and thus all records. **Note:** AI Search doesn't apply relevancy ranking to `***` queries. Results from `***` queries appear in an unspecified order.

Note: When expanding search terms that contain `%` or `*` wildcard operators, AI Search ignores terms defined as stop words. For example, suppose you define `the` and `their` as stop words. A search for `the*` won't expand to match `the` or `their`, but will still match non-stop word terms such as `there` and `these`.

Viewing search results in AI Search

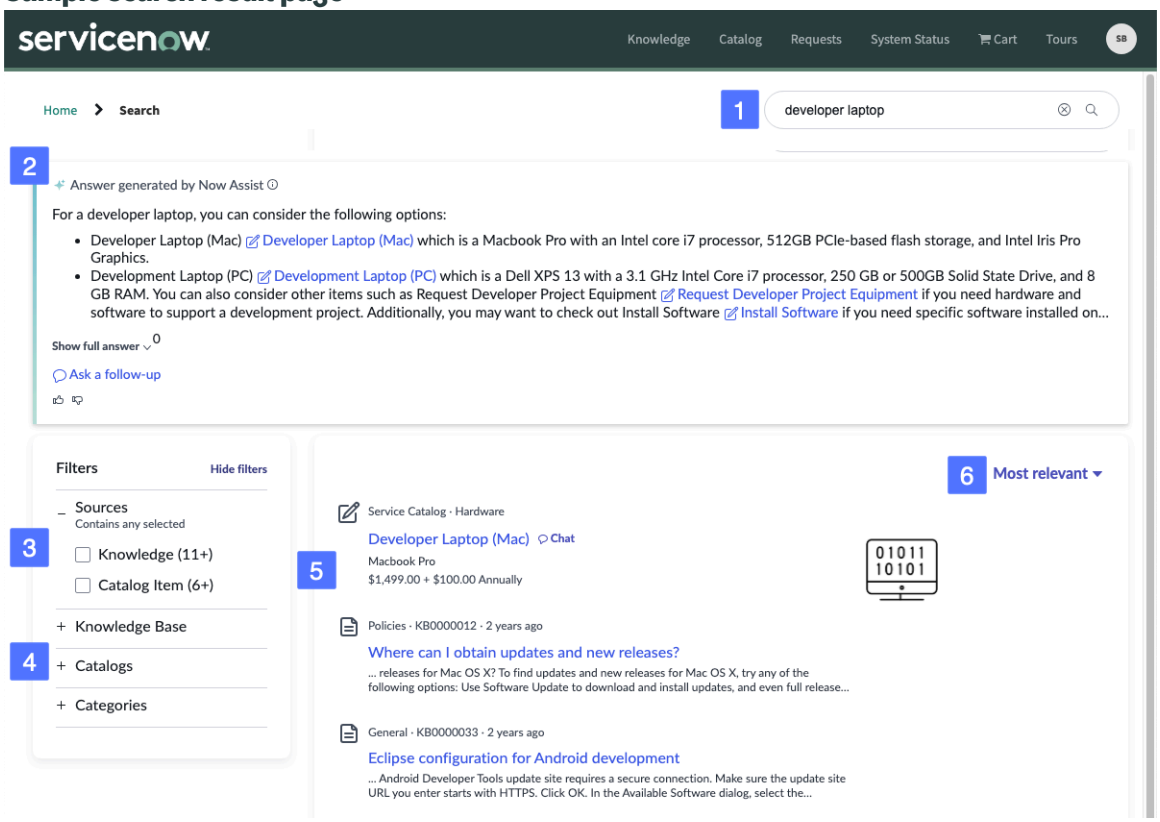
Learn about the components that AI Search uses to display results for search queries.

Search result page elements

The layout and appearance of AI Search UI elements varies from application to application. This example shows the elements as they might appear on a Service Portal search results page.

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Sample search result page



Search result page elements

Element	Description
1. Search input field	Displays the search query that produced the listed search results. You can modify this search query and search again to view different results.
2. Genius Result answer cards	Display the best answers for your search query along with actions you can take directly from each card. **Note:** Genius Result answer cards may not appear for all search queries. You may see your regular search results appear before AI Search finishes computing Genius Result answers for your search. An animated message lets you know if Genius Result answer computation is still ongoing when your regular search results appear. When a search returns multiple Genius Result answers, the answer cards display in a carousel. You can scroll the carousel and select the answer card you want to take action from. To provide feedback relating to a Genius Result answer, select one of its **Was this suggestion helpful?** links. If the answer is relevant to your search, select **Yes**; otherwise, select **No**.
3. Source facet buckets	Displays static filter options for refining search results by search source. To view only results from a single search source, select the option for that search source. To remove the filter, clear the search source option.

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Search result page elements (continued)

Element	Description
	Source names in source facet buckets display as options instead of links, and include a label showing how multiple selections are applied when filtering your search results. Labels include: • *`Contains all selected`*: Displays only search results that include all of the selected sources. This label indicates the Multi Select And facet type. • *`Contains any selected`*: Displays search results that include any one of the selected sources. This label indicates the Multi Select Or facet type.
4. Facet filters	Displays dynamic filter options for refining search results by field value. To expand or collapse a facet, select the **+** (plus) or **-** (minus) symbol by its name. To view only search results that contain a specific field value, select the field value option in the facet. Clear the field value option to remove the facet filter. **Note:** When faceting on a date field, the facet options are precomputed date ranges, such as `Past 3 months`, rather than exact date field values. Selecting an option displays only results that have date field values in the specified range. You can select and clear these date range options in the same way that you select and clear field value options for non-date facets. Some facets allow you to select multiple field values. Field values in multi select facets display as options instead of links, and include a label showing how multiple selections are applied when filtering your search results. Labels include: • *`Contains all selected`*: Displays only search results that include all of the selected field values. This label indicates the Multi Select And facet type. • *`Contains any selected`*: Displays search results that include any one of the selected field values. This label indicates the Multi Select Or facet type. If your facet filter cannot be applied to search results from the source facet bucket you've selected, AI Search ignores the facet filter.
5. Search results	Displays the icon, summary field values, title, and text snippet for each search result. Select a result to view its source record in a new browser tab, preserving the state of your search in the current tab. The display settings for search results may be customized by modifying their EVAM properties. As an example, search results for Service Catalog items might be customized to display item images along with icons and field values. To learn about customizing search result display settings, see Configure EVAM display settings for search results in AI Search applications. Search results for attachments may be displayed separately or may appear grouped with their parent search results. Each grouped attachment displays an icon indicating the attachment file type. For more details on how grouped attachments appear in the search results list, see Group attachment search results with their parent results. **Note:** When you select an attachment search result, the system may display the attachment in a new browser tab or may prompt you to download the attachment.
6. Search	Displays the currently selected sort order for search results.

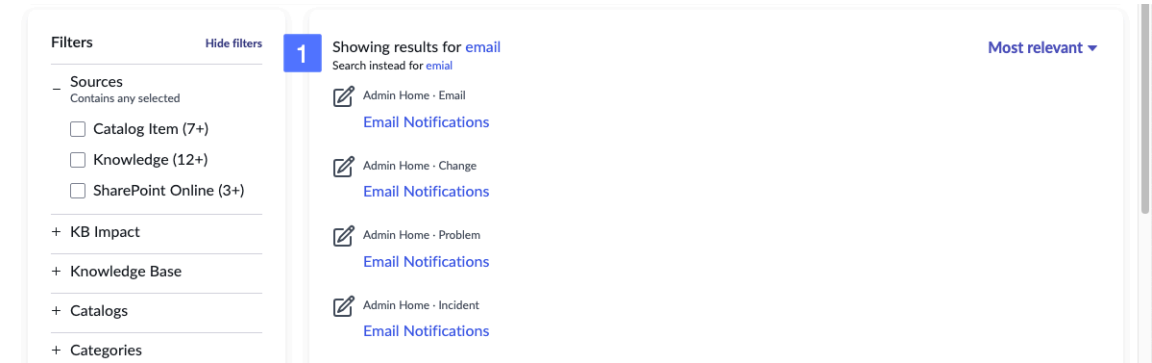
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Search result page elements (continued)

Element	Description
result sort order	By default, AI Search displays the most relevant results first. To apply an alternative sort order, open this list and select one of the available search result sort options. **Note:** If no search result sort options are available, the sort menu doesn't display and results are automatically sorted by relevance.

Auto-correction message

When AI Search auto-corrects a misspelled search query term, a `Showing results for <corrected_term>` message appears above the search results list.



Auto-correction message elements

Element	Description
1. Typo handling auto-correction message and link to original search term	Displays the auto-corrected query term used for the search. To repeat the search using your original search query term, select the link in the **Search instead for <original_term>** line of the message.

Change the sort order for your search results

Choose the order in which AI Search displays results for your search. By default, the most relevant search results appear first. You can override this behavior and view search results ordered by their field values.

Before you begin

Role required: none

About this task

Sorting enables you to view your search results in an order based on their field values. You can select any of the sort options available in the search application.

Note: If your search administrator has deactivated sort options globally or for the search application, the sort menu doesn't appear and you can only see your search results in the default relevancy order.

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Procedure

1. On the results page for your search, access the sort menu.
   - In Now Mobile, select **Filter**, and then select **Sort by**.
   - In other applications, select **Most relevant**.

   The sort menu shows the list of available sort options.
2. Select the sort option that you want to apply to your current search result set.

   Example
   As an example, to show the most recently updated search results first, select **Most recent**. The search results page refreshes to display your results in the preferred order.

> **Note:** The new sort order persists when you select facets or navigation filters. It resets to the default relevancy order when you start a new search by modifying the search query terms.

Automatic search query resubmission

When a search query returns too few results, AI Search automatically modifies and resubmits it with the goal of returning at least the desired number of results.

Search administrators configure the minimum number of desired results per search query using the **Search Results Limit** field in search application configurations. For more details, see Create a search application configuration for AI Search.

AND-to-OR search query resubmission

When a search query with conjunctive terms or phrases returns insufficient results, AI Search resubmits it with the default Boolean operator changed from AND to OR and displays results for the modified query.

For example, if a query for `hotel "conference room" suite` matches no results, AI Search resubmits it as `hotel OR "conference room" OR suite`. This less-restrictive query may match more results than the original query.

> **Note:** If you set the **Boolean search operator to use when a search query includes multiple terms** (*`glide.ais.query.search_operator`*) system property to *`OR query`*, AI Search doesn't resubmit search queries in this way because the initial search already treats all query terms and phrases as though separated by the `OR` operator.

When automatically resubmitting a search query in this way, AI Search adds a minimum match count restriction to the OR expression. The modified query only returns results that match at least half (rounded up) of the terms separated by OR operators. This restriction improves query performance and provides more relevant results.

For example, suppose a search query for `laptop can't access wi-fi network` returns no results. AI Search automatically resubmits the query as `laptop OR can't OR access OR wi-fi OR network`. Only records that match at least three of the five query terms appear as results for the resubmitted search.

Conditions for automatic search query resubmission

Automatic search query resubmission ignores search queries that meet any of the following conditions.

- The original search query only includes a single term.
- The original search query includes 8 or more terms and returns at least one search result.

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Fuzzy numeric search in AI Search

Fuzzy numeric search lets you find indexed records by their Number field values without needing to enter alphabetic prefixes or leading zeroes.

Fuzzy numeric search overview

Fuzzy numeric search in AI Search allows your numerical search terms to match indexed ServiceNow AI Platform® records by their Number field values. The fuzzy matching compares the numeric search term with each indexed record's Number, ignoring its alphabetical prefix and any leading zeroes. As an example, if you index knowledge article and problem records, a search for `23583` might return knowledge article KB00023583 and problem PRB00023583 as search results.

When fuzzy numeric search is activated, AI Search checks all-numeric search terms for fuzzy numeric matches when you search and when computing auto-complete suggestions for your search terms.

Important:

Fuzzy numeric search only searches records from numbered tables. These are tables with Number fields that have prefixes defined in the Number [sys_number] table. To learn about record numbering and the Number table, see Record numbering.

Child tables that inherit the Number field from their parent table can't be searched using fuzzy numeric search. Only tables that have their own Number field defined work with this feature.

Fuzzy numeric search only finds numeric field values in predefined fields named **number**. It doesn't search custom fields or predefined fields with other names.

Fuzzy numeric matching behavior

The following table provides additional details on how fuzzy numeric matching operates.

Fuzzy numeric matching behavior	Description
AI Search only checks all-numeric search terms for fuzzy matches	A search for `KB52578` doesn't match knowledge article KB00052578 because the search term includes non-numeric characters. If you search for `16867 test`, your all-numeric `16867` search term is checked for fuzzy numeric matches, but your non-numeric `test` search term isn't.
Fuzzy numeric matching ignores leading zeroes in all-numeric search terms	A search for `07295` returns the same fuzzy numeric matches as a search for `7295` (without the leading zero) does.
Fuzzy numeric search only matches Number field values from indexed records	A search for `28761` matches the knowledge article with Number field value KB00028761, but it doesn't match the term `KB00028761` if it occurs in the text of other knowledge articles.
Fuzzy numeric matching only ignores alphabetical prefixes and leading zeroes in record Number field values	A search for `729` matches knowledge article KB00000729, but doesn't match article KB00003729 because its Number field value has a non-zero digit before the matching substring.

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Fuzzy numeric matching behavior	Description
To be a fuzzy match, a numeric substring must match the final digits of a record's Number field value	A search for 1164 matches knowledge article KB00001164, but doesn't match article KB00116497 because its Number field value includes digits after the matching substring.

Examples of fuzzy numeric search

The following table includes examples to illustrate how fuzzy numeric searches match search results. These examples assume that records are indexed from the Knowledge [kb_knowledge] and Problem [problem] tables.

Search	Search results
73492	Search matches these results: • Knowledge article with Number KB00073492 • Problem with Number PRB00073492 • Any indexed record or document that includes 73492 as a whole term (not a substring)
05638	Search matches these results: • Knowledge article with Number KB0005638 • Problem with Number PRB0005638 • Any indexed record or document that includes 05638 as a whole term (not a substring)
2541 828	Search matches these results when using the AND (conjunctive) operator: • Knowledge article with Number KB0002541 and text including 828 as a whole term (not a substring) • Knowledge article with Number KB0000828 and text including 2541 as a whole term (not a substring) • Problem with Number PRB0002541 and text including 828 as a whole term (not a substring) • Problem with Number PRB0000828 and text including 2541 as a whole term (not a substring) • Any indexed record or document that includes 2541 and 828 as whole terms (not substrings) Search matches these results when using the OR (disjunctive) operator: • Knowledge article with Number KB0002541 • Knowledge article with Number KB0000828 • Problem with Number PRB0002541 • Problem with Number PRB0000828

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Search	Search results
	• Any indexed record or document that includes `2541` as a whole term (not a substring) • Any indexed record or document that includes `828` as a whole term (not a substring) **Note:** For more details on the AND and OR operators, see the description of the *`glide.ais.query.search_operator`* system property in AI Search system properties.
model 9433	Search matches these results when using the AND (conjunctive) operator: • Knowledge article with Number KB0009433 and text including `model` as a whole term (not a substring) • Problem with Number PRB0009433 and text including `model` as a whole term (not a substring) • Any indexed record or document that includes `model` and `9433` as whole terms (not substrings) Search matches these results when using the OR (disjunctive) operator: • Knowledge article with Number KB0009433 • Problem with Number PRB0009433 • Any indexed record or document that includes `model` as a whole term (not a substring) • Any indexed record or document that includes `9433` as a whole term (not a substring) **Note:** For more details on the AND and OR operators, see the description of the *`glide.ais.query.search_operator`* system property in AI Search system properties.

Fuzzy numeric search availability

Fuzzy numeric search is deactivated by default. It's only available at search time if your ServiceNow AI Platform® admin has activated it. To view activation steps for this feature, see Activate fuzzy numeric search in AI Search.

Provide feedback on Genius Results

Users can submit feedback for each Genius Result answer card, specifying whether it was helpful for their search or not. For cards from default Genius Result configurations, users can also select the reason they found an answer unhelpful. AI Search records feedback responses as search signals that you can use to assess the relevancy of your Genius Result configurations.

Before you begin

You must have performed a search that returned one or more Genius Result answer cards.

Role required: none

About this task

You can provide feedback for each Genius Result answer card in your search result set, marking it as helpful or unhelpful for your search. If you mark an answer card produced by a default Genius Result configuration as unhelpful, you can also select the reason it was unhelpful.

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AI Search stores user feedback for Genius Result answers as signals in the Genius Result Event Action [sys_search_genius_result_event_action] table. For more information on this table, see Search signal tables.

Procedure

1. On the Genius Result answer card that you want to provide feedback for, find the **Helpful?** section.
2. Choose one of the following:
   - If you found the Genius Result answer helpful for your search, select **Yes**.
   - If you found the Genius Result answer unhelpful for your search, select **No**.
3. If you selected **No** on an answer card produced by a default Genius Result configuration, choose one of the following:
   - To indicate why you found the Genius Result answer unhelpful, select a reason from the list in the dialog box, then select **Submit feedback**.
   - To submit your feedback without a reason, select anywhere outside the dialog box.

Result

AI Search submits your feedback as a search signal.

Administering AI Search

Learn how AI Search features and behavior affect indexing and search. Gain insight into AI Search behavior by reviewing log messages, ingestion history for indexed sources, and session debugging messages.

AI Search and performance testing

Understand how the AI Search topology affects performance testing on instances created with System Clone.

> **⚠ Warning:**
>
> Be careful when testing AI Search performance in cloned non-production instances. The same dedicated AI Search nodes handle search query traffic from all of your instances. Search queries on non-production instances can impact search query performance in your production instance.

Lemma and Unicode normalization

AI Search normalizes inflected words and Unicode glyphs during indexing and at search query time. Normalization improves search recall and enables users to find content with variant forms of their search query terms.

Normalization features are automatically enabled and aren't configurable.

Lemma normalization

Many languages include inflected forms of terms, such as plural nouns or verb tenses. AI Search normalizes inflected terms found in indexed content and search queries. Normalization enables matching based on a root form, such as the singular for a plural noun or the base form for a conjugated verb. This root form is called a lemma, and this process is referred to as lemma normalization.

For example, when a source record includes the conjugated verb `selling`, AI Search expands the indexed term to include the lemma form `sell` in addition to `selling`. When a user

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searches for the past-tense conjugated form `sold`, AI Search expands the search query term to include the lemma form `sell` as well as `sold`. Because the indexed term and the search query term include matching forms, the user's search returns the `selling` record as a result.

AI Search supports language-specific lemma normalization for Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, French - Canada, German, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmål), Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish.

Decompounding

In addition to normalizing lemmas for Danish, Finnish, German, Hungarian, Korean, Norwegian (Bokmål), and Swedish, AI Search indexes compound words and their individual component words. For example, when indexing a German record that contains the compound word `Humanressourcen`, AI Search indexes the component terms `Human` and `ressourcen` in addition to the compound term.

Unicode normalization

AI Search performs Unicode normalization on indexed terms and search query terms. This normalization makes alphabetical Unicode glyphs searchable using their nearest equivalent characters.

For example, when indexing a record containing the term `resumé`, AI Search expands the term to also include the non-accented form `resume`. This record appears as a search result when users search for either `resume` or `resumé`.

Unicode normalization includes NFKD (compatibility decomposition) and NFKC (compatibility composition) stages. For more information on these normalization forms, see the Unicode Standard Annex #15, https://www.unicode.org/reports/tr15/ .

Interaction with other search features

The following table describes interactions between normalization and other search features.

Feature	Interaction with lemma and Unicode normalization
Genius Results	Search query terms added by lemma or Unicode normalization can't trigger Genius Result configurations with Term trigger conditions.
Result improvement rules	A search query term added by lemma or Unicode normalization can trigger a result improvement rule if it matches the rule's Query trigger.
Stop words	If a search query term is defined as a stop word, AI Search removes that term without normalizing it.
Synonyms	If a search query term is defined as a synonym, AI Search doesn't normalize it.
Typo handling	AI Search performs lemma and Unicode normalization on auto-corrected search query terms.

Internationalization support for AI Search

AI Search supports indexing and search in all languages offered by the ServiceNow AI Platform®. Search linguistic features are supported in Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, French - Canada, German, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmål), Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish.

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Internationalization support is automatically enabled and isn't configurable.

To view the full list of languages offered as ServiceNow AI Platform plugins and supported in AI Search, see Activate a language.

Note: After you activate a new language plugin, you must reindex all indexed source content that you want to make searchable in the new language. For details on reindexing, see Perform a full table index or reindex for a single AI Search indexed source.

Language settings determine how AI Search separates the text of indexed content and search queries into individual terms. This process, called tokenization, is handled differently for each supported language, using language-specific settings. For example, most languages use spaces and punctuation to separate words and sentences, but when tokenizing Chinese or Japanese text, AI Search instead uses contextual interpretation to correctly identify word and sentence breaks. When tokenizing Japanese text, AI Search additionally recognizes the nakaguro (middle dot) as a word separator.

Note: If you indexed content in any of the following languages before the specified date, reindex that content to benefit from improved tokenization and feature support added in the AI Search back end.

Languages requiring reindexing

Date	Languages to reindex
August 2024	Brazilian Portuguese, Dutch, Italian, Japanese, Korean, Portuguese, Swedish
August 2025	Finnish
December 2025	Polish
June 2026	Arabic, Czech, Danish, Hebrew, Hungarian, Norwegian (Bokmål), Russian, Turkish
September 2026	Finnish

Indexing behavior in supported languages

When indexing content and metadata from a ServiceNow AI Platform source record or an external document, AI Search uses tokenization settings for the language of the record or document, as shown in the following table.

Indexing behavior by source

Record or document	Tokenization settings
Source record from the Task [task] table	AI Search performs language identification and uses tokenization settings for the detected language to index the record's content and metadata.

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Indexing behavior by source (continued)

Record or document	Tokenization settings
or one of its child tables	**Note:** Language identification only identifies Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, French - Canada, German, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmål), Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish. Content in other languages is identified and treated as English.
Source record from a non-Task table	AI Search uses tokenization settings for the record's language to index its content and metadata. If the record has no language specified, the ServiceNow AI Platform treats it as being in the instance's default language. In an English instance, for example, AI Search indexes records without specified languages using tokenization settings for English.
External document	AI Search performs language identification and uses tokenization settings for the detected language to index the document's content and metadata. **Note:** Language identification only identifies Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, French - Canada, German, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmål), Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish. Content in other languages is identified and treated as English.

Note: When indexing content and metadata, AI Search recognizes regions of Japanese, Simplified Chinese, and Traditional Chinese text embedded within text in other languages. These text regions are indexed with the appropriate language tokenization settings regardless of the surrounding text's language. As an example, suppose you index an English-language knowledge article that includes a paragraph of Simplified Chinese. AI Search indexes this paragraph's content as Simplified Chinese and the rest of the record's content as English.

Search query behavior in supported languages

When processing search query text, AI Search uses tokenization settings for the language of the current user's ServiceNow AI Platform session.

Note: AI Search recognizes Japanese, Simplified Chinese, and Traditional Chinese terms in search queries. These terms are processed with the appropriate language tokenization settings regardless of the user session's language. As an example, if a user in a French user session searches for `remplacement ordinateur 笔#本##`, AI Search applies Simplified Chinese settings for the `笔#本##` term and French settings for the other search terms.

AI Search compares your search query terms with terms from indexed content and metadata, returning search results for indexed records or documents that contain matches. When your search terms are in the same language as the indexed terms, AI Search processes both sets of terms with the same tokenization settings, producing predictable matches and search results. If your search terms aren't in the same language as the indexed terms, AI Search processes the two sets of terms with different tokenization settings and matching may be unpredictable.

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Language dependence for search features

The following search features are language-dependent and supported only for the listed languages.

Search feature language dependence

Feature	Language dependence and supported languages
Genius Results	AI Search only evaluates Genius Result configurations with NLU triggers if the linked NLU model has the same language as the search query. Genius Result configurations that use an LLM or a heuristic model, such as Summary or Q&A, are limited to languages supported by the model. Supported languages: Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, French - Canada, German, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmål), Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish.
Language identification and tokenization	During indexing, AI Search identifies supported languages in Task table records and external documents. Text processing for the indexed content uses tokenization settings for the identified language. Supported languages: Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, French - Canada, German, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmål), Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish.
Lemma and Unicode normalization	AI Search performs language-specific lemma normalization for terms in indexed content and search queries. Supported languages: Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, French - Canada, German, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmål), Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish. **Note:** For Danish, Finnish, German, Hungarian, Korean, Norwegian (Bokmål), and Swedish, AI Search performs term decompounding in addition to lemma normalization. AI Search performs Unicode normalization for all terms in indexed content and search queries. For more information on normalization of lemmas and Unicode forms in indexed content and search queries, see Lemma and Unicode normalization.
Result improvement rules	AI Search only evaluates activation for result improvement rules that have the same language as the search query or that have **All Languages** specified. Supported languages: All languages activated in your instance. For the list of languages you can activate, see Activate a language.
Stop words	AI Search only considers stop words from dictionaries that have the same language as the search query. Supported languages: All languages activated in your instance. For the list of languages you can activate, see Activate a language.

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Search feature language dependence (continued)

Feature	Language dependence and supported languages
Synonyms	AI Search only considers synonyms from dictionaries that have the same language as the search query. Supported languages: All languages activated in your instance. For the list of languages you can activate, see Activate a language.
Typo handling	AI Search derives a separate list of auto-correction terms for each supported language found in search source indexed content. Auto-correction only replaces search query terms with terms from the list that has the same language as the search query. Supported languages: Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French - Canada, French, German, Hebrew, Hungarian, Italian, Norwegian (Bokmål), Polish, Portuguese, Russian, Spanish, Swedish, and Turkish. Typo handling isn't supported for Japanese, Korean, Simplified Chinese, or Traditional Chinese.

Searching translated content

Understand how AI Search searches translated fields and documents.

The ServiceNow AI Platform® includes two categories of translated content:

1. Translated fields, such as translations of Catalog Item record fields.
2. Translated documents (long text and HTML values), such as translations of knowledge article records.

The default AI Search matching behavior differs for these two types of content.

Translated fields

When you search content that includes translated fields, AI Search matches and displays field translations in your ServiceNow AI Platform session language. If a field lacks a translation in the session language, AI Search instead falls back to matching against the English-language field value. For example, if your session language is Japanese, AI Search returns Japanese field translations where present on a Catalog Item record, but returns English values for Catalog Item fields that have no Japanese translation.

To learn more about how the ServiceNow AI Platform handles translated fields, see Translating individual UI strings.

If you insert or update field translation records in the Translated Text [sys_translated_text] table, reindex content from the relevant indexed source to make AI Search use the new translations. For details on reindexing content, see Perform a full table index or reindex for a single AI Search indexed source and Perform a full table index or reindex for multiple AI Search indexed sources.

Note: AI Search doesn't support translated fields on the Knowledge [kb_knowledge] table. This behavior has the following effects.

- Search queries don't match translated versions of kb_knowledge translated fields.
- Search results don't display translated versions of kb_knowledge translated fields.
- Search application facets don't display translated versions of kb_knowledge translated fields.

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Translated documents

When searching content with translated documents, by default AI Search only matches documents in the user's ServiceNow AI Platform session language. For example, a Japanese user search only matches knowledge articles in Japanese, excluding all knowledge articles in other languages.

Starting with the Utah release, you can configure a filter condition for globally searchable knowledge articles. Articles that satisfy this condition can be matched by searches in any language. For information on this setting, see Configure globally searchable knowledge articles.

Starting with the Tokyo release, you can set a fallback language for each language enabled in your ServiceNow AI Platform instance. When a fallback language is configured for the user's session language, AI Search returns search results in both languages. For more details, see AI Search interaction with fallback languages.

You can configure a global fallback locale to make AI Search match documents in the instance locale's language as well as the user's session language. This configuration works best when you need to make all English-language documents globally searchable. To learn more about configuring a global fallback locale, see Enable a global fallback locale for translated content.

Assign Knowledge article search languages by country

Improve multilingual search recall by defining a set of Knowledge article search languages for each user country. User searches can match Knowledge articles in any of the search languages specified for their country as well as in the language associated with their ServiceNow AI Platform® session.

Before you begin

Role required: ais_admin

About this task

By default, user searches only match Knowledge articles in the language associated with the user's ServiceNow AI Platform session. As an example, a user searching from a Japanese session only sees search results for Japanese-language Knowledge articles.

Search administrators can expand the recall of Knowledge article searches for a country's users by specifying additional Knowledge article search languages for that country. For example, suppose you specify the Knowledge article search languages English and French for the country of Japan. With these country-to-language mappings in place, a user searching from a Japanese session can see search results for Knowledge articles in English and French as well as for articles in Japanese.

Procedure

1. Navigate to the AI Search Country To Search Language [ais_country_to_search_language] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `ais_country_to_search_language.list`.
   c. Press Enter.
2. For each Knowledge article search language that you want to map to a country, create a new record in the table.
   a. Select **New**.
   b. On the AI Search Country To Search Language form, fill in the fields.

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For a description of the field values, see AI Search Country To Search Language form.

c. Select **Submit**.

Note: You can define multiple AI Search Country To Search Language records for the same country, as long as each one has a different Knowledge article search language. If you attempt to create multiple records with the same country and the same Knowledge article search language, the system displays a warning message and the record insert operation fails.

Result

When users in a country with one or more Knowledge article search languages defined perform a search, they can match Knowledge articles in those search languages as well in the language associated with their ServiceNow AI Platform session.

Configure globally searchable knowledge articles

Define an encoded query for knowledge articles that you want to make searchable in any language.

Before you begin

Role required: ais_admin

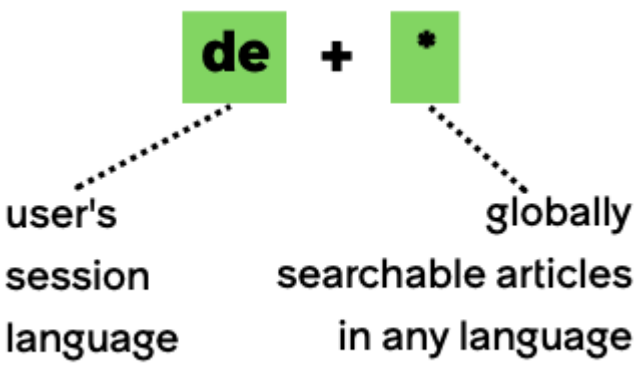
About this task

By default, AI Search only matches translated content records, such as knowledge articles, that are in the user's ServiceNow AI Platform® session language. For example, a user searching from a Spanish user session only matches Spanish knowledge articles. For full details on this restriction, see Searching translated content.

Note: If you've configured a global fallback locale, search can match translated content records in that locale's language as well as in the user's session language. For more details on this approach, see Enable a global fallback locale for translated content.

To enable users to search for knowledge articles in any language, you can define an encoded query as the value of the *glide.ais.global_searchable_filter.kb_knowledge* system property. Records that match this query are globally searchable, meaning they bypass the normal language filters and can be matched regardless of the search's language. As an example, a user searching from a German user session can match English or Japanese knowledge articles as long as they match the encoded query.

Search result languages with globally searchable articles



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Note: To generate knowledge article query strings for your encoded query, you can navigate to **All** > *Knowledge* > **Articles** > **All** and follow the steps found in Generate an encoded query string through a filter. For descriptions of encoded query syntax and operators, see Encoded query strings and Operators available for filters and queries.

Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Open the *glide.ais.global_searchable_filter.kb_knowledge* system property record.
3. In the **Value** field, enter a filter expression specifying the knowledge articles that you want to make globally searchable.
4. Select **Update**.

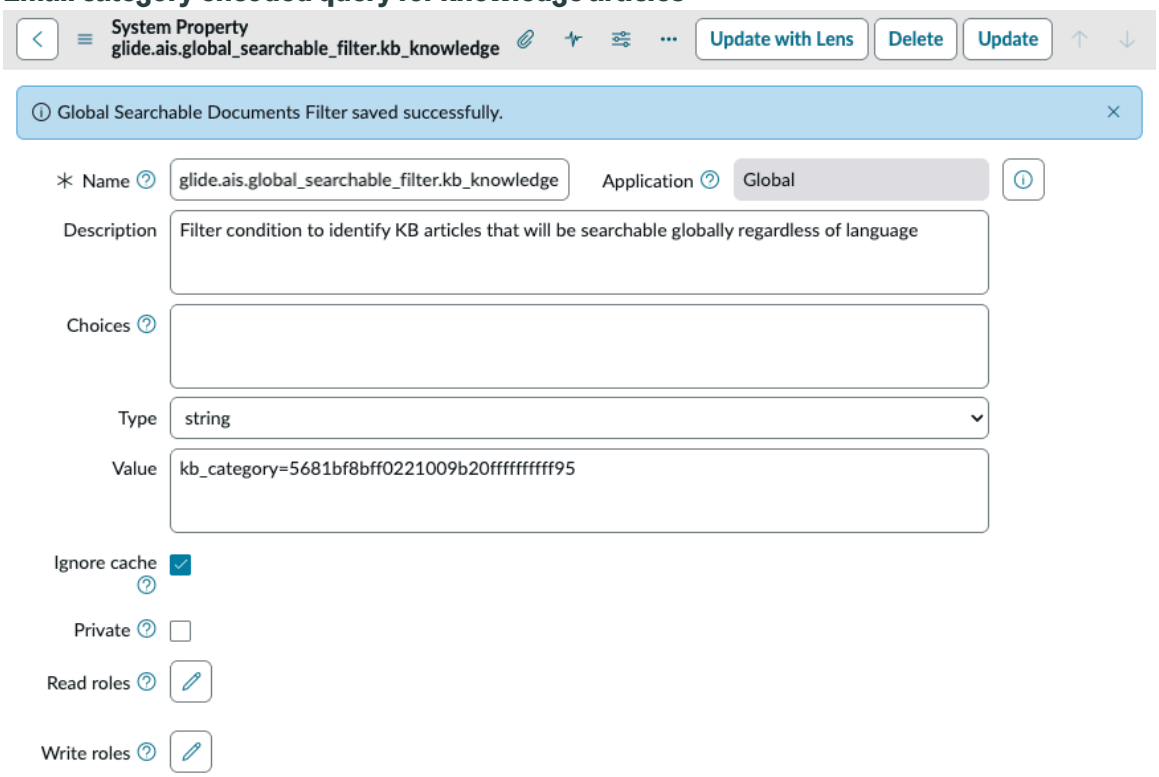
Result

Knowledge articles that match your encoded query can be returned as results for user searches in any language.

Example: Make knowledge articles in the Email category globally searchable

Here is an example that defines the encoded query `kb_category=5681bf8bff0221009b20ffffffffff95` to make knowledge articles in the Email category globally searchable.

Email category encoded query for knowledge articles



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Configure translation for knowledge article reference field values in facets

Specify whether facets should display knowledge article reference field values in the search user's session language. If you disable translation, facets display knowledge article reference field values in your instance's default language.

Before you begin

Role required: ais_admin

About this task

By default, the search results page displays facets for knowledge article reference fields using translated field values in the search user's session language. If no translated field value is available for the search user's session language, the knowledge article facet instead displays the field value in your instance's default language.

As an example, if you search from a Japanese session on an English-language instance, the KB Category facet displays field values in Japanese using Japanese translated field values. If a field value has no Japanese translation, the KB Category facet falls back to displaying that field value in English.

Search administrators can disable this translation behavior for knowledge article reference fields. With translation disabled, search users will see knowledge article facet field values in the instance's default language instead of in their session language.

To learn more about facets, see Create a facet in an AI Search application configuration. For details on translated field values, see System Localization.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Open the Knowledge Table indexed source record in form view by selecting its name.
3. In the Advanced Configuration related list, select **New**.
4. On the Indexed Source Attribute form, fill in the fields.

Field	Value
Name	index_translated_reference_fields
Value	false

Note: To re-enable translation for facets, so that knowledge article reference field values appear in the user's session language when translated field values are available, set the index_translated_reference_fields attribute's value back to *true*, its default value. For more information on the index_translated_reference_fields attribute, see Indexed source attributes for AI Search.

5. Select **Submit**.
   The updated attribute value appears in the indexed source's Advanced Configuration related list. If you changed the index_translated_reference_fields attribute's value, a `Re-index is needed for configuration change to take effect` informational message appears.
6. If you changed the index_translated_reference_fields attribute's value, select **Index All Tables** to reindex content for the Knowledge Table indexed source.
   For more details on reindexing, see Perform a full table index or reindex for a single AI Search indexed source.

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Result
Facets for knowledge article reference fields display field value translations in the user's session language.

> **Note:** If you set the index_translated_reference_fields attribute's value back to `true` and see knowledge article reference field values displayed in the instance's default language in facets, check whether translations of these field values exist for the user's session language.

AI Search interaction with fallback languages

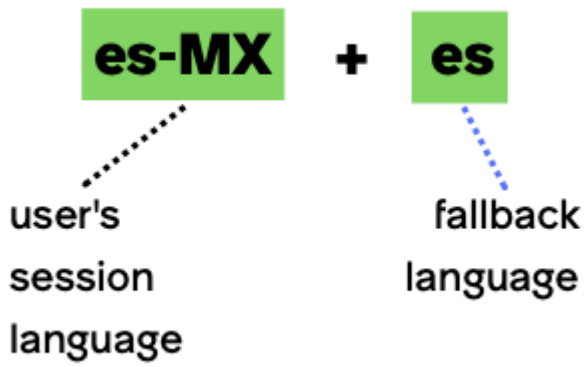
When a fallback language is configured for the user's session language, AI Search searches translated documents in both languages. Search uses the appropriate stop word, synonym, and typo handling dictionaries for the fallback language.

Starting with the Tokyo release, you can set a fallback language for each language enabled in your instance. The system uses this fallback language for elements of user interface text that aren't translated in the specified language. For details on configuring fallback languages, see Set a fallback language.

If you set a fallback language for the user's ServiceNow AI Platform® session language, AI Search returns results for translated content, such as knowledge articles, in both the session language and your configured fallback language. When searching content in the fallback language, AI Search uses the stop word, synonym, and typo handling dictionaries for the fallback language.

As an example, suppose you configure Spanish as the fallback language for Mexican Spanish. With this configuration, users searching in Mexican Spanish sessions can find knowledge articles in both Mexican Spanish and Spanish. AI Search uses the Mexican Spanish and Spanish dictionaries and result improvement rules when matching articles in Mexican Spanish. It uses the Spanish dictionaries and result improvement rules when matching articles in Spanish.

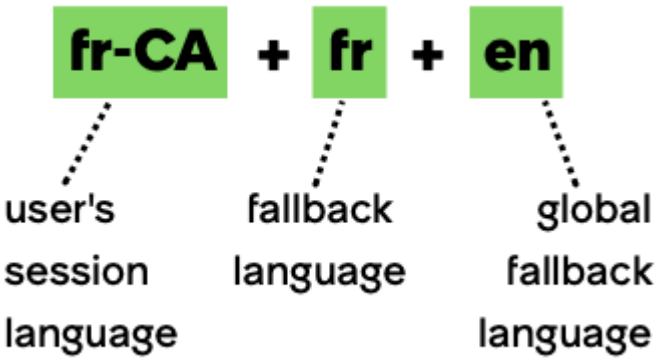
Search result languages with a fallback language



If you configure a global fallback locale in addition to a fallback language, AI Search returns matching results for translated content in the user's session language, the fallback language, and the global fallback locale's language. As an example, suppose you configure French as the fallback language for Canadian French, and also configure English as the global fallback locale. Users searching in Canadian French sessions can search knowledge articles in Canadian French, French, and English.

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Search result languages with a fallback language and a global fallback locale



For details on configuring a global fallback locale, see Enable a global fallback locale for translated content.

Enable a global fallback locale for translated content

Configure AI Search to match translated documents in a global fallback locale's language as well as the user's session language.

Before you begin

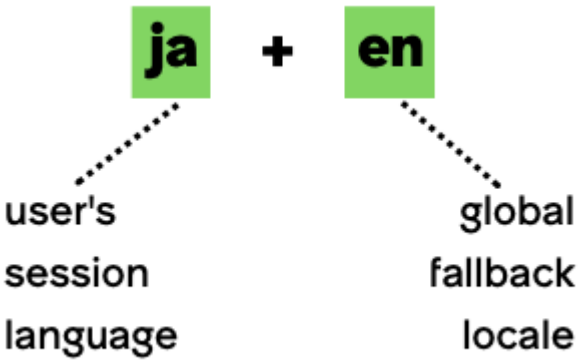
Role required: ais_admin

About this task

By default, when searching content with translated documents, AI Search only matches indexed records in the user's ServiceNow AI Platform® session language. For example, a search in a Japanese user session only matches knowledge articles in Japanese, excluding all articles in other languages.

You can configure AI Search to apply a global fallback locale to user searches. When you enable this option, AI Search matches records in the language from the ServiceNow AI Platform instance's locale (or another locale that you specify) as well as matching records in the user's session language. As an example, if you set English as the global fallback locale, users searching in Japanese sessions can see knowledge article results in both Japanese and English.

Search result languages with a global fallback locale



Note: The global fallback locale works best when you need to make all English-language records globally searchable. To make other sets of records globally searchable, see Configure globally searchable knowledge articles.

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When you enable the global fallback locale option for search, AI Search determines the global fallback locale as follows:

1. If the value of the *glide.ais.translate.global_fallback_locale* system property is a valid locale identifier string, such as *en*, *en-US*, or *fr*, AI Search uses the matching locale as the global fallback locale.
2. Otherwise, AI Search uses the ServiceNow AI Platform instance's locale, as specified by the value of the *glide.system.locale* system property, as the global fallback locale.
3. If the *glide.system.locale* system property's value isn't a valid locale, AI Search uses English as the global fallback locale.

For more details on ServiceNow AI Platform locales and their associated languages, see Configuring locales.

Procedure

1. Navigate to **All** > **System Properties** > *AI Search*.
2. Select the option for the **Enable global language fallback** (*glide.ais.translate.enable_global_language_fallback*) system property.
3. Select **Save**.
4. **Optional:** Add the *glide.ais.translate.global_fallback_locale* system property and set its value to the locale that you want AI Search to use as the global fallback locale.
   For instructions on adding this system property, see Add a system property.

Result

AI Search searches translated document content in the global fallback locale's language as well as the user's session language.

Note: When searching the Catalog Item table, AI Search ignores the instance locale. Catalog searches only match documents in the user's ServiceNow AI Platform session language.

Language filtering for external content

AI Search filters search results from external content connectors, showing only results in the user's session language, fallback language, and global fallback locale language.

When you have the External Content Connectors application installed, AI Search applies language-based filtering to search results retrieved by your external content connectors. For an external content search result to be displayed, it must include content in one of the following languages:

- The search user's ServiceNow AI Platform® session language
- The fallback language for the search user's ServiceNow AI Platform session language (if configured)
- The language for the global fallback locale (if configured)

As an example, if the session language is Canadian French, with French configured as the fallback language and English configured as the global fallback locale language, searches only return external content results that contain Canadian French, French, and English content. External content search results which only contain content in other languages don't appear in the search results list.

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Note: AI Search can detect multiple languages when indexing content from external source system documents, so a single external content search result may be tagged with multiple languages. As an example, a document in Japanese that contains a section in English might be tagged as including both Japanese and English content. This document would appear in the search results from the previous example because it contains content in English. For more information on language detection at indexing time, see Internationalization support for AI Search.

To learn about configuring and using connectors to make content from external source systems searchable, see External Content Connectors. For details on fallback languages and the global fallback locale, see AI Search interaction with fallback languages and Enable a global fallback locale for translated content.

Machine learning relevancy in AI Search

AI Search displays the most relevant search results for a query first. Machine learning automatically tunes search result relevancy scoring for search experiences based on aggregated user interactions.

Machine learning relevancy is automatically enabled and isn't configurable.

Relevancy models and scoring

AI Search uses a relevancy model to compute a relevancy score for each result returned by a search. Documents with higher relevancy scores appear first in the result set. A result's relevancy score is specific to the particular document, search terms, and user associated with the query.

Each search profile includes its own relevancy model. You can't view, modify, or delete this relevancy model.

Note: AI Search doesn't apply relevancy ranking to `***` universal wildcard queries. Results from `***` queries appear in an unspecified order.

Search signals and machine learning relevancy tuning

AI Search UX components record signals associated with user searches. These search signals include data on how search users interact with the search input field, auto-complete suggestions, facet and source facet bucket filters, Genius Result answer cards, and search results. To learn more about how search signals are recorded and stored, see Search signals.

Machine learning relevancy uses data from these search signals to intelligently tune relevancy models on a continual basis. Every 30 days, AI Search computes a new version of each relevancy model, iteratively modifying its parameters and regression testing it against aggregated search signal data for the search profile. When this tuning process is complete, AI Search compares the existing and new relevancy models to see which one produces better matches for user search behavior as recorded in the historical signal data.

If the new relevancy model produces better results with the signal data, AI Search uses its modified parameter values to perform A/B testing evaluations of live search traffic for the search profile. These evaluations test individual parameter changes to verify that they produce better search relevancy.

Note: For details on the search query parameter evaluation framework used to perform A/B testing evaluations, see Search query parameter evaluation framework.

If the new model outperforms the original model in both the historical search-match comparison and the A/B testing, AI Search sets it as the active relevancy model for the search profile, overwriting the existing relevancy model. The updated relevancy model remains in use until the next tuning cycle begins.

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These relevancy model tuning processes occur separately for each search profile. Changes made to the relevancy model in one search profile don't affect relevancy models in other search profiles.

Note: When you upgrade to Brazil from a previous release, the default relevancy scores for your search results may change. Relevancy models trained in the previous release should continue to produce the same result ordering. Models trained more than one release ago may revert to the default relevancy model.

Successful relevancy tuning requires at least 10,000 stored search event signals for a search profile. If the search profile has fewer than 10,000 signals stored, relevancy tuning fails with an error message and AI Search continues to use the original relevancy model for that search profile.

Relevancy model for auto-complete suggestions

AI Search uses a dedicated relevancy model to rank records for display as auto-complete suggestions in the search field. This relevancy model scores records based on their freshness and on search query term matches in their **title** fields. The system doesn't train this auto-complete suggestion relevancy model. For details on configuring auto-complete suggestions, see Auto-complete suggestions in AI Search applications.

Viewing relevancy scores for search results

Search administrators can view the scores for search results in the Search Preview UI from the Advanced AI Search Management Tools ServiceNow® Store application. For details on using this feature to investigate search behavior, see Search Preview UI for AI Search.

Content security in AI Search

AI Search filters search query results and displays only records that the currently logged in user can access.

Content security is automatically enabled and isn't configurable.

Indexed security features

When indexing records from ServiceNow AI Platform® tables, AI Search preserves the following access control settings:

- Role-based field-level access control list rules (ACLs)
- Non-scripted conditional ACLs
- Scripted table-level ACLs
- Before Query business rules
- Domain separation
- User criteria for records indexed from the Knowledge [kb_knowledge] and Catalog Item [sc_cat_item] tables

AI Search doesn't support scripted field-level ACLs or conditional field-level ACLs.

Early and late binding security implementations for search queries

At query time, AI Search filters search results by evaluating user access to indexed tables and records. The filtering implementation used depends on the security features present on tables and records that match the search query.

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Content security implementation	Description
Early binding	Default content security implementation that incorporates security filters into the search query. The system adds relevant security filters for the user to each search query. To appear in the search results, records must match the search query and pass all security filters. Early binding security supports non-scripted ACLs, Before Query business rules, and domain separation, plus user criteria for records indexed from the kb_knowledge and sc_cat_item tables. If a search matches records that have table-level scripted ACLs, the search query automatically falls back to use late binding security. **Note:** If an early binding filter produces an error, the search query automatically falls back to use late binding security.
Late binding	More computationally expensive alternate content security implementation that post-filters search query results. The system applies security filters to the search query just as early binding security does. After retrieving records that match the filtered query, it invokes the *GlideRecord.canRead()* method for each record. To appear in the search results, records must match the search query, pass all security filters, and return *true* for the API method. Late binding security supports all indexed security features. By default, late binding security serves as a fallback mechanism for early binding security. You can override this default behavior in the following ways: • To make AI Search use late binding security for all results from an indexed source, set the value of that indexed source's **Force Late Binding** field to *true*. • To make AI Search use late binding security for all search results, set the value of the **Force *AI Search* to use late binding for ACL evaluation** (*glide.ais.security.force_late_binding*) system property to *true*. If AI Search applies late binding security to any results from an indexed source used by a facet, the list of available filter selections for the facet changes. When this happens, the facet only displays field values found in the current page of search results. For details on facets, see Create a facet in an AI Search application configuration. When you enable search result counts for facets in a search application, the counts indicate the number of results that matched the user's search. Late binding security can remove results after they're counted, causing the actual number of displayed results to be lower than the count. For more information on search result counts for facets, see Show search result counts for facets on the results page for a search application.

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Content security for external content

AI Search preserves access permissions when ingesting external documents. You can alias ServiceNow AI Platform users to the externally defined users and groups specified in these access permissions. AI Search constructs content security filters for external document records from these permissions and aliases.

To learn about using AI Search with external data sources, see Indexing and searching external content in AI Search. For full details on external content security, see External content security for AI Search.

Encrypted fields in AI Search

AI Search excludes source record fields encrypted with Encryption Support or Edge Encryption.

When dealing with an encrypted source record field, AI Search has the following limitations:

- Content indexing excludes the encrypted field. This exclusion means that search query terms won't match terms from the encrypted field's content.
- You can't create a facet using the encrypted field.
- If a search query attempts to filter on the encrypted field, such as when applying an access control list (ACL) filter, the search query fails. An `Encrypted Field is not supported` error message is logged.

For detailed descriptions of the encryption options available for source records, see Encryption.

Semantic vector search in AI Search

Semantic vector search enables the Now LLM Service to find results based on how similar they are in meaning to your search terms. Knowledge base articles Genius Results and ServiceNow® Otto for Virtual Agent use semantic vector search to improve recall with natural language interpretation of search queries.

By default, AI Search uses keyword search, meaning that it finds results for records that contain the best matches for the keywords (terms) in your search query. Term matching doesn't account for the context or meaning of your search terms.

Starting with the Vancouver Patch 4 release, AI Search includes an alternate search mode called semantic vector search that's used in features which work with the Now LLM Service. Examples of such features include ServiceNow® Otto for Virtual Agent chats, Summary Genius Results, and Actions Genius Results.

Semantic vector search analyzes the meanings and context of your search terms and uses that information to find results with similar meanings. It improves search recall by interpreting natural language to more accurately reflect the intent of your search.

As an example, suppose you index a source record including text `how to prevent phishing` and search for `avoiding scams`.

- In keyword search mode, AI Search returns no result for this record because your search query terms aren't literal matches for the terms included in the indexed content.
- In semantic vector search mode, however, AI Search might return a result for the record based on the following context-aware analysis:
  - Your search term `avoiding` is contextually similar in meaning to `prevent`
  - Your search term `scams` has meaning that overlaps with the meaning of `phishing`

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AI Search orders results from semantic vector search based on how similar they are to your search. In the example, suppose you had a second indexed record including text `how to prevent scams`. This record would be more similar to the `avoiding scams` search and its search result would appear before the `how to prevent phishing` result.

Unlike the default keyword-based search mode, semantic vector search doesn't rely on your synonym dictionaries to find term equivalences. AI Search identifies term similarities automatically when indexing source content and metadata for semantic vector search.

Semantic vector search is enabled automatically and has no configurable settings.

Benefits of semantic vector search

Compared to the default keyword search mode, semantic vector search provides the following benefits:

- Helps improve recall for knowledge article, Catalog Item, and topic retrieval searches by matching results based on the underlying meaning of your search rather than matching on keywords.
- Provides a more natural and consistent search experience by returning similar results for varied search queries with the same underlying meaning.
- Reduces the need to create and maintain synonym dictionaries to anticipate similarities in searches.

Semantic vector search output

Semantic vector search overrides the normal AI Search term matching and relevancy ranking mechanisms. Results are ordered based on their computed similarity to your search query terms, with the most similar results appearing first.

Availability of semantic vector search

Semantic vector search is available in the following contexts.

- ServiceNow Otto for Virtual Agent uses semantic vector search for Catalog Item retrieval and live agent topic retrieval. For more details, see .
- Knowledge base articles Genius Results use semantic vector search along with legacy keyword search when looking for knowledge articles that match your search query. They also use semantic vector search when looking for cached answers that match your query in the second-level cache. For more details, see Knowledge base articles Genius Results and Caching for Knowledge base articles Genius Results.
- Actions Genius Results use semantic vector search along with legacy keyword search when looking for Catalog Items that match your search query. For more details, see Actions Genius Results.
- All connectors from the External Content Connectors application support semantic vector indexing when retrieving document content from external source systems. Only features which use semantic vector search with the Now LLM Service can take advantage of this support. For more information on external content connector configuration and usage, see External Content Connectors.

AI Search logging and debugging

Review AI Search logs and history to analyze performance and diagnose issues. View log messages and ingestion history, or use session debugging to capture detailed messages for a user session.

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View AI Search ingestion log messages

Review AI Search ingestion and indexing events by viewing log messages.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Logs** > **Ingestion Warnings & Errors**.
   The Log [syslog] table appears with a **[Source] [starts with] [AIS-Datasource]** filter condition applied.
2. Use the list search, sort, filter, and group functions to locate messages of interest.

View all AI Search log messages

Review AI Search events by viewing log messages.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Logs** > **All**.
   The Log [syslog] table appears with a **[Message] [contains] [ais]** filter condition applied.
2. Use the list search, sort, filter, and group functions to locate messages of interest.

Review ingestion history for an indexed source

View processing results and performance statistics associated with an ingestion event for an indexed source.

Before you begin
Role required: ais_admin

About this task
The AI Search Indexed Source History [ais_ingest_datasource_stats] table contains records for indexed source ingestion events. Each record includes performance statistics and processing results for the ingestion event. You can review the ingestion event history record to analyze ingestion performance and diagnose issues.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Open the indexed source whose indexing history you want to review.
3. In the Indexing History related list, open the ingestion event record that you want to review.
4. On the Indexed Source History form, review the fields for the selected ingestion event.
   For a description of the field values, see Indexed Source History form.

Enable session debugging for AI Search

Capture and review detailed AI Search log messages for a user session.

Before you begin
Role required: admin

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About this task

When you enable session debugging for AI Search in a user session, the system records debug log messages for that session. These messages include:

- Messages illustrating how AI Search interprets a user's search query
- Messages specifying the search source filters and content security filters applied to a search query
- Messages containing search query request and response objects in human-readable format

You can review these debug log messages to diagnose search issues or configure optimal search performance settings.

After enabled, session debugging remains active for the user session until you disable it. For more information on session debugging, see Session debug.

Procedure

1. To enable debugging, navigate to **All** > **System Diagnostics** > **Session Debug** > **Debug** *AI Search*.
   A message reports completion of the Debug AI Search session debug script.
2. To review debug logs, navigate to **All** > **System Diagnostics** > **Session Debug** > **Debug Log**.
   Debug log messages appear in the **Session Log** window.
3. To disable debugging, navigate to **All** > **System Diagnostics** > **Session Debug** > **Disable All**.
   A message reports completion of the Disable All session debug script.

Search Preview UI for AI Search

The Search Preview UI enables you to test AI Search queries using settings from a selected search application configuration or search profile. Administrator tools help you review search query performance data and feedback, debug queries, and override default query settings for testing purposes.

Note: The new Search Preview UI feature is included with AI Search. It replaces the legacy Search Preview UI that's included with Advanced AI Search Management Tools. The new version provides additional functionality when compared with the legacy version, and offers a revised and cleaner interface.

Access the new Search Preview UI by navigating to *AI Search* > **Preview** > **Search Preview (New)**.

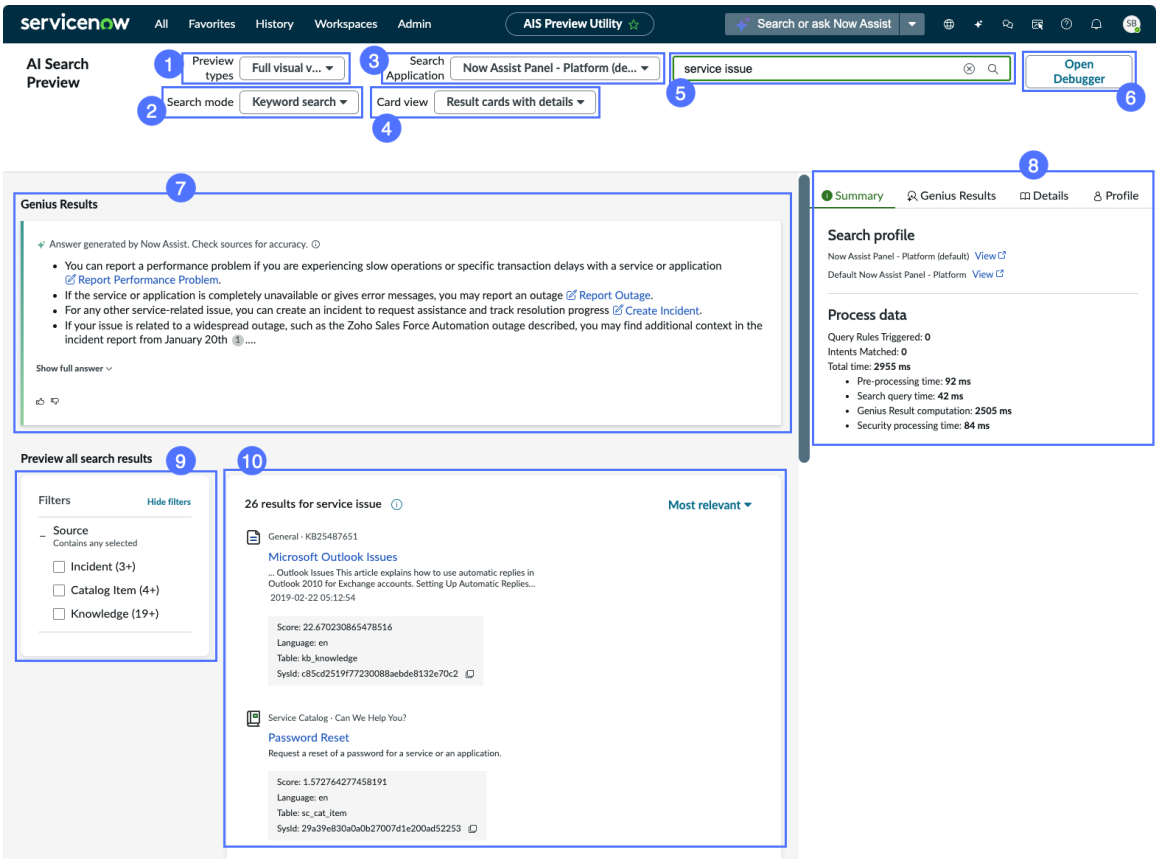
Required ServiceNow AI Platform® roles

- The ais_admin role is required to view and use the Search Preview UI.
- The impersonator role is required for some AI Search administrator tools.
- The ais_high_security_admin role is required to bypass search source and content security filtering. For details on this procedure, see Diagnose search result access issues using the Search Preview UI.

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Search Preview UI components

Search Preview UI



Search Preview UI components

Component	Description
1. Preview types list	Select the type of preview you want to view. • *`Full visual view`*: preview search query results using the search profile and display settings defined for the search application configuration record selected in the **Search Application** list. • *`Text view`*: preview search query results using a search profile selected in the **Search Profile** list. When previewing in text view, features from search application configurations, such as auto-complete suggestions, aren't available.
2. Search mode list	Select the search mode you want to use for your search query.

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Search Preview UI components (continued)

Component	Description
	• *Keyword search*: Use the legacy keyword search mode to find the best matches for your search query terms. • *Hybrid search*: Use the hybrid search mode, blending keyword search and semantic vector search to find the best combination of search precision and contextual relevance for your search query. **Note:** Hybrid search applies to any indexed source that's included in the semantic index. By default, the following indexed sources ship with preconfigured semantic indexing and work with hybrid search: ○ Knowledge Table indexed source [kb_knowledge table] ○ Catalog Item Table indexed source [sc_cat_item table] ○ Skills indexed source [sys_gen_ai_skill table] ○ All External Content Connectors indexed sources [connector-specific tables] You can manually configure additional indexed sources to be included in the semantic index, extending hybrid search to those sources as well. For details on this procedure, see Configure semantic indexing settings for an indexed source.
3. Search Application / Search Profile list	Select the search application configuration or search profile that you want to apply when previewing search queries. When you select full visual view as the preview type, the name of this list is **Search Application** and it includes all available search application configurations that have published search profiles with one or more linked search sources. When you select text view as the preview type, the name of this list is **Search Profile** and it includes all published search profiles with one or more linked search sources. **Note:** If a search profile has unpublished changes, its entry in the list displays a warning icon and shows [DRAFT] after the profile's name. Publish the search profile to see the changes reflected in the Search Preview UI results.
4. Card view list	Select how you want to display the results from your search query: • *Result cards with details*: Display search results using EVAM result cards, with a text box for each result showing key details like its relevancy score, language, source table, and source record system_id. • *Result cards*: Display search results using EVAM result cards, as they appear in search portals and applications. • *Raw output*: Display the search query response object in JSON format. Individual search results appear in this document as objects in the response object's `searchResults` array.

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Search Preview UI components (continued)

Component	Description
5. Search input field	Enter search query terms and operators in this field. To preview the query's results using settings from the selected search application configuration or search profile, press Enter or select the Submit search icon. To clear the search input field, select the Clear search term icon. For details on search query syntax and operators, see AI Search query language. When you select full visual view as the preview type, this field displays auto-complete suggestions from your selected search application configuration. When you select text view as the preview type, this field doesn't display auto-complete suggestions.
6. Open Debugger button	Select this icon to enable session debugging for AI Search and launch the Script Debugger in a new browser tab. To learn about session debugging and using the Script Debugger, see Enable session debugging for AI Search and Script Debugger and Session Log.
7. Genius Result answers	Review the Genius Result answers the search query produces when executed with the selected search application configuration or search profile. **Note:** Genius Result answers may not appear for all search queries. If multiple Genius Result answers are produced for the search query, they appear in a carousel, with the currently selected answer displayed.
8. AI Search administrator tools	Select the icon for the administrator tool that you want to use: **Summary** View links to the search query's search profile (and search application configuration, in full visual view). Review overview data on the processing of the search query. **Genius Results** View the Genius Result configurations activated for the search query, with those that generated Genius Result answers indicated. Review the set of search results that were sent to the LLM for Genius Result answer generation. **Details** View summaries of how stop word, typo handling, and synonym dictionaries affected processing of the search query. Review the list of fields and values from the search query object, filtering to focus on areas of interest. **Profile** Set a user or locale for the search query to test user access to results or view translated documents. Specify user context field values for the search query to test result improvement rule triggers.

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Search Preview UI components (continued)

Component	Description
	For more details on each administrator tool's output, controls, and fields, see Search Preview admin tools.
9. Filters	View facet filters applicable to your current search results. To filter the query results, select a facet bucket. To remove the filter, clear the facet bucket selection, select **Clear** at the facet level, or select **Clear all**. You can hide the filter list by selecting **Hide filters** and display it again by selecting **Show filters**. The filter list contents depend on whether you're previewing results for a search application configuration or a search profile. • *`Search application configuration`*: The filter list displays facet filters for the facets defined in the search application configuration. • *`Search profile`*: The filter list displays a facet filter for the source table field. To learn more about facet filters, see Create a facet in an AI Search application configuration.
10. Search query results	View the results the search query produces when executed with the selected search application configuration or search profile. When viewing result cards, you can page through results by selecting **Next** or **Previous**, and use the Sort search results list to choose a sort order for the displayed search results. When viewing raw output, this section displays the search query response object in JSON format. Select the Search icon to search for a term in the response. Open the More options menu to activate or deactivate syntax highlighting, show or hide the navigation minimap of the full JSON response, or enable or disable word wrap.

Search Preview admin tools

Learn about the output, controls, and fields provided by admin tools in the new Search Preview UI.

In all of the admin tools, the active search profile is the search profile currently selected for previewed search queries.

- If you select the **Full visual view** preview type, the active search profile is the one linked to the search application configuration selected in the **Search Application** field.
- If you select the **Text only view** preview type, the active search profile is the one selected in the **Search Profile** field.

Summary tool

The Summary tool displays these sections:

Search profile

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In full visual view, this section provides links to the selected search application configuration and the active search profile that's linked to it. In text only view, it provides a link to the active search profile.

Process data

This section provides an overview of how the previewed search query behaved, with details as given in the following table.

Entry	Description
Query Rules Triggered	Count and names of result improvement rules triggered by the search query.
Intents Matched	Count and names of NLU model intents detected in the search query.
Total time	Total time the AI Search back end spent processing the search query. This time includes the pre-processing time, search query time, Genius Result computation time, and security processing time values that are reported separately. It doesn't include time spent sending the search query results across the network to the user's browser.
Pre-processing time	Time spent preparing the search query for execution. Includes time spent looking up the user's access permissions for content security.
Search query time	Time spent retrieving records that match the search query and generating the result set.
Genius Result computation	Time spent computing Genius Result answers for the search query.
Security processing time	Time spent filtering inaccessible records out of the search query's result set based on the user's access permissions.

Genius Results tool

The Genius Results tool displays these sections:

Genius Result status

In full result view, this section shows a list of Genius Result configurations activated in the active search profile. A checkmark and status text indicate whether or not each Genius Result configuration generated an answer for the search query.

LLM Context

This section shows a list of all the search results that were sent to the LLM for Genius Result answer generation, along with indicators of how well each sent result matched the context of the search query.

Details tool

The Details tool displays these sections:

Dictionary

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This section shows how the stop word, typo handling, and synonym dictionaries defined in the active search profile affected the previewed search query.

Entry	Description
Stopwords	Summary of stop word removal operations performed while processing the search query.
Spellcheck	Summary of typo handling auto-correction operations performed while processing the search query.
Synonyms	Summary of synonym expansion operations performed while processing the search query.

Query

List of fields and values from the search query object. Select **Filters** to refine this list by field category. You can select multiple categories at a time to view just the fields you're interested in.

Profile tool

The Profile tool displays these sections:

User

This section provides fields you can use to search as a specific user or in a specific supported language. Use these fields to see how search results differ from user to user and language to language.

Field	Description
Search as user	To submit search preview queries as another user, enter the user's name from the User [sys_users] table. You must have the impersonator role. Use this control to see how content security affects search query results for specific user accounts. Searches performed while impersonating another user don't affect the **Search users** metric, trend, and report on the AI Search Analytics dashboard. **Note:** Changing the value of this field terminates elevated privileges for the ais_high_security_admin role. To bypass filters after changing this field's value, you must re-elevate to the ais_high_security_admin role.
Query locale	To submit search preview queries using a specific supported language, select the language from the list. Use this control to observe differences in search query results for different languages.

Context settings

This section provides the following groups of user context fields you can use to specify user context values. Use these fields when testing user context triggers for your result improvement rules.

Location and language

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Field	Description
User language	To set a language in the user context for search preview, select it from the list of supported languages.
User groups	To set a user group in the user context for search preview, enter the name of a group from the Group [sys_user_group] table.
User title	To set a title in the user context for search preview, select it from the list. This list includes all Title values found in the User [sys_user] table.
User department	To set a department in the user context for search preview, enter the name of a department from the Department [cmn_department] table.
User location	To set a location in the user context for search preview, enter the name of a location from the Location [cmn_location] table.
User country	To set a country in the user context for search preview, select it from the list. This list includes all countries found in user locations from the User [sys_user] table.
User office	To set an office in the user context for search preview, enter the name of a building from the Building [cmn_building] table.
User office city	To set an office city in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User office state	To set an office state in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User office country	To set an office country in the user context for search preview, select it from the list. This list includes all countries found in user locations from the User [sys_user] table.

User access

Field	Description
User company	To set a company in the user context for search preview, enter the name of a company from the Company [core_company] table.
User roles	To set a role in the user context for search preview, enter the name of a role from the Role [sys_user_role] table and press Enter. You can set multiple roles for a single search query. Each selected role appears as a pill. To remove a role, select the Remove icon × for its pill.

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Environment

Field	Description
User OS	To set an operating system in the user context for search preview, enter its name in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User OS version	To set an operating system version in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User agent	To set a web browser's user-agent string in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User browser agent	To set a browser name in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User device form	To set a device form in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User device type	To set a user device type in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.

Diagnose search result access issues using the Search Preview UI

Use the Search Preview UI and the AI Search High Security administrator elevated privilege role to determine whether filters prevent a search user from viewing a specific search result in the AI Search index.

Before you begin

Role required: ais_admin, ais_high_security_admin, and impersonator.

About this task

Use the Search Preview UI to diagnose filter configurations that prevent a search user from seeing a specific search result in the AI Search index. First, search as the affected user in the Search Preview UI to confirm that the search result in question isn't returned for them. Next, end impersonation and repeat the search after elevating to the ais_high_security_admin role to bypass all search source and content security filters. If the desired search result appears in your elevated search, examine its search source and content security filter settings to determine why the affected user can't view it.

Note: Changing the value of the **Search as User** field in the Search Preview UI's User tool terminates elevated privileges for the ais_high_security_admin role. To bypass filters after changing this field's value, you must re-elevate to the ais_high_security_admin role, as directed in the following procedure.

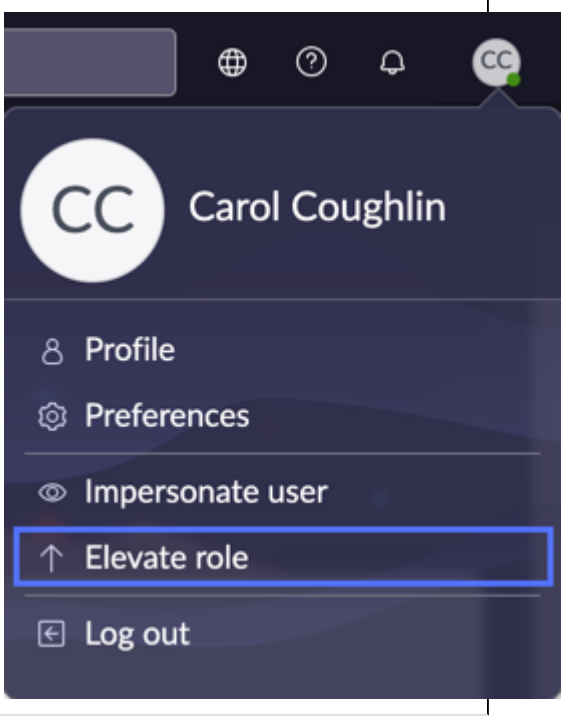
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Procedure

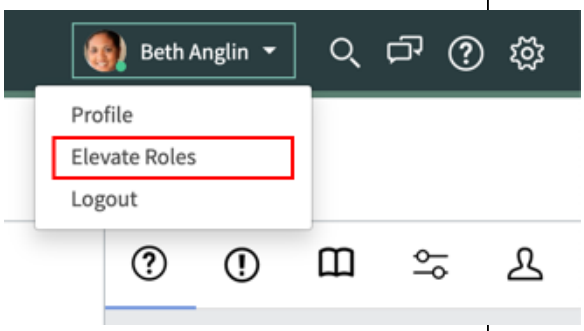
1. Navigate to *AI Search* > **Preview** > **Search Preview (New)**.
2. Select the Search Preview UI's Profile tool and enter the affected user's name into the **Search as user** field.

   Note: For more details on the **Search as user** field, see Search Preview admin tools.
3. In the Preview types list, select **Full visual view**.
4. In the Search mode list, select the mode used by the search application configuration for the portal or search application where the affected user is unable to see the search result in question.
5. In the Search Application list, select the search application configuration for the portal or search application where the affected user is unable to see the search result in question.
6. In the Card view list, select **Result cards with details**.
7. Enter the search query of interest into the search input field and press Enter or select the Submit search icon to search as the affected user.
   Search results appear, matching those seen by the affected user for the search query of interest in the selected portal or search application. Some results that match your search terms may be hidden by search source or content security filters.
8. Elevate to the ais_high_security_admin role:

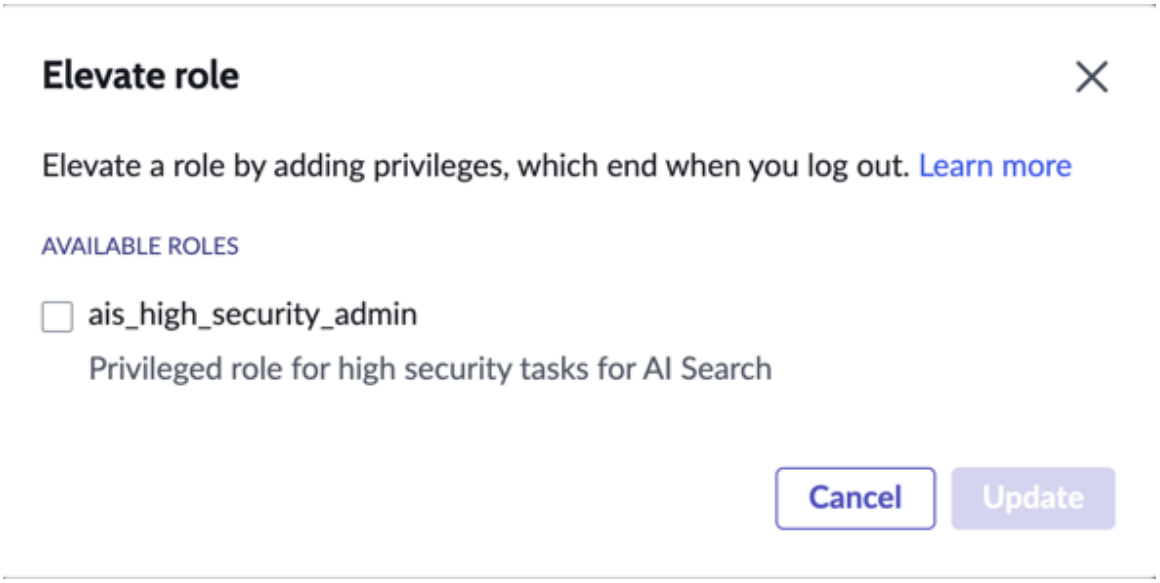
   a. Perform the appropriate action for your version of the UI:

UI version	Action
Next Experience UI	In the banner frame, select the icon for your account to open the user menu, then select **Elevate role**. 

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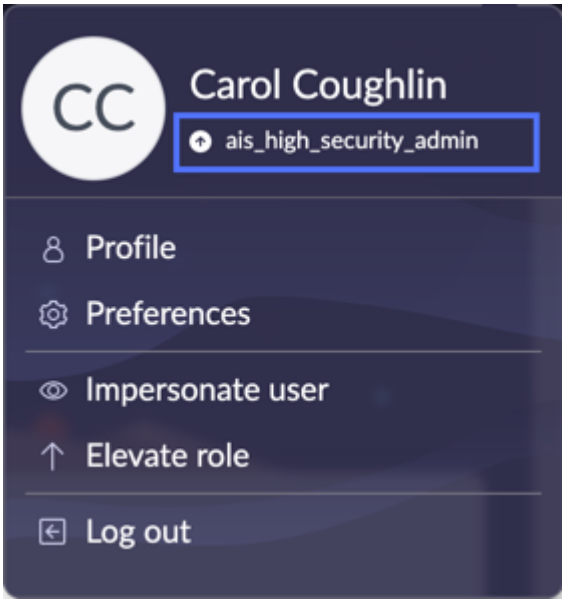
UI version	Action
Core UI	In the banner frame, select your name to open the user menu, then select **Elevate Roles**. 

A dialog box appears, displaying a checklist of your available privileged roles.



b. In the dialog box, select the **ais_high_security_admin** option, then select **Update** (in Next Experience UI) or **OK**.
The page reloads and an elevated role indicator appears next to your user name in the user menu. In Next Experience UI, this indicator displays the names of the active privileged roles.
In Core UI, the indicator displays the elevated role icon .

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Note: When the page reloads, any unsaved edits are lost.

9. Repeat the search of interest without impersonating the affected user.
   Search results appear with no search source or content security filters applied.

What to do next

Compare the two search result sets. If the search result in question appears only in the elevated search, a search source or content security filter prevents the affected user from viewing that result. If the search result doesn't appear in either search, it's not present in the AI Search index.

If the search result in question is indexed from an external document, you can debug the external content security access permission filter for the affected user to see whether it prevents access to the search result. For details on this procedure, see Debug external content security filters for a ServiceNow AI Platform user.

Debug search source and content security filters

Use the Session Log to view search source and content security filters applied to results for a search query. Administrators can use this approach to verify search source filters and content security settings.

Before you begin

Role required: admin

About this task

Enable session debugging for AI Search to view debug log messages for search source and content security filters. Each debug log message shows the filters that AI Search applies to determine which records appear in a search query's results.

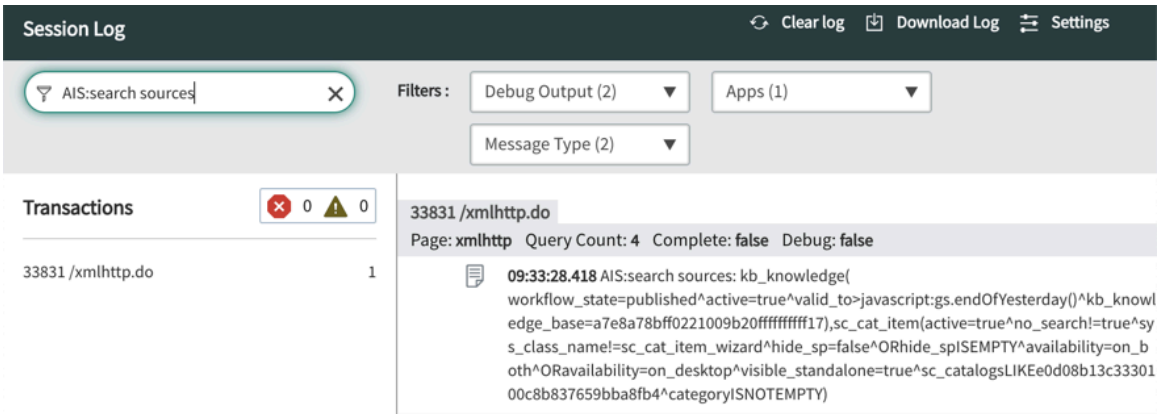
Procedure

1. To enable session debugging for AI Search, navigate to **All** > **System Diagnostics** > **Session Debug** > **Debug** *`AI Search`*.
2. Navigate to **All** > **System Diagnostics** > **Session Debug** > **Debug Log**.
   The Session Log opens.
3. Use the Search Preview UI for AI Search to submit the search query of interest.

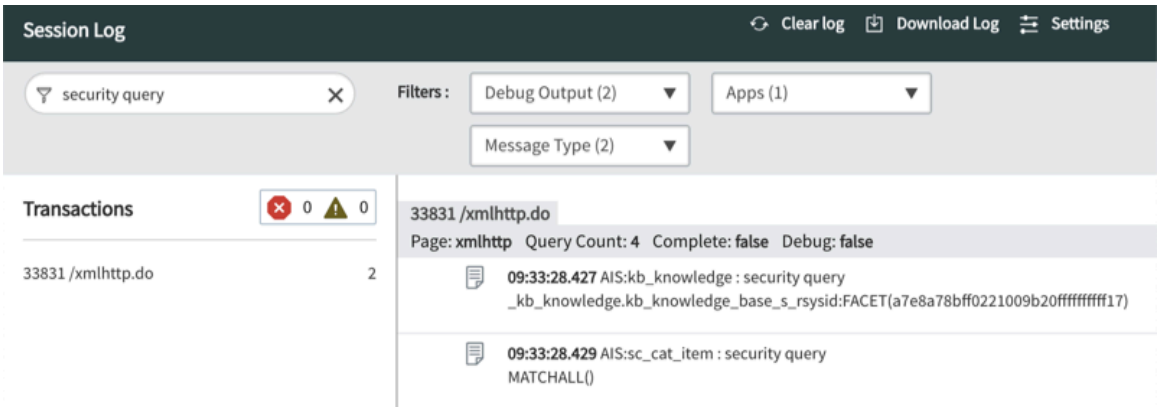
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Note: To debug content security filters for another user, specify their name in the Search Preview UI's user impersonation tool.

4. To see the search source filters applied for your search queries, filter the Session Log entries for `AIS : search sources`.



5. To see the content security filters applied when evaluating access to search results for the current (or impersonated) ServiceNow AI Platform® user, filter the Session Log entries for `security query`.



What to do next

If a search source's filters exclude records that should be searchable, modify those filters. For details, see Create a search source for AI Search.

If content security filters prevent the user from seeing search results that should be accessible, correct the access control settings for the affected source records and then reindex content for the relevant indexed source. For details on content security settings, see Content security in AI Search. To reindex content, follow the steps from Perform a full table index or reindex for a single AI Search indexed source.

Debug external content security filters for a ServiceNow AI Platform® user

Use the Session Log to view the set of externally defined user and group access permission filters associated with the current ServiceNow AI Platform user. Administrators can use this approach to verify that the proper user mappings exist for the current user.

Before you begin

Role required: admin

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About this task

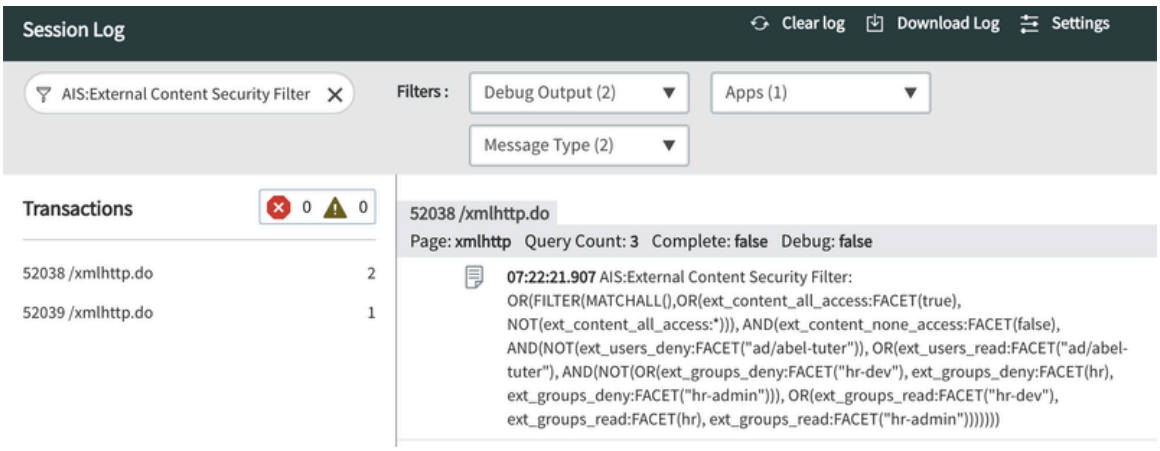
Enable session debugging for AI Search to view debug log messages for external content security. Each debug log message shows the external content security filter that AI Search applies to determine whether the current ServiceNow AI Platform user can see a search result for an external document.

Procedure

1. To enable session debugging for AI Search, navigate to **All** > **System Diagnostics** > **Session Debug** > **Debug** *`AI Search`*.
2. Navigate to **All** > **System Diagnostics** > **Session Debug** > **Debug Log**.
   The Session Log opens.
3. Use the Search Preview UI for AI Search to submit the external content search query of interest.

   Note: To debug external content security access permissions for another user, specify their name in the Search Preview UI's user impersonation tool.

4. In the Session Log, filter for `AIS:External Content Security Filter` to see the external content security filters applied when evaluating access to an external document search result for the current (or impersonated) ServiceNow AI Platform user.



What to do next

If the external content security filters don't include the desired external user or group access permissions, a search administrator can import an updated and corrected user mapping for the relevant ServiceNow AI Platform user. For more details on defining and importing user mappings, see Mapping external users and groups to ServiceNow AI Platform users.

Review record counts for indexed sources

Understand where your indexed content originates by viewing record counts for your indexed sources in the AI Search Indexed Source Statistics table.

Before you begin

Role required: ais_admin

About this task

The AI Search Indexed Source Statistics [ais_datasource_stats] table contains entries showing the indexed record counts for each of your indexed sources. These entries are logged every 24 hours by the **AIS Collect Ingestion Stats** scheduled job. You can review the statistics entries to see how many records each indexed source contributes to the AI Search index.

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Procedure

1. Navigate to the AI Search Indexed Source Statistic [ais_datasource_stats] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `ais_datasource_stats.list`.
   c. Press Enter.
2. If the Updated field doesn't appear, add it to the list view.
   a. Select the Personalize List icon .
   b. In the Personalize List Columns dialog box, find the Updated field in the Available list and use the Add icon to move it to the Selected list.
   c. Select **OK**.
3. To display the most recent indexed record-count entries first, select the Updated field's column options icon in Next Experience UI or , then select **Sort (z to a)**.
4. Review the indexed record-count entries for each of your indexed sources.

> **Note:** The entry for an indexed source indicates the number of indexed records from that source when the **AIS Collect Ingestion Stats** scheduled job ran at the time listed in the Updated field.

Search query parameter evaluation framework

AI Search performs A/B test evaluations that compare result relevancy for alternate sets of search query parameter values. These evaluations determine the models that AI Search uses for machine learning relevancy and for Q&A Genius Results.

The search query parameter evaluation framework enables A/B relevancy testing on live search traffic. AI Search considers results from this live testing along with its offline evaluation of aggregated search signal data when making the following determinations:

- Determining which relevancy model to publish for a search profile. For details on generation and publication of relevancy models, see Machine learning relevancy in AI Search.
- Determining which machine reading comprehension (MRC) model to use when validating potential Q&A Genius Result answers. For more information on the MRC model used for Q&A Genius Results, see Q&A Genius Results.

AI Search computes A/B testing evaluation results on a nightly basis.

> **Note:** The search query parameter evaluation framework doesn't support user configured A/B testing. All A/B testing is automatically performed by AI Search as part of its evaluation of machine learning relevancy models.

The search query parameter evaluation framework is part of the Adaptive Telemetry suite of features.

Search query parameter evaluation framework tables

The search query parameter evaluation framework for AI Search uses tables to store results and metrics from A/B testing of live search traffic. AI Search uses the stored data when determining which relevancy model and Q&A Genius Result answer validation model to publish for a search application.

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A/B Testing Evaluation table

The A/B Testing Evaluation [evaluation] table stores details for A/B testing evaluations performed on live search traffic.

Note: The system automatically cleans this table, removing records for inactive evaluations that are more than two years old.

evaluation

Column	Description
Number	Autogenerated number to identify the evaluation.
Name	Name and description for the evaluation.
Source	Name of the table containing records to run the evaluation for.
Testing Scope	Scope of the evaluation. • Supported values: ○ *ALL*: Run the evaluation against all records in the table specified by **Source**. ○ *SELECTED*: Only run the evaluation against records specified in the **Selected Artifacts** field value. • Default value: *ALL*
Artifact Provider	List of artifact filtering classes that provide records for testing.
Selected Artifacts	Comma-separated list of record sys_id values. When **Testing Scope** is set to **SELECTED**, the evaluation only runs against records with sys_id values specified in this list.
Minimum Signals for Evaluation	Minimum number of search signals the evaluation should collect before ending. • Type: integer • Default value: *0* (no minimum) • Maximum value: *30000* For details on how this condition interacts with the **Minimum Days for Evaluation** condition, see **End Criteria Operator**.
Minimum Days for Evaluation	Minimum number of days the evaluation should be active before ending. • Type: integer • Default value: *0* (no minimum) • Maximum value: *180* For details on how this condition interacts with the **Minimum Signals for Evaluation** condition, see **End Criteria Operator**.
End Criteria Operator	Logical operator to use for evaluation end conditions when both **Minimum Signals for Evaluation** and **Minimum Days for Evaluation** conditions exist.

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evaluation (continued)

Column	Description
	• Supported values: ○ *AND*: The evaluation remains active until the **Minimum Signals for Evaluation** and **Minimum Days for Evaluation** conditions are both satisfied. ○ *OR*: The evaluation remains active until either of the **Minimum Signals for Evaluation** or **Minimum Days for Evaluation** conditions is satisfied. • Default value: *OR*

A/B Testing Evaluation Execution table

The A/B Testing Evaluation Execution [evaluation_execution] table stores details of individual operations executed as part of A/B testing evaluations for live search traffic.

evaluation_execution

Column	Description
Number	Autogenerated number to identify the evaluation operation.
Evaluation	Reference to the record for the evaluation on the A/B Testing Evaluation [evaluation] table.
Artifact ID	Sys_id for the record analyzed by this evaluation operation.
State	State for the record evaluation execution. • Supported values: ○ *Queued*: The evaluation operation is queued for execution. ○ *In Progress*: The evaluation operation is underway. ○ *Scoring*: The evaluation operation is in the scoring phase. ○ *Complete*: The evaluation operation completed successfully. ○ *Errored*: The evaluation operation failed with an error. ○ *Canceled*: The evaluation operation was canceled by the system. ○ *Suspended*: The evaluation operation was suspended by the system. • Default value: *Queued*
Start Date	Date and time when the evaluation operation started.
End Date	Date and time when the evaluation operation ended.

A/B Testing Evaluation Parameter table

The A/B Testing Evaluation Parameter [evaluation_parameter] table stores details of individual search query parameters considered in A/B testing evaluations for live search traffic.

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evaluation_parameter

Column	Description
Evaluation	Reference to the record for the evaluation on the A/B Testing Evaluation [evaluation] table.
Name	Name and description for the evaluation parameter.
Use Artifact's Assigned Parameter	• Type: true | false • Supported values: ○ *true*: Compare the specified *Parameter Values* to the currently assigned search query parameter value on the provided artifact. ○ *false*: Don't compare the specified *Parameter Values* to the currently assigned search query parameter value on the provided artifact • Default value: *true*
Parameter Values Traffic Percentage	Percentage of search queries to apply the specified *Parameter Values* to during the A/B evaluation. • Type: integer • Default value: *0* • Maximum value: *100*
Parameter Values	JSON list of values to compare to the current search query parameter value when *Use Artifact's Assigned Parameter* is true.
Parameter Type	Type for the search query parameter. The selected value determines how the *Parameter Values* are used during and after an A/B evaluation. Supported values: • *Search Context Parameters*: Merge and override search profile context parameters with the *Parameter Values* for search query requests. When the evaluation ends, use the search query context parameter value set with the winning score to override or merge the relevant search profile context parameters. • *Search QnA Genius Result Configuration*: Apply the *Parameter Values* to Q&A Genius Result configurations used in search query requests. When the evaluation ends, update the relevant search profile to include the Genius Result configuration parameter value with the winning score. • *Search QnA Model*: Apply the *Parameter Values* to Q&A Genius Result models used in search query requests. When the evaluation ends, update the relevant search profile to include the Q&A Genius Result model parameter value with the winning score. • *Search Relevancy Model*: Apply the *Parameter Values* as search relevancy models to use in search query requests. When the evaluation ends, update the relevant search profile to include the relevancy model parameter value with the winning score.

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evaluation_parameter (continued)

Column	Description
	• *Search REST Parameters*: Merge and override search profile query parameters with the *Parameter Values* for search query requests. When the evaluation ends, use the search query parameter value set with the winning score to override or merge the relevant search profile parameters.
Score Calculation Type	Form of calculation used to compute search query parameter value scores and find the best value. Supported values: • *Average Click Position*: The best search query parameter value is the one with the lowest average click position score. **Note:** AI Search computes the average click position score by dividing the sum of all selected search result ranks by the number of searches. The highest-ranked search result has rank 1, the next-highest has rank 2, and so on. As an example, if you perform two searches, selecting the first result in one case and the second result in the other, your average click position score is (1 + 2) / 2 = 1.5. • *Genius Result Helpfulness*: The best search query parameter value is the one with the highest helpfulness score. This calculation takes into account whether a relevant Genius Result answer appeared in your search results. **Note:** The helpfulness score is a metric that indicates whether Genius Result answers were helpful in the context of your search. • *Helpfulness*: The best search query parameter value is the one with the highest helpfulness score. Unlike *Genius Result Helpfulness*, this calculation doesn't take into account whether a relevant Genius Result answer appeared in your search results.
Signal Provider	The provider for search signals needed to score the search query parameter. *Search Event Signal Provider* is the only supported value.

A/B Testing Evaluation Parameter Result table

The A/B Testing Evaluation Parameter Result [evaluation_parameter_result] table stores calculation results for individual search query parameters considered in A/B testing evaluations for live search traffic.

evaluation_parameter_result

Column	Description
Evaluation Execution	Reference to the record for the evaluation execution on the A/B Testing Evaluation Execution [evaluation_execution] table.
Parameter Evaluation	Reference to the record for the search query parameter on the A/B Testing Evaluation Parameter [evaluation_parameter] table.
Best Value	Best value for the search query parameter, as determined by the *Winning Score*.

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evaluation_parameter_result (continued)

Column	Description
Winning Score	Numeric score for the search query parameter, determined using the *Score Calculation Type*.
Score Metadata	Metadata from the score computation for the search query parameter.

Exclude a search profile from the search query parameter evaluation framework

Exclude a search profile from A/B testing evaluations of live AI Search traffic. This procedure prevents AI Search from using A/B testing evaluation results when publishing the search profile's search result relevancy model and its Q&A Genius Result answer validation model.

Before you begin
Role required: ais_admin

About this task
The search query parameter evaluation framework performs A/B testing evaluations of search configuration settings using live search traffic. By default, AI Search evaluates configuration settings for all search profiles.

Search administrators can exclude individual search profiles from the search query parameter evaluation framework. Excluding a search profile from the framework prevents AI Search from performing A/B testing evaluations for live search traffic that uses the excluded search profile.

Note: When you exclude a search profile from evaluations, AI Search no longer considers evaluation results when updating the machine learning relevancy and machine reading comprehension (MRC) models for that search profile. As a result, relevancy scoring settings and Q&A Genius Result answer filtering settings for the search profile may be less reflective of your search traffic. For more information on how AI Search uses A/B evaluation testing results when publishing these models, see Machine learning relevancy in AI Search and Q&A Genius Results.

Procedure
1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the record for the search profile that you want to exclude from A/B testing evaluations of live search traffic.
3. If the Search Profile form doesn't already display the **Exclude from evaluation** field, configure the form layout to make the field visible.
   For details on configuring a form layout to make fields visible, see Configuring the form layout.
4. Select the **Exclude from evaluation** option.
5. Select **Update**.

Result
AI Search no longer performs A/B testing evaluations for traffic that uses the excluded search profile. Machine learning relevancy no longer updates the relevancy model for the search profile.

AI Search reference

These reference topics provide additional information about AI Search installed components, system properties, features, and forms.

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Plugins installed with AI Search

AI Search adds the following plugin.

AI Search plugins

Plugin	Description
AI Search plugin (com.glide.ais)	Enables core functionality for AI Search. Installed in the base system. **Note:** This plugin isn't visible in the **All** > **System Applications** > **All Available Applications** > **All** and **All** > **System Definition** > **Plugins** listings. To verify that AI Search is installed and provisioned for use on your instance, navigate to **All** > *AI Search* > *AI Search* **Status**.

Components installed with AI Search

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

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

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

Scheduled jobs installed

Scheduled job	Description
Aggregate Health Data for AIS Partition	Collects health check data for AI Search query nodes connected to your instance.
AI Search Expire Rules	Marks result improvement rules as expired when their end date is in the past.
AI Search Relevancy Data Processor	Processes search signal data as part of search profile relevancy model tuning by the machine learning relevancy feature.
AIS Collect Ingestion Stats	Collects ingestion history statistics for indexed sources.
AIS Derived Dictionary Auto Refresh	Refreshes derived typo handling dictionaries when their refresh interval has elapsed.
AIS Index Event Processor	Processes indexing events for indexed sources.
AIS Index Event Queue Size Monitor	Monitors the size of the indexing queue during indexing of source records.
AIS Index Purge Stale Document	Optimizes the search index by deleting stale documents.
AIS Validate Publish ID and Auto Publish	Publishes search profiles and typo handling, stop word, and synonym dictionaries.
ML Trigger for AIS Search Relevancy	Triggers automatic tuning of search profile relevancy models by the machine learning relevancy feature.

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Tables installed

Table	Description
AI Search ACL Overrides [ais_acl_overrides]	List of rules used by content security.
AI Search Active Table Ingestion Tracker [ais_active_table_ingestion_tracker]	List of active content ingestion events for indexed source tables.
AI Search Child Table [ais_child_table]	List of child tables defined for indexed sources.
AI Search Configuration Attribute [ais_configuration_attribute]	List of indexed source attributes available for use in indexed sources.
AI Search Connection [ais_connection]	List of AI Search query nodes connected to your instance.
AI Search Dictionary [ais_dictionary]	List of typo handling, stop word, and synonym dictionaries.
AI Search Dictionary Term [ais_dictionary_term]	List of terms defined in typo handling, stop word, and synonym dictionaries.
AI Search External Content User Mapping Base [ais_external_search_user_mapping]	Empty list of external content user mappings. All custom external content user mapping tables extend this table. **Note:** This table is only installed after activation of the External Content for AI Search plugin (com.glide.ais.external_content).
AI Search External Content User Mapping History Record [ais_external_content_user_mapping_history]	List of import history events for external content user mapping tables. **Note:** This table is only installed after activation of the External Content for AI Search plugin (com.glide.ais.external_content).
AI Search External Content User Mapping Table Data Source Relationship [ais_external_search_user_mapping_data_source_m2m]	List of mappings between external content user mapping tables and indexed sources. **Note:** This table is only installed after activation of the External Content for AI Search plugin (com.glide.ais.external_content).

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Table	Description
AI Search Genius Result Configuration [ais_genius_result_configuration]	List of Genius Result configurations.
AI Search Genius Result Configuration NLU Model Mapping [ais_genius_result_configuration_sys_nlu_model_m2m]	List of mappings between NLU models and Genius Result configurations.
AI Search Index Events stats [ais_index_queue_stats]	List of statistics entries for indexing events.
AI Search Indexed Batch History [ais_ingest_batch_stats]	List of ingestion history events for indexing batches.
AI Search Indexed Event History [ais_ingest_event_stats]	List of ingestion history events for indexer events
AI Search Indexed Retry History [ais_ingest_retry_stats]	List of ingestion history events produced when retrying indexing for a source table record.
AI Search Indexed Source [ais_datasource]	List of indexed sources.
AI Search Indexed Source Attribute [ais_datasource_attribute]	List of indexed source attributes configured for indexed sources.
AI Search Indexed Source Field Attribute [ais_datasource_field_attribute]	List of field settings configured for indexed sources.
AI Search Indexed Source History [ais_ingest_datasource_stats]	List of ingestion history events for indexed sources.
AI Search Indexed Source Statistics [ais_datasource_stats]	List of entries showing indexed record counts for indexed sources. For more information on these entries, see Review record counts for indexed sources.
AI Search Indexed Table History [ais_ingest_table_stats]	List of ingestion history events for individual source tables defined in indexed sources.
AI Search Ingestion Trigger Checkin [ais_ingestion_trigger_checkin]	List of ingestion trigger check-in times for AI Search nodes.
AI Search Partition Health [ais_partition_health]	List of health check events for AI Search query nodes connected to your instance.
AI Search Partition Health Response [ais_partition_health_response]	List of health check response events for AI Search query nodes connected to your instance.
AI Search Publish History [ais_publish_history]	List of publication history events for search profiles and typo handling, stop word, and synonym dictionaries.
AI Search Relevancy Auto Train Solution [ais_relevancy_autotrain_solution]	List of relevancy model tuning records used by machine learning relevancy.

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Table	Description
AI Search Relevancy Solution Definition [ais_relevancy_solution_definition]	List of search profiles with relevancy models tuned by machine learning relevancy.
AI Search Relevancy Training Execution [ais_relevancy_training_execution]	List of relevancy model tuning tasks performed by machine learning relevancy.
AI Search Relevancy Training Staging [ais_relevancy_training_staging]	List of relevancy model staging tasks performed by machine learning relevancy.
AI Search Results Improvement Rule [ais_rule]	List of result improvement rules.
AI Search Results Improvement Rule Action [ais_rule_action]	List of actions defined for use in result improvement rules.
AI Search Results Improvement Rule Condition Builder Values [v_ais_result_improvement_rule_condition_builder_values]	List of static values defined for use in result improvement rule actions.
AI Search Retention Policy [ais_retention_policy]	List of retention policies available for use in indexed sources.
AI Search Search Profile [ais_search_profile]	List of search profiles.
AI Search Search Profile Dictionary Mapping [ais_search_profile_ais_dictionary_m2m]	List of mappings between search profiles and typo handling, stop word, and synonym dictionaries.
AI Search Search Profile Genius Result Configuration Mapping [ais_search_profile_ais_genius_result_configuration_m2m]	List of mappings between search profiles and Genius Result configurations.
AI Search Search Profile Relevancy Model [ais_search_profile_relevancy_model]	List of relevancy models created by machine learning relevancy.
AI Search Search Profile Search Source Mapping [ais_search_profile_ais_search_source_m2m]	List of mappings between search profiles and search sources.
AI Search Search Source [ais_search_source]	List of search sources.
AI Search Updatable Field Event [ais_updatable_field_event]	List of events for updatable fields on indexed records.
Raw User Mapping for External Content [ais_external_content_raw_external_user_mapping]	List of imported user mapping table entries. **Note:** This table is only installed after activation of the External Content for AI Search plugin (com.glide.ais.external_content).

Roles installed

AI Search includes the following roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

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AI Search administrator [ais_admin]

Manage configuration settings for the AI Search application.

- Creates, reads, updates, and deletes indexed sources
- Creates, reads, updates, and deletes search sources
- Creates and deletes mappings between search sources and search profiles
- Creates, reads, updates, and deletes search profiles
- Creates, reads, updates, and deletes synonym and stop word dictionaries
- Creates and deletes mappings between dictionaries and search profiles
- Reads and updates typo handling auto-correction dictionaries linked to search profiles
- Creates, reads, updates, and deletes Genius Result configurations
- Creates and deletes mappings between Genius Result configurations and search profiles
- Creates, reads, updates, and deletes result improvement rules
- Creates and deletes mappings between result improvement rules and search profiles

Contains roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

External Content for AI Search roles

External Content for AI Search includes the following roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

AI Search external content API user [ais_external_content]

Access endpoints for AI Search external content APIs.

- Feeds external documents for AI Search to index as search results, or deletes records for external documents from the index, using the External Content Ingestion API.
- Imports user mappings for external content security using the AI Search External User Mapping API.

Contains Roles

List of roles contained within the role.

None.

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Groups

List of groups this role is assigned to by default.

None.

Special considerations

Assign this role to non-interactive users and integration users who require access to external content API endpoints. For more information on non-interactive users, see Non-interactive sessions. For details on integration users, see Mark service accounts as internal integration users.

Users with the admin role don't need this role to access external content API endpoints.

AI Search high security administrator [ais_high_security_admin]

Access High Security settings for AI Search.

- Bypasses all search filters from search sources and content security in the Search Preview UI, viewing all search query results available in the AI Search index
- Reads external content user mapping import history records
- Reads indexed content item records in the index inspector tool for External Content Connectors

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

This is an elevated privilege role. Elevated privilege roles aren't assigned to users or groups, and must be used by elevation. For more information on elevated privilege roles, see Elevated privilege roles. To learn about elevation, see Elevate to a privileged role.

The Instance Security Center **Users with High Privilege Roles** user metric displays the count of users assigned this role. For more details, see .

AI Search system properties

Users with the admin role can configure the following system properties for AI Search by navigating to **All** > **System Properties** > *AI Search*.

AI Search system properties

Property
Enable automatic switch over to a healthy *AI Search* **node in the near datacenter** (*glide.ais.ha.auto*)

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AI Search system properties (continued)

Property
Enable automatic failover to an alternate *AI Search* **node when the active node becomes unhealthy** (*glide.ais.ha.enable_auto_failover*)
Ingestion batcher queue memory size in MB (*glide.ais.ingestion.batcher_queue_memory_siz*
Ingestion batcher queue length (records) (*glide.ais.ingestion.batcher_queue_size*)
glide.ais.ingestion.catalog_variables_filter_query

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AI Search system properties (continued)

Property
Ingestion dictionary batcher queue length (records) (*glide.ais.ingestion.dictionary_term_bat*
Ingestion failure retry timeout in seconds (*glide.ais.ingestion.failure_retry_timeout*)
Ingestion feedback logger for error messages (*glide.ais.ingestion.feedback_logger_error*)

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AI Search system properties (continued)

Property
Ingestion feedback logger for informational messages (*glide.ais.ingestion.feedback_logger_i*
Ingestion feedback logger for minor error messages (*glide.ais.ingestion.feedback_logger_mir*
Ingestion feedback logger for warning messages (*glide.ais.ingestion.feedback_logger_warn*)
glide.ais.ingestion.ignore_catalog_variables_read_roles

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AI Search system properties (continued)

Property
glide.ais.ingestion.index_catalog_variables

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AI Search system properties (continued)

Property
Interval in seconds between AI Search node health status check requests (*glide.ais.monitor.health_status_check_interval*)
Timeout period in seconds for AI Search node health status check request (*glide.ais.monitor.health_status_check_timeout*)
Inclusive lower bound for GREEN (healthy) range of AI Search node health scores (*glide.ais.monitor.health_threshold_green*)
Inclusive lower bound for YELLOW range of AI Search node health scores (*glide.ais.monitor.healt*
Maximum request count per search query for AI Search node (*glide.ais.query.max_request_coun*
Search query result count multiplier for AI Search node (*glide.ais.query.requested_rows_multi*

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AI Search system properties (continued)

Property
Boolean search operator to use when a search query includes multiple terms (*glide.ais.query.searc*

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AI Search system properties (continued)

Property
Force *AI Search* **to use late binding for ACL evaluation** (*glide.ais.security.force_late_bindi*
Enable global language fallback (*glide.ais.translate.enable_global_language_fallback*)

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AI Search system properties (continued)

Property
glide.mlpredictor.ml_x_snc_global_global_6eedb38234bf5010f877396127c8ffee.pr
query.maxDictionaryTermLength

ServiceNow AI Platform® tables excluded from AI Search indexing

AI Search excludes the following ServiceNow AI Platform tables when indexing content. You can't configure these tables, or tables derived from them, as AI Search indexed sources.

- AI Search External Search User Mapping Base [ais_external_search_user_mapping]
- Base Configuration Item [cmdb]
- Email [sys_email]
- Event [sysevent]
- Import Set Row [sys_import_set_row]
- Log [syslog]
- Queue [ecc_queue]
- Replicated Operation [sys_replication_queue]
- Sys Audit [sys_audit]

Variable types supported by AI Search indexing

AI Search can index searchable content and metadata from multiple variable types found on indexed source records.

Variable types indexed from variables column

When indexing records from any source table, AI Search retrieves searchable content from supported variable types when they're present in a source record column that has name **variables** and type *Variables*.

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Supported variable types include:

- Email
- Multi-line text
- Single-line text
- URL
- Wide single-line text

Service Catalog variable types indexed from Catalog Items

When indexing records from the Catalog Item [sc_cat_item] table and tables that extend it, AI Search can retrieve searchable content from these Service Catalog variable types:

- Multiple choice
- Select box

Other variable types aren't supported for catalog variable indexing.

Catalog variable indexing is not active in the base system, but it's activated if you have the ServiceNow® Otto for AI Search application installed. To learn how to activate and configure catalog variable indexing, see Activate indexing of catalog variable content on Catalog Item records. For details on the ServiceNow Otto for AI Search application, see ServiceNow Otto for AI Search.

For the full list of available Service Catalog variable types, see Types of Service Catalog variables.

AI Search index fields

List of fields available on records in the AI Search index. AI Search populates these fields with values from source record fields during indexing.

AI Search index fields

Field	Description
ai_search_parent_title	Title of the indexed record's parent record, if it has one. This field is automatically generated by AI Search from the parent record's **title** field value.
ai_search_teaser_text	Searchable text of the indexed record, displayed in search results. This field is automatically generated by AI Search from the indexed record's **text** field value.
ai_search_teaser_title	Title of the indexed record, displayed in search results. This field is automatically generated by AI Search from the indexed record's **title** field value.
datasource_id	Name of the indexed source that added the record to the AI Search index.
ext_record_id	Unique identifier for the external content source record that corresponds to the indexed record. Only populated for records from external content sources.
ext_groups_deny	Names of security principal groups that can't read the record. Only populated for records from external content sources.

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AI Search index fields (continued)

Field	Description
	Note: Deny entries take precedence over read entries. If a group appears in this field and in *ext_groups_read*, members of that group can't read the record.
ext_groups_read	Names of security principal groups that can read the record. Only populated for records from external content sources. **Note:** Deny entries take precedence over read entries. If a group appears in this field and in *ext_groups_deny*, members of that group can't read the record.
ext_users_deny	Names of security principal users that can't read the record. Only populated for records from external content sources. **Note:** Deny entries take precedence over read entries. If a user appears in this field and in *ext_users_read*, that user can't read the record.
ext_users_read	Names of security principal users that can read the record. Only populated for records from external content sources. **Note:** Deny entries take precedence over read entries. If a user appears in this field and in *ext_users_deny*, that user can't read the record.
index_event_id	Sys_id of the indexing event that added the record to the AI Search index.
language	Language of the indexed record. AI Search uses the language specified for the record in the source table. If no language is specified in the source table, AI Search automatically detects the record's language.
record_class_name	The hierarchical class used to render the source record.
sys_id	Sys_id of the source record.
table	Name of the indexed record's source table. For records from external content sources, this index field indicates the name of the content schema table specified during document ingestion.
text	Searchable text for the indexed record. This index field may be populated directly from a source record field, such as **Description**, or may be extracted from binary content.
title	Title for the indexed record. This index field may be populated directly from a source record field, such as **Short description**, or may be extracted from binary content.
url	URL for the source record's form view. When you select the indexed record from a search result list, the system redirects you to this URL so you can view the source record.

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AI Search index fields (continued)

Field	Description
	Note: AI Search automatically populates this index field from the source record. You cannot override the index field value using *map_to* field settings.

Common index fields

The following AI Search index fields appear on all records indexed from ServiceNow AI Platform® source tables:

- ai_search_parent_title
- ai_search_teaser_text
- ai_search_teaser_title
- record_class_name
- sys_id
- table

AI Search Country To Search Language form

The AI Search Country To Search Language form enables you to define a knowledge article search language for a country.

For details on defining knowledge article search languages for a country, see Assign Knowledge article search languages by country.

AI Search Country To Search Language form

Field	Description
Country	Reference to the country from the Country [core_country] table that you want to define an additional knowledge article search language for.
Search language	Reference to a language from the Language [sys_language] table that you want AI Search to use for knowledge article searches by users in the selected country.

Note: You can define multiple AI Search Country To Search Language records for the same country, as long as each one has a different knowledge article search language. If you attempt to create multiple records with the same country and the same knowledge article search language, the system displays a warning message and the record insert operation fails.

AI Search External Search User Mapping Table Data Source Relationship form

The AI Search External Search User Mapping Table Data Source Relationship form enables you to link a user mapping table to an indexed source for external content in AI Search.

For details on linking a user mapping table to an indexed source for external content, see Mapping external users and groups to ServiceNow AI Platform users.

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AI Search External Search User Mapping Table Data Source Relationship form

Field	Description
User Mapping Child Table	The name of the user mapping table that you want to link to the external content indexed source.
Index Source	The name of the external content indexed source that you want to link the user mapping table to.

AI Search Genius Result Configuration form

The AI Search Genius Result Configuration form enables you to create a Genius Result configuration for use in your AI Search search profiles.

For details on creating or editing a Genius Result configuration, see Create a Genius Result configuration.

AI Search Genius Result Configuration form

Field	Description
Name	Name for the Genius Result configuration.
Trigger condition	Condition that triggers evaluation of the Genius Result configuration. Supported values: • *Always*: The Genius Result configuration triggers for every search query. • **NLU**: The Genius Result configuration triggers when the search query's detected intent matches an NLU model intent. To use this trigger condition, you must link the NLU model and one or more of its intents to your Genius Result configuration. For instructions, see Link an NLU model and intents to a Genius Result configuration. **Note:** For an NLU trigger condition to function, the NLU model must be published. You can verify NLU model status by navigating to **All** > *AI Search* > **Search Query Settings** > **Search Intents**. • *Term*: The Genius Result configuration triggers when the search query exactly matches a specified set of query terms. **Note:** Exact matching means that the search query must contain only the specified terms in the specified order. For example, if you define `conference room` as the trigger term, a search for `conference room` triggers the Genius Result condition but searches for `hotel conference room` or `room conference` don't trigger it.
Term	Term that triggers the Genius Result configuration when it exactly matches the search query. This field appears only when you select **Term** from the **Trigger condition** field.
Application	Application scope for the Genius Result configuration. This field is automatically set.
Active	Option to activate the Genius Result configuration. Inactive Genius Result configurations never trigger.

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AI Search Genius Result Configuration form (continued)

Field	Description
Processor script template	Sample server-side script function. Use the code displayed in this field as a basis for your *AI Search* **request processor** and *AI Search* **response processor** scripts. This field is automatically set.
AI Search request processor	Server-side script function that takes a `GeniusResultContext` object as its parameter. The function must return a `GeniusResultAnswer` object that contains a search query. Up to three results from this search query display as Genius Result answer cards. **Note:** This field is required if **AI Search response processor** isn't populated. You can copy the code from the **Processor script template** to use as a starting point for your script function. When a search query triggers the Genius Result configuration, the system executes this script and then sends both the triggering search query and the scripted search query to the AI Search back end for computation of search results. To define a search query, use the `GeniusResultAnswer.setTable()`, `GeniusResultAnswer.addSearchPhrases()`, and `GeniusResultAnswer.setSearchPhrase()` API methods. For details of API methods usable in this script function, including examples of use, see the GeniusResultAnswer and GeniusResultContext scoped JavaScript API descriptions. **Note:** The `GeniusResultContext.getMatchingDocuments()` API method returns no results when invoked in an **AI Search request processor** script, since the script is executed before AI Search computes results for the triggering search query. Don't use this method in your request processor scripts.
AI Search response processor	Server-side script function that takes a `GeniusResultContext` object as its parameter. The function must return a `GeniusResultAnswer` object that defines one or more maps of key-value pairs. You can display these key-value pairs on the Genius Result answer card by specifying them as **Return fields**. **Note:** This field is required if **AI Search request processor** isn't populated. You can copy the code from the **Processor script template** to use as a starting point for your script function. When a search query triggers the Genius Result configuration, the system executes this script after AI Search computes search results. To define your map of key-value pairs, use the `GeniusResultAnswer.addDataMap()` API method. Each key-value pair represents a field name and value that you can display on the Genius Result answer card using the **Return fields** list. For details of API methods usable in this script function, including examples of use, see the GeniusResultAnswer and GeniusResultContext scoped JavaScript API descriptions.
Return fields	Comma-separated list of fields to display on the Genius Result answer card. This field is required if **AI Search response processor** is populated.

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AI Search Genius Result Configuration form (continued)

Field	Description
	Behavior depends on which processor script field is populated: • If **AI Search response processor** is populated, you must use this field to specify the names of fields defined in your `GeniusResultAnswer` response object that you want to display on the Genius Result answer card. • If **AI Search response processor** isn't populated, the Genius Result answer card automatically displays the common AI Search index fields: ○ ai_search_parent_title ○ ai_search_teaser_text ○ ai_search_teaser_title ○ record_class_name ○ sys_id ○ table You can optionally use this field to specify any additional AI Search index fields that you want to display for search results shown on the Genius Result answer cards. To view the list of AI Search index fields, see AI Search index fields.

AI Search Genius Result Configuration NLU Model Mapping form

The AI Search Genius Result Configuration NLU Model Mapping form enables you to link a Genius Result configuration to an NLU model.

For details on linking Genius Result configurations to NLU models, see Link an NLU model and intents to a Genius Result configuration.

AI Search Genius Result Configuration NLU Model Mapping form

Field	Description
Genius Result Configuration	The Genius Result configuration to link the NLU model to. This field is automatically set to the selected Genius Result configuration.
NLU Model	Existing NLU model to use for the Genius Result configuration's NLU trigger condition.
State	Current state of the selected NLU model. This field is automatically set.
Intents	List of intents from the NLU model that can trigger the Genius Result configuration when detected in the search query.
Order	Order of evaluation for the NLU model in the context of the Genius Result configuration.
Application	Application scope for the NLU model link. This field is automatically set.

AI Search Results Improvement Rule form

The AI Search Results Improvement Rule form enables you to create a result improvement rule in an AI Search search profile.

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For details on creating or editing result improvement rules, see Create a result improvement rule.

AI Search Results Improvement Rule form

Field	Description
Label	Unique label for the result improvement rule.
Start Date	System time for the first date when the result improvement rule can activate. If left empty, this field is automatically set to the current date.
End Date	System time for last date when the result improvement rule can activate. After this date, the rule state changes to *Expired*. If left empty, this field is automatically set to 30 days from the **Start Date**.
Activate on all queries	Option to make the result improvement rule activate for every search query.
Language	Language for the result improvement rule. AI Search only evaluates activation for result improvement rules that have the same language as the search query or that have **All Languages** specified for this field.
State	Current state for the result improvement rule. • **New**: The rule has never been published. • **Draft**: The rule is saved with unpublished changes. • **Published**: The rule is saved with all changes published. • **Expired**: The rule can't activate because its **End Date** is in the past. Publishing a search profile doesn't publish expired rules.
Marked for Deletion	Option indicating whether AI Search will delete the result improvement rule the next time you publish the search profile.
Apply only to Genius Results	Option to make the result improvement rule only operate on Genius Result answers when activated. **Note:** When this option is selected, the result improvement rule can only contain block actions.
Triggers	
Expand Synonyms For Query Conditions	Option for enabling synonym expansion for Query condition arguments. This field disappears if you select **Activate on all queries**. When expanding Query conditions, AI Search only considers active synonyms that are defined in the same search profile and that have a language matching the language of the result improvement rule.
Triggers	List of conditions that must be met for the result improvement rule to activate. This field disappears if you select **Activate on all queries**. Select one of the following fields as the subject for your condition:

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AI Search Results Improvement Rule form (continued)

Field	Description
	• *Keywords*: Operates on one or more keywords found in the user's search query. For example, a **[Keywords] [are] [password]** condition is satisfied by searches for `How do I change my password` or `password reset`. • *Query*: Operates on the user's full search query. As an example, a **[Query] [is] [password reset]** condition is satisfied by a search for `password reset`, but not by a search for `password reset steps`. • *User Context*: Operates on a user context element from the search user's ServiceNow AI Platform® session. The system displays the source table and field after the user context element name. As an example, a **[User Context - Country (sys_user.country)] [is] [Japan]** condition is satisfied when the search user's User [sys_user] record has **country** set to Japan.

Child Table form

The Child Table form enables you to enable AI Search content indexing for a child table that extends an indexed source table.

For details on creating or modifying an indexed source child table, see Create an indexed source.

Child Table form

Field	Description
Indexed Source	Reference to the indexed source. This field is automatically set.
Table	Label and name for the child table that you want to enable content indexing for. You can only select from tables that extend the indexed source table.
Active	Option to activate indexing for the child table.
Application	Application scope for the child table indexing configuration. This field is automatically set.

Custom Matcher form

The Custom Matcher form enables you to create a global search custom matcher.

For details on creating a global search custom matcher, see Create a custom search matcher for global search.

Custom Matcher form

Field	Description
Name	Unique name for the custom matcher.
Regex	Java regular expression pattern that AI Search compares search queries to. When a search query matches this regular expression pattern, the custom matcher triggers and the search only returns results from the specified **Table** and **Column**. This field is automatically set when you select **Generate Regex**.

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Custom Matcher form (continued)

Field	Description
	Note: For details on Java regular expression pattern syntax, see the Javadoc for the java.regex.util.Pattern class.
Table name	Table that you want to restrict search matches to when a user search satisfies the custom matcher's **Regex** regular expression pattern.
Application	Application scope for the custom matcher. This field is automatically set.
Column	Field from the specified **Table** that you want to restrict search matches to when a user search satisfies the custom matcher's **Regex** regular expression pattern.
Active	Option to activate the custom matcher. To deactivate the matcher, clear the **Active** option.

Dictionary form

The Dictionary form enables you to create a typo handling, stop word, or synonym dictionary for use in your AI Search search profiles.

For details on creating and modifying dictionaries, see Modify settings for a typo handling dictionary, Create a stop word dictionary linked to a search profile, and Create a synonym dictionary linked to a search profile.

Note: When creating a typo handling dictionary, the name of the form is shown as AI Search Dictionary instead of Dictionary.

Dictionary and AI Search Dictionary forms

Field	Description
Label	Unique label for the dictionary.
Dictionary name	Name for the dictionary. This field is automatically set based on the **Label** field value.
Language	Language for all terms defined in the dictionary. This field only displays when editing a stop word or synonym dictionary. AI Search automatically sets the language for typo handling dictionaries. **Note:** You can only link one stop word dictionary with a given language to a search profile.
Type	Dictionary type. This field is automatically set to *`Spell Check`*, *`Stop Word`*, or *`Synonym`*.
State	Current state of the dictionary. • **New**: The dictionary has never been published. • **Draft**: The dictionary is saved with unpublished changes. • **Published**: The dictionary is saved with all changes published.
Case sensitive	Option to enable case sensitivity for all terms in the dictionary. For more details on case sensitivity, see Typo handling, Stop words, or Synonyms.

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Dictionary and AI Search Dictionary forms (continued)

Field	Description
Punctuation sensitive	Option to enable punctuation sensitivity for all terms in the dictionary. For more details on punctuation sensitivity, see Typo handling, Stop words, or Synonyms.
Derived	Option to derive dictionary entries from indexed content. This field and the **Derive Settings** section only display when editing a typo handling dictionary.
Derive Settings	
Indexed sources	List of indexed sources. The dictionary derives auto-correction terms from content indexed for these sources. This field only displays when editing a typo handling dictionary. For more information on indexed sources, see Indexed sources in AI Search.
Auto refresh	Interval, in hours, after which derived typo handling entries automatically refresh. The minimum value is 24 hours. This field only displays when editing a typo handling dictionary.
Blocked Fields	Comma-separated list of fields. The dictionary excludes terms found in these fields when deriving typo handling auto-correction terms from indexed source records. This field only displays when editing a typo handling dictionary. You can specify fields using the following formats: • *** (asterisk): Exclude terms found in all fields. This value disables derivation of typo-handling auto-corrections for the dictionary. • *`fieldname`*: Exclude terms found in the specified AI Search index field, such as **title** or **text**. For details on AI Search index fields, see AI Search index fields. • *`tablename.fieldname`*: Exclude terms found in the specified field on the specified ServiceNow AI Platform® table. • *`tablename.*`*: Exclude terms found in all fields in the specified ServiceNow AI Platform table.

Dictionary Term form

The Dictionary Term form enables you to create a typo handling entry, a stop word, or a synonym in a dictionary linked to an AI Search search profile.

For more details on creating or modifying dictionary terms, see Exclude a term from a typo handling dictionary, Create stop words, and Create synonyms.

Dictionary Term form

Field	Description
Dictionary	Name of the dictionary that includes the typo handling, stop word, or synonym term. This field is automatically set based on the dictionary that you selected.
Term	The term or phrase to include in the typo handling, stop word, or synonym dictionary.

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Dictionary Term form (continued)

Field	Description
Payload	List of equivalent terms or phrases in JSON array format. For example, `["wireless network", "WLANS"]`. This field only displays when editing a synonym term.
State	Current state for the dictionary term. • **New**: The dictionary term has never been published. • **Draft**: The dictionary term is saved with unpublished changes. • **Published**: The dictionary term is saved with all changes published. This field only displays when editing a synonym term.
Active	Option to activate the term for use in the dictionary. To deactivate the term, clear the **Active** option.
Marked for Deletion	Option indicating that AI Search will delete the term the next time you publish the search profile linked to the selected dictionary. This field only displays when editing a typo handling or stop word term, and is automatically set.
Application	Application scope for the dictionary term. This field only displays when editing a typo handling or stop word term, and is automatically set.

Facet form

The Facet form enables you to create a facet refinement filter in the search application configuration for an AI Search application.

For details on creating or modifying a facet, see Create a facet in an AI Search application configuration.

Facet form

Field	Description
Name	Unique name for the facet.
Label	Label to display for the facet in the search application.
Facet Field	Comma-separated list of field names from AI Search indexed source tables. The facet displays search result refinement filters for values from one or more specified fields that are present in the current search result set. When you select a refinement filter after searching, AI Search restricts the search result set to show only results that contain the specified field value. **Note:** When you save or update a facet, AI Search verifies each facet field. To pass verification, the field must exist on at least one record that exists in a search source used by the search application. If a field doesn't satisfy this condition, the system displays an error message. Supports the following formats: **Table-specific field list** Enter a comma-separated list of qualified `[indexed_source_table_name].[field_name]` entries.

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Facet form (continued)

Field	Description
	AI Search displays search result refinement filters for values from the superset of the specified indexed source table fields. For example, enter `kb_knowledge.author` to display search result refinement filters for **Author** field values from the Knowledge [kb_knowledge] indexed source table. Or enter `kb_knowledge.author, sc_cat_item.owner, custom_table.author_field` to display search result refinement filters for values from all of the three specified indexed source table fields. **Note:** All fields specified in a facet field list must be of the same type. The `[indexed_source_table_name]` qualifier must be the name of a table specified in an indexed source. Don't specify indexed source child table names for this qualifier. **Cross-table field** Enter an unqualified `[field_name]` entry. AI Search displays search result refinement filters for values from the specified cross-table field. For example, enter `language` to display search result refinement filters for **Language** field values from any indexed source table. **Note:** This format only supports the `language` and `tags` cross-table fields. Special cases include: **Faceting on parent table fields** If you specify an indexed source parent table field as a facet field, AI Search includes values from the same field on child tables from the indexed source. As an example, suppose you create an indexed source for a custom Parent [u_parent] table, which is extended by a custom Child [u_child] table. If you specify `u_parent.author` as a facet field, AI Search displays search result refinement filters for both `u_parent.author` and `u_child.author` field values. **Faceting on child table fields** You can specify a field that's unique to an indexed source child table as a facet. Continuing the previous example, if your Child [u_child] table includes an **Editor** field that's not present on the Parent [u_parent] table, you can specify `u_parent.editor` as a facet to display search result refinement filters for **Editor** field values. **Note:** Be sure to specify the parent table name as the qualifier, not the child table name. **Faceting on dot-walk fields from referenced tables**

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Facet form (continued)

Field	Description
	If your indexed source includes a *dot_walk_fields* field setting for a dot-walk referenced table field, you can specify that field in a facet field entry using dot-separated reference field qualifiers. Add these qualifiers between the indexed source table name and the referenced table field name. For example, to facet knowledge article search results based on the Department field values for their authors, you can define `author.department` as a *dot_walk_fields* field setting for the indexed source for the Knowledge [kb_knowledge] table and then specify `kb_knowledge.author.department` in your facet field entry. If you define `company.contact.department` as a *dot_walk_fields* field setting for the indexed source for the User [sys_user] table, you can specify `sys_user.company.contact.department` in your facet field entry. **Note:** Each dot-walk reference level imposes a performance impact on indexing. Avoid using multi-level references unless necessary. To learn about *dot_walk_fields* field settings, see Enable indexing of referenced table fields for an AI Search indexed source. Facets work best when created from fields of the following types with relatively few unique values: • Choice • Reference • String • String (Full UTF-8) • True/False
Type	Type of the facet. The facet type determines how many field values you can select as facet refinement filters and the filter logic used by the facet. Supports the following values: **Single Select** In a Single Select facet, you can only select a single field value as a facet refinement filter. When you select a field value from a Single Select, AI Search filters the search results list, displaying only results that contain your chosen field value. A Single Select facet only allows you to select field values that are found in the current result set. **Multi Select And** In a Multi Select And facet, you can select multiple field values as facet refinement filters.

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Facet form (continued)

Field	Description
	When you select a field value from a Multi Select And facet, AI Search filters the search results list, displaying only results that contain all of the field values you've selected from the facet. A Multi Select And facet only allows you to select field values that are found in the current result set. **Multi Select Or** In a Multi Select Or facet, you can select multiple field values as facet refinement filters. When you select a field value from a Multi Select Or facet, AI Search filters the search results list, displaying only results that contain any of the field values you've selected from the facet. A Multi Select Or facet initially only allows you to select field values that are found in the current result set. All field values that are available when you make your first selection remain available for selection. As an example, suppose you have a Multi Select Or facet for a custom **Color** field with blue, green, and red field values. If your search returns only green and red results, the **Color** facet only displays **green** and **red** field values. When you select the **red** field value, AI Search keeps the **green** field value available for selection because it was available before you made any **Color** selection. ⚠ **Warning:** Applying multiple filters from a Multi Select And or Multi Select Or facet makes your search query URL longer. Test your multi-select facet configurations to ensure that search query URLs with facet filters don't exceed the maximum URL length limit for your web browser. (Different web browsers have different URL length limits.)
Facet Value Limit	Maximum number of distinct field values to display for the facet.
Order	Order of appearance for the facet in the context of the search application configuration.
Active	Option to activate the facet for the application.
Sort by	Order in which to display the facet's buckets in the search results UI. Type: Choice list Default value: Count Supported values: • *Count*: Sort facet buckets by their search result counts, going from highest count to lowest. • *Value*: Sort facet buckets by their labels in alphabetical order.

Field Setting form

The Field Setting form enables you to create a field setting for an indexed source in AI Search.

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For details on creating or editing field settings for indexed sources, see Field settings for AI Search.

Field Setting form

Field	Description
Indexed Source	Indexed source that the field setting applies to.
Source	Specific table from the indexed source that the field setting applies to.
Attribute	Field setting to apply for the selected field on all records indexed from the selected source table. For the full set of available field settings, see List of AI Search indexed source field settings.
Application	Application scope for the field setting. This field is automatically set.
Field	Record field that the field setting operates on.
Value	Value for the specified field setting. For details on the values supported for each field setting, see List of AI Search indexed source field settings.

Indexed Source form

The Indexed Source form enables you to create an indexed source for use in AI Search.

For details on creating or modifying an indexed source, see Create an indexed source.

Indexed Source form

Title	Description
Name	Unique name for the indexed source.
Source	The ServiceNow AI Platform® table to index. AI Search excludes some ServiceNow AI Platform tables from indexing. You can't define indexed sources for these excluded tables or their derived tables. For a list of excluded tables, see ServiceNow AI Platform tables excluded from AI Search indexing. To index content from a remote table, create an external indexed source. For more details on configuring indexed sources for external content, see Indexing and searching external content in AI Search. Plugins and applications can define multiple indexed sources for the same ServiceNow AI Platform table, but only one of them can be active at a time. For more details, see *Active*.
Active	Option to activate the indexed source. AI Search only indexes content and metadata from active indexed sources. **Note:** Only one indexed source can be active at a time for a given ServiceNow AI Platform table. The system makes duplicate indexed sources for a table inactive by default. Before you can make one of these duplicate sources active, you must edit the currently active source and make it inactive. AI Search only indexes content and metadata from active indexed sources.

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Indexed Source form (continued)

Title	Description
Application	Application scope for the indexed source. This field is automatically set.
Retention Policy	Policy specifying a retention time limit for records from the source table. AI Search only indexes source records that were last updated within the specified time period, and purges records from the index when their time since last update exceeds the limit. If this field is empty, AI Search indexes source records regardless of their last updated date and retains them in the index indefinitely. **Note:** This field is required when **Source** is set to the Task [task] table or any table that extends it.
Force Late Binding	Option to make AI Search use late binding security for all search results from the indexed source. This field isn't shown in the default Indexed Source form view. For instructions on configuring the form layout to show the field, see Configuring the form layout. For an explanation of late binding security and its effects on search, see Content security in AI Search.
Condition	
Filter	Optional filter conditions limiting the set of records to index from the source table. AI Search only indexes records that satisfy all defined filter conditions, and purges records from the index if they no longer satisfy these conditions.

Indexed Source Attribute form

The Indexed Source Attribute form enables you to create an indexed source attribute for an indexed source in AI Search.

For details on creating or editing indexed source attributes, see Indexed source attributes for AI Search.

Indexed Source Attribute form

Field	Description
Indexed Source	Indexed source the attribute applies to.
Attribute	Attribute to set for all records indexed from the selected source table. For the full set of indexed source attributes, see List of AI Search indexed source attributes.
Application	Application scope for the indexed source attribute. This field is automatically set.
Source	Specific table from the indexed source that the attribute applies to.
Value	Value for the specified attribute.

Indexed Source History form

The Indexed Source History form enables you to review details from the ingestion history for an AI Search indexed source.

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To learn how to review the ingestion history for an indexed source, see Review ingestion history for an indexed source.

Indexed Source History form

Field	Description
Indexed Source	Reference to the indexed source from which AI Search ingested records for indexing.
Ingestion Event ID	Sys_id of the ingestion event.
Partial Ingestion	Option indicating whether AI Search ingested all parent and child tables defined in the indexed source. Valid values: • *false*: AI Search ingested records from the indexed source table and all child tables configured for indexing. • *true*: AI Search only ingested records from a subset of the indexed source tables configured for indexing.
Number of Errors	Count of error messages logged for the ingestion event.
Number of Minor Errors	Count of minor error messages logged for the ingestion event.
Number of Warnings	Count of warning messages logged for the ingestion event.
Ingestion State	State for the ingestion event. Valid values: • *cancelled*: Ingestion and indexing didn't complete successfully. • *indexed*: Ingestion and indexing completed successfully. • *indexing*: Ingestion and indexing are ongoing. • *not_started*: Ingestion and indexing are pending.
Start Time	System time at which the ingestion event began.
End Time	System time at which the ingestion event completed.
Content Preparation Duration	Total time that the ServiceNow AI Platform® spent retrieving source records for the ingestion event.
Indexing Duration	Total time that AI Search spent indexing source records for the ingestion event.
Records Processed	Count of source records processed for the ingestion event.
Attachments Processed	Count of source record attachments processed for the ingestion event.
Documents Processed per Second (DPS)	Average number of source records and attachments processed per second for the ingestion event.

Source Facet Bucket form

The Source Facet Bucket form enables you to configure display settings for a source facet bucket in the search application configuration for an AI Search application.

For information on configuring source facet bucket display settings for an AI Search application, see Configure source facet buckets in an AI Search application configuration.

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Source Facet Bucket form

Field	Description
Name	Name for the source facet bucket. This field is set by default to the name of the originating search source. Changing the name doesn't affect the source facet bucket's filtering behavior.
Active	Option to enable the source facet bucket. Inactive source facet buckets aren't displayed in the search application.
Order	Order of appearance for the source facet bucket in the context of the search application configuration.
Label	Label to display for the source facet bucket in the search application.
Search Context Config	Search application configuration for the source facet bucket.

Record Producer Configuration form

The Record Producer Configuration form enables you to create an AI Search Assist record producer configuration.

Record Producer Configuration form

Field	Description
Title	Title of the record producer configuration. For example, `Search Results`.
Results per page	Number of search results to display per page.
Allow expand/ collapse	Option to allow users to expand or collapse search results in this record producer configuration.
Active	Option to make this record producer configuration active for your instance.
Application	Application scope for this record producer configuration.

Rule - Action Mapping form

The Rule - Action Mapping form enables you to link a boost action to a result improvement rule in an AI Search search profile.

For information on configuring boost actions in result improvement rules, see Boost search results using a result improvement rule.

Rule - Action Mapping form

Field	Description
Label	Unique label for the boost action.
Type	Action type. This field is automatically set to **Boost Action**.
Application	Application scope for the boost action. This field is automatically set to the name of the current application.
Order	Order of evaluation for the boost action in the context of the result improvement rule.

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Rule - Action Mapping form (continued)

Field	Description
Boost Action	
Boost Type	Type of boost the action applies to search results from the selected indexed source. Supported types include: • *Boost All Documents In Indexed Source*: Applies relevancy boost to every search result from the indexed source. • *Boost By User Context (dynamic)*: Applies relevancy boost to search results from the indexed source if they include a value for the selected field that matches a field value specified in the dynamically populated user context. • *Boost By Field Match (static)*: Applies relevancy boost to search results from the indexed source if they include a value for the selected field that matches a specified static value. • *Boost By Synonym Dictionary*: Applies relevancy boost to search results from the indexed source if they include a value for the selected field that matches any synonym defined in a synonym dictionary.
Indexed Source	Reference to an indexed source. The boost action only applies to search results for records from this indexed source.
Boost Weight	Integer value that AI Search uses to alter the relevancy scores for search results affected by the boost action. Boost weights can be positive or negative. Positive boost weights increase the relevancy scores for boosted search results. Each boost weight of 1 increases a boosted search result's relevancy score by 0.1% of its original value. For example, if you set a boost weight of 100, you increase each boosted search result's relevancy by +10%, so a search result with an original relevancy score of 60 gets a final relevancy score of 66. Setting a boost weight of 1000 adds +100%, doubling the relevancy scores for boosted search results. Negative boost weights reduce the relevancy scores for boosted search results. Each boost weight of –1 reduces a boosted result's relevancy score by 0.1% of its original value. As an example, if you set a boost weight of –150, you reduce a boosted search result's relevancy by 15%, so a search result with an original relevancy score of 100 gets a final relevancy score of 85. Any boost weight of –1000 or lower reduces a boosted search result's relevancy score to 0, causing it to appear at the end of the search result list. When a single search result is affected by multiple boost actions, AI Search adds the individual boost weights together to determine the total relevancy score modifier. For example, a search result boosted by three rules with boost weights 100, 150, and –25 has a total boost weight of 225, increasing its final relevancy score by 22.5% of its original value.
When	Name of a field from the selected indexed source. This field appears only when you select **Boost By User Context (dynamic)**, **Boost By Field Match (static)**, or **Boost By Synonym Dictionary** as the boost type.

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Rule - Action Mapping form (continued)

Field	Description
Matches the Searcher's	Dynamically populated user context element to compare with a search result's value for the field selected in the **When** field. This field appears only when you select **Boost By User Context (dynamic)** as the boost type. The choice list displays the source table and field for each user context element. As an example, the **Language** user context element is populated using the User [sys_user] table's **language** field value for the search user.
Contains	Static value to compare with a search result's value for the field selected in the **When** field. This field appears only when you select **Boost By Field Match (static)** as the boost type.
Matches A Synonym Dictionary	Synonym dictionary to check for synonyms that match a search result's value for the field selected in the **When** field. This field appears only when you select **Boost By Synonym Dictionary** as the boost type.

Search Application Configuration form

The Search Application Configuration form enables you to create a search application configuration for an AI Search application.

For details on creating or modifying a search application configuration for use with AI Search, see Create a search application configuration for AI Search.

Search Application Configuration form

Field	Description
Name	Name for the search application configuration. Type: string
Search Engine	Search engine to use in the ServiceNow AI Platform® search application that links to the search ap Type: choice list Default value: AI Search Supported values: • *AI Search*: Use AI Search as the search engine for the application. Select this search engine application has the **Enable** *AI Search* option enabled. • *Zing*: Use the Zing text indexing and search engine as the search engine for the application. Se search application has the **Enable AI Search** option disabled, or if it lacks this option. **Note:** If your search engine selection conflicts with your search application's **Enable** *AI Se* system displays an error message. Before changing search engines, first make sure that your the proper **Enable** *AI Search* setting.
Search Profile	Search profile to use for searches in the application. This field appears only when you select **AI Se** application's search engine. Type: reference to a record from the Search Profile [ais_search_profile] table

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Search Application Configuration form (continued)

Field	Description
Search Results Limit	Maximum number of search results the application should display on each search results page. This limit also specifies the minimum number of search results each query should return. When a s less than this number of results, AI Search attempts to broaden the result set by automatically resu modified parameters. For more details on query resubmission, see Automatic search query resubr Type: integer Default value: 10 Supported values: 0 or positive
Genius Results Limit	Maximum number of Genius Result answer cards the application should display on the search res appears only when you select **AI Search** as the application's search engine. Type: integer Supported values: 0 or positive When **Genius Results Limit** is set to 2 or greater and a search returns multiple Genius Result answ display in a carousel. You can scroll the carousel and select the answer card you want to take actio **Note:** Search applications display a maximum of 10 answer cards per search query. If you se the search application still displays a maximum of 10 answer cards. Starting with version 6 of ServiceNow Otto for AI Search, installing ServiceNow® Otto for AI Search field default to 10 instead of 1 when you create a search application configuration or edit an existin
Attachment Limit	Maximum number of grouped attachments to display by default on a parent search result when at specified in **Show parent for results that are attachments**. Attachments beyond this limit are hidden by default and only shown when you select **Show more** result's attachments list. Type: integer Default value: 5 Supported values: 0 or positive
Enable Typo Handling	Option to auto-correct search query terms to match terms found in the search profile's typo handli appears only when you select **AI Search** as the application's search engine. For more details on typo handling auto-correction configuration and behavior, see Typo handling. Type: true | false Supported values: • *true*: Auto-correct search query terms in the search application. • *false*: Don't auto-correct search query terms in the search application.
Enable Exact Match	Option to use exact matching in the search application. When this option is selected, if a search result's **Number** field exactly matches the search, the app record or document associated with that search result, bypassing the search results page. Exact m any custom matchers defined for the search application.

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Search Application Configuration form (continued)

Field	Description
	Important: Exact match is not supported in portals. If you enable this option for a portal, us portal may experience navigation issues. Exact match behavior is controlled by the *com.snc.agent_workspace.global_search.typeahead.exact_match_reques* system property. This property's value is a Java regular expression pattern. Only search queries th expression pattern are evaluated as possible exact record matches. For details on Java regular ex see the Javadoc for the java.regex.util.Pattern class. Type: true | false Default value: true Supported values: • *true*: Use exact matching in the search application. • *false*: Don't use exact matching in the search application.
Show parent for results that are attachments	Option to display attachment search results inline with their parent results on the search applicati cleared, attachment search results display separately from their parent results. For more details on the effects of attachment grouping, see Grouping attachment search results w results. Type: true | false Default value: true Supported values: • *true*: Group attachment search results inline with their parent results in the search application • *false*: Display attachment search results separately from their parent results in the search app
Filter Genius Results by tab	Option to filter Genius Result searches based on the selected source facet bucket. In a search application that has this option enabled, when you select a source from the applicatio Result searches honor the source filter and so can only return results from the selected source. Th Genius Result configurations that include information from the selected source can generate Geni the search application. Genius Result configurations that don't include information from the select any search results and thus can't generate Genius Result answers. As an example, suppose you select the Knowledge source facet bucket in a search application tha selected. With that Knowledge source selection applied, Q&A Genius Results, which include infor Knowledge source, can still find search results and generate Genius Result answers. But Catalog I which include information from the Catalog Item source which isn't selected, can't find search resu generate Genius Result answers. **Note:** The Summary Genius Results configuration (from the ServiceNow Otto for AI Search S application) includes information from multiple sources, so it can generate Genius Result answ source is selected. To learn more about Summary Genius Results, see Summary Genius Resu
Show Search Results Count	Option to display search result counts for facets on the search application's results page. For more details on this option, see Show search result counts for facets on the results page for a Type: true | false

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Search Application Configuration form (continued)

Field	Description
	Default value: true Supported values: • *true*: Display search result counts for facets on the search application's results page. • *false*: Don't display search result counts for facets on the search application's results page.

Search Profile form

The Search Profile form enables you to create a search profile for use in AI Search applications.

For details on creating or editing search profiles, see Create a search profile.

Search Profile form

Field	Description
Label	Label for the search profile.
Description	Text description for the search profile.
Application	Application scope for the search profile. This field is automatically set.
Updated	Last update date for the search profile. This field is automatically set.
Updated by	User who most recently updated the search profile. This field is automatically set.
Active	Option to activate the search profile.
State	State of the search profile. • **New**: The search profile has never been published. • **Draft**: The search profile is saved with unpublished changes. • **Published**: The search profile is saved with all changes published.

Search Profile - Dictionary Mapping form

The Search Profile - Dictionary Mapping form enables you to link a stop word or synonym dictionary to a search profile in AI Search.

For details on linking stop word and synonym dictionaries to your search profiles, see Link a stop word dictionary to a search profile and Link a synonym dictionary to a search profile.

AI Search Profile Dictionary M2M form

Field	Description
Dictionary	The stop word or synonym dictionary that you want to link to the selected search profile.
Application	Application scope for the dictionary mapping record. This field is automatically set.
Profile	The search profile that you want to link the selected stop word or synonym dictionary to. This field is automatically set to the profile that you edited.

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Search Profile - Genius Result Mapping form

The Search Profile - Genius Result Mapping form enables you to link a Genius Result configuration to a search profile in AI Search.

For details on linking Genius Result configurations to your search profiles, see Link a Genius Result configuration to a search profile.

Search Profile - Genius Result Mapping form

Field	Description
Profile	The search profile to link the Genius Result configuration to. This field is automatically set to the profile that you edited.
Genius Result Configuration	The Genius Result configuration to link to the specified search profile.
Order	Order of evaluation for the Genius Result configuration in the context of the search profile.
Application	Application scope for the Genius Result configuration mapping record. This field is automatically set.

Search Profile - Search Source Mapping form

The Search Profile - Search Source Mapping form enables you to link a search source to a search profile in AI Search.

For details on linking search sources to your search profiles, see Link a search source to a search profile.

Search Profile - Search Source Mapping form

Field	Description
Profile	The search profile that you want to link the search source to. This field is automatically set to the profile that you edited.
Search source	The search source that you want to link to the specified search profile.
Exclude in Regular Search	Option to exclude content from this search source when generating standard search results for searches that use the selected search profile.
Application	Application scope for the search source mapping record. This field is automatically set.
Exclude in Now Assist Genius Results	Option to exclude content from this search source when generating Genius Result answers for searches that use the selected search profile. This option applies to all Genius Results, not just ServiceNow Otto Genius Results.
Exclude Attachments in Now Assist Genius Results	Option to exclude attachments from this search source when generating Genius Result answers for searches that use the selected search profile. If *`Exclude in ServiceNow Otto Genius Results`* is not selected, selecting this option has no effect. This option applies to all Genius Results, not just ServiceNow Otto Genius Results.

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Search Profile - Search Source Mapping form (continued)

Field	Description
	Note: Selecting this option has no effect on search sources created from external indexed sources (those that index external content). It only affects search sources created from internal indexed sources (those that index content from ServiceNow AI Platform® tables).

Search Scripted Post-processors form

The Search Scripted Post-processors form enables you to create a search scripted post-processor in the search application configuration for an AI Search application.

For details on creating or editing search scripted post-processors, see Using search scripted post-processors in AI Search application configurations.

Search Scripted Post-processors form

Field	Description
Active	Option to activate the search script post-processor.
Name	Name for the search script post-processor.
Application	Application scope for the search script post-processor. This field is automatically set.
Type	Type of record the search script post-processor operates on. Valid values: • *Genius Result*: Script operates on a Genius Result answer record. • *Search Result*: Script operates on a search result record.

Post processing script	Server-side script function that takes a record object as its parameter. When the search scripted post-processor is linked to a search application configuration, search results reflect changes made to the record object in this script function.
	As an example, this post-processing script function operates on search results from the kb_knowledge table, transforming sys_updated_on date field values into a human-readable format:
	`function process(record) {`
	`  var transformableTables = ['kb_knowledge'];`
	`  var transformableDateFields = ['sys_updated_on'];`
	`  var table = record.getTable();`
	`  // Terminate early if possible, to avoid unnecessary overhead`
	`  if (transformableTables.indexOf(table) === -1)`
	`  return;`
	`  function transformToHumanFriendlyDate(rawDate) {`
	`  // Time gaps in ms`
	`  var MINUTE_GAP = 60000;`
	`  var HOUR_GAP = 3600000;`

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Search Scripted Post-processors form (continued)

Field	Description

```
        var DAY_GAP = 86400000;
        var WEEK_GAP = 604800000;
        var MONTH_GAP = 2592000000;
        var YEAR_GAP = 31536000000;

        var gap = new Date().getTime() - rawDate;
        if (gap < MINUTE_GAP) {
            return gs.getMessage('Just Now');
        } else if (gap > MINUTE_GAP && gap < 2 *
MINUTE_GAP) {
            return gs.getMessage('1 minute ago');
        } else if (gap < HOUR_GAP) {
            return gs.getMessage('{0} minutes ago', ''
+ Math.floor(gap / MINUTE_GAP));
        } else if (gap > HOUR_GAP && gap < 2 *
HOUR_GAP) {
            return gs.getMessage('1 hour ago');
        } else if (gap < DAY_GAP) {
            return gs.getMessage('{0} hours ago', '' +
Math.floor(gap / HOUR_GAP));
        } else if (gap > DAY_GAP && gap < 2 * DAY_GAP)
{
            return gs.getMessage('1 day ago');
        } else if (gap < WEEK_GAP) {
            return gs.getMessage('{0} days ago', '' +
Math.floor(gap / DAY_GAP));
        } else if (gap > WEEK_GAP && gap < 2 *
WEEK_GAP) {
            return gs.getMessage('1 week ago');
        } else if (gap < MONTH_GAP) {
            return gs.getMessage('{0} weeks ago', '' +
Math.floor(gap / WEEK_GAP));
        } else if (gap > MONTH_GAP && gap < 2 *
MONTH_GAP) {
            return gs.getMessage('1 month ago');
        } else if (gap < YEAR_GAP) {
            return gs.getMessage('{0} months ago', ''
+ Math.floor(gap / MONTH_GAP));
        } else if (gap > YEAR_GAP && gap < 2 *
YEAR_GAP) {
            return gs.getMessage('1 year ago');
        } else {
            return gs.getMessage('{0} years ago', '' +
Math.floor(gap / YEAR_GAP));
        }
    }

    for (var i = 0; i <
transformableDateFields.length; i++) {
        var fieldName = transformableDateFields[i];
        var updatedDateField =
record.getField(fieldName);
        if (updatedDateField !== null) {
```

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Search Scripted Post-processors form (continued)

Field	Description

	``
	            var updatedDateRaw =
	updatedDateField.getValue();
	            if (updatedDateRaw != null) {
	                var humanFriendlyDate =
	transformToHumanFriendlyDate(updatedDateRaw);
	
	updatedDateField.setDisplayValue(humanFriendlyDate);
	            }
	        }
	    }
	}
	``
	
	Note: The UI displays an overview of API methods usable in the post-processing script function.
	
	You can copy code from an existing post-processor script to use as a starting point for your own script function. To access existing post-processor scripts, open the Search Scripted Post-processors [sys_search_scripted_processor] table in list view by following these steps:
	
	1. Select **All**.
	
	2. In the Filter field, enter `sys_search_scripted_processor.list`.
	
	3. Press Enter.

Search Source form

The Search Source form enables you to create a search source that you can make available in AI Search user search experiences.

For details on creating or editing search sources, see Create a search source for AI Search.

AI Search Source form

Field	Description
Name	Name for the search source.
Indexed source	Reference to an indexed source. For more details on indexed sources, see Indexed sources in AI Search.
Conditions	Set of filter conditions that documents from the indexed source must meet to be included in the search source. For more details on filter conditions, see Filters.

Semantic Index Configuration form

The Semantic Index Configuration form enables you to define semantic indexing settings for an AI Search indexed source.

For details on defining and modifying semantic indexing settings for an indexed source, see Configure semantic indexing settings for an indexed source.

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Note: This form is only available when the AI Search Semantic Controller plugin (com.glide.ais.semantic_search) is active on your instance. To activate this plugin, your instance must have at least one ServiceNow Otto® application installed.

Semantic Index Configuration form

Field	Description
Name	Unique name for the semantic index generated by this semantic index configuration. As an example, if you're creating a semantic index configuration for the Knowledge Table indexed source, you might name it `Knowledge-Table-semantic-index`. **Note:** The semantic index's name can't contain special characters, underscores, or whitespace.
Embedding Models	List of embedding models to use for the semantic index configuration. • Default value: *`ServiceNow Embedding (E5)`* • Supported values: ○ *`ServiceNow Embedding (E5)`*: Use the E5 fine-tuned embedding model for content in the semantic index. The embedding model's encoder limit is 512 terms. ○ Azure OpenAI Embedding: Use the Azure OpenAI fine-tuned embedding model for content in the semantic index. For more information, see Configuring your embedding model. ○ Google Gemini Embedding: Use the Google Gemini fine-tuned embedding model for content in the semantic index. For more information, see Configuring your embedding model. ○ Custom Embedding: Use the custom fine-tuned embedding model for content in the semantic index. For more information, see Configuring bring your own model (BYOM).
Active	Option to make the semantic index configuration active for your instance. AI Search ignores inactive semantic index configurations when indexing content from the specified index source.
Indexed Source	Reference to the AI Search indexed source that you want to apply this semantic index configuration to. This field is automatically set. For more details on indexed sources, see Indexed sources in AI Search.
Application	Application scope for the semantic index configuration record. This field is automatically set.
Chunking Configuration For Embedding	
Chunking Strategy	Strategy to use when chunking semantically indexed text for the embedding model. • Default value: *`Passage`* • Supported values:

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Semantic Index Configuration form (continued)

Field	Description
	○ *Passage*: Chunking strategy for longer text field values. Index text from semantic field values in chunks. Each chunk contains a maximum number of words or sentences determined by your *Chunk Unit* and *Chunk Size* selections. ○ *Truncate*: Chunking strategy for short text field values. Concatenate all semantic index field values, then perform semantic indexing for terms up to the *Maximum Total Words* limit. ○ *Full Text*: Chunking strategy for short text field values. Concatenate all semantic index fields, then perform semantic indexing for all terms up to the embedding model's encoder limit. • Type: choice list
Overlap Sentences	Number of sentences to overlap between chunks when indexing text from semantic index field values. Higher overlap values increase recall for semantic vector search at the expense of performance. This field appears only when *Passage* is selected from *Chunking Strategy*. • Default value: 5 • Supported values: Any non-negative integer • Type: integer
Chunk Unit	Textual unit to use as the basis for chunk size when indexing semantic field values for semantic vector search. This field appears only when *Passage* is selected from *Chunking Strategy*. • Default value: *Words* • Supported values: ○ *Words*: Use words as the textual unit by which semantic index field values are chunked. Each chunk can include up to *Chunk Size* words. ○ *Sentences*: Use sentences as the textual unit by which semantic index field values are chunked. Each chunk can include up to *Chunk Size* sentences. • Type: choice list
Chunk Size	Maximum number of words or sentences (depending on your *Chunk Unit* selection) to include in a chunk when indexing semantic field values for semantic vector search. This field appears only when *Passage* is selected from *Chunking Strategy*. • Default value: 250 when *Words* is selected from *Chunk Unit*, or 15 when *Sentences* is selected from *Chunk Unit* • Supported values: Any non-negative integer • Type: integer
Maximum Total Words	Maximum number of words to index for semantic vector search from the concatenated values of all semantic index fields.

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Semantic Index Configuration form (continued)

Field	Description
	This field appears only when *Truncate* is selected from *Chunking Strategy*. • Default value: 500 • Supported values: Any non-negative integer • Type: integer

Semantic Index Field form

The Semantic Index Field form enables you to define a semantic index field for use in an AI Search semantic index configuration.

To learn about defining and modifying semantic indexing settings for an indexed source, see Configure semantic indexing settings for an indexed source. For details on semantic index configuration fields, see Semantic Index Configuration form.

Note: This form is only available when the AI Search Semantic Controller plugin (com.glide.ais.semantic_search) is active on your instance. To activate this plugin, your instance must have at least one ServiceNow Otto® application installed.

Semantic Index Field form

Field	Description
Semantic Index Name	The name of the semantic index defined in the semantic index field's parent semantic index configuration. This field is automatically set.
Source	ServiceNow AI Platform® source table whose value you want to include in the semantic index.
Type	Type of object to index for semantic vector search. • Default value: *Field* • Supported values: ○ *Field*: Field from the ServiceNow AI Platform source table specified by your *Source* selection. ○ *Attachment*: Attachments from the ServiceNow AI Platform source table specified by your *Source* selection. • Type: choice list
Application	Application scope for the semantic index field record. This field is automatically set.
Order	Order of concatenation for this field's value relative to the values of other semantic index fields defined in the same semantic index configuration. Fields with lower values appear first in the concatenation. This field's value is only meaningful when *Truncate* or *Full Text* is selected from *Chunking Strategy* for the semantic index field's parent semantic index configuration.

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Semantic Index Field form (continued)

Field	Description
	• Supported values: Any positive integer • Type: integer
Field	Name of the source table field to include in the semantic index. This field's value will be handled according to the parent semantic index configuration's specified *Chunking configuration for embedding* settings. This field is automatically set to *attachment_body* when *Attachment* is selected from *Type*.

Sort Option form

The Sort Option form enables you to create a search result sort option in the search application configuration for an AI Search application.

For details on creating or editing search result sort options, see Search result sort options in AI Search application configurations.

Sort Option form

Field	Description
Label	Label displayed for the search result sort option in the search application's sort menu.
Sort Field	Name of a source table field or common index field that the sort option uses to sort search results. The sort field can be a date, number, or string field. **Note:** If you specify a sort field of an unsupported type, an error message appears when you attempt to save the sort option. Supports the following formats: **Qualified `[indexed_source_table_name].[field_name]` entry** Sort search results on their values from the specified table's field. For example, enter `kb_knowledge.author` to sort search results by their Author field values. **Note:** The parent search application configuration's linked search profile must include a search source derived from the specified indexed source table. If this condition isn't met, an error message appears when you attempt to save the sort option. **Unqualified common index field name** Sort search results on their values from the specified common AI Search index field. For example, enter `title` to sort search results based on their titles, or `language` to sort search results based on their language.

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Sort Option form (continued)

Field	Description
	The `[indexed_source_table_name]` qualifier must be the name of a table specified in an indexed source. Don't specify indexed source child table names for this qualifier. Special cases include: **Sorting on parent table fields** If you specify an indexed source parent table's field in a sort option, AI Search includes values from the same field on child tables from the indexed source. For example, suppose you create an indexed source for custom table Parent [u_parent] which is extended by custom table Child [u_child], and then specify `u_parent.author` as the field for a sort option. When a user applies the sort option, AI Search uses both `u_parent.author` and `u_child.author` field values to sort the search result list. **Sorting on child table fields** You can specify a field that's unique to an indexed source's child table as a sort option field. Continuing the previous example, if your Child [u_child] table includes an **Editor** field that's not present on the Parent [u_parent] table, you can define `u_parent.editor` as a sort option field to sort search result s using this field's values. **Note:** Be sure to specify the parent table's name as the qualifier, not the child table's name.
Application	Application scope for the search result sort option. This field is automatically set.
Ascending	Option to make the search result sort option display results in ascending order (a to z). Clear this option to make the search result sort option display results in descending order (z to a).
Active	Option to activate the search result sort option for use in the search application.

Suggestion Reader Group form

The Suggestion Reader Group form enables you to modify settings for an auto-complete suggestion type in the search application configuration for an AI Search application.

For details on configuring auto-complete suggestions in AI Search applications, see Auto-complete suggestions in AI Search applications.

Suggestion Reader Group form

Field	Description
Suggestion Type	Application-specific name for the auto-complete suggestion type. This field is automatically set.
Section Header	Header displayed in the application search field for auto-complete suggestions of this type.

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Suggestion Reader Group form (continued)

Field	Description
Application	Application scope for the auto-complete suggestion type. This field is automatically set.
Order	Order of appearance in the application search field for the section containing auto-complete suggestions of this type. The system uses this field to determine display order when a search application configuration includes multiple suggestion types with the same **Click-in Mode** setting.
Suggestion Limit	Maximum number of auto-complete suggestions of this type that the application should display in the search field.
Click-in Mode	Option to control the display of the section containing auto-complete suggestions of this type. • If selected, auto-complete suggestions of this type are displayed when the user first selects the empty application search field. • If deselected, auto-complete suggestions of this type are displayed as the user enters search query terms into the application search field. **Note:** A search application configuration can't link to multiple search suggestion types that include the same reader and have the same click-in mode. If you try to link a second suggestion type with the same reader and click-in mode to a search application configuration, the system displays an error message.

Extending AI Search with ServiceNow Store applications and integrations

Applications and integrations from the ServiceNow® Store extend AI Search functionality and provide insight into search usage and behavior.

AI Search spoke

This Integration Hub spoke enables storage of document data from third-party applications in the AI Search index using Workflow Studio. Users can access the indexed data through portals that have AI Search enabled.

Platform Analytics Solution for Advanced AI Search Management Tools

This Platform Analytics Solution helps AI Search administrators analyze search query traffic trends, review indexed record and configuration settings, and preview search query results.

AI Search for Next Experience

The AI Search for Next Experience ServiceNow® Store application enables administrators to configure AI Search as the search engine for Unified Navigation searches in Next Experience, including global search and configurable workspace search.

ServiceNow Otto for AI Search

The ServiceNow Otto for AI Search ServiceNow® Store application combines the power of search with a large language model (LLM) to answer questions in user searches with actionable AI-generated summaries of relevant knowledge articles.

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AI Search for Next Experience

This ServiceNow® Store application enables administrators to configure AI Search as the search engine for Unified Navigation searches in Next Experience, including global search and configurable workspace search.

AI Search for Next Experience is automatically installed and enabled in the Brazil release, so you don't need to perform the initial migration and enablement configuration steps. To add new Unified Navigation workspace search configurations later, see Add a new Unified Navigation workspace search configuration to AI Search for Next Experience.

To learn about how global search and configurable workspace search work when AI Search for Next Experience is enabled, see Using global search with AI Search for Next Experience.

Install AI Search for Next Experience

Install the AI Search for Next Experience application from the ServiceNow® Store.

Before you begin

If your instance was zBooted in Brazil, the AI Search for Next Experience application is already installed. You only need to install the application if you upgraded your instance from Tokyo or a previous release.

- 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

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the AI Search for Next Experience application (sn_aisearch_global) 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. Select **Install**.

What to do next

With the plugin installed, you can walk through Guided Setup tasks to enable AI Search as the search engine for the Unified Navigation search field in Next Experience. To get started with Guided Setup, see Verify that your instance meets the prerequisites for AI Search for Next Experience.

Configuring AI Search for Next Experience

Use a Guided Setup module to step through configuration of search application settings and enablement of AI Search for Next Experience on your instance.

The *Guided Setup* **for Zing to** *AI Search* **Migration** module walks you through the following configuration steps:

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1. Verifying that your instance satisfies the prerequisites for AI Search for Next Experience.
2. Migrating your existing Zing search application configurations for use with AI Search.
3. Enabling AI Search for Next Experience on your instance. This step makes AI Search the search engine for global and workspace searches in the Unified Navigation search field.

After you've enabled AI Search for Next Experience, you can use the Guided Setup module at any time to perform either of these tasks:

- Enable AI Search for a newly installed workspace by adding its search application configuration into AI Search for Next Experience.
- Revert to using Zing as the search engine for the Unified Navigation search field by disabling AI Search for Next Experience.

Verify that your instance meets the prerequisites for AI Search for Next Experience

Walk through Guided Setup tasks to confirm that your instance meets the requirements for AI Search for Next Experience.

Before you begin

The AI Search for Next Experience ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install AI Search for Next Experience.

Role required: ais_admin

About this task

The **Prerequisites** Guided Setup tasks walk you through verifying that your instance can use AI Search for Next Experience. Complete these tasks before you begin migrating your Zing search application configurations.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **for** *Next Experience* > *Guided Setup* **for Zing to** *AI Search* **Migration**.
2. Select **Get Started**.
3. In the **Prerequisites** category, select **Get Started**.
4. Confirm that AI Search is provisioned and enabled on your instance.

   a. In the **Confirm that** *AI Search* **is enabled** task, select **Configure**.
   A modal window reports whether AI Search is provisioned and enabled on your instance.

   b. If the window reports *AI Search* **is ready**, select **Close**, then select **Mark as Complete** for the **Confirm that** *AI Search* **is enabled** task.

   c. If the window reports any other status, select **Close**, then repeat this task after AI Search is provisioned and enabled on your instance.

5. Confirm that Next Experience is enabled on your instance.

   a. In the **Confirm that** *Next Experience* **is Enabled** task, select **Configure**.
   A modal window reports whether Next Experience is enabled on your instance.

   b. If the system reports *Next Experience* **is enabled**, select **Close**, then select **Mark as Complete** for the **Confirm that** *Next Experience* **is Enabled** task.

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c. If the system reports any other enablement status, ask your administrator to enable Next Experience on your instance, then repeat this task after it's enabled.

   For details on enabling Next Experience, see Enable Next Experience.

6. Index content and metadata for AI Search indexed sources used in global search.

   a. In the **Index searchable content and metadata for global search sources** task, select **Configure**.
   The AI Search Indexed Sources list opens in a new browser tab.

   b. Select all indexed sources marked with the alert triangle icon ⚠, then index their content by selecting **Actions on selected rows...** > **Index All Tables**.

   For more information on indexing tables from multiple indexed sources, see Perform a full table index or reindex for multiple AI Search indexed sources.

   c. When indexing is complete, close the browser tab and return to the **Prerequisites** Guided Setup category tab.

   d. Select **Mark as Complete** for the **Index searchable content and metadata for global search sources** task.

7. When all three **Prerequisites** tasks are marked as complete, select the Back icon < to return to the top-level *Guided Setup* **for Zing to** *AI Search* **Migration** page.

What to do next

Now that you've satisfied the prerequisites, it's time to migrate your existing Zing search application configurations for use with AI Search. For details on this procedure, see Migrate Zing search application configurations to AI Search.

Migrate Zing search application configurations to AI Search

Walk through a Guided Setup task to migrate your existing Zing search application configurations to AI Search application configurations.

Before you begin

The AI Search for Next Experience ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install AI Search for Next Experience.

You must have already completed the **Prerequisites** Guided Setup tasks. For details on completing these tasks, see Verify that your instance meets the prerequisites for AI Search for Next Experience.

Role required: ais_admin

About this task

The base system includes Zing search application configurations for global search and some workspaces. To use AI Search for Next Experience, you need AI Search configurations for these search applications.

You can create the new AI Search application configurations you need by migrating settings from your existing Zing search application configurations. The **Convert Zing search applications** Guided Setup task walks you through this procedure.

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Note: When you migrate a Zing search application configuration, the system creates a new search application configuration for use with AI Search. This procedure doesn't delete or change your original Zing search application configuration.

Migration of a Zing search application configuration to AI Search includes these steps:

1. The migration tool analyzes your selected Zing search application configuration and determines what record changes in ServiceNow AI Platform® tables are needed to replicate its settings in a new AI Search application configuration.
2. You accept the proposed migration changes for review, and then commit them to make the required record changes in ServiceNow AI Platform tables.
3. You index content and metadata from any new indexed sources that the migration job created.

For more information on AI Search application configurations, see Search application configurations. To learn more about indexing content and metadata from AI Search indexed sources, see Indexed sources in AI Search.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **for** *Next Experience* > *Guided Setup* **for Zing to** *AI Search* **Migration**.
2. In the **Convert Zing search applications** category, select **Get Started**.
3. In the **Migrate settings for a** *Next Experience* **search application** task, open the Zing to AI Search Migration Job form by selecting **Configure**.
   A modal window shows a list of Zing search application configurations and their migration status. Custom search application names are only translated to your session language if you've created appropriate Message [sys_ui_message] table records for them. For details on translating message strings by creating Message table records, see Translate a client script message.
4. Close the modal list of Zing search application configurations.

   Note: You can reopen the list of Zing search application configurations at any time by selecting the **View Search Application Migration Status** related link.

5. For each Zing search application configuration with **Needs migration** status, migrate the search application configuration to AI Search.

   a. In the **Search Application Configuration** field, use the Lookup using list icon to select the Zing search application configuration that you want to migrate to AI Search.

      Note: Only Zing search application configurations with **Needs migration** status are available for selection. Application configurations with **Migrated** status already have corresponding AI Search application configurations.

   b. **Optional:** To have the system send email notifications to users when indexing of content for the migration job starts and completes, add those users to the watch list.

      Note: The system automatically adds the current user to the watch list when a migration job is created or updated.

   c. Select **Start Migration**.
      The migration tool converts the Zing search application configuration for use with AI Search, and the migration job's state changes from **Pending Conversion** to **Configuration Converted**.

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d. Select **Accept All Changes**.
The system displays proposed changes to system tables in the Changes to Review related list.

e. Select **Commit Changes**.
The system commits the changes to system tables shown in the Changes to Review related list, and the migration job's state changes to **Configuration Committed**.

f. Select **Index Searchable Content**.
AI Search indexes content and metadata for new indexed sources created by the migration job. When indexing completes, the job's state changes to **Indexing Complete** and the modal window with the list of Zing search application configurations reopens.

6. When all Zing search application configurations in the modal list show **Migrated** status, close the browser tab and return to the **Convert Zing search applications** Guided Setup category tab, then select the Back icon < to return to the top-level *Guided Setup* **for Zing to** *AI Search* **Migration** page.

What to do next

Now that you've got AI Search application configurations for global search and your workspaces, it's time to enable AI Search for Next Experience on your instance. For details on this procedure, see Enable AI Search for Next Experience.

Enable AI Search for Next Experience

Walk through a Guided Setup task to configure AI Search as the search engine for global and workspace searches from the Unified Navigation search field.

Before you begin

The AI Search for Next Experience ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install AI Search for Next Experience.

You must have already completed the **Convert Zing search applications** Guided Setup task. For details on completing this task, see Migrate Zing search application configurations to AI Search.

Role required: ais_admin

About this task

The **Activate** *AI Search* **for all** *Next Experience* **search applications** Guided Setup task walks you through enabling the AI Search for Next Experience application.

After you enable the application, Next Experience search applications use AI Search instead of Zing. Each search application uses the specific settings defined in its search application configuration.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **for** *Next Experience* > *Guided Setup* **for Zing to** *AI Search* **Migration**.
2. In the **Complete migration to** *AI Search* category, select **Get Started**.
3. In the **Activate** *AI Search* **for all** *Next Experience* **search applications** task, select **Configure**.
A modal window reports whether AI Search for Next Experience is enabled on your instance.

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4. If the system reports *AI Search* **for** *Next Experience* **is disabled**, select **Enable** *AI Search* **for** *Next Experience*.

   Note: If AI Search for Next Experience is already enabled, ensure that all migrated search application configurations are activated by disabling the application and then re-enabling it.

5. When the system reports *AI Search* **for** *Next Experience* **is enabled**, select **Close**, then select **Mark as Complete** for the **Activate** *AI Search* **for all** *Next Experience* **search applications** task.

Result
The system uses AI Search as the search engine for global search and Next Experience workspace application searches issued from the Unified Navigation search field.

What to do next
Notify all users of your instance about the following details.

- Users need to log out and back in before they can use AI Search for Next Experience.
- After you enable AI Search for Next Experience, only workspace applications that use AI Search as their search engine appear in the Unified Navigation search context menu. To search from workspace applications that use the Zing text indexing and search engine, you must navigate to the workspace instead of using the Unified Navigation search context menu.

Add a new Unified Navigation workspace search configuration to AI Search for Next Experience

Enable Unified Navigation search for newly installed workspaces in AI Search for Next Experience.

Before you begin
The AI Search for Next Experience ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install AI Search for Next Experience.

You must have already enabled AI Search for Next Experience on your instance. For details on this procedure, see Enable AI Search for Next Experience.

Role required: ais_admin

About this task
When a new workspace application that includes a search application configuration is installed on your instance, you can enable search for the workspace in AI Search for Next Experience by following this procedure.

Procedure
1. Navigate to **All** > *AI Search* > *AI Search* **for** *Next Experience* > *Guided Setup* **for Zing to** *AI Search* **Migration**.
2. In the **Post-Migration Actions** category, select **Get Started**.
3. In the **When a new** *Next Experience* **workspace has been added to your instance** task, open the Zing to AI Search Migration Job form by selecting the **migration tool** link.
   A modal window shows a list of Zing search application configurations and their migration status.
4. If the new workspace's search application configuration shows **Migrated** status, reindex its associated content and publish its search profiles and dictionaries.

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a. Repeat the **Index searchable content and metadata for global search sources** task in the **Prerequisites** Guided Setup category.
For details on this procedure, see Verify that your instance meets the prerequisites for AI Search for Next Experience.

b. Publish all search profiles and dictionaries provided by the new workspace.
To learn how to publish search profiles, see Publish an AI Search search profile. For details on publishing stop word and synonym dictionaries, see Create stop words and Create synonyms.

5. If the new workspace's search application configuration shows **Needs migration** status, migrate it for use with AI Search.

a. Close the modal window.

> **Note:** You can reopen the list of Zing search application configurations at any time by selecting the **View Search Application Migration Status** related link.

b. In the **Search Application Configuration** field, use the Lookup using list icon to select the new Zing search application configuration.

> **Note:** Only Zing search application configurations with **Needs migration** status are available for selection. Application configurations with **Migrated** status already have corresponding AI Search application configurations.

c. **Optional:** To have the system send email notifications to users when indexing of content for the migration job starts and completes, add those users to the watch list.

> **Note:** The system automatically adds the current user to the watch list when a migration job is created or updated.

d. Select **Start Migration**.
The migration tool converts the Zing search application configuration for use with AI Search, and the migration job's state changes from **Pending Conversion** to **Configuration Converted**.

e. Select **Accept All Changes**.
The system displays proposed changes to system tables in the Changes to Review related list.

f. Select **Commit Changes**.
The system commits the changes to system tables shown in the Changes to Review related list, and the migration job's state changes to **Configuration Committed**.

g. Select **Index Searchable Content**.
AI Search indexes content and metadata for new indexed sources created by the migration job. When indexing completes, the job's state changes to **Indexing Complete** and the modal window with the list of Zing search application configurations reopens.

6. Refresh the list of search application configurations included in AI Search for Next Experience.

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a. Navigate to **All** > *AI Search* > *AI Search* **for** *Next Experience* > *Guided Setup* **for Zing to** *AI Search* **Migration**.

b. In the **Complete migration to** *AI Search* category, select **Edit**.

c. In the **Activate** *AI Search* **for all** *Next Experience* **search applications** task, select **Configure**.
A modal window reports whether AI Search for Next Experience is enabled on your instance.

d. Select **Refresh** *AI Search* **for** *Next Experience*.

Result
AI Search for Next Experience updates to include the new workspace application's search application configurations. The system uses AI Search as the search engine for workspace searches from the Unified Navigation search field.

What to do next
Notify all users of your instance that they need to log out and back in before they can use the new workspace search in AI Search for Next Experience.

Revert to Zing as the Unified Navigation search engine

Revert to using Zing text indexing and search engine for the Unified Navigation search field in Next Experience.

Before you begin
The AI Search for Next Experience ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install AI Search for Next Experience.

Role required: ais_admin

About this task
You can undo the configuration changes you made to enable AI Search for Next Experience. This may be for either of the following reasons:

- You prefer to use Zing text indexing and search engine for Unified Navigation in Next Experience.
- You plan to disable Next Experience and revert to the legacy UI. (The legacy UI only supports the Zing engine for global search and workspace search.)

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **for** *Next Experience* > *Guided Setup* **for Zing to** *AI Search* **Migration**.
2. In the **Complete migration to** *AI Search* category, select **Edit**.
3. In the **Activate** *AI Search* **for all** *Next Experience* **search applications** task, select **Configure**.
   A modal window reports the enablement status of AI Search for Next Experience on your instance.
4. If the system reports *AI Search* **for** *Next Experience* **is enabled**, select **Disable** *AI Search* **for** *Next Experience*.
5. When the system reports *AI Search* **for** *Next Experience* **is disabled**, select **Close**, then select **Mark as Incomplete** for the **Activate** *AI Search* **for all** *Next Experience* **search applications** task.

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Result
The system reverts to using Zing as the search engine for global search and Next Experience workspace application searches issued from the Unified Navigation search field.

What to do next
Notify all users of your instance that they need to log out and back in before they can use Zing search in the Unified Navigation search field.

Repair AI Search for Next Experience after activating a new ServiceNow AI Platform® language

Install translated search UI element labels for a newly activated ServiceNow AI Platform language by repairing the AI Search for Next Experience application.

Before you begin
You must have activated a new ServiceNow AI Platform language plugin after AI Search for Next Experience was installed in your instance. For details on activating language plugins, see Activate a language.

Role required: admin

About this task
At installation time, the AI Search for Next Experience application includes search UI element translations for all languages currently active in your ServiceNow AI Platform instance. These translations include language-specific labels for the Unified Navigation search field, source facet buckets, and other elements of the global search and configurable workspace search user interfaces.

If you activate a new ServiceNow AI Platform language plugin in an instance that already has AI Search for Next Experience installed, the application doesn't automatically update to include UI element translations for the newly added language. To install these translations, you can repair the AI Search for Next Experience application.

For more details on repairing applications, see Repair a ServiceNow application.

Procedure
1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Locate the AI Search for Next Experience and select its menu icon ⋮.
3. In the Activate Plugin dialog box, select **Repair**.

Result
The AI Search for Next Experience application and its dependencies are reinstalled. After reinstallation, the application includes search UI element translations for all languages activated in your ServiceNow AI Platform instance.

Enable search-based auto-complete suggestions in AI Search for Next Experience

Run a scheduled job to make search-based auto-complete suggestions available in AI Search for Next Experience.

Before you begin
The AI Search for Next Experience ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install AI Search for Next Experience.

Only perform this task if you installed AI Search for Next Experience 3.x on a San Diego instance that you then upgraded to Tokyo or a later release.

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Role required: admin

About this task

If you install AI Search for Next Experience 3.x on a San Diego instance and then upgrade to Tokyo or a later release, the new search-based auto-complete suggestion types introduced in Tokyo aren't automatically enabled in the **[AIS]** *Next Experience* **Search Configuration** search application configuration used by global search.

To enable the new search-based auto-complete suggestion types in AI Search for Next Experience and remove the legacy suggestion types that they replace, administrators can run a scheduled job.

Running the scheduled job adds these auto-complete suggestion types to the **[AIS]** *Next Experience* **Search Configuration** search application configuration, making them available for global search:

- Search-based Suggested Results Reader Group for [AIS] Next Experience Search Configuration
- User History Reader Group for [AIS] Next Experience Search Configuration

The scheduled job removes these two legacy auto-complete suggestion types from the **[AIS]** *Next Experience* **Search Configuration** search application configuration, making them unavailable for global search:

- Suggested Query Reader Group for [AIS] Next Experience Search Configuration
- Suggested Result Reader Group for [AIS] Next Experience Search Configuration

To learn more about auto-complete suggestion types in AIS applications, see Auto-complete suggestions in AI Search applications.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the **Enable search-based suggestions** scheduled job record.
3. Select **Execute Now**.

Result

The scheduled job adds these auto-complete suggestion types to the **[AIS]** *Next Experience* **Search Configuration** search application configuration:

- Search-based Suggested Results Reader Group for [AIS] Next Experience Search Configuration
- User History Reader Group for [AIS] Next Experience Search Configuration

The scheduled job removes these auto-complete suggestion types from the **[AIS]** *Next Experience* **Search Configuration** search application configuration:

- Suggested Query Reader Group for [AIS] Next Experience Search Configuration
- Suggested Result Reader Group for [AIS] Next Experience Search Configuration

Global search uses the updated set of auto-complete suggestion types.

Using global search with AI Search for Next Experience

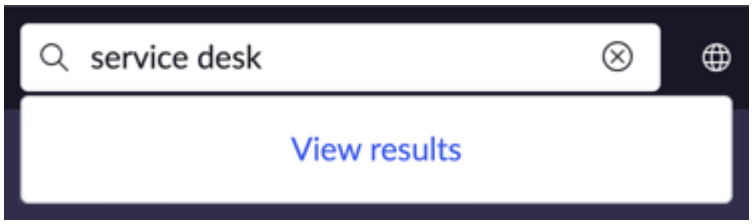
Global search enables you to search multiple record types at once from the Next Experience Unified Navigation search field. You can switch between global search results and results from workspace applications that you have access to.

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Search in the Unified Navigation search field

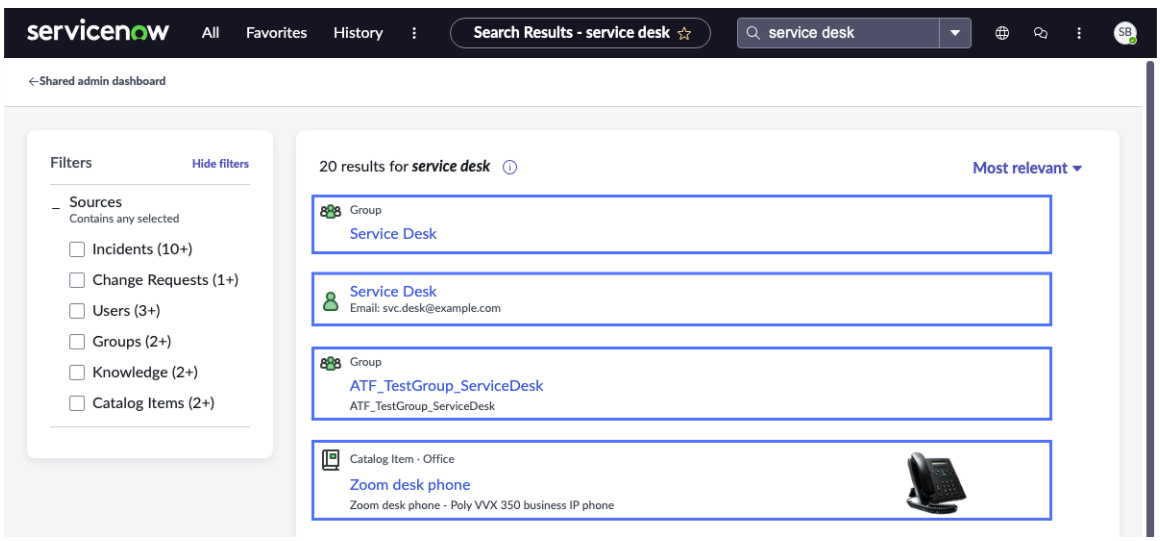
To use global search, enter your search query in the Unified Navigation search field, then select **View all results for "<search-query>"** or press Enter.





The search results page displays a list of previews for records that match your search query. You can open any search result record in a new browser tab by selecting its preview in the list. Your search remains open in your original browser tab, so you can return to it and refine it.

Note: AI Search administrators can configure search results to open in the same browser tab as the search. To make this change, edit the EVAM configuration bundle from the EVAM definition for the **[AIS] Next Experience Search Configuration** search application, setting the **forceNewTab** property to false in the relevant Search Result card EVAM view configurations. For more details on editing EVAM display settings for search results, see Configure EVAM display settings for search results in AI Search applications and List of Search Result EVAM card properties.



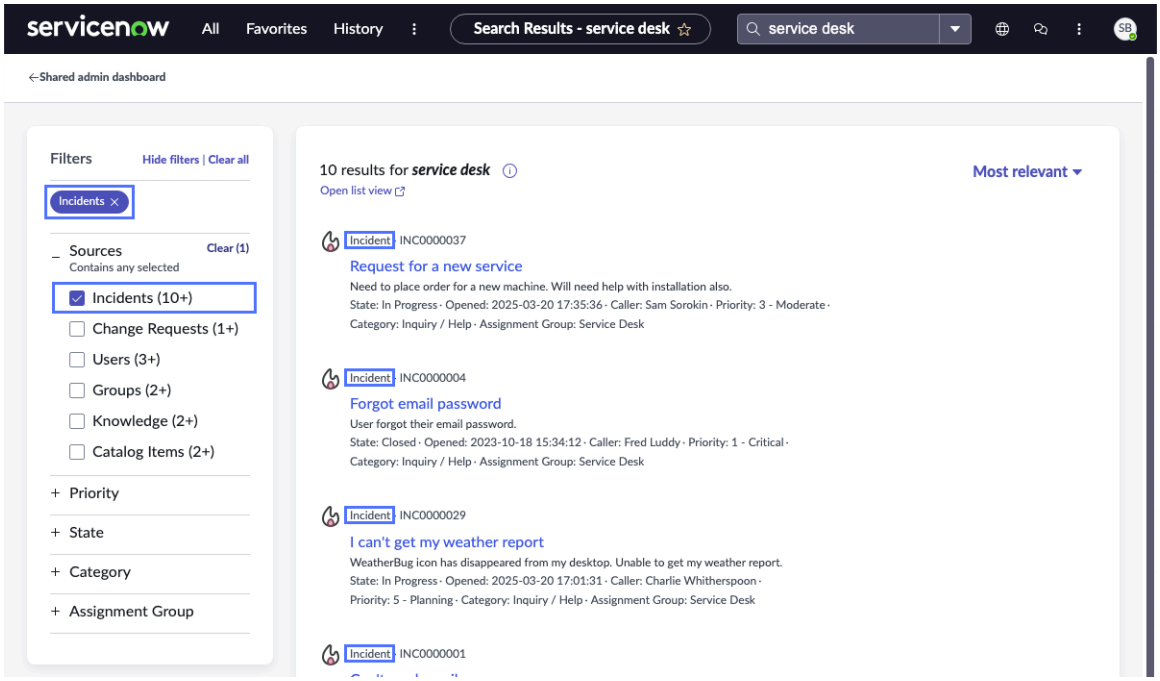
Note: When you search with a search query, the system only displays results for records included in the AI Search index. Search queries won't match records that have never been indexed or records that have been purged from the index by a retention policy. AI Search administrators can configure indexing and retention policy settings. For details on these settings, see Indexing content from AI Search indexed sources and Indexed source retention policies and filter conditions.

AI Search administrators can customize the index fields displayed on search result previews. For details, see the customization section found in this topic.

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Narrow your search by source on the search results page

You can narrow your search to display only results from a particular search source. When you select one or more of the search results page's source facet bucket options, the page shows only those matching records that come from the selected sources. To return to viewing matching records from all sources, clear the selected source facet bucket options or select **Clear** in the Sources list.



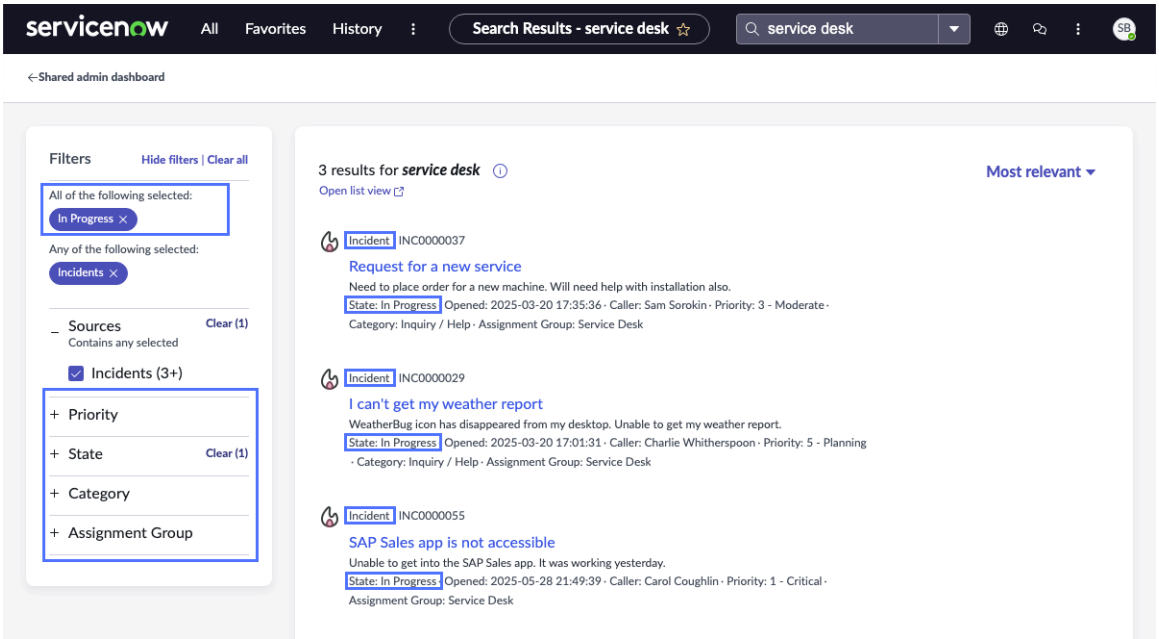
AI Search administrators can configure display settings for source facet buckets. For details, see Configure source facet buckets in an AI Search application configuration.

Narrow your search by field value on the search results page

After you select one or more source facet buckets, you may see a Filters list. Each facet filter in this list indicates a field from your selected search source(s). The filter displays the field's values that are found on one or more of your currently displayed search result records. When you select a facet filter value, your search narrows to show only those matching records that include the specified field value.

For example, suppose you select the **Incident** source facet bucket to view only Incident records that match your search query. The Filters list appears, displaying facet filters for Incident fields such as **Priority**, **State**, **Category**, and **Assignment Group**. Selecting the **In Progress** value from the **State** facet filter narrows your search to show only matching records for Incidents that are in progress.

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To remove an applied facet filter, select **Clear** by the facet field name, or **Clear all** to remove all applied filters at once. You can hide the Filters list by selecting **Hide filters**.

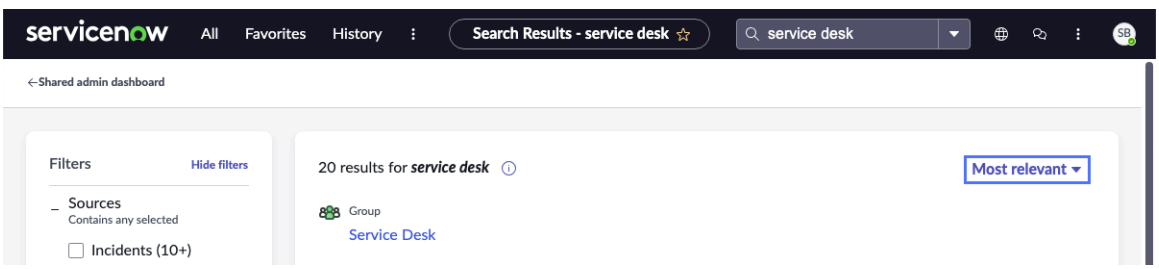
AI Search administrators can define facets in search application configurations. For details, see Create a facet in an AI Search application configuration.

In the base system, facets don't appear in the Filters list until you've selected a source facet bucket. Administrators can override this behavior and show all available facets in the Filters list by creating a *glide.ui.ais.show_all_facets* system property record and setting its value to *true*. For more details on this system property, see AI Search for Next Experience properties.

The Filters list defaults to displaying a count of matching search results for each facet bucket. Search administrators can configure this behavior in search application configurations. To learn more about result counts for facets, see Show search result counts for facets on the results page for a search application.

Sort your search results

By default, AI Search displays the most relevant search results first. To change the display order for records on the search results page, select a sort option from the sort menu.



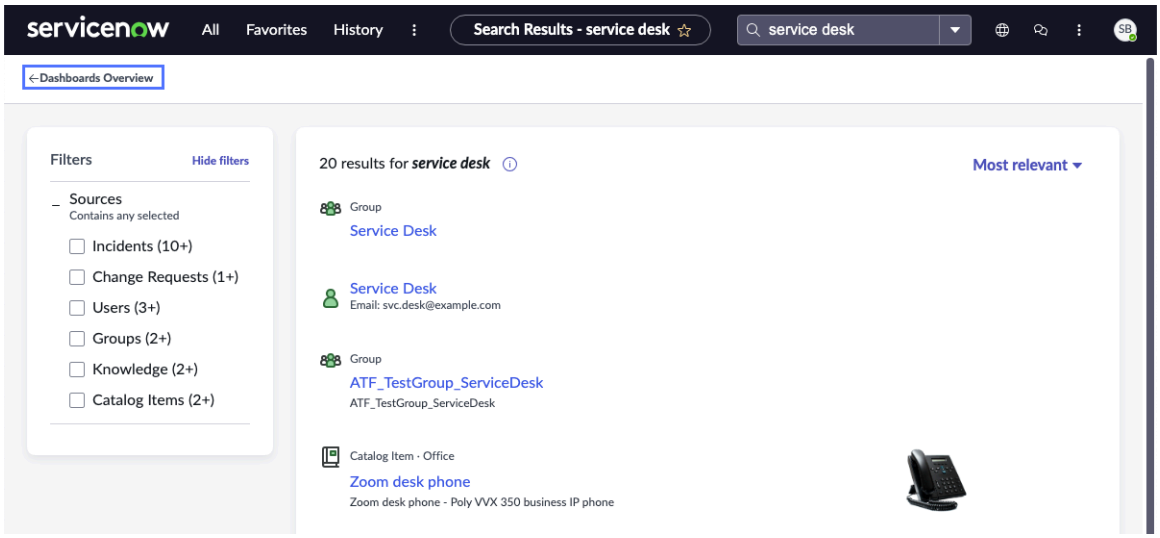
AI Search administrators can configure search result sort options. For details, see Search result sort options in AI Search application configurations.

Return to your starting point from the search results page

To return to the page where you initiated your search, select the link with a left arrow that appears above the source facet buckets on the search results page. The title of this link indicates the

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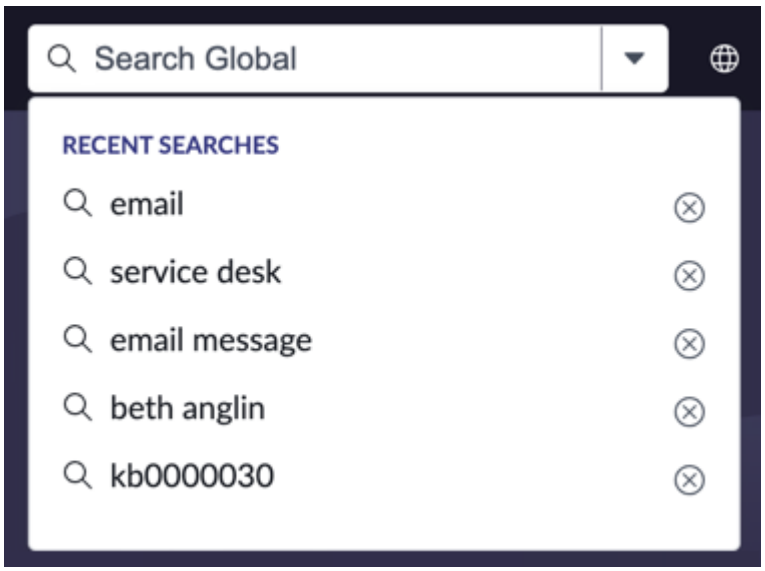
page it returns you to. For example, if you searched from the Home page, the link text would be **Home**, but if you searched from the Dashboards page, the link text would be **Dashboards Overview**.



Search suggestions in the Unified Navigation search field

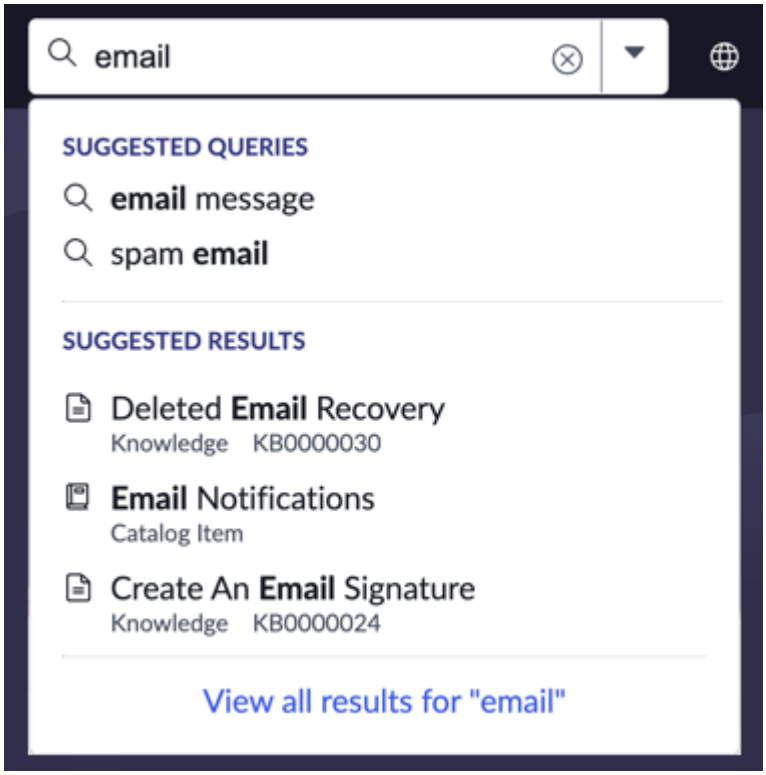
AI Search displays auto-complete suggestions to help you get directly to the results you need. Suggestions may include recent search queries, recently viewed search results, or search queries or results that match the terms you're typing into the search field.

Some suggestion types appear when you initially select the search field.



Other suggestion types appear when you begin typing your search query into the search field.

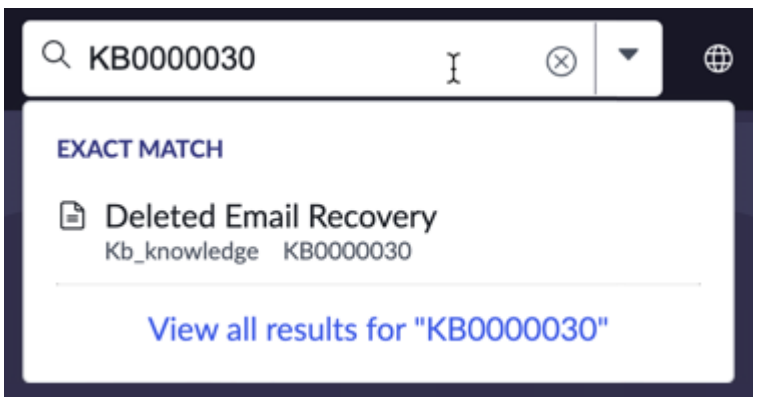
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AI Search administrators can configure auto-complete suggestions. For details, see Auto-complete suggestions in AI Search applications.

Search for a specific record using Exact Match

Enter a record number into the Unified Navigation search field but don't press Enter or select **View results**. The search field displays a preview of the record with an **Exact Match** tag. Select the preview to go directly to the matching record, bypassing the search results page.



Note: When you search for a record by number, the system displays the matching record regardless of whether it's included in the AI Search index or not.

Exact matching returns results from tables with a prefix defined in the Number [sys_number] table. If the search includes a single term that starts with the table's prefix, AI Search returns an exact match result from the table if one exists. As an example, searching for the single term `INC3263827` returns an exact match from the Incident [incident] table because the search term starts with the INC prefix defined for that table.

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If more than one record has a **Number** field value that exactly matches your search, AI Search displays the first exact match. An informational message reports the total number of exact matches and provides links to the other exact matches.

Search administrators can override the default exact match behavior by configuring custom search matchers. For details on this procedure, see Create a custom search matcher for global search.

View results for your search in an available workspace application

If you have access to search in workspace applications, an arrow appears at the right of the Unified Navigation search field after you search that enables you to switch between the results in global search and in your workspace applications.



For example, if the context menu in the illustration was available after you performed a global search, you could select **CSM/FSM Configurable Workspace** from the context menu to view results for the search in CSM/FSM Configurable Workspace.

Exact matches open in the selected workspace application. For example, if you selected **CSM/FSM Configurable Workspace**, entered a record number, and selected the record preview in the search results, the record would open in CSM/FSM Configurable Workspace.

Customize display fields for your search result previews

Search result previews display a default set of AI Search index fields. If you have the ais_admin role, you can customize the set of index fields a search result preview displays by modifying its EVAM view configuration. For information on EVAM view configurations, see Entity View Action Mapping.

When customizing a search result preview's EVAM view configuration, you can reference the AI Search index fields that exist on the previewed search result. To add a new AI Search index field to search results from an indexed source, define a *map_to* field setting. This field setting populates the index field on each affected search result with the value of a field you specify from the search result's source record or document. For an overview of mapping source fields to AI Search index fields, see Field settings for AI Search. To create a new *map_to* field setting for one of your indexed sources, see Create a field setting for an AI Search indexed source.

ServiceNow Otto® for Virtual Agent enhanced chat entry point

If ServiceNow Otto for Virtual Agent enhanced chat is activated in the ServiceNow Otto panel, the search field in global and workspace search displays a search icon and `Search or ask` ServiceNow Otto® placeholder text. When you enter search terms, the search field displays ServiceNow Otto suggestions. Selecting a ServiceNow Otto suggestion takes you to enhanced chat in the dynamic window.

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Note:

To see this enhanced chat entry point behavior, your instance must satisfy all of the following conditions:

- ServiceNow Otto for AI Search is installed.
- is installed.
- Enhanced chat is activated via the ServiceNow Otto panel. For details on activating enhanced chat, see Activate ServiceNow Otto panel enhanced chat.

If these conditions aren't satisfied, the search field in global and workspace search doesn't display the icon and placeholder text or show ServiceNow Otto suggestions.

To learn about ServiceNow Otto for Virtual Agent enhanced chat, see Enhanced chat.

AI Search for Next Experience reference

Reference information for the AI Search for Next Experience application.

Plugins installed with AI Search for Next Experience

Plugin	Description
AI Search for Next Experience (sn_aisearch_global)	Includes system and search configuration settings required to enable AI Search as the search engine for the Unified Navigation search field in Next Experience. • Search profile: Now Experience Search Configuration • Search application configuration: [AIS] Now Experience Search Configuration To learn more about search profiles and search application configurations, see Search profiles in AI Search and Search application configurations.
AI Search Index Sources (com.glide.ais.index_sources)	Includes indexed source definitions for ServiceNow AI Platform® tables beyond those provided with AI Search: • Catalog Task [sc_task] • Change [change_request] • Change Task [change_task] • Company [core_company] • Group [sys_user_group] • Incident [incident] • Location [cmn_location] • Problem [problem] • Request [sc_request] • Requested Item [sc_req_item] For more details on indexed sources, see Indexed sources in AI Search.

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System properties installed with AI Search for Next Experience

System property	Description
glide.ui.polaris.ais_ready	Option to enable AI Search as the search engine for the Unified Navigation search field in Next Experience. • Type: true | false • Default value: *false* • Supported values: ○ *true*: The system uses AI Search as the search engine for the Unified Navigation search field in Next Experience. ○ *false*: The system uses Zing indexing and text search as the search engine for the Unified Navigation search field in Next Experience. • Location: System Property [sys_properties] table

Search profiles installed with AI Search for Next Experience

Search profile	Description
Next Experience Search Configuration	Contains search experience settings for AI Search for Next Experience: • Search sources • Stop word dictionaries • Synonym dictionaries • Typo handling dictionaries • Result improvement rules • Genius Results For details on configuring these settings, see Search profiles in AI Search. • Application scope: AI Search For Next Experience • Location: **All** > *AI Search* > **Search Experience** > **Search Profiles**

Search application configurations installed with AI Search for Next Experience

Search application configuration	Description
[AIS] Next Experience	Contains search result display and refinement settings for AI Search for Next Experience:

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Search application configuration	Description
Search Configuration	• Source facet buckets • Facets • Auto-complete suggestions • Search scripted post-processors • Search result sort options For details on configuring these settings, see Search application configurations. • Application scope: AI Search For Next Experience • Location: **All** > *AI Search* > **Search Experience** > **Search Applications** **Note:** If you install AI Search for Next Experience 3.x on a San Diego instance and then upgrade to Tokyo or a later release, an informational message appears when you view the search application configuration record, pointing out that search-based auto-complete suggestion types aren't enabled for global search. To enable these auto-complete suggestion types for global search, see Enable search-based auto-complete suggestions in AI Search for Next Experience.

Entity View Action Mapper (EVAM) configurations installed with AI Search for Next Experience

Configuration	Description
AI Search Global | Catalog Genius Results	Contains view configuration settings for the Catalog Item Genius Result configuration in AI Search for Next Experience. To learn more about this Genius Result configuration, see Catalog Item Genius Results. • Application scope: AI Search For Next Experience • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Configurations**
AI Search Global | Q&A Genius Result	Contains view configuration settings for the Q&A Genius Result configuration in AI Search for Next Experience. To learn more about this Genius Result configuration, see Q&A Genius Results. • Application scope: AI Search For Next Experience • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Configurations**
AI Search Global | User Genius Results	Contains view configuration settings for the People Genius Result configuration in AI Search for Next Experience. To learn more about this Genius Result configuration, see People Genius Results.

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Configuration	Description
	• Application scope: AI Search For Next Experience • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Configurations**

Entity View Action Mapper (EVAM) templates installed with AI Search for Next Experience

Template	Description
AI Search Global | Catalog Genius Results Template	Contains component, static value, field mapping, and action mapping settings for the Catalog Item Genius Result configuration in AI Search for Next Experience. To learn more about this Genius Result configuration, see Catalog Item Genius Results. • Application scope: AI Search For Next Experience • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Templates**
AI Search Global | Q&A Genius Result Template	Contains component, static value, field mapping, and action mapping settings for the Q&A Genius Result configuration in AI Search for Next Experience. To learn more about this Genius Result configuration, see Q&A Genius Results. • Application scope: AI Search For Next Experience • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Templates**
AI Search Global | User Genius Results Template	Contains component, static value, field mapping, and action mapping settings for the People Genius Result configuration in AI Search for Next Experience. To learn more about this Genius Result configuration, see People Genius Results. • Application scope: AI Search For Next Experience • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Templates**

List of all components installed with AI Search for Next Experience

To view the complete list of components installed with AI Search for Next Experience, follow the steps described in Find components installed with an application. The application's package name is *`AI Search`* **For** *`Next Experience`*.

AI Search for Next Experience properties

A system property allows you to control whether facets are shown when no source is selected in global search and workspace search results pages.

This property is available for AI Search for Next Experience.

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

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Properties for AI Search for Next Experience

Property	Description
glide.ui.ais.show_all_facets	• Type: true | false • Default value: *false* • Supported values: ○ *true*: Show facets from all sources in the Filters list on global and workspace search results pages, even when no source is selected. ○ *false*: Only show facets from selected sources in the Filters list on global and workspace search results pages. • Location: System Property [sys_properties] table (record not present by default)

AI Search for Next Experience default source facet buckets for global search

List of source facet buckets that appear by default in AI Search for Next Experience global search results.

When you activate AI Search for Next Experience, global search results display in source facet buckets. Each source facet bucket represents a search source that's linked to the Next Experience Search Configuration search profile. This search profile is the one used by the [AIS] Next Experience Search Configuration search application.

The following table lists the source facet buckets that appear by default when you activate AI Search for Next Experience.

Source facet bucket	Description
All	Global search results from all search sources linked to the Next Experience Search Configuration search profile.
Incidents	Global search results from the Tasks - Incidents search source. • Indexed source: Incident • Source table: Incident [incident] Incident [incident]
Change Requests	Global search results from the Tasks - Change Requests search source. • Indexed source: Change • Source table: Change Request [change_request]
Change Tasks	Global search results from the Tasks - Change Tasks search source. • Indexed source: Change Task • Source table: Change Task [change_task]
Problems	Global search results from the Tasks - Problems search source.

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Source facet bucket	Description
	• Indexed source: Problem • Source table: Problem [problem]
Requests	Global search results from the Tasks - Requests search source. • Indexed source: Request • Source table: Request [sc_request]
Dashboards	Global search results from the Dashboards search source. • Indexed source: Dashboards • Source table: PAR Dashboard [par_dashboards]
Data Visualizations	Global search results from the Data visualizations search source. • Indexed source: Data visualizations • Source table: PAR Visualization [par_visualization]
KPIs	Global search results from the KPIs search source. • Indexed source: KPIs • Source table: Indicator [pa_indicators]
Catalog Tasks	Global search results from the Tasks - Catalog Tasks search source. • Indexed source: Catalog Task • Source table: Catalog Task [sc_task]
Users	Global search results from the People - Users search source. • Indexed source: User table • Source table: User [sys_user]
Requested Items	Global search results from the Tasks - Requested Items search source. • Indexed source: Requested Item • Source table: Requested Item [sc_req_item]
Groups	Global search results from the People - Groups search source. • Indexed source: Group • Source table: Group [sys_user_group]
Knowledge	Global search results from the Knowledge & Catalog - Knowledge search source.

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Source facet bucket	Description
	• Indexed source: Knowledge Table • Source table: Knowledge [kb_knowledge]
Catalog Items	Global search results from the Knowledge & Catalog - Catalog Items search source. • Indexed source: Catalog Item Table • Source table: Catalog Item [sc_cat_item]
Companies	Global search results from the People - Companies search source. • Indexed source: Company • Source table: Company [core_company]

You can change the search sources linked to the Next Experience Search Configuration search profile. To learn more about creating search sources and linking them to search profiles, see Search sources in AI Search.

For details on configuring labels and display order for source facet buckets, see Configure source facet buckets in an AI Search application configuration.

ServiceNow Otto for AI Search

The ServiceNow Otto for AI Search application combines the power of search with a large language model (LLM) to provide actionable AI-generated or AI-selected answers in user searches. By constraining the context passed to the LLM, ServiceNow Otto for AI Search can increase the likelihood that LLM responses are grounded in indexed content.

ServiceNow Otto for AI Search overview

In Service Portal, Virtual Agent, Employee Center, and global searches, ServiceNow Otto for AI Search includes the following AI Genius Result configurations:

Summary Genius Results

Summary Genius Results use your chosen LLM to generate actionable Genius Result answers synthesized from a variety of content sources. Answers can include content from knowledge articles, Service Catalog items, Knowledge Graph schema nodes, enhanced chat searches and conversations, and external content documents and attachments.

Knowledge base articles Genius Results

Knowledge base articles Genius Results use the LLM to generate actionable Genius Result answers from the most relevant knowledge article results.

External Content Q&A Genius Results

External Content Q&A Genius Results generate actionable Q&A Genius Result answers from documents in your Microsoft SharePoint Online instance.

Actions Genius Results

Actions Genius Results use the Now LLM Service to select, filter, and display the most relevant Catalog Item and Virtual Agent topic results as answers.

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If a search is broad or unclear, ServiceNow Otto for AI Search may ask follow-up questions before answering. This disambiguation step helps clarify what the user is looking for and is configurable. For configuration details, see .

AI Genius Result answers enhance search results with actionable answer cards. Each answer card includes links to its source records or external documents.

Get started

Install	Configure	Reference
		
Activate the ServiceNow Otto for AI Search plugin on your instance	Configure ServiceNow Otto for AI Search Genius Results for use in Service Portal, Virtual Agent, Employee Center, and global search	View components installed with ServiceNow Otto for AI Search

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.

Language support

ServiceNow Otto for AI Search natively supports searches, content, and answers in English. Additional languages are supported through Dynamic Translation. For details on translation functionality and supported languages, see Dynamic Translation for Knowledge base articles Genius Results.

Domain support

By default, all skills exist in the global domain. When you use AI in a domain-separated environment, users are only able to access data in their domain. For example, if a user uses the summarization skill, AI only uses material that exists in the user's domain when generating that summary. Additionally, there is no co-mingling of data for domain-separated instances when using generative AI skills. The data resides only on the instance, and the shared services used

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for generative AI do not persist any requests (prompts) and responses. For more information, see Domain separation in the AI Admin Hub console. (Note that global domain is not the same as global scope. For more information, see Exploring Next Experience pickers.)

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. 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.

Install ServiceNow Otto for AI Search

As an administrator, you can install the ServiceNow® Otto for AI Search application (sn_ais_assist) from the AI Admin Hub module.

Before you begin

Role required: admin

About this task

The ServiceNow Otto for AI Search plugin is automatically installed as a dependency when you install a ServiceNow Otto plugin in ServiceNow Otto Admin. ServiceNow Otto for AI Search is included in Now Assist suites.

Note: When you upgrade to the latest version of ServiceNow Otto for AI Search, the system reindexes content from the Catalog Item Table and Knowledge Table indexed sources. While these reindexing tasks are ongoing, searches may not return Catalog and Q&A Genius Result answers. After reindexing completes, Catalog and Q&A Genius Result answers should appear normally.

Procedure

1. In ServiceNow Otto Admin, install one or more ServiceNow Otto plugins.
   To review the instructions for ServiceNow Otto feature plugin installation, see Install plugins for ServiceNow Otto. As part of the procedure, you may need to request a license for the plugin from the ServiceNow Store.
2. Verify that ServiceNow Otto for AI Search is installed:
   a. Navigate to **All** > *AI Admin Hub* > **Skills**.
   b. In the workflow list, select **Platform**.
   c. Verify that the **Conversational experience** feature card displays, and that the **Knowledge base articles Genius Results** and **Actions** skills appear in the **All Conversational experience skills** listing.

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What to do next

With the plugin installed, search administrators can enable Genius Results in the following contexts.

- Enable all available Genius Result configurations in individual AI Search portals. For details, see Enable ServiceNow Otto for AI Search Genius Results in AI Search portals and mobile applications.
- Enable Q&A Genius Results in search profiles for AI Search applications. For steps, see Enabling Knowledge base articles Genius Results.
- Enable Q&A Genius Results in global search using the AI Search for Next Experience application. For steps, see Enabling Knowledge base articles Genius Results.

To learn more about configuration settings for the plugin, see Configuring ServiceNow Otto for AI Search.

Review available versions of ServiceNow Otto for AI Search

View all versions of the ServiceNow® Otto for AI Search application on the ServiceNow Store. Use this information to find the latest version of the application that's compatible with your instance's current ServiceNow AI Platform® family release.

Before you begin

You need access to the ServiceNow Store site.

Role required: none

Procedure

1. In a web browser, navigate to the ServiceNow Store site: https://store.servicenow.com/sn_appstore_store.do#!/store/home
2. Use search or navigation to find the listing for a ServiceNow Otto plugin.
3. Open the application listing.
   The listing shows the **Product Details** view for the selected application.
4. Select the **Dependencies** tab, then select *`ServiceNow Otto for AI Search`* from the **App Dependency** listing.
   The listing shows the **Product Details** view for the ServiceNow Otto for AI Search application.
5. In the **Version** section, select **Other App Versions**.
   The Version History window shows the list of all available versions of the ServiceNow Otto for AI Search application. Each entry shows a version's number, family release compatibility, release type, and release date.
6. To view the listing for another version of the ServiceNow Otto for AI Search application, expand the entry for that version by selecting its arrow icon , then select **View Details**.
   The listing shows the **Product Details** view for the selected version of the ServiceNow Otto for AI Search application.

Configuring ServiceNow Otto for AI Search

As an administrator or search administrator, you can configure settings to control the behavior of ServiceNow® Otto for AI Search.

Enable ServiceNow Otto for AI Search Genius Results in AI Search portals and mobile applications

Specify the ServiceNow Otto for AI Search Genius Result types you want to make available in each of your AI Search portals and mobile applications.

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Before you begin

The ServiceNow Otto for AI Search ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install ServiceNow Otto for AI Search.

Role required: ais_admin

About this task

ServiceNow Otto for AI Search provides multiple AI-powered Genius Result configurations. As a search administrator, you can enable individual Genius Result configurations in AI Search portal and mobile applications.

To learn more about how Genius Results work, see Genius Results. For details on the Genius Result configurations, see Knowledge base articles Genius Results and Actions Genius Results.

Procedure

1. Navigate to **All** > *AI Search* > *Now Assist* **in** *AI Search* **Setup**.
   The Set up ServiceNow Otto for AI Search panel displays a list of search profiles associated with AI Search portals and mobile applications and a Prerequisites section for each Genius Result configuration.
2. **Optional:** If a Genius Result enablement option isn't selectable, follow the guidance in its Prerequisites entry to make it selectable.

   Note: After following the Prerequisites guidance, you may need to refresh the Set up panel to make the Genius Result enablement option selectable.

3. In each search profile row, select the options for the individual Genius Results you want to enable for the associated AI Search portal or mobile application.

   As an example, to enable Q&A Genius Results in Service Portal, select the **Knowledge base articles** option in the **Service Portal Default Search Profile** row.

   Note: You can disable a Genius Result for an AI Search portal or mobile application by clearing its option.

4. Select **Apply Changes**.

Result

AI Search enables your selected Genius Result configurations for all users of the specified AI Search portals and mobile applications.

Summary Genius Results

Summary Genius Results use an LLM to generate search and chat responses that synthesize information from knowledge articles, Service Catalog items, and other available content types.

Summary Genius Results overview

Summary Genius Results is a Now Assist skill in the Platform workflow. It's included in the Conversational experience skill group.

You can use this skill in portal search and in global/workspace search in place of the legacy Knowledge base articles Genius Results and Actions Genius Results configurations. It improves on those legacy Genius Result configurations in multiple ways:

Broader source information

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Summary Genius Results use an improved LLM pipeline to display synthesized responses that can include information drawn from knowledge articles, Service Catalog items, Knowledge Graph schema node content, enhanced chat conversation and search results, and external content documents and attachments. Answers include citations to help users view the search results cited in the synthesized response.

By comparison, Knowledge base articles Genius Results can only display answers generated from knowledge articles using a legacy LLM pipeline, while Actions Genius Results can only display Catalog Items and Virtual Agent topics as answers.

More extensive and authoritative answers

A Summary Genius Result synthesized response can combine information from different search results to answer multiple aspects of a user's question.

By comparison, each Knowledge base articles Genius Result answer can only include information generated from a single knowledge article, and each Actions Genius Result can only include a single Catalog Item or Virtual Agent topic.

Support for follow-up questions

Users can ask follow-up questions directly from Summary Genius Result answers.

Content types included in synthesized responses

When a Summary Genius Result answer card appears in your conversation or search results, it displays a sentence or paragraph generated by the LLM. As part of this sentence or paragraph, the card displays citations for the content elements that were used to synthesize the response.

Citations for synthesized responses may include any or all of these content types:

Content type	Description
Knowledge articles	ServiceNow AI Platform® records indexed from the Knowledge [kb_knowledge] table.
Service Catalog items	ServiceNow AI Platform records indexed from the Catalog Item [sc_cat_item] table.
Content types from Knowledge Graph	
Records from tables configured as Knowledge Graph schema nodes	ServiceNow AI Platform records from tables configured as Knowledge Graph schema nodes. **Note:** Content from Knowledge Graph schema nodes is only available in synthesized responses if you've installed the Knowledge Graph ServiceNow® Store application. To learn about installing this application and configuring nodes in Knowledge Graph schemas, see Knowledge Graph.
Content types from enhanced chat experiences in Now Assist in Virtual Agent	
Enhanced chat results	Results from enhanced chat conversations and searches, such as Virtual Agent topics.

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Content type	Description
	Note: Enhanced chat results are only available in synthesized responses when Summary Genius Result answers are generated in a Now Assist in Virtual Agent experience. To learn more about how these results appear in enhanced chat conversations and searches, see Enhanced chat. For more details on Now Assist in Virtual Agent, see .
Content types from External Content Connectors	
External content documents and attachments	Documents and attachments retrieved from external source systems such as Atlassian Confluence Cloud or Microsoft SharePoint Online. **Note:** Documents and attachments from external source systems are only available in synthesized responses if you've installed the External Content Connectors ServiceNow Store application and then indexed them from your source systems using the appropriate external content connectors. For more details on installing, configuring, and using this application, see External Content Connectors.

Citations

Selecting a citation from a Summary Genius Result answer typically displays a link to the source content so you can verify the synthesized response.

In global and workspace search, when a Virtual Agent topic is cited as a source for a Summary Genius Result answer, its citation displays a chat icon followed by the topic name. Selecting this topic citation opens the selected topic in the ServiceNow Otto panel, allowing the user to continue their conversation on that topic.

Note: To open topic citations in the ServiceNow Otto panel from global or workspace search, the following requirements must be met:

- The panel must be activated.
- A search source derived from the Skill (topics) indexed source must be linked to the search profile used for global search or the workspace search.

If these requirements aren't met, topic citations from global or workspace search display a link to the source content, just as occurs for other citations.

Asking follow-up questions

In portal search, workspace search, and Now Assist in Virtual Agent enhanced chat, Summary Genius Result answer cards display an **Ask a follow-up** link after the synthesized response.

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Selecting this link opens the ServiceNow Otto panel so you can ask follow-up questions in the context of the Genius Result answer.

To learn about using the panel conversational interface, see ServiceNow Otto panel.

Activating Summary Genius Results

When you use Guided Setup to activate the ServiceNow Otto panel, Summary Genius Results are automatically activated for search profiles that satisfy these conditions:

- The search profile is linked to a search application configuration record for global search or for a workspace that uses AI Search.
- The search profile includes one or more search sources containing indexed records from the Catalog Item Table or Knowledge Table indexed sources.

Users with the ais_admin role can add Summary Genius Results to search profiles and then link those search profiles to AI Search portals in the AI Search Admin console. For details on configuring search application settings in the AI Search Admin console, see Configure and manage AI Search in search applications.

Note: When you activate Summary Genius Results in a search application, they're available to all users who search using that application.

For details on activating Summary Genius Results in global and workspace search, see Configure and manage AI Search in search applications

Note: When you activate Summary Genius Results in the search profiles for global or workspace search, they override all other Genius Result configurations activated for those search profiles. This means that global and workspace searches ignore other Genius Result answers and only display Summary Genius Result answers.

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Large language model (LLM) providers

By default, Summary Genius Results use the Azure OpenAI model as the AI service provider. The Now LLM Service is used as a fallback AI service provider.

With the admin role, you can use AI Admin Hub to select a different LLM to use as the AI service provider for Summary Genius Results. For details on selecting the LLM for Platform workflow Now Assist skills, see Manage AI models.

As a Now Assist skill, Summary Genius Results supports these LLMs:

- AWS Anthropic
- Azure OpenAI
- Google Gemini
- Now LLM Service

Knowledge base articles Genius Results

Knowledge base articles Genius Results use the LLM to generate concise, actionable answers from knowledge article results in Service Portal, Virtual Agent, Employee Center, and global searches.

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Important: Starting with the Now Assist in AI Search 11 release, the Knowledge base articles Genius Results feature is in maintenance mode. This feature will remain available but will not be updated or supported. Similar and improved functionality is available in the newer Summary Genius Results feature. For more details on this feature, see Summary Genius Results.

Knowledge base articles Genius Results overview

Knowledge base articles Genius Results send the most relevant knowledge articles from your search to the LLM, which generates answer snippets from the articles' HTML fields.

Each Knowledge base articles Genius Result answer card displays up to three generated answer snippets. For reference, the answer card also includes a link you can select to view the source knowledge articles.

The Knowledge base articles Genius Result answer card contains a snippet that summarizes a knowledge article. Select the answer card's **View article** action link to view the full knowledge article.

Note: Because the Knowledge base articles Genius Result answer is automatically generated, it's a good idea to review it for accuracy. You can provide feedback on the answer by selecting the thumbs-up icon if the generated answer is accurate, or the thumbs-down icon if it's not. Your feedback helps ServiceNow improve future versions of this Genius Result configuration.

Knowledge base articles Genius Results use semantic vector search and legacy keyword search to find knowledge articles that best match the meaning and intent of your search query. For more details on semantic vector search, see Semantic vector search in AI Search.

The Knowledge base articles Genius Result configuration replaces the original Q&A Genius Result configuration from the base system. The base system's configuration extracts answers from knowledge articles using internal routines instead of using the LLM. To learn more about the base system's Q&A Genius Result configuration, see Q&A Genius Results.

Enabling Knowledge base articles Genius Results

You can enable Knowledge base articles Genius Results in your AI Search portals and mobile applications using the ServiceNow® Otto for AI Search Setup module. For details on this procedure, see Enable ServiceNow Otto for AI Search Genius Results in AI Search portals and mobile applications.

To use Knowledge base articles Genius Results in global search, you can enable the configuration in the AI Search for Next Experience application. For details on this procedure, see Enabling Knowledge base articles Genius Results.

Note: When you activate Knowledge base articles Genius Results in a search application, they're available to all users who search using that application.

Limitations

By default, Knowledge base articles Genius Results only support English-language searches. Administrators can enable support for other languages by activating Dynamic Translation. To learn more about how content and answers are translated, see Dynamic Translation for Knowledge base articles Genius Results. For more details on Dynamic Translation, see Dynamic Translation.

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Knowledge articles that are boosted or promoted by result improvement rules are more likely to appear as Knowledge base articles Genius Results, but aren't guaranteed to appear.

Note: The Knowledge search property settings don't affect Knowledge base articles Genius Results. For more information on these settings, see Knowledge search properties.

If you have the External Content Connectors ServiceNow® Store application installed, Knowledge base articles Genius Results exclude search results retrieved from external content source systems when generating answers.

Answer snippet creation for Knowledge base articles Genius Results

AI Search uses the LLM to create each Knowledge base articles answer snippet from a knowledge article record's HTML fields. Each answer card can include up to three snippets. These snippets may all be generated from the same source article or from different source articles.

LLM automatically determines which elements of a knowledge article's text to include in an answer snippet. You can't configure the criteria for this behavior.

The LLM summarizes and abstracts content from the knowledge articles' text fields. Answer snippets displayed on Knowledge base articles Genius Result answer cards may not exist word for word in the source records.

Both AI Search content retrieval and the LLM are continually improving, so Knowledge base articles results for specific queries may vary over time. Because results from the LLM are non-deterministic, you should expect a higher answer variability compared to the base system's Q&A Genius Results.

Interaction with other search features

The following table describes the interactions between Knowledge base articles Genius Results and other search features.

Feature	Interaction with Knowledge base articles Genius Results
Result improvement rules	When computing Knowledge base articles Genius Result answers for a search query, AI Search applies result improvement rules normally. The effects depend on the result improvement rule's action, as follows: • *block*: Knowledge base articles Genius Results don't generate answers from blocked records. • *boost* or *promote*: Boosted and promoted records are more likely to be used when generating Knowledge base articles Genius Result answers.
Stop words	Knowledge base articles Genius Results use a blend of semantic vector search, which doesn't support stop words, and keyword-based search. AI Search only removes stop

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Feature	Interaction with Knowledge base articles Genius Results
	words from keyword-based searches, so answers may not reflect your stop words settings.
Synonyms	Knowledge base articles Genius Results use a blend of semantic vector search, which doesn't support synonyms, and keyword-based search. AI Search expands synonyms in keyword-based searches, so your synonyms are likely to improve the relevancy of Genius answers.
Typo handling	When computing Knowledge base articles Genius Result answers for a search query, AI Search corrects misspelled terms in the query.

Enabling Knowledge base articles Genius Results

As a search administrator, you can use the Knowledge base articles Genius Results skill in AI Search portals and mobile applications by enabling the skill in search profiles. You can also use the skill in global search by enabling Knowledge base articles Genius Results in the AI Search for Next Experience application.

Enable Knowledge base articles Genius Results in AI Search portals and mobile applications

For details on how to enable Knowledge base articles Genius Results and other Genius Results in your AI Search portals and mobile applications, see Enable ServiceNow Otto for AI Search Genius Results in AI Search portals and mobile applications.

Enable Knowledge base articles Genius Results in global search

Enable Knowledge base articles Genius Results in global search using the AI Search for Next Experience application.

Before you begin

The Next Experience UI must be activated on your instance. To learn about activating Next Experience UI, see Considerations for activating Next Experience.

The AI Search for Next Experience application must be installed and enabled on your instance. For more information about the application, see AI Search for Next Experience.

The Now Assist for Search application must be installed on your instance. For details on installing this application from the AI Admin Hub console, see Install ServiceNow Otto for AI Search.

Role required: ais_admin

About this task

As a search administrator, you can enable agentic AI model answer generation for Knowledge article results in global searches by adding the Knowledge base articles Genius Result configuration to the Next Experience Search Configuration search profile used by AI Search for Next Experience.

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Note: Linking the Knowledge base articles Genius Result configuration to the Next Experience Search Configuration search profile changes the status of the Knowledge base articles Genius Results skill to **Active** in the AI Admin Hub console. The skill remains active as long as any search profile includes a link to the Knowledge base articles Genius Result configuration.

When you enable Knowledge base articles Genius Results in global search, it is enabled for all users.

Procedure

1. In the Unified Navigation, select the application scope and update set icon  , and then set the application scope to *AI Search* **for** *Next Experience*.
2. If you have version 1.x or 2.x of the AI Search for Next Experience application installed on a Tokyo or Utah instance, add the Genius Result data source to the AI Search For Next Search EVAM definition.
   If you have version 3.x or a later version of the AI Search for Next Experience installed, or are on Vancouver or a later release, go to the next step.
   a. Navigate to **All** > **Entity View Action Mapper (***EVAM***)** > *EVAM* **Definitions**.
   b. Open the AI Search For Next Search definition record by selecting it from the list.
   c. In the EVAM Datasource M2Ms related list, select **Link Existing**.
   d. On the EVAM Datasource M2M form, populate the **Datasource** field with a reference to the Genius Result Data Source record from the EVAM Datasources table by using the Lookup using list icon  .
   e. Select **Submit**.
   The Genius Result Data Source reference appears in the EVAM Datasource M2Ms related list.
3. Add the Knowledge base articles Genius Result configuration to the search profile used by AI Search for Next Experience.
   a. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
   b. Open the Next Experience Search Configuration search profile record by selecting it from the list.
   c. In the Genius Results related list, select **Link Existing**.
   d. On the Search Profile - Genius Result Mapping form, fill in the following field values.

Field	Value
Genius Result Configuration	Enter or select **Knowledge base articles**.
Order	Specify the evaluation order for the Knowledge base articles Genius Result configuration in the search profile. AI Search evaluates active Genius Result

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Field	Value
	configurations for a search profile in order, from lowest **Order** field value to highest. For more details on the evaluation order for Genius Results, see Set the evaluation order for Genius Result configurations in a search profile.

e. Select **Submit**.

4. Select the existing related list row for the Knowledge base articles Genius Result configuration, and then select **Unlink Selected**.
The configuration supersedes the original Knowledge base articles Genius Result configuration. You don't need both configurations in the same search profile.

Result
The Knowledge base articles Genius Result configuration is enabled for global searches.

In the AI Admin Hub console, the status for the Knowledge base articles Genius Results skill is **Active**.

Define a query filter for Knowledge base articles Genius Results

Define a Java regular expression pattern that a search must match to be eligible for triggering Knowledge base articles Genius Results. Searches that don't match this pattern don't return Genius Result answers from Knowledge base articles Genius Results.

Before you begin
The ServiceNow Otto for AI Search ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install ServiceNow Otto for AI Search.

Make sure that you're familiar with Java's regular expression pattern syntax. To learn about the regular expression pattern syntax, see the Javadoc for the java.regex.util.Pattern class.

Role required: admin

About this task
Knowledge base articles Genius Results send eligible knowledge article search results to the LLM for answer generation.

By default, the system only sends knowledge article results to the LLM when the search satisfies all of these conditions.

- The search application is Service Portal, Virtual Agent, Employee Center, or global search.
- The user's session language is English.
- The search contains two or more terms.
- The search matches the Java regular expression pattern defined by the *sn_ais_assist.u_question_regex* system property's value. This system property has no value set in the base system, so by default all search queries satisfy this condition.

You can customize the pattern match condition by defining your own Java regular expression pattern for use by Knowledge base articles Genius Result configurations.

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Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Open the record for the *`sn_ais_assist.u_question_regex`* system property by selecting it from the list.
   If the system prompts you to change the application scope so that you can edit the record, select the provided link.
3. In the system property's **Value** field, enter a Java regular expression pattern that you want Knowledge base articles search queries to match.
   The Java regular expression match is case-insensitive. As an example, to restrict Knowledge base articles answer expansion to search queries that start with a question keyword, you can set the property's value to `^(what|where|when|why|who|whom|which|how)\b`.
4. Select **Update**.

Result

Knowledge base articles Genius Results don't send knowledge article search results to the LLM for Knowledge base articles answer generation unless the search query matches your Java regular expression pattern.

Change the minimum search term count for Knowledge base articles Genius Results

Specify the minimum number of terms that a search must contain to be eligible for triggering Knowledge base articles Genius Results. Searches with fewer terms don't return Knowledge base articles Genius Result answers.

Before you begin

The ServiceNow Otto for AI Search ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install ServiceNow Otto for AI Search.

Role required: ais_admin

About this task

Knowledge base articles Genius Results send eligible knowledge article search results to the LLM for answer generation.

By default, the system only sends knowledge article results to the LLM when the search satisfies all of these conditions.

- The search application is Service Portal, Virtual Agent, Employee Center, or global search.
- The user's session language is English.
- The search contains two or more terms.
- The search matches the Java regular expression pattern defined by the *`sn_ais_assist.u_question_regex`* system property's value. This system property has no value set in the base system, so by default all search queries satisfy this condition.

You can customize the term count condition by altering the minimum term count required by Knowledge base articles Genius Result configurations.

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Procedure

1. Navigate to **All** > *AI Search* > **Search Query Settings** > **Genius Results**.
2. Open the record for the Knowledge base articles Genius Result configuration by selecting it from the list.
3. In the *AI Search* **response processor** field, locate the following code block:

```
var searchPhrase = context.getOriginalSearchPhrase();
if (searchPhrase.split(" ").length < 2) {
    return answer;
}
```

4. Change the inequality statement's numeric argument from 2 to another positive integer. As an example, if you only want the Genius Result configuration to operate on searches with three or more search terms, change 2 to 3. If you want the Genius Result configuration to operate on searches with any number of search terms, change 2 to `1`.
5. Select **Update**.

Result

The modified Genius Result configuration doesn't send knowledge article search results to the LLM for Knowledge base articles answer generation unless the search query has enough search terms to satisfy your chosen limit.

Dynamic Translation for Knowledge base articles Genius Results

Dynamic Translation improves the international search experience for knowledge article content. When Dynamic Translation is activated, AI Search can generate Knowledge base articles Genius Result answers from non-English knowledge articles. Dynamic Translation also enables AI Search to translate Knowledge base articles Genius Result answers into the search user's language.

When computing Knowledge base articles Genius Result answers, the Now LLM Service only accepts English-language knowledge article content and only generates answers in English.

Dynamic Translation expands the range of languages supported by Knowledge base articles Genius Results by adding the following features:

Feature	Description
Content translation	The Now LLM Service automatically translates knowledge article content from non-English languages into English before using that content to generate Knowledge base articles Genius Result answers. **Note:** Translation is based on the language specified for the knowledge article record. If the record has no language specified, the Now LLM Service analyzes the record's content to determine its language.
Answer translation	When you search in a non-English language, the Now LLM Service automatically translates answers generated by Knowledge base

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Feature	Description
	articles Genius Results from English into your search language.

To read more about the capabilities of Dynamic Translation and learn how to activate it, see Dynamic Translation.

Languages supported

Dynamic Translation works with all languages supported by the ServiceNow AI Platform®.

Interaction with Knowledge base articles Genius Result cache

The query-time caches for Knowledge base articles Genius Results only support English-language searches, articles, and answers. When searching in a non-English language or matching a non-English knowledge article, Knowledge base articles Genius Result behavior depends on the cache mode:

Cache mode	Description
on or *online*	AI Search bypasses the caches and queries the Now LLM Service to generate an answer for the Knowledge base articles Genius Result.
offline	AI Search bypasses the caches and returns no answer for the Knowledge base articles Genius Result.

For more details on the query-time caches for Knowledge base articles Genius Results, see Caching for Knowledge base articles Genius Results.

Caching for Knowledge base articles Genius Results

AI Search provides two query-time caches to improve search performance for Knowledge base articles Genius Results. Caching enables AI Search to return previously generated answers without submitting knowledge articles to the Now LLM Service for answer generation.

Knowledge base articles Genius Results caching overview

When a search query triggers a Knowledge base articles Genius Result configuration, AI Search uses the search query and the sys_id of the search's top-ranked knowledge article search result to look for cached article summaries. If no article summary is found in the active caches, AI Search submits the search query and article sys_id to the Now LLM Service for answer generation.

Note: By default, AI Search only uses the first-level cache and the Now LLM Service when finding Knowledge base articles Genius Result answers. To enable the second-level cache or disable use of the Now LLM Service, administrators can change the operational mode for the caches as described in this topic.

The query-time caches only support English-language searches, knowledge articles, and answers.

Cache levels

The cache includes two levels which work in different ways to improve search performance for Knowledge base articles Genius Results.

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First-level cache

The first-level cache comprises a list of key-value pairs stored in memory for fast access. Each cache entry has a key that includes a search query and the sys_id of a knowledge article returned by that query. The cache entry's value includes the summary generated by the Now LLM Service for the specified search query and knowledge article.

When checking the first-level cache, AI Search compares your search query and the sys_id of your knowledge article search result to the cache entry keys. If it finds a matching key, it returns the article summary from the corresponding cache entry value. Otherwise, it goes on to check the second-level cache.

Note: The first-level cache only yields a result when your search query is an exact keyword match for the cached search query. For example, if you search for `avoiding scams` you won't get a result for a cached entry with search query `how to prevent scams` because the two search queries don't contain the same terms.

Second-level cache

The second-level cache comprises a table that is configured as an AI Search indexed source. Each record on this table is a cache entry, and includes a search query, the sys_id for an associated knowledge article search result, the summary generated for that query and knowledge article, and other fields such as pinned, sys_updated_on, and run_as. AI Search updates the index for this table whenever its records are created, updated, or deleted. This index update operation can take up to a minute.

When checking the second-level cache, AI Search queries the indexed table, looking for an entry that matches your search query and the sys_id of your knowledge article search result. If it finds a matching entry, it returns the article summary stored in the indexed table. Otherwise, it goes on to submit your search query and knowledge article search result to the Now LLM Service.

Note: Unlike the first-level cache, the second-level cache compares search query meanings using semantic vector search, so you may get a cache result even if your search query isn't an exact keyword match for the cached search query. For example, if you search for `avoiding scams` you might get the result for a cached entry with search query `how to prevent scams` because the meanings of the two search queries are similar. For more information on semantic vector search, see Semantic vector search in AI Search.

Benefits of caching

Caching for Knowledge base articles Genius Results provides the following benefits:

- Decreases average response time for common Knowledge base articles Genius Result answers
- Lowers Now Assist entitlement consumption by reducing the number of search query results sent to the Now LLM Service for Knowledge base articles answer extraction
- Increases the likelihood of returning a Knowledge base articles Genius Result answer
- Improves search consistency by returning the same Knowledge base articles Genius Result answer for similar searches

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Content Security for cached queries

Because AI Search applies Content Security restrictions to your search before it matches knowledge articles and checks the caches, neither cache returns hits for knowledge articles that you don't have access to. For full details on AI Search's Content Security model, see Content security in AI Search.

Cache modes

The Knowledge base articles Genius Result answer caches support the following operational modes:

- *off*: Use the first-level cache and the Now LLM Service to find Knowledge base articles Genius Result answers.

  AI Search looks in the first-level cache for Knowledge base articles Genius Result answers that exactly match your search query and knowledge article result. If it doesn't find a matching answer, it sends your query and Knowledge article sys_id to the Now LLM Service for answer generation.

  Knowledge base articles Genius Result answers generated by the Now LLM Service populate the first-level cache.

  When using Dynamic Translation, AI Search bypasses the caches and queries the Now LLM Service to generate an answer for the Knowledge base articles Genius Result.

- *offline*: Use the first-level and second-level caches to find Knowledge base articles Genius Result answers. Don't submit queries to the Now LLM Service.

  AI Search looks in the first-level cache for Knowledge base articles Genius Result answers that exactly match your search query and knowledge article result. If it doesn't find a matching answer, it uses semantic vector search to look for answers that match the meaning of your query in the second-level cache. If no cached answers match your query and knowledge article result, AI Search returns no answer for the Knowledge base articles Genius Result.

  Knowledge base articles Genius Result answers found in the second-level cache populate the first-level cache.

  When using Dynamic Translation, AI Search bypasses the caches and returns no answer for the Knowledge base articles Genius Result.

- *online*: Use the first-level and second-level caches and the Now LLM Service to find Knowledge base articles Genius Result answers.

  AI Search looks in the first-level cache for Knowledge base articles Genius Result answers that exactly match your search query and knowledge article result. If it doesn't find a matching answer, it uses semantic vector search to look for answers that match the meaning of your query in the second-level cache. If no cached answers match your query and knowledge article result, AI Search submits the query and article sys_id to the Now LLM Service for answer generation.

  Knowledge base articles Genius Result answers generated by the Now LLM Service populate the first-level and second-level caches.

  When using Dynamic Translation, AI Search bypasses the caches and queries the Now LLM Service to generate an answer for the Knowledge base articles Genius Result.

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The default operational mode is *off*.

Administrators can change the operational mode for the Knowledge base articles Genius Result answer caches by setting the value for the *sn_ais_assist.semantic_cache_mode* system property to *off*, *offline*, or *online*. For details on system property settings, see Add a system property.

For more details on using Dynamic Translation with ServiceNow Otto for AI Search Genius Results, see Dynamic Translation for Knowledge base articles Genius Results.

Scheduled job for cache management

The *Update Semantic Cache* scheduled job runs daily to perform the following tasks:

- Populate the second-level cache with results for the most frequently submitted queries found in the Search Event [sys_search_event] search signal table. For more information on this table, see Search signal tables.
- Purge all unpinned second-level cache entries that haven't been used in the past seven days. Search administrators can pin results in the second-level cache table to prevent them from being purged. For more details on this procedure, see Pin cached answers for Knowledge base articles Genius Results.

Pin cached answers for Knowledge base articles Genius Results

Improve performance for Knowledge base articles Genius Results by pinning frequently used answers in the second-level cache. Pinning an answer exempts it from the cache's purge mechanism.

Before you begin

The ServiceNow Otto for AI Search ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install ServiceNow Otto for AI Search.

Role required: ais_admin

About this task

Search administrators can pin entries in the second-level cache for Knowledge base articles Genius Result answers. The *Update Semantic Cache* scheduled job ignores pinned entries when purging the second-level cache.

Pinning frequently used entries helps improve search performance by enabling AI Search to return previously generated Knowledge base articles Genius Result answers without submitting knowledge articles to the Now LLM Service for answer generation.

To learn more about the second-level Knowledge base articles Genius Result answer cache and its usage, see Caching for Knowledge base articles Genius Results.

Procedure

1. Navigate to the ServiceNow Otto for AI Search Semantic Cache [sn_ais_assist_semantic_cache] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sn_ais_assist_semantic_cache.list`.
   c. Press **Enter**.
   Each record in this table represents a second-level cache entry. The table is populated with Knowledge base articles Genius Result answers previously generated by the Now LLM Service.
2. Update each cache entry record that you want to pin.

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a. Open the cache entry record by selecting it from the list view.

b. Set the value of the record's **Pinned** field to **true**.

c. Select **Update**.

Result
The *Update Semantic Cache* scheduled job ignores your pinned entries when purging the second-level cache.

External Content Q&A Genius Results

External Content Q&A Genius Results display concise, actionable AI-generated answers derived from documents in your Microsoft SharePoint Online instance.

Important: Starting with the Now Assist in AI Search 10 release, the External Content Q&A Genius Results feature is being prepared for future deprecation. This feature is no longer installed on new instances and is removed from instances where it's not in use, but will continue to be supported on instances where it's in use. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

External Content Q&A Genius Results overview

The External Content Q&A Genius Result configuration searches for documents relevant to your search using an Integration Hub subflow. If it finds sufficiently relevant documents, it sends them to the Now LLM Service, which generates answers from their content and metadata.

Each External Content Q&A Genius Result answer card includes a generated answer. For reference, the answer card also includes a link you can select to download the source documents.

Note: Because the External Content Q&A Genius Result answer is automatically generated, it's a good idea to review it for accuracy. You can provide feedback on the answer by selecting the thumbs-up icon if the generated answer is accurate, or the thumbs-down icon if it's not. Your feedback helps ServiceNow improve future versions of this Genius Result configuration.

When searching for relevant documents, the system uses your Microsoft SharePoint Online credentials and user profile, so your searches generate External Content Q&A Genius Result answers from documents that you can access.

Enabling External Content Q&A Genius Results

To make External Content Q&A Genius Results available for use in AI Search applications, administrators first need to perform the following steps:

1. Verify that the ServiceNow IntegrationHub Enterprise Pack Installer [com.glide.hub.integrations.enterprise] plugin is installed on your instance. If this plugin isn't installed, you can request it. For details on requesting IntegrationHub plugins, see Request an Integration Hub plugin.
2. Create and configure an OAuth application in the Microsoft Azure portal to verify and authorize connection requests from your ServiceNow AI Platform® instance. To learn about this procedure, see Configure OAuth application in Microsoft Azure.
3. Add the AllSites.FullControl SharePoint delegated permission (and grant admin consent) to your new OAuth application in the Microsoft Azure portal. For details on this procedure, see

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Configure SharePoint API permissions for your External Content Q&A Genius Results OAuth 2.0 application.

4. Define OAuth configuration settings for External Content Q&A Genius Results. For full details on the required OAuth settings, see Configure OAuth settings for External Content Q&A Genius Results.

Next, search administrators need to enable External Content Q&A Genius Results in one or more AI Search portals. To learn about this procedure, see Enable ServiceNow Otto for AI Search Genius Results in AI Search portals and mobile applications.

After all these steps are completed, AI Search portal users can authorize External Content Q&A Genius Results for their searches by authenticating with Microsoft SharePoint Online. For details on this authentication procedure, see Sign in to Microsoft SharePoint Online to authorize External Content Q&A Genius Results.

Note: When you activate External Content Q&A Genius Results in a search application, they're available to all users with Microsoft SharePoint Online credentials who search using that application.

Limitations

By default, External Content Q&A Genius Results only support English-language searches. Administrators can enable support for other languages by activating Dynamic Translation. To learn more about how content and answers are translated, see Dynamic Translation for Knowledge base articles Genius Results. For more details on Dynamic Translation, see Dynamic Translation.

External Content Q&A Genius Results only generate answers from documents found in your Microsoft SharePoint Online instance. They don't generate answers from sites found in your instance.

Interaction with other search features

The following table describes the interactions between External Content Q&A Genius Results and other search features.

Feature	Interaction with External Content Q&A Genius Results Genius Results
Result improvement rules	When computing External Content Q&A Genius Result answers, AI Search doesn't apply your result improvement rules because they don't operate on documents from your Microsoft SharePoint Online instance.
Stop words	When computing External Content Q&A Genius Result answers, AI Search doesn't remove stop words from your search.
Synonyms	When computing External Content Q&A Genius Result answers, AI Search doesn't expand synonyms found in your search.
Typo handling	When computing External Content Q&A Genius Result answers, AI Search doesn't correct misspelled search terms.

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Configure SharePoint API permissions for your External Content Q&A Genius Results OAuth 2.0 application

Add the AllSites.FullControl SharePoint API delegated permission to your External Q&A Genius Results OAuth 2.0 application in Microsoft Azure portal and grant admin consent to allow the application to access this permission. The OAuth 2.0 application for External Q&A Genius Results requires the delegated permission to search your Microsoft SharePoint Online sites.

Before you begin

The ServiceNow Otto for AI Search ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install ServiceNow Otto for AI Search.

You need to have an OAuth 2.0 application configured in Microsoft Azure portal for External Content Q&A Genius Results. For details on this procedure, see Configure OAuth application in Microsoft Azure.

You must have permissions to change the OAuth 2.0 application's settings in Microsoft Azure portal.

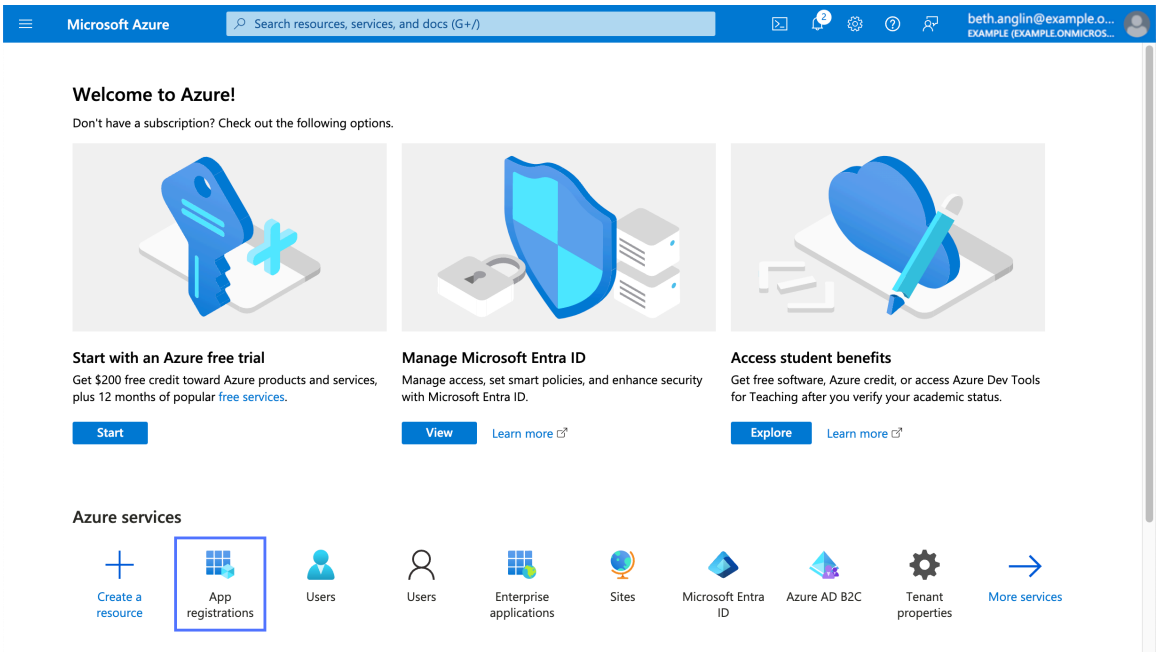
Role required: admin

Procedure

1. Access your OAuth 2.0 application's settings in Microsoft Azure portal.

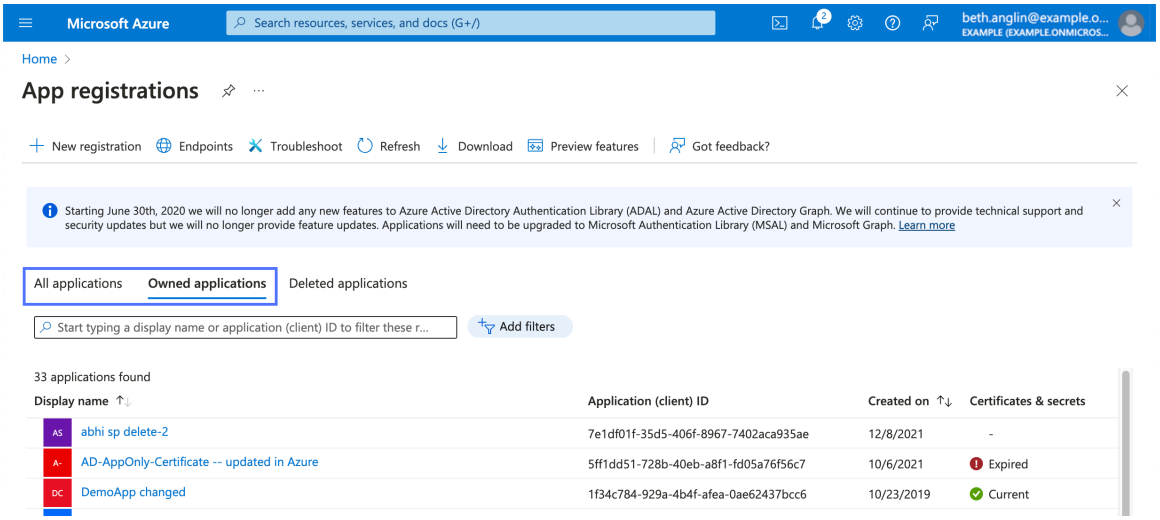
a. Log in to https://portal.azure.com/.

b. In the **Azure services** section, select **App registrations**.

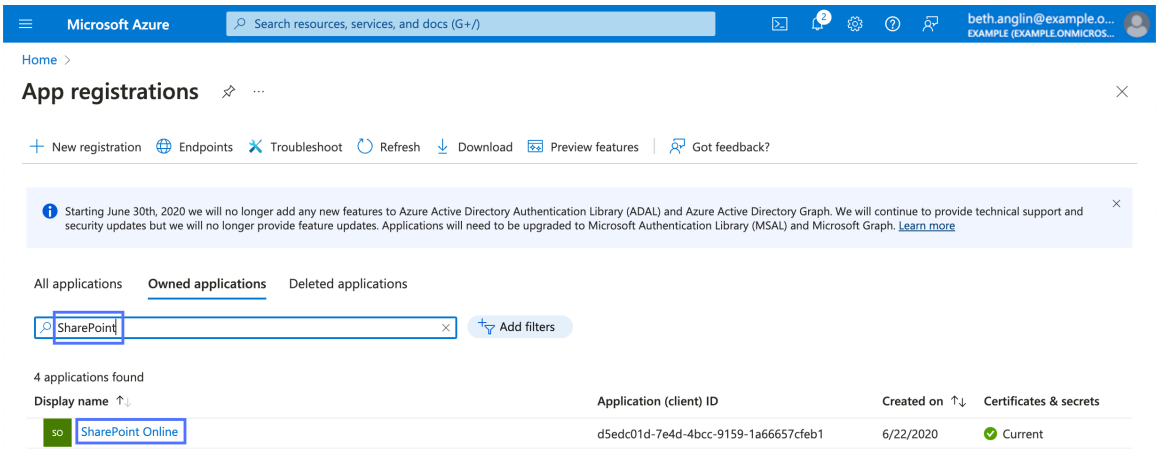


c. Select **All applications** or **Owned applications**.

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d. In the search field, enter the name or application (client) ID of the OAuth 2.0 application you created for External Content Q&A Genius Results, then select that application's display name from the list of results.

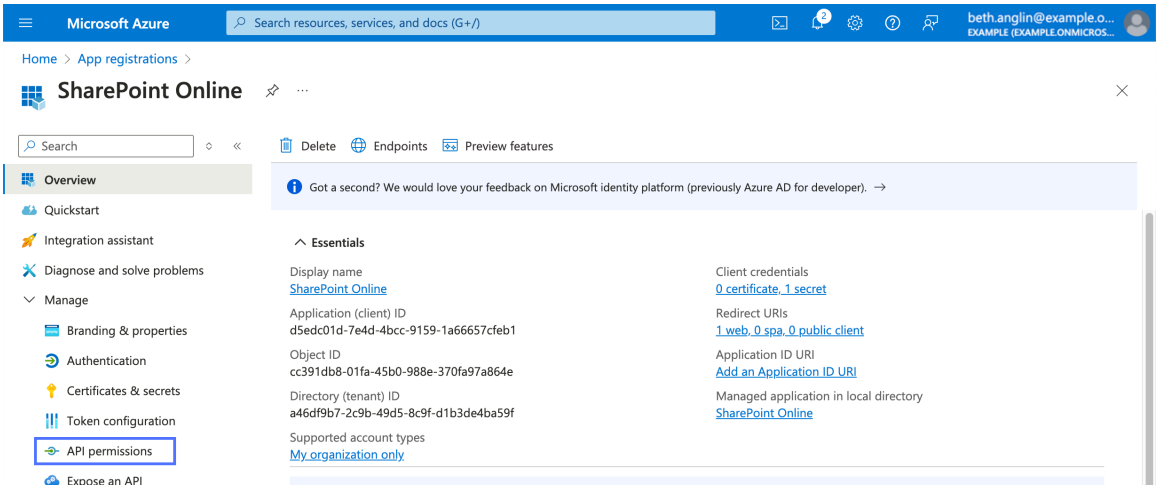


To learn how to configure an OAuth 2.0 application for External Content Q&A Genius Results, see Configure OAuth application in Microsoft Azure.

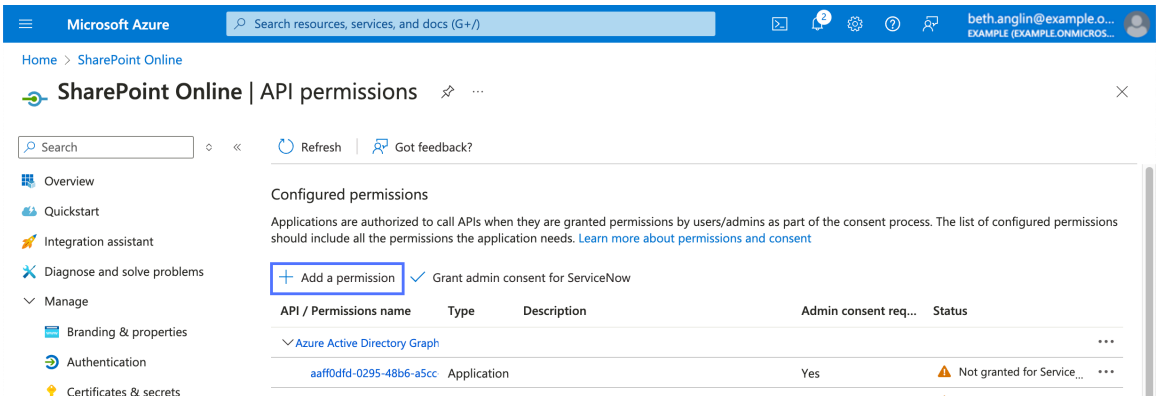
2. Add an AllSites.FullControl SharePoint API delegated permission to your OAuth 2.0 application.

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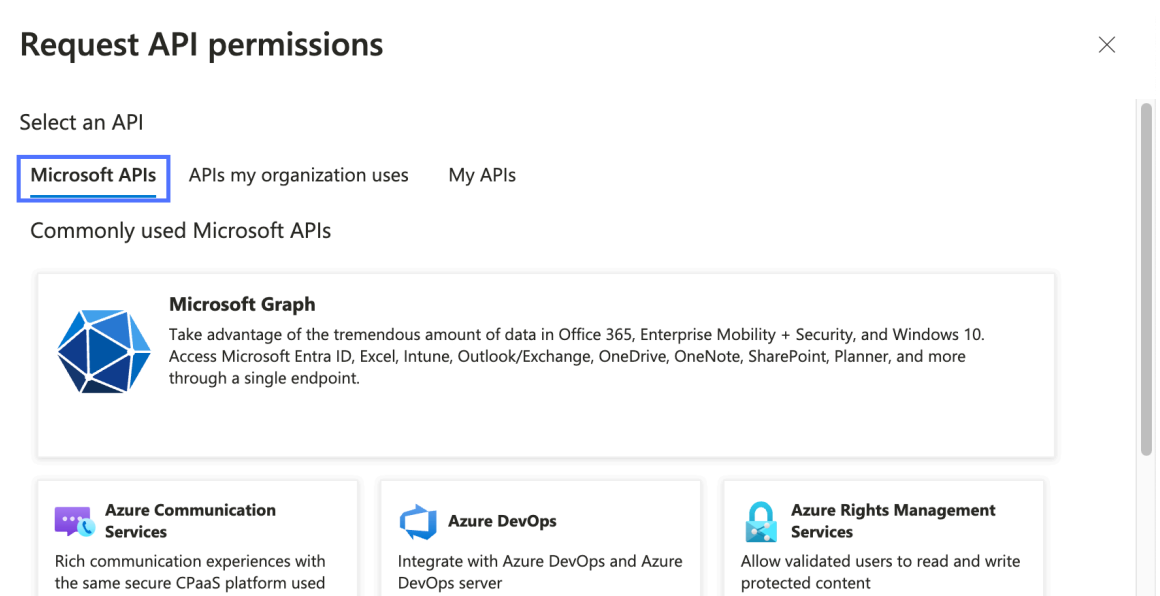
a. In the menu, select **Manage** > **API permissions**.



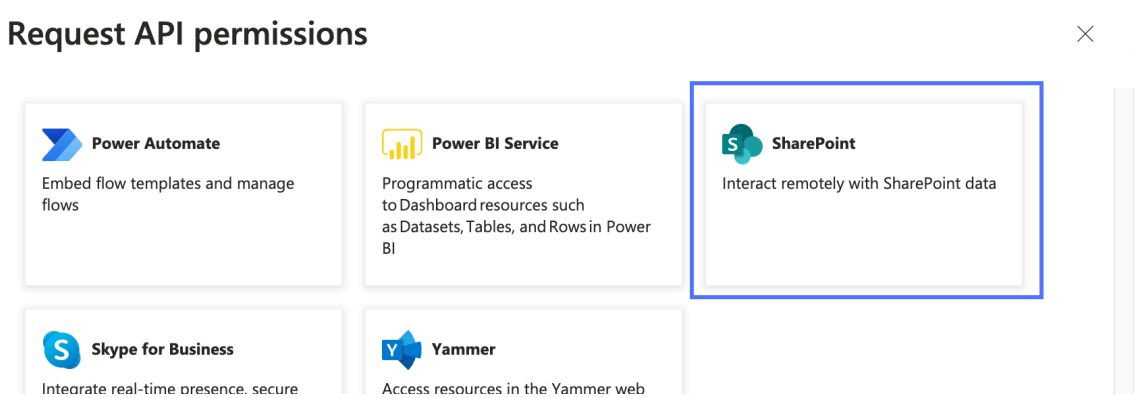
b. Under the **Configured permissions** heading, select **Add a permission**.



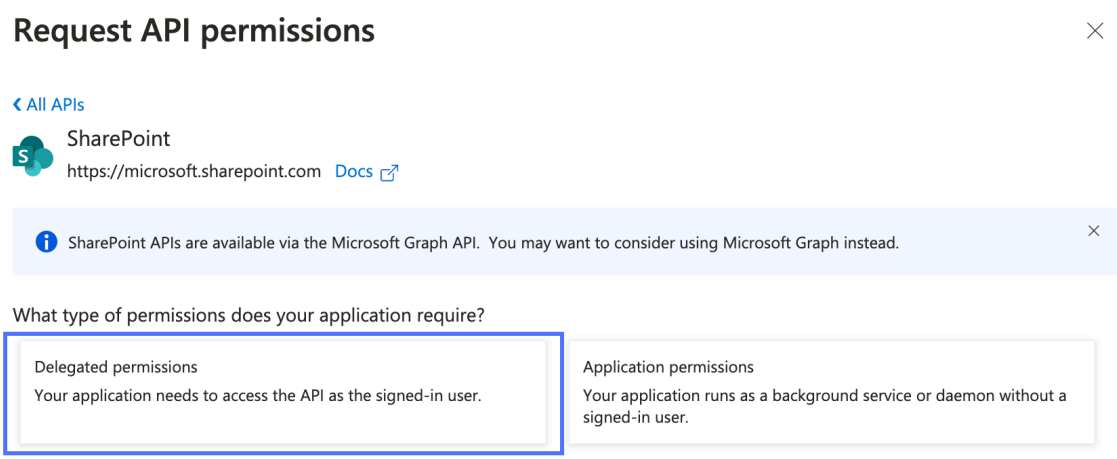
c. In the **Request API permissions** window's **Select an API** section, select **Microsoft APIs**, then select the **SharePoint** API.



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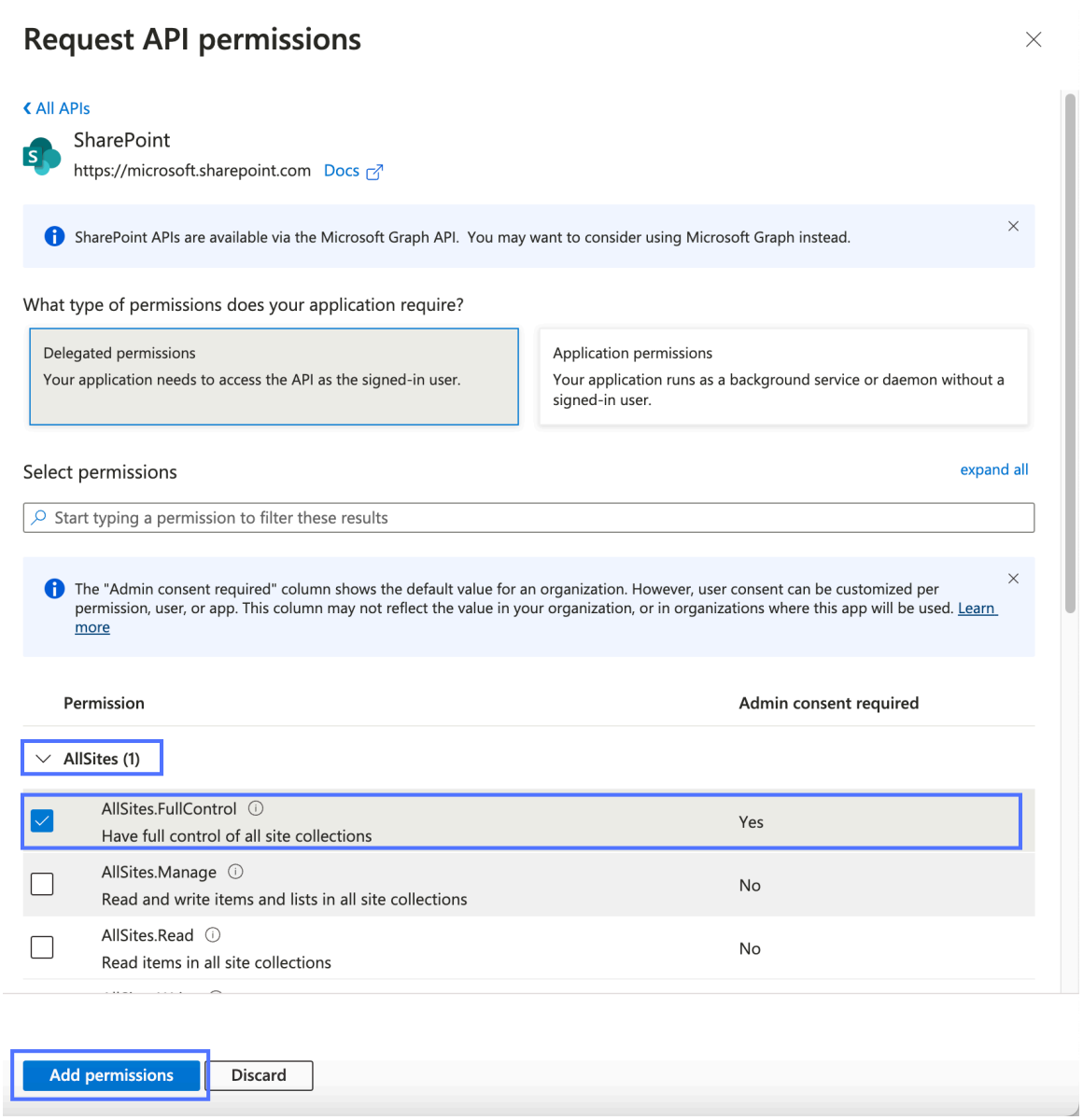


d. When prompted, select **Delegated permissions** as the type of permission to add.



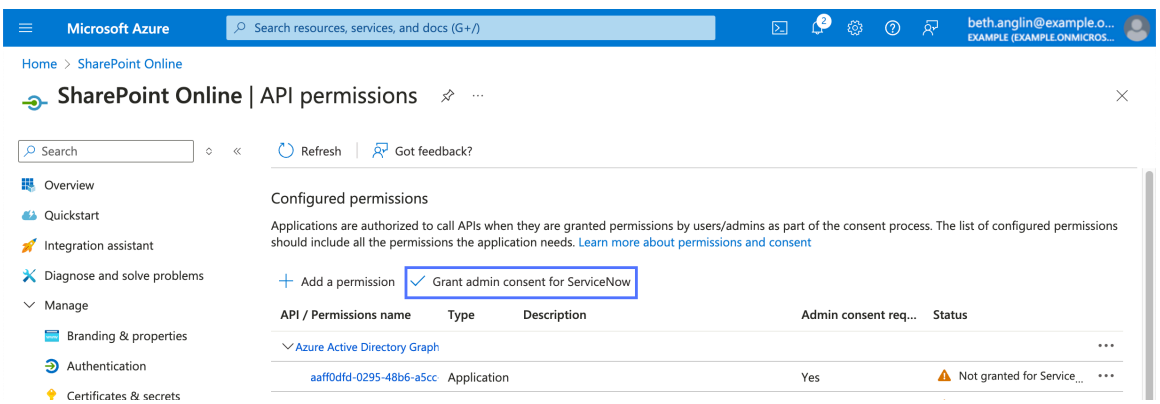
e. In the **Select permissions** section, select **AllSites** > **AllSites.FullControl**, then select **Add permissions**.

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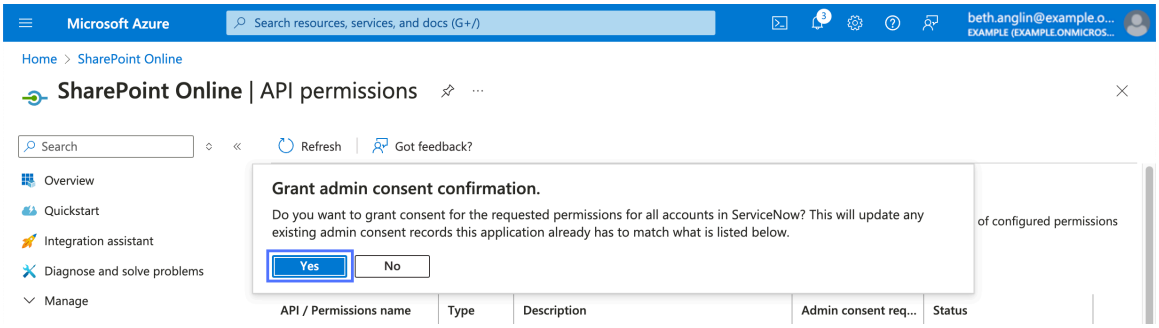
The new AllSites.FullControl SharePoint API permission appears in the list of configured permissions with status `Not granted for` *`ServiceNow`*.

f. Under the **Configured permissions** heading, select **Grant admin consent for** *`ServiceNow`*.



g. In the **Grant admin consent confirmation** dialog box, select **Yes**.

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The AllSites.FullControl SharePoint API permission's status changes to `Granted for` *`ServiceNow`*.

What to do next

Configure the OAuth 2.0 settings in your ServiceNow AI Platform® instance that are needed for External Content Q&A Genius Results. For details on this procedure, see Configure OAuth settings for External Content Q&A Genius Results.

Configure OAuth settings for External Content Q&A Genius Results

Configure the settings that External Content Q&A Genius Results need to interact with your Microsoft SharePoint Online instance.

Before you begin

The ServiceNow Otto for AI Search ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install ServiceNow Otto for AI Search.

You must have already completed the following tasks:

- Request installation of the ServiceNow IntegrationHub Enterprise Pack Installer [com.glide.hub.integrations.enterprise] plugin
- Configure OAuth application in Microsoft Azure

You will need read access to the following Microsoft Azure Portal configuration settings for your Microsoft SharePoint Online instance:

- Root site URL
- Client ID
- Client secret
- Tenant ID
- Authorization URL
- Token URL
- Token revocation URL
- Redirect URL

Role required: admin

About this task

Administrators need to perform this one-time procedure to enable External Content Q&A Genius Results.

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Procedure

1. Create an Application Registry record:

   a. Navigate to **All** > **System OAuth** > **Application Registry**.

   b. Select **New**.

   c. Select **Connect to a third party OAuth Provider**.

   d. On the Application Registries form, fill in the fields:

Field	Value
Name	Enter a name of your choice for the Application Registry record.
Client ID	Enter the client ID value from your Microsoft SharePoint Online configuration on Microsoft Azure Portal.
Client Secret	Enter the client secret value from your Microsoft SharePoint Online configuration on Microsoft Azure Portal.
Default Grant type	Select *Authorization Code*.
Authorization URL	Enter the fully qualified authorization URL for your Microsoft SharePoint Online source system in this format: `https://login.microsoftonline.com/<tenant-id>/oauth2/v2.0/authorize`. Replace `<tenant-id>` with your Microsoft SharePoint Online tenant ID, as found in your Microsoft Azure Portal settings.
Token URL	Enter the fully qualified token URL for your Microsoft SharePoint Online source system in this format: `https://login.microsoftonline.com/<tenant-id>/oauth2/v2.0/token`. Replace `<tenant-id>` with your Microsoft SharePoint Online tenant ID, as found in your Microsoft Azure Portal settings.
Token Revocation URL	Enter the fully qualified token revocation URL for your Microsoft SharePoint Online source system in this format: `https://login.microsoftonline.com/<tenant-id>/oauth2/v2.0/token`. Replace `<tenant-id>` with your Microsoft SharePoint Online tenant ID, as found in your Microsoft Azure Portal settings.
Redirect URL	Enter the fully qualified redirect URL for the Integration Hub subflow in this format: `https://<instance-`

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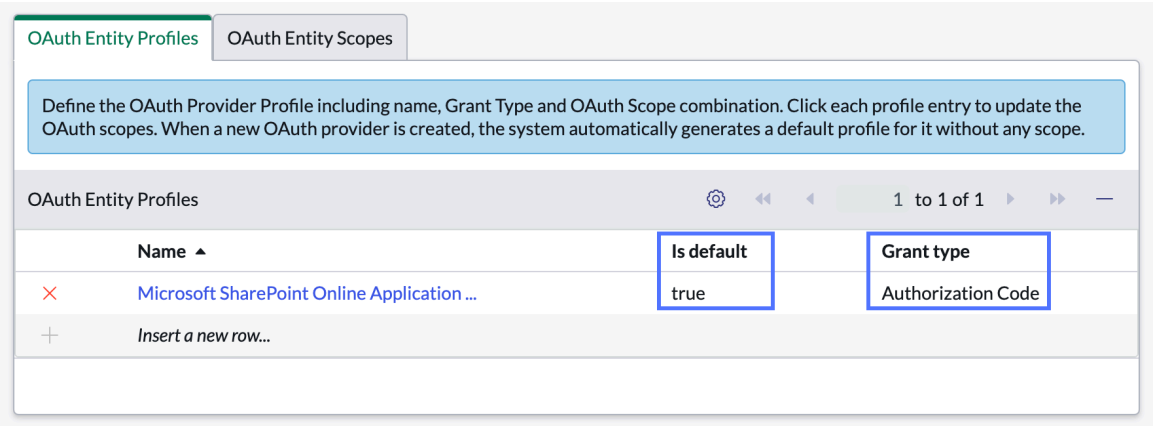
Field	Value
	`name>.service-now.com/oauth_redirect.do`. Replace `<instance-name>` with your ServiceNow AI Platform® instance name, as specified in your Microsoft Azure Portal settings.

e. Select **Submit**.
The new Application Registry record appears in the table list view.

2. Define an OAuth entity scope for your new Application Registry record:

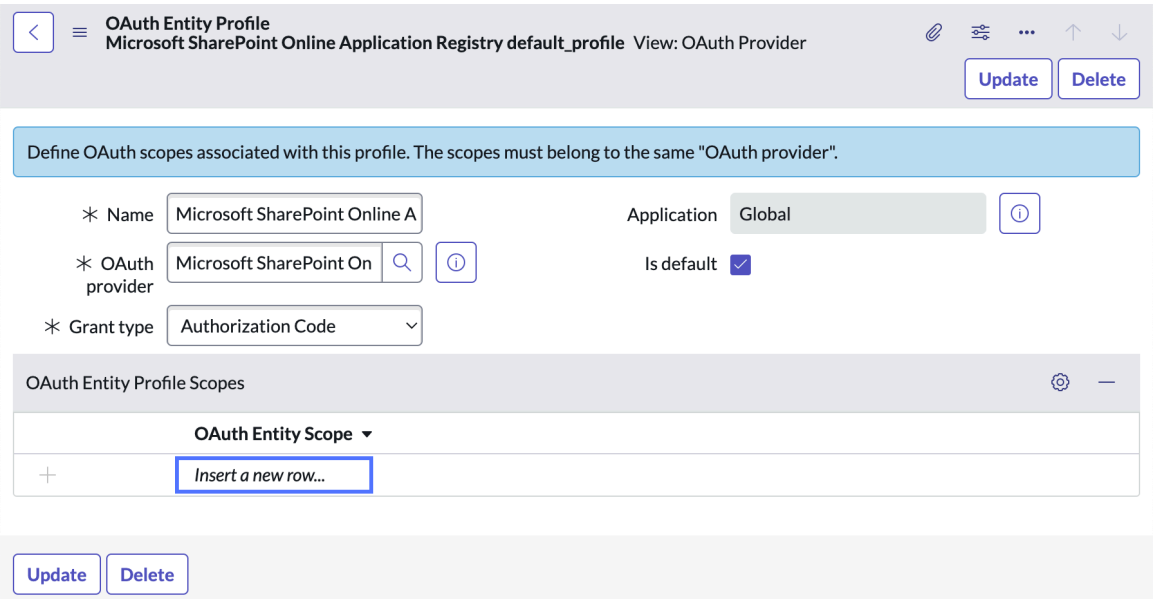
a. Open your new Application Registry record in form view by selecting it.

b. In the OAuth Entity Profiles related list, verify that an OAuth entity profile record appears with **Is default** set to *`true`* and **Grant type** set to *`Authorization Code`*.

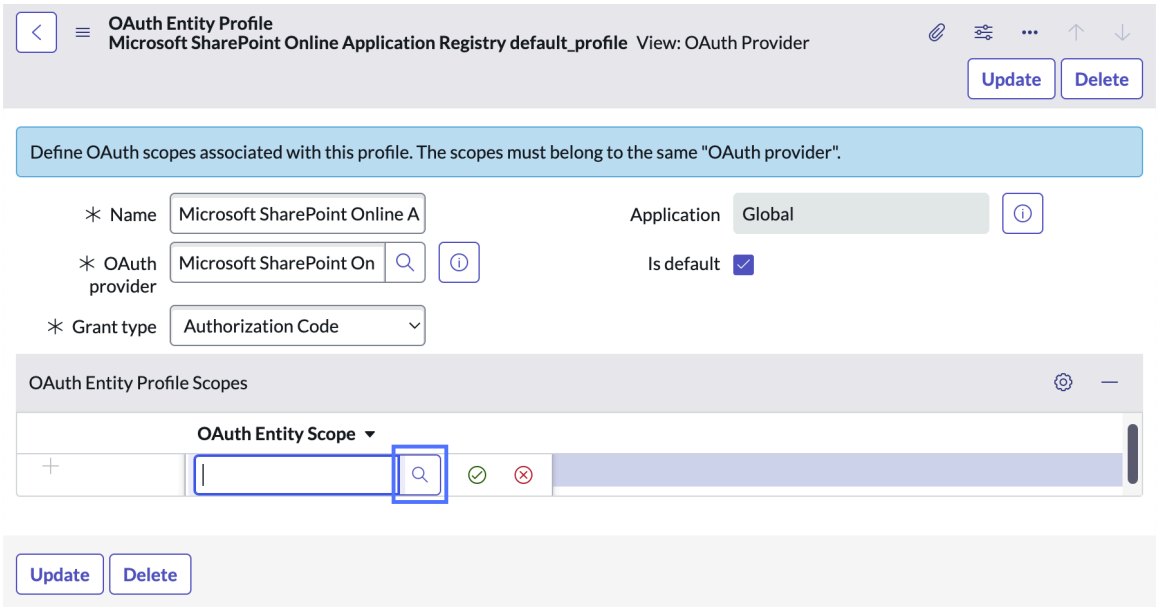


c. Open the new OAuth entity profile record in form view by selecting its name.

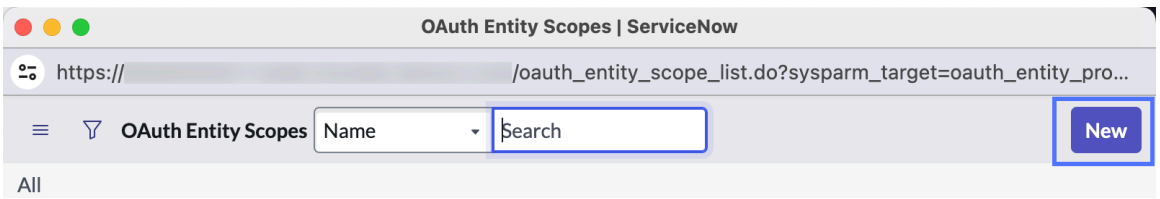
d. On the OAuth Entity Profile form, in the OAuth Entity Profile Scopes related list, double-click **Insert a new row**, then select the Lookup using list icon .



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e. On the OAuth Entity Scopes form, select **New**.



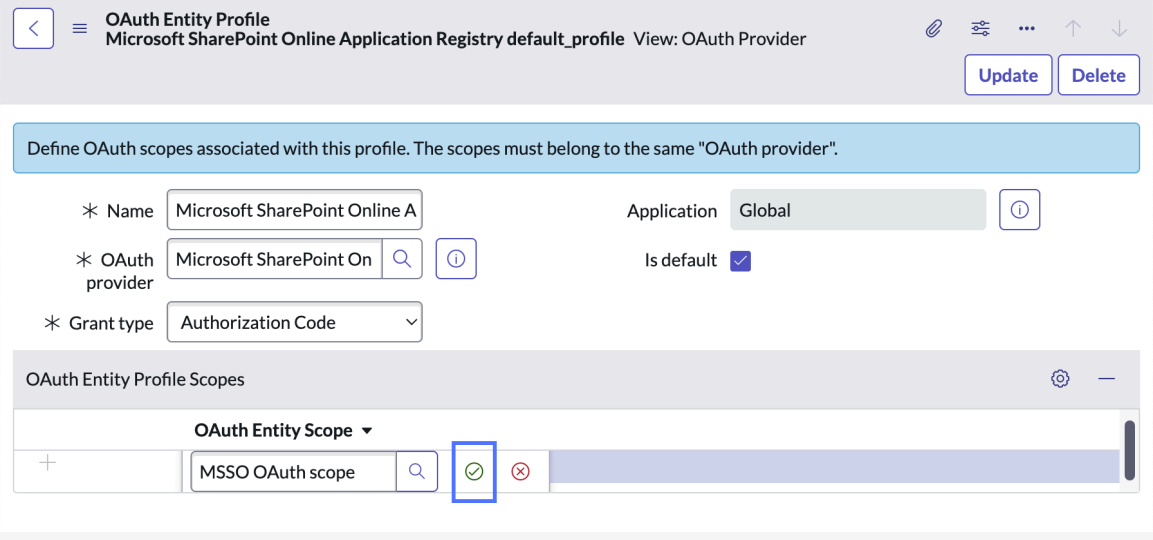
f. On the OAuth Entity Scope form, fill in the fields:

Field	Value
Name	Enter a name of your choice for the connection and credential alias.
OAuth provider	Select or enter the name of the Application Registry record that you created in step 1.e.
OAuth scope	Enter `offline_access https://<root-site>.sharepoint.com/.default`, replacing `<root-site>` with the name of your Microsoft SharePoint Online instance's root site. **Important:** Make sure to include the dot before `default`.

g. Select **Submit**.

h. In the OAuth Entity Profile Scopes related list, select the Save (Enter) icon .

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The new OAuth entity scope record appears in the OAuth Entity Profile Scopes related list.

i. Select **Update**.

3. Define a connection and credential alias record for Microsoft SharePoint Online:

   a. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.

   b. Open the **MicrosoftSharePointOnlineforAISearch** alias record in form view by selecting it.

   c. In the Connections related list, select **New**.

   d. On the HTTP(s) Connection form, fill in the fields:

Field	Value
Name	Enter a name of your choice for the connection and credential alias.
Connection URL	Enter the fully qualified URL for your Microsoft SharePoint Online instance: `https://<root-site>.sharepoint.com`.

   e. To create your new connection record, select **Submit**.
   The new connection record appears in the Connections related list.

4. Define a new OAuth 2.0 credential associated with your Application Registry record:

   a. Navigate to **All** > **Connections & Credentials** > **Credentials**.

   b. Select **New**.

   c. Select **OAuth 2.0 Credentials**.

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d. If the **Integration Type** field isn't visible on the OAuth 2.0 Credentials form, configure the form layout to make the field visible.
For details on configuring a form layout, see Configuring the form layout.

e. On the OAuth 2.0 Credentials form, fill in the fields:

Field	Value
Name	Enter a name of your choice for the OAuth 2.0 credential record.
OAuth Entity Profile	Select the new OAuth entity profile record associated with the Application Registry record that you created in step 1.e.
Integration Type	Select *Personal*.

f. Select **Submit**.
The new OAuth 2.0 credentials record appears in the Credentials [discovery_credentials] table list view.

5. Specify your new OAuth 2.0 credential as the one to use when connecting to Microsoft SharePoint Online:
   a. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.
   b. Open the **MicrosoftSharePointOnlineforAISearch** alias record in form view by selecting it.
   c. In the Connections related list, select the connection record that you created in step 3.e.
   d. On the HTTP(s) Connection form, select the **Credential** field's Lookup using list icon, then select the credential that you defined in step 4.
   e. Select **Update**.

What to do next
You can optionally configure a Microsoft Keyword Query Language (KQL) query to restrict the set of Microsoft SharePoint Online sites that External Content Q&A Genius Results search for relevant documents. For details on defining this KQL query, see Restrict the Microsoft SharePoint Online sites that External Content Q&A Genius Results can search.

Restrict the Microsoft SharePoint Online sites that External Content Q&A Genius Results can search

Define a Microsoft Keyword Query Language (KQL) query to restrict the set of Microsoft SharePoint Online sites (paths) that External Content Q&A Genius Results can search for documents. Only documents that satisfy your query are eligible for External Content Q&A Genius Result answer generation.

Before you begin
The ServiceNow Otto for AI Search ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install ServiceNow Otto for AI Search.

Role required: admin

About this task
By default, External Content Q&A Genius Results search for relevant documents in all sites (paths) in your Microsoft SharePoint Online source system. You can restrict the set of sites

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searched by specifying a Microsoft Keyword Query Language (KQL) property restriction query expression as the value for the *sn_ais_assist.sharepoint_search.query_filter* system property. Only documents from sites that satisfy your property restriction query are eligible for External Content Q&A Genius Result retrieval and answer generation.

To learn more about KQL property restriction queries and the operators they support, see https://learn.microsoft.com/en-us/sharepoint/dev/general-development/keyword-query-language-kql-syntax-reference.

Procedure

1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Search the list for the *sn_ais_assist.sharepoint_search.query_filter* system property record.
   - If the system property record appears in the list, open it in form view by selecting it.
   - If the system property record doesn't appear in the list, add it, setting its **Type** to `string`. To learn how to add a new system property, see Add a system property.
3. In the system property record's **Value** field, enter a valid KQL property restriction query expression.
   As an example, suppose your Microsoft SharePoint Online source system is `https://example.sharepoint.com`.
   - To limit External Content Q&A Genius Result searches to documents in your Marketing and Sales sites, you might enter `path:"https://example.sharepoint.com/teams/Marketing/" path:"https://example.sharepoint.com/teams/Sales/"` as your property restriction query expression.
   - To prevent External Content Q&A Genius Results from searching documents in your Engineering and QA sites, you might enter `NOT (path:"https://example.sharepoint.com/teams/Engineering/" path:"https://example.sharepoint.com/teams/QA/")` as your query expression.

   Note: You can use KQL Boolean and inclusion/exclusion operators to combine multiple property restriction expressions into a complex query expression.
4. Select **Update**.

Result

When searching for documents in your Microsoft SharePoint Online source system, External Content Q&A Genius Results apply your property restriction KQL query as a filter. Only documents in sites that satisfy your query are eligible for retrieval and answer generation.

Sign in to Microsoft SharePoint Online to authorize External Content Q&A Genius Results

Obtain an OAuth 2.0 token from Microsoft SharePoint Online so that External Content Q&A Genius Results can find documents and generate answers when you search.

Before you begin

Only perform this task if your search results page displays this informational message: `To view results generated from SharePoint, you need to be signed in.`

Role required: none

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About this task

External Content Q&A Genius Results use an OAuth 2.0 token to access your Microsoft SharePoint Online instance and search for relevant documents. The OAuth 2.0 token is specific to your Microsoft SharePoint Online user account, so your search only returns documents that you can access.

Perform this task to generate a valid OAuth 2.0 token in Microsoft SharePoint Online and authorize External Content Q&A Genius Results for your searches.

Note: How often you need to sign in depends on your Microsoft SharePoint Online instance's settings. Ask your Microsoft SharePoint Online administrator about the OAuth 2.0 token's lifespan.

Procedure

1. Select the **Sign in** link in the informational message on your search results page.
2. When prompted, enter your Microsoft SharePoint Online credentials to authenticate with Microsoft.

   Note: This login step submits your credentials directly to Microsoft. If you're unable to authenticate, ask your Microsoft SharePoint Online administrator for assistance.

3. After you're authenticated, repeat your previous search.

   Note: External Content Q&A Genius Results respect your Microsoft SharePoint Online user profile security settings. If you're not seeing an expected Genius Result answer, it's a good idea to check with your Microsoft SharePoint Online administrator to make sure you have access to the appropriate source documents.

Actions Genius Results

Genius Results display actionable answers showing Catalog Items and Virtual Agent topics that match your search query. AI Search matches records based on their similarity to your search's intent and meaning instead of looking for exact term matches.

Important: Starting with the Now Assist in AI Search 11 release, the Actions Genius Results feature is in maintenance mode. This feature will have no new enhancements but will have continued support. Similar and improved functionality is available in the newer Summary Genius Results feature. For more details on this feature, see Summary Genius Results.

Genius Results send content from your search's most relevant Catalog Item records and Virtual Agent topic records to the LLM. The LLM ranks and filters the selected records' content for display.

A Genius Result answer card can display content from up to three records. AI Search uses semantic vector search and legacy keyword search to select records that best match the meaning and intent of your search query. For more details on semantic vector search, see Semantic vector search in AI Search.

Supported record types

In Service Portal, Genius Results only operate on Catalog Items. In Virtual Agent, Genius Results operate on Virtual Agent topics as well as on Catalog Items. To learn more about Virtual Agent topics, see Virtual Agent.

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In Virtual Agent, Genius Results rank Catalog Item and Virtual Agent topic records using a unified relevancy scoring scheme. As a result, Genius Result answers may display records of either type in any order.

Activating Actions Genius Results

To enable the skill in an AI Search application, you can link the Genius Result configuration to your search profile for the search application. For details on this procedure, see Link a Genius Result configuration to a search profile.

For AI Search portal applications, you can enable ServiceNow Otto® Genius Results using the Now Assist in AI Search Setup page. For more information on this approach, see Enable ServiceNow Otto for AI Search Genius Results in AI Search portals and mobile applications.

Note: When you activate Actions Genius Results in a search application, they're available to all users who search using that application.

Limitations

Genius Results are only supported in Service Portal and Virtual Agent.

By default, Genius Results only support English-language searches. Administrators can enable support for other languages by activating Dynamic Translation. To learn more about how answers are translated, see Dynamic Translation for Actions Genius Results. For more details on Dynamic Translation, see Dynamic Translation.

If you have the External Content Connectors ServiceNow® Store application installed, Genius Results exclude search results retrieved from external content source systems when generating answers.

Interaction with other search features

The following table describes the interactions between Genius Results and other search features.

Feature	Interaction with Genius Results
Result improvement rules	When computing Genius Result answers for a search query, AI Search applies result improvement rules normally. The effects depend on the result improvement rule's action, as follows: • *block*: Genius Results don't return blocked records as answers. • *boost* or *promote*: Boosted and promoted records are more likely to be returned as Genius Result answers.
Stop words	Genius Results use a blend of semantic vector search, which doesn't support stop words, and keyword-based search. AI Search only removes stop words from keyword-based searches, so Genius Result answers may not reflect your stop words settings.

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Feature	Interaction with Genius Results
Synonyms	Genius Results use a blend of semantic vector search, which doesn't support synonyms, and keyword-based search. AI Search expands synonyms in keyword-based searches, so your synonyms are likely to improve the relevancy of Genius Result answers.
Typo handling	When computing Genius Result answers for a search query, AI Search corrects misspelled terms in the query.

Dynamic Translation for Actions Genius Results

Dynamic Translation improves the international search experience for Catalog Items and Virtual Agent topics. When Dynamic Translation is activated, AI Search can translate searches into English before matching Catalog Items and Virtual Agent topics for inclusion in Genius Result answers, and can translate generated answers into the search user's language.

When computing Genius Result answers, the Now LLM Service only supports English-language searches for Catalog Items and Virtual Agent topics.

Dynamic Translation expands the range of languages supported by Genius Results by adding the following features:

Feature	Description
Search translation	The Now LLM Service automatically translates non-English searches into English and uses the translated search to find Catalog Items and Virtual Agent topics for inclusion in Genius Result answers.
Answer translation	When you search in a non-English language, the Now LLM Service automatically translates Genius Result answers into your search language. The Genius Result answer card displays the translated text.

To read more about the capabilities of Dynamic Translation and learn how to activate it, see Dynamic Translation.

Languages supported

Dynamic Translation works with all languages supported by the ServiceNow AI Platform®.

Configure AI Search as the source for Ask ServiceNow Otto suggestions

Enable term highlighting in enhanced chat's Ask ServiceNow Otto suggestions by configuring AI Search as the source for those suggestions.

Before you begin
You must have at least Now Assist in AI Search 15 installed.

Role required: admin

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About this task

By default, Ask ServiceNow Otto suggestions are generated using a prefix-based GlideAggregate query against the Utterance Suggestion [sys_suggested_utterance] table.

Admins can configure the system to use AI Search as the source for Ask ServiceNow Otto suggestions in enhanced chat. Making this change activates suggestion term highlighting in Ask ServiceNow Otto and provides improvements such as wildcard searching and lemmatization for suggestions.

For more information on Ask ServiceNow Otto suggestions in enhanced chat, see Enhanced chat.

Procedure

1. Index all content for the Ask ServiceNow Otto Suggestions indexed source.
   a. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
   b. Open the record for the Ask ServiceNow Otto Suggestions indexed source.
   c. Select **Index All Tables**.
2. Publish the Ask ServiceNow Otto Suggestions search profile.
   a. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
   b. Open the record for the Ask ServiceNow Otto Suggestions search profile.
   c. Select **Publish**.
3. Navigate to the list view for the System Property [sys_properties] table.
   a. Navigate to **All**.
   b. In the **Filter** field, enter `sys_properties.list`, then press Enter.
4. Search for the *glide.search.suggestions.utterance.use_ais* system property record and perform the appropriate steps depending on whether it exists or not.
   - If the *glide.search.suggestions.utterance.use_ais* record already exists in the System Property table, open it.
   - If no record with the name *glide.search.suggestions.utterance.use_ais* exists in the System Property table, select **New**, then enter `glide.search.suggestions.utterance.use_ais` as the name for your new system property and select *true / false* as its type.
5. On the System Property form, set the system property's value to *true*, then select **Update**.

Hybrid search in AI Search

In hybrid search mode, AI Search blends keyword search and semantic vector search to find results that best match the terms and meaning of your search. Hybrid search is usable for any indexed source that has semantic vector search enabled.

Overview of hybrid search

In older releases, AI Search performs all searches in keyword search mode. This mode looks for the best matches for your search terms, but doesn't take the context or meaning of those terms into account. The keyword search relevance score for a search result indicates how well the indexed terms in that search result match your search terms.

Starting with the Yokohama Patch 11 release, AI Search includes an alternate semantic vector search mode in features which work with the Now LLM Service. Semantic vector search analyzes the meanings and context of your search terms and uses that information to find results with

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similar meanings. It improves search recall by interpreting natural language to more accurately reflect your search's intent. The semantic vector search relevance score for a search result indicates how closely the search result matches the meaning of your search.

Note: To learn more about semantic vector search mode and how it differs from keyword search mode, see Semantic vector search in AI Search.

Installation of ServiceNow Otto for AI Search offers a new hybrid search mode. This mode combines keyword relevance scores and semantic similarity scores into a single result ranking using Reciprocal Rank Fusion (RRF). By blending keyword and semantic vector search modes, AI Search offers the best of both worlds, providing users with both search precision and contextual relevance.

Hybrid search is automatically activated for all search application configurations (SACs) when you install ServiceNow Otto for AI Search for the first time. Upgrading an existing installation doesn't change current hybrid search settings. Users with the admin role can deactivate hybrid search for individual SACs after installation.

Note: Hybrid search applies to any indexed source that's included in the semantic index. By default, the following indexed sources ship with preconfigured semantic indexing and work with hybrid search:

- Knowledge Table indexed source [kb_knowledge table]
- Catalog Item Table indexed source [sc_cat_item table]
- Skills indexed source [sys_gen_ai_skill table]
- All External Content Connectors indexed sources [connector-specific tables]

You can manually configure additional indexed sources to be included in the semantic index, extending hybrid search to those sources as well. For details on this procedure, see Configure semantic indexing settings for an indexed source.

In portal search, hybrid search queries the default semantic field names, **title** and **body**. These default field names are specified by the value of the *glide.ais.query.default_hybrid_semantic_fields* system property. If your indexed source's semantic configuration uses non-default semantic field names, you can set the value of the *glide.ais.query.use_default_hybrid_semantic_fields* system property to **false**. With this value set, hybrid search resolves each indexed source's own semantic field mappings instead of using the default field names.

Benefits of hybrid search

Hybrid search offers these benefits when compared with keyword search.

Improved search quality and recall

Hybrid search combines keyword and semantic matching, increasing the chances of retrieving relevant results, even when users phrase their queries differently.

More relevant top-ranked search results

Understanding the intent of your search, along with matching the words you use, helps find results that match what you mean.

Fewer zero-result searches

Hybrid search can return useful results even for vague or misspelled queries because it uses semantic matching to understand meaning beyond exact keywords. This reduces the number of searches that return no results.

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Availability of hybrid search

Hybrid search requires installation of the ServiceNow Otto for AI Search application. This feature is available beginning in ServiceNow Otto for AI Search 15.

If you install ServiceNow Otto for AI Search without having any previous version installed, hybrid search is automatically activated for your search application configurations that use AI Search as their search engine.

Note: Search application configurations that use the legacy Zing text indexing and search engine don't support hybrid search.

If you upgrade to ServiceNow Otto for AI Search from a previous version, hybrid search isn't automatically activated for your search application configurations that use AI Search as their search engine. To learn how to manually activate hybrid search for these search application configurations in the AI Search Admin console, see Manage hybrid search in search applications.

Interactions with other features

Activating hybrid search in a search application configuration disables search result counts for facets in that search application configuration. For more information on search result counts for facets, see Show search result counts for facets on the results page for a search application.

When you activate hybrid search in a search application configuration, the behavior of the **Most recent** search result sort option changes for the specified search application. Instead of sorting the entire list of search results by last modification date, AI Search first retrieves keyword search results and the most relevant semantic vector search results, then merges those results and sorts them by last modification date. To learn about sorting search results based on recency, see Change the sort order for your search results.

Provide feedback on Summary Genius Result answers

Provide positive or negative feedback on Summary Genius Result answers.

Before you begin

You can perform this task when viewing a Summary Genius Result answer in a search portal that uses the faceted search widget.

Role required: none

About this task

Use the thumb-up and thumb-down icons in a Summary Genius Result answer to submit positive or negative feedback on the answer. Positive feedback indicates that the answer provided you with the information you were looking for. Negative feedback indicates that the answer didn't help you with your question.

Note: You can only submit feedback once per Summary Genius Result answer.

Feedback for Summary Genius Result answers is stored in the Generative AI Log [sys_generative_ai_log] and Genius Result Event Actions [sys_search_genius_result_event_action] tables. Users with the admin role can view answer feedback metadata in the Gen AI Log Metadata [sys_gen_ai_log_metadata] table.

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Procedure

1. In the Summary Genius Result answer, select the thumb icon that matches your desired feedback type.
   - If the answer provided the information you wanted, provide positive feedback by selecting the thumb-up icon .
   - If the answer did not address your question, provide negative feedback by selecting the thumb-down icon .
2. If you chose negative feedback, select the option that best explains why the answer didn't help you.
   If none of the predefined options explains why the answer didn't help you, select **Other**, then enter your own explanation into the text field.
3. Select **Submit feedback**.

Result

Your feedback is submitted for the Genius Result answer. The thumb-up and thumb-down icons for the answer become inactive, indicating that you've already submitted feedback for the answer.

ServiceNow Otto for AI Search reference

Reference information for the ServiceNow® Otto for AI Search application.

Components installed with ServiceNow Otto for AI Search

The ServiceNow® Otto for AI Search application installs new system components including scheduled jobs and Entity View Action Mapping (EVAM) configurations and templates.

Scheduled jobs installed with ServiceNow Otto for AI Search

Scheduled job	Description
Update Semantic Cache	• Populate the second-level Q&A Genius Results cache with results for the most frequently submitted queries found in the Search Event [sys_search_event] search signal table. For more information on this table, see Search signal tables. • Purge all unpinned entries in the Q&A Genius Results second-level cache that haven't been used in the past seven days. Search administrators can pin results in the second-level cache table to prevent them from being purged. For more details on this procedure, see Pin cached answers for Knowledge base articles Genius Results.

Entity View Action Mapper (EVAM) configurations installed with ServiceNow Otto for AI Search

Configuration	Description
AI Search Global - Q&A Genius Result	Contains the view configuration settings for the Q&A Genius Result configuration in AI Search for Next Experience global search.

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Configuration	Description
	• Application scope: ServiceNow Otto for AI Search • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Configurations**
Q&A Genius Result	Contains the view configuration settings for the Q&A Genius Result configuration in a search application. • Application scope: ServiceNow Otto for AI Search • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Configurations**
Taxonomy - Q&A Genius Result	Contains the view configuration settings for the Q&A Genius Result configuration in Content Taxonomy. • Application scope: ServiceNow Otto for AI Search • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Configurations**
Virtual Agent - Q&A Genius Result	Contains the view configuration settings for the Q&A Genius Result configuration in Virtual Agent. • Application scope: ServiceNow Otto for AI Search • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Configurations**

Entity View Action Mapper (EVAM) templates installed with ServiceNow Otto for AI Search

Template	Description
AI Search Global - Q&A Genius Result Template	Contains the component, static value, field-mapping, and action-mapping settings for the Q&A Genius Result configuration in AI Search for Next Experience global search.

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Template	Description
	• Application scope: ServiceNow Otto for AI Search • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Templates**
Q&A Genius Result Template	Contains the component, static value, field-mapping, and action-mapping settings for the Q&A Genius Result configuration in Service Portal. • Application scope: ServiceNow Otto for AI Search • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Templates**
Virtual Agent - Q&A Genius Result Template	Contains the component, static value, field-mapping, and action-mapping settings for the Q&A Genius Result configuration in Virtual Agent. • Application scope: ServiceNow Otto for AI Search • Location: **All** > **Entity View Action Mapper (*EVAM*)** > **View Definitions** > **View Templates**

List of all components installed with ServiceNow Otto for AI Search

To view the complete list of components installed with ServiceNow Otto for AI Search, follow the steps in Find components installed with an application. The application's package name is *`ServiceNow Otto for AI Search`*.

ServiceNow Otto for AI Search properties

System properties that you can use to modify behavior for ServiceNow® Otto for AI Search Genius Results.

These properties are available for ServiceNow Otto for AI Search.

Note: To open the System Property [sys_properties] table's list view, select **All**, enter `sys_properties.list` in the **Filter** field, and press **Enter**.

Properties for ServiceNow Otto for AI Search

Property	Description
sn_ais_assist.semantic_cache_mode	Operational mode for the Q&A Genius Results caches. Use this mode to control how AI Search uses the caches and the Now LLM Service when looking for Q&A Genius Result answers.

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Properties for ServiceNow Otto for AI Search (continued)

Property	Description
	For details about how AI Search caches Q&A Genius Result answers, see Caching for Knowledge base articles Genius Results. • Type: string • Default value: off • Supported values: ○ *off*: Use the first-level cache and the Now LLM Service to find Knowledge base articles Genius Result answers. AI Search looks in the first-level cache for Knowledge base articles Genius Result answers that exactly match your search query and knowledge article result. If it doesn't find a matching answer, it sends your query and Knowledge article sys_id to the Now LLM Service for answer generation. Knowledge base articles Genius Result answers generated by the Now LLM Service populate the first-level cache. When using Dynamic Translation, AI Search bypasses the caches and queries the Now LLM Service to generate an answer for the Knowledge base articles Genius Result. ○ *offline*: Use the first-level and second-level caches to find Knowledge base articles Genius Result answers. Don't submit queries to the Now LLM Service. AI Search looks in the first-level cache for Knowledge base articles Genius Result answers that exactly match your search query and knowledge article result. If it doesn't find a matching answer, it uses semantic vector search to look for answers that match the meaning of your query in the second-level cache. If no cached answers match your query and knowledge article result, AI Search returns no answer for the Knowledge base articles Genius Result. Knowledge base articles Genius Result answers found in the second-level cache populate the first-level cache. When using Dynamic Translation, AI Search bypasses the caches and returns no answer for the Knowledge base articles Genius Result. ○ *online*: Use the first-level and second-level caches and the Now LLM Service to find Knowledge base articles Genius Result answers. AI Search looks in the first-level cache for Knowledge base articles Genius Result answers that exactly match your search query and knowledge article result. If it doesn't find a matching answer, it uses semantic vector search to look for answers that match the meaning of your query in the second-level cache. If no

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Properties for ServiceNow Otto for AI Search (continued)

Property	Description
	cached answers match your query and knowledge article result, AI Search submits the query and article sys_id to the Now LLM Service for answer generation. Knowledge base articles Genius Result answers generated by the Now LLM Service populate the first-level and second-level caches. When using Dynamic Translation, AI Search bypasses the caches and queries the Now LLM Service to generate an answer for the Knowledge base articles Genius Result. • Location: Not present in the System Property [sys_properties] table by default. To override the default value, add this property by following the steps in Add a system property.
sn_ais_assist.u_llm_api_timeout	Maximum time in seconds to wait for Knowledge base articles Genius Result answer generation results from the LLM. • Type: integer • Default value: 120 • Location: Not present in the System Property [sys_properties] table by default. To override the default value, add this property by following the steps in Add a system property.
sn_ais_assist.u_question_regex	Case-insensitive Java regular expression pattern that defines searches eligible for Q&A answer generation. As an example, the pattern `^(what|where|when|why|who|whom|which|how)\b` restricts eligibility to search queries that begin with one of the specified keywords. When this system property has a value defined, only searches in supported applications that match the specified pattern are eligible for Q&A answer generation. When no value is defined, all searches in supported applications are eligible for Q&A answer generation. • Type: string • Default value: none • Location: System Property [sys_properties] table To learn about Java regular expression pattern syntax, see the Javadoc for the java.regex.util.Pattern class.
sn_ais_assist.u_sanitize_kb	Option to remove HTML tags from knowledge article text before sending to the LLM for Knowledge base articles Genius Result answer generation.

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Properties for ServiceNow Otto for AI Search (continued)

Property	Description
	• Type: true | false • Default value: false • Location: Not present in the System Property [sys_properties] table by default. To override the default value, add this property by following the steps in Add a system property.

Auto-complete suggestion types included with ServiceNow Otto for AI Search

ServiceNow® Otto for AI Search includes an auto-complete suggestion type that displays suggested ServiceNow® Otto for Virtual Agent conversational prompts.

To learn more about how this auto-complete suggestion type appears to search and chat users, see Enhanced chat. For details on configuring and using auto-complete suggestion types in your search application configurations, see Auto-complete suggestions in AI Search applications.

Auto-complete suggestion type	Description
Now Assist Suggested Query Reader Group for <application name>	Displays Virtual Agent conversational prompts based on previous user searches (utterances) that produced synthesized Genius Result responses. Selecting a suggested prompt opens a Virtual Agent conversation within the enhanced chat window or full-page experience. ServiceNow Otto for AI Search scores conversational prompt suggestions based on how search users have interacted with and rated their synthesized Genius Result responses. Suggestions with higher scores are preferentially displayed when searching. User queries from Virtual Agent conversations are stored as suggestions in the Utterance Suggestions [sys_suggested_utterance] table. The system prunes this table and automatically removes conversational prompt suggestions that meet any of these conditions: • The conversational prompt suggestion's query and result combination haven't been used in a search within the last 180 days. • The conversational prompt suggestion refers to a record (such as a Catalog Item or a knowledge article) that has been deleted or deactivated. New conversational prompt suggestions are disabled if they match any exclusion rule entry from the Search Suggestion Exclusion List

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Auto-complete suggestion type	Description
	[sys_search_suggestion_blacklist] table. When a new exclusion rule is added to the Search Suggestion Exclusion List table, existing conversational prompt suggestions that match it are disabled. For details on the Search Suggestion Exclusion List table, see Prevent the creation of suggestions in special cases. Conversational prompt suggestions are only returned from the search user's domain. Only search users with the global domain can see utterance suggestions from the global domain. When you create a new search application configuration, this suggestion reader group isn't linked to it by default. If you enable enhanced chat in a search portal, this suggestion reader group is linked to the search application configuration record shared between the portal and Virtual Agent. Conversational prompt suggestions are displayed in search portals by default. To make conversational prompt suggestions available in global and workspace search, you must enable ServiceNow Otto panel enhanced chat. For details on this procedure, see Activate ServiceNow Otto panel enhanced chat. Default section header: `Ask` *`ServiceNow Otto`* Readers: ServiceNow Otto Suggested Utterance Reader **Note:** This suggestion reader group is only supported in search application configurations for applications that support the enhanced chat experience, such as the *`ServiceNow Otto`* **in VA** search application configuration.

AI Search Admin console

The AI Search Admin console application provides AI Search administrators with a no-code management tool to configure, test, and activate AI Search solutions across different types of search applications.

https://player.vimeo.com/video/1101270095?h=055f3e232d&badge=0&autopause=0&player_id=0&app_id=58479

AI Search Admin console overview

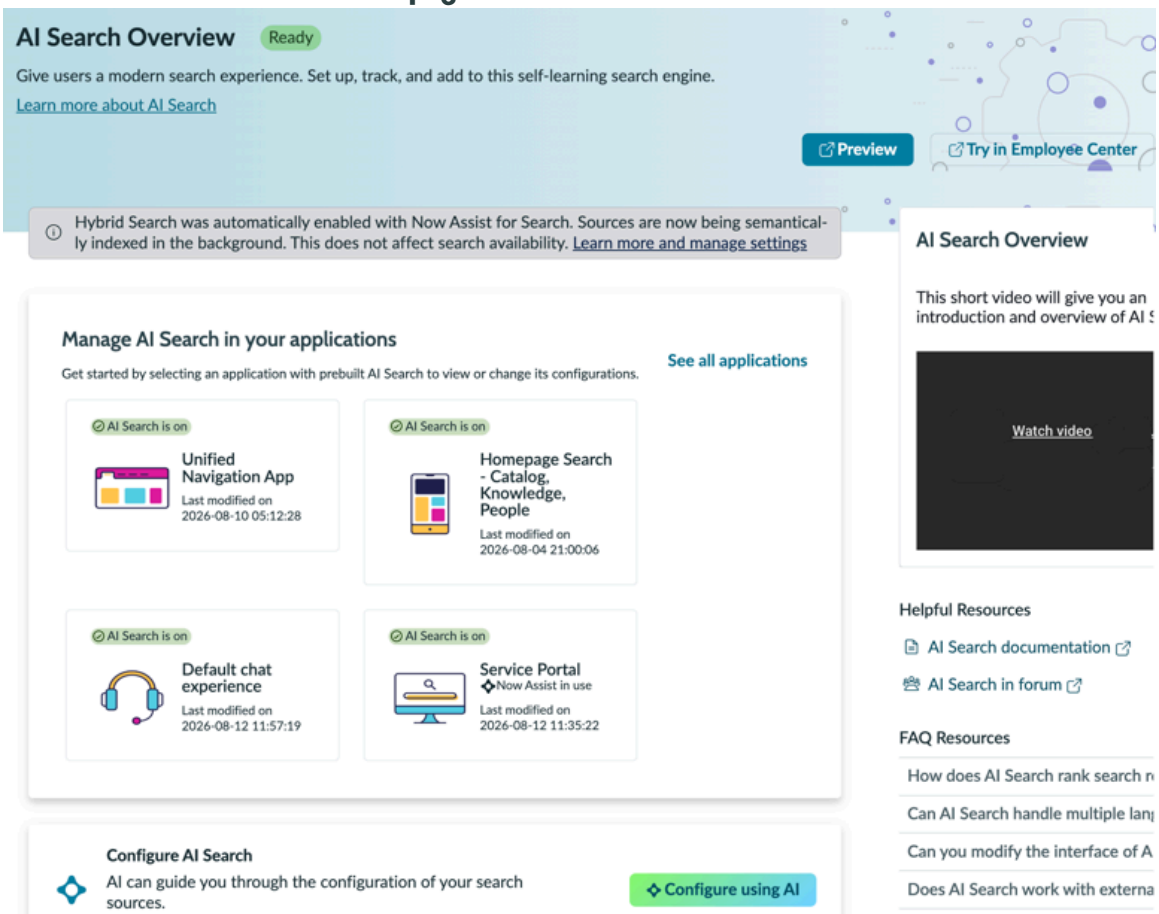
The AI Search Admin console is a central hub for managing and monitoring AI Search capabilities across search applications. It provides a streamlined experience for setting up, tracking, and enhancing AI Search configurations. This console supports both AI Search and ServiceNow® Otto for AI Search, which makes it easy to integrate advanced AI Search features.

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The following example shows the AI Search Admin console home page.

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AI Search Admin console home page



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The home page has the following sections that help search administrators understand how AI Search works and how to manage it by using the AI Search Admin console:

Manage AI Search in your applications

View and configure AI Search for supported applications. Select an application to access its settings or explore all available applications.

Indexed sources

Create, view, or edit index sources to define which data is included in the search indexes. This helps to decide which content appears in search results.

Track AI Search activity

Monitor key metrics, such as indexed documents and search queries. Refresh views or access the full dashboard for deeper insights.

AI Search with additional features

Discover and install applications and plugins to expand the AI Search capabilities in your search application.

For more information about the home page and its controls, see AI Search Admin console Home page.

AI Search Admin console benefits

- Prebuilt AI Search configurations for Service Portal, Now Mobile, Virtual Agent, and other applications that support AI Search.
- Step-by-step assistance to activate Genius Results.
- Easy access to pages that have various configuration settings.
- Performance Analytics indicators to track and monitor the search applications.

Install AI Search Admin console

The AI Search Admin console application (sn_ai_search_admin) is available from the ServiceNow® Store.

Before you begin

- Confirm 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

Installing the AI Search Admin Admin console makes the application available to users with the ais_admin or admin roles. For more information, see AI Search Admin console roles.

For information on the tasks that users can perform in the application, see Using AI Search Admin console.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the AI Search Admin console (sn_ai_search_admin) application using the filter criteria and search bar.

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

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.

3. Select **Install**.

What to do next

Access the AI Search Admin console application by navigating to **All** > *AI Search* **Admin** > *AI Search* **Admin Home**.

Related topics

Components installed with AI Search Admin console

Using AI Search Admin console

If you have the ais_admin role, you can use the AI Search Admin console to set up and manage AI Search in search applications, track AI Search activity, add features to AI Search, or access AI Search resources.

With the AI Search Admin console, you can manage advanced AI Search configurations.

- Set up AI Search configurations to customize the search experience of your application to your needs.
- Track and monitor the usage of AI Search in the search applications.
- Adding extra features to improve the search engine functionality of your search application.
- Customize the result-card interface of search application by using Entity View Action Mapper (EVAM).
- Configure Indexed sources to make the content searchable and improves the search performance of AI Search.

Configure and manage AI Search in search applications

Configure and manage the AI Search settings for search applications that support the AI Search engine.

Before you begin

Role required: ais_admin

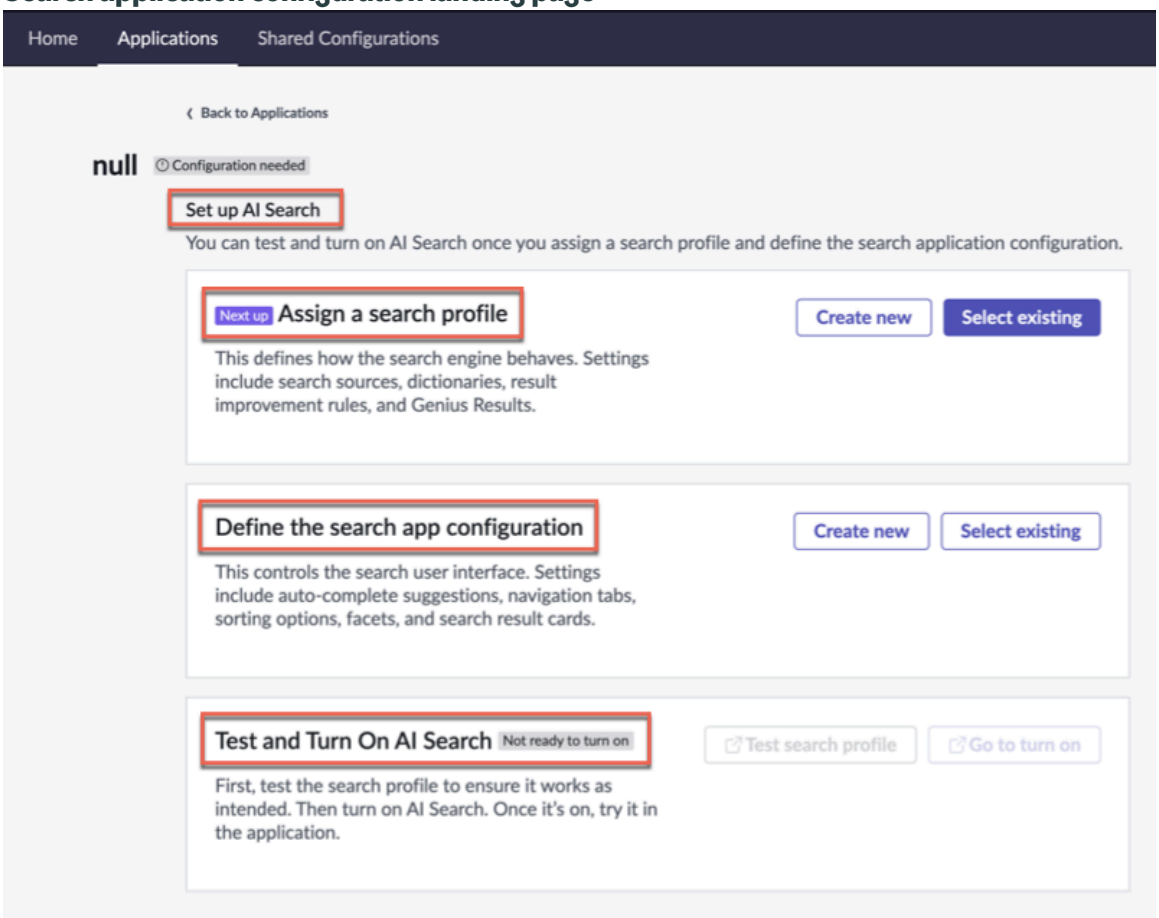
About this task

You can modify existing search application configurations, or create and configure your own search application configurations with AI Search when you specify it as the search engine. By configuring the AI Search settings for a search application, you can customize the search experience for your specific needs. To set up the AI Search configuration, you do the following tasks from the search application configuration landing page:

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1. Assign a search profile. Create a search profile and set the search sources as a priority to define the behavior of your search application. For more information, see Search profiles in AI Search.
2. Define the search application configuration. Configure the search profile to customize the user interface of your search application. For more information, see Search application configurations.
3. Test and turn on AI Search. Display the options to test and verify AI Search in your search profile, turn on, or turn off AI Search based on its configuration status. For more information, see AI Search Admin console Applications page.

Search application configuration landing page



Procedure

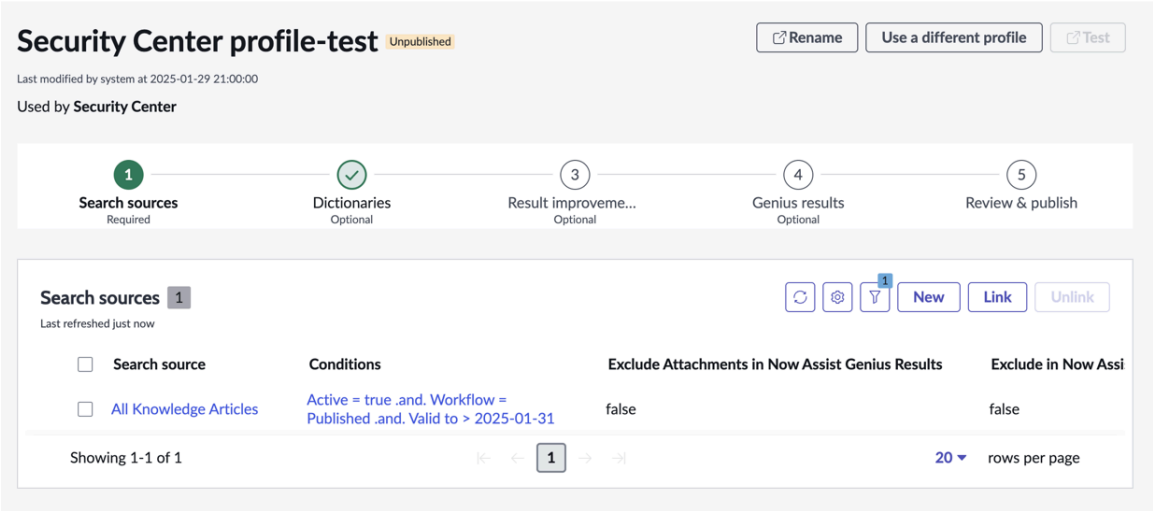
1. Navigate to **All** > *AI Search* **Admin** > *AI Search* **Admin Home**.
2. In the Set up and Manage *AI Search* in your applications section, select a supported search application that you want to configure the *AI Search* settings for.
3. In the application configuration landing page, assign a search profile.

Option	Procedure
Create a new search profile	Select **Create new**. A new search profile is created automatically. You can rename it or use a different search profile. For more information about the search profile controls, see AI Search Admin console Applications page. For a description of the

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Option	Procedure
	search profile field values, see Search Profile form.
Link an existing search profile	**a.** Select **Select existing**. **b.** Select a profile from the list of existing search profiles. **c.** Select **Link to application name**.

Each search profile contains the settings that determine how *AI Search* generates the search results for a search. The search profile settings include Search sources, Dictionaries, Result improvement rules, Genius results, and Review & publish.



a. Add Search sources to a search profile to make your searchable content available for your users.

- Create a search source:
  - **i.** On the **Search sources** tab, select **New**.
  - **ii.** On the form, fill in the fields.

    For a description of the field values, see Search Source form.
  - **iii.** Select **Submit**.
- Link an existing AI Search search source:
  - **i.** On the **Search sources** tab, select **Link**.
  - **ii.** From the list of existing AI Search search sources, select one or more search sources.
  - **iii.** Select **Link**.

For more information, see Search sources in AI Search.

b. Define the language-specific dictionaries of terms, such as equivalent terms (synonyms), common terms, and spell check.

- Create a AI Search term:
  - **i.** On the **Dictionaries** tab, select **New**.
  - **ii.** On the form, fill in the fields.

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For a description of the field values, see Dictionary form.

iii. Select **Submit**.

- Link an existing AI Search term:

  i. On the **Dictionaries** tab, select **Link**.

  ii. From the list of existing AI Search dictionaries, select one or more dictionaries.

  iii. Select **Link**.

  For more information, see Search profiles in AI Search.

c. Define the Result improvement rules to boost, block, or promote the search results for specific search queries.

i. On the **Result improvement rules** tab, select **New**.

ii. On the form, fill in the fields.

For a description of the field values, see AI Search Results Improvement Rule form.

iii. Select **Submit**.

iv. From the Actions related list, create boost action, block, or promote documents to appear as search results.

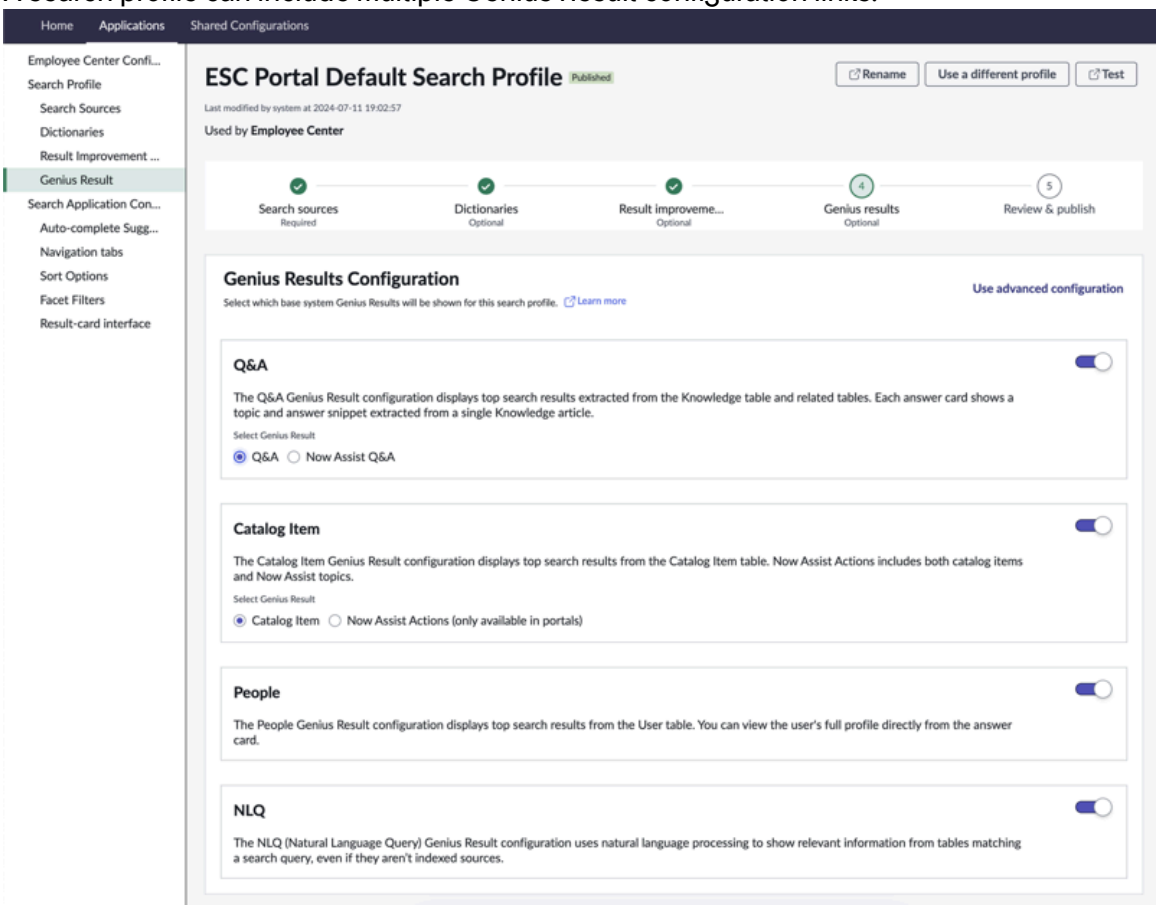
v. Select **Update**.

For more information, see Result improvement rules.

d. Populate one or more Genius Result cards with concise, actionable answers that are derived from the relevant search results by linking AI Search Genius results configurations to your search profile.

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A search profile can include multiple Genius Result configuration links.



i. On the **Genius Results Configuration** tab, enable base system genius results for your search profile from the list of genius result configuration options.

ii. Select **Save**.

For more information, see Genius Result configurations in the base system.

e. Review and publish the search profile to make the profile's settings active in the linked search applications.

i. On the **Review & publish** tab, review the summary of your search profile.

ii. If all configurations look correct, select **Publish Profile**.

iii. Select **Finish**.

The search profile is published and assigned to the search application.

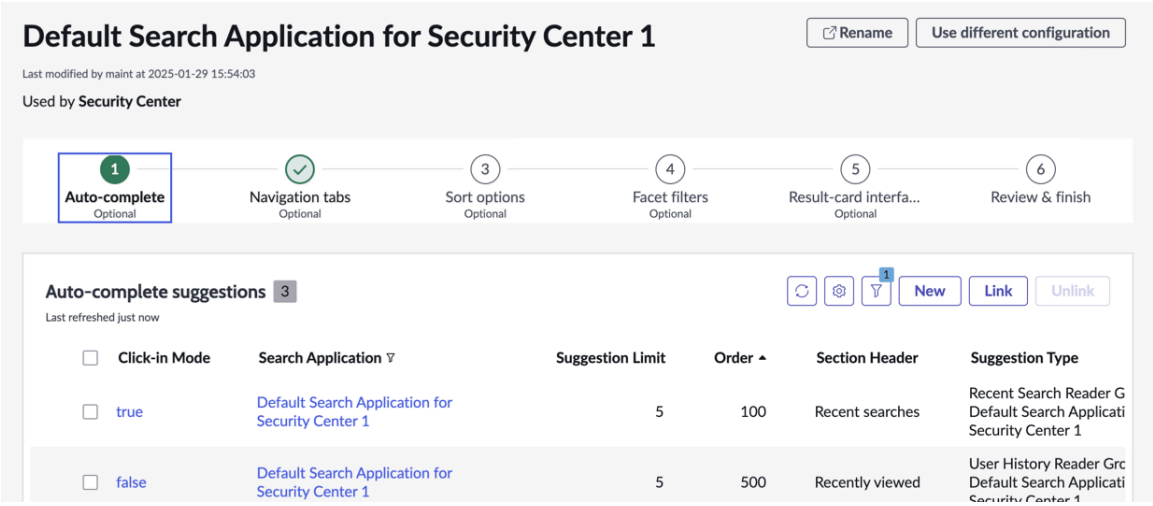
4. Define the search application configuration.

Option	Procedure
Create a new search application configuration	Select **Create new**. A new search application configuration is created automatically. You can rename it or use a different configuration. For more information about the search application configuration controls, see AI Search Admin console Applications page. For a description of the

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Option	Procedure
	search application configuration field values, see Search Application Configuration form.
Link an existing search application configuration	**a.** Select **Select existing**. **b.** Select an application from the list of existing search application configurations. **c.** Select **Link to application name**.

Each search application configuration contains the settings that determine how search results are displayed to users of the application. The search application configuration settings include Auto-complete, Navigation tabs, Sort options, Facet filters, Result-card interface, and Review & finish.



a. Display the intelligent suggestions in your search application's input field by adding auto-complete suggestions to the search application configuration.

- Create a suggestion:
  - **i.** On the **Auto-complete suggestions** tab, select **New**.
  - **ii.** On the form, fill in the fields.

    For a description of the field values, see Suggestion Reader Group form.
  - **iii.** Select **Submit**.
- Link an existing suggestion to the search application:
  - **i.** On the **Auto-complete suggestions** tab, select **Link**.
  - **ii.** From the list of existing suggestions, select one or more search application.
  - **iii.** Select **Link**.

For more information, see Auto-complete suggestions in AI Search applications.

b. Edit the display settings for navigation tabs to help users navigate within the search application to access and manage information.

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i. On the **Navigation tabs** tab, select the **Navigation tabs List Actions icon** > **Edit columns**.

ii. On the form, fill in the fields.

For a description of the field values, see Source Facet Bucket form.

Note: AI Search automatically defines the navigation tabs for search application configurations. You can't create or delete these navigation tabs.

c. Display the search results in a specific order by defining the Sort options for your AI Search application (such as sorting the search results based on the date).

i. On the **Sort Options** tab, select **New**.

ii. On the form, fill in the fields.

For a description of the field values, see Sort Option form.

iii. Select **Submit**.

d. Define the facets to filter your searches.

Use categories that are dynamically generated from the current search results, such as filtering the search results based on the dates or keywords.

i. On the Facet filters page, select **New**.

ii. On the form, fill in the fields.

For a description of the field values, see Facet form.

iii. Select **Submit**.

e. Select the result-card interface of your AI Search application to customize the appearance and layout of search results in AI Search applications.

i. On the Result-card interface page, select **Choose**.

ii. Create or update the result-card interface for the AI Search application.

Option	Procedure
Select from the existing result-card interfaces for your search application.	1. Select **Use an existing result-card interface**. 2. From the Result card interface list, select an option.
Add a new result-card interface for your search application	1. Select **Create new interface**. 2. In the **Configuration name** field, enter the name.

iii. Select **Save**.

For more information, see Create or edit an EVAM view definition.

f. Review the search application configurations of your AI Search application.

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5. Go back to the application configuration landing page and select **Test search profile** to verify that the search application works as intended.
6. Enable AI Search in the search application by selecting **Go to turn on**.

Result
The AI Search engine is ready to use AI Search in the search application.

Related topics
AI Search Admin console Applications page

Track your AI Search activity
View key analytics for AI Search usage, or follow a link to the full AI Search dashboard.

Before you begin
Role required: ais_admin

About this task
The **Track *AI Search* activity pane** pane displays reports summarizing your AI Search configurations and trends.

Procedure
1. Navigate to **All** > ***AI Search* Admin** > ***AI Search* Admin Home**.
2. In the **Home** page's **Track *AI Search* activity** pane, review the dashboard reports.
3. **Optional:** To view the full AI Search dashboard, select the **Go to full dashboard** link. For details on this dashboard's reports, see AI Search dashboard.

AI Search activity reports
Reports summarize your AI Search configurations and trends.

Title	Type	Source table	Description
Applications that need configuration	Single Score ( )	ais_publish_history, sp_portal, sys_cs_context_profile_search, sys_properties, sys_search_context_config, and sys_sg_global_search (all accessed via AISGetAppStatus script include)	Shows the number of search applications that need configuration before AI Search can be enabled.
Applications ready to turn on	Single Score ( )	ais_publish_history, sp_portal, sys_cs_context_profile_search, sys_properties, sys_search_context_config, and sys_sg_global_search (all accessed via AISGetAppStatus script include)	Shows the number of search applications that have AI Search configurations and are ready to have AI Search enabled.

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Title	Type	Source table	Description
Applications with AI Search on	Single Score ( )	ais_publish_history, sp_portal, sys_cs_context_profile_search, sys_properties, sys_search_context_config, and sys_sg_global_search (all accessed via AISGetAppStatus script include)	Shows the number of search applications that have AI Search enabled.
Indexed documents by month	Bar ( )	sn_ais_admin_tools_ai_search_dashboard_documents_by_mon	Shows the number of searchable records newly indexed by AI Search, grouped by month.
Documents by indexed sources	Donut ( )	sn_ais_admin_tools_ai_search_dashboard_total_indexed_docu	Shows the number of searchable records indexed by AI Search, grouped by indexed source.
Queries by search profile	Donut ( )	sys_search_event	Shows the number of search queries, grouped by search profile used.

Add features to AI Search

Improve AI Search functionality by adding extra features through supported applications. Install the applications to expand AI Search capabilities.

Before you begin
Role required: ais_admin

About this task
Expand AI Search functionality by installing the AI Search Integration Hub spoke and the AI Search Data Labeling and AI Search for Next Experience applications. If any of these apps are installed, their card doesn't show up. If all three apps are installed, the entire section doesn't appear.

Procedure

1. Navigate to **All** > *AI Search* **Admin** > *AI Search* **Admin Home**.
2. In the Add features to *AI Search* section, select Install for the application you want to add to *AI Search*.

Access AI Search resources

Review the AI Search introductory video, follow links to the AI Search documentation and ServiceNow Community forum, or view answers to commonly asked questions about AI Search.

Before you begin
Role required: ais_admin

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Procedure

Navigate to **All** > *AI Search* **Admin** > *AI Search* **Admin Home**.

Customizing the result-card interface of an AI Search application by using EVAM

You can customize the appearance and layout of the result-card interface in AI Search applications by accessing Entity View Action Mapper (EVAM) configurations from the AI Search Admin console. This helps to enhance usability, clarity of search results, making them easier to read and navigate.

Using EVAM to modify the Result-card interface overview

AI Search Admin console provides a unified platform that enables you to manage the search result interface of your AI Search application with EVAM configurations. EVAM standardizes how different data sources are displayed in cards and lists. You can create, edit, copy, view usage, activate, deactivate, or delete EVAM view configurations, and even create EVAM definitions as needed all from the AI Search Admin console. To learn more about EVAM, see Exploring Entity View Action Mapper.

The Result-card interface in AI Search applications displays a search result in clear, visual format. It includes key details, such as title, a brief description, relevant icons, and other important information. This helps users quickly understand each search result and decide which one to explore further.

The following table describes the tasks that you can do to set up the search result interface by using EVAM.

Task	Description
Map fields to display in search results	Define which fields from your data should be shown in the search results to help ensure that the most relevant information is presented to users. For more information, see View config details fields.
Configure icons for search results	Assign specific icons to different types of search results to make them visually distinct and easier to identify at a glance. For more information, see Card image fields.
Configure navigation actions	Set up actions that users can take directly from the search results, such as navigating to a related page. For more information, see Card details field.

Create or edit an EVAM view definition

Create or edit an Entity View Action Mapper (EVAM) view definition in the AI Search Admin console to customize how your AI Search results appear in the portal or workspace.

Before you begin

Role required: admin or ais_admin

About this task

An EVAM is a data source type tool that helps standardize how data appears in lists and cards. An EVAM lets you combine data from multiple sources, set up views for each source, and browse large data sets more easily. When you create or edit an EVAM definition, you can define which

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conditions, fields, and declarative actions to use and pair them with a view template. This setup lets you customize the result-card interface to your needs.

Procedure

1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. On the **Applications** tab, select the application card that you want to create or edit the EVAM configurations for.
3. In the left pane, select **Result-card Interface**.
   The result-card Interface shows the configured EVAM definition. You can modify the existing EVAM definition or if you're configuring your application for the first time, you can add an EVAM definition. For more information, see step 4.
4. **Optional:** Update an existing EVAM definition or add a definition.
   - To update the existing EVAM definition for the result-card interface, select **Change**.
   - To add an EVAM definition and configure the result-card interface for the first time, select **Choose**.

   a. Create or update an EVAM definition for the result-card interface.

Option	Procedure
Select from the existing result-card interfaces for your search application	i. Select **Use an existing result-card interface**. ii. From the Result card interface list, select an option.
Add a new result-card interface for your search application	i. Select **Create new interface**. ii. In the **Configuration name** field, enter the name.

   b. Select **Save**.

5. From the Select a bundle to edit list, select an EVAM configuration bundle.
   You can link more bundles to the selected EVAM definition by selecting **Advanced configuration**. For more information, see Create an EVAM definition.
   The list of view configurations that are associated with the selected bundle are displayed.
6. Manage the EVAM view configuration.

Option	Procedure
Create an EVAM view configuration	a. Select **Create New**. b. In the Create new view config dialog box, re view the auto-populated values, and then select **Create**.
Edit the existing EVAM view configuration	a. From the View configs list, identify an EVAM view configuration that you want to edit. b. Select the **More Actions icon** > **Edit**.

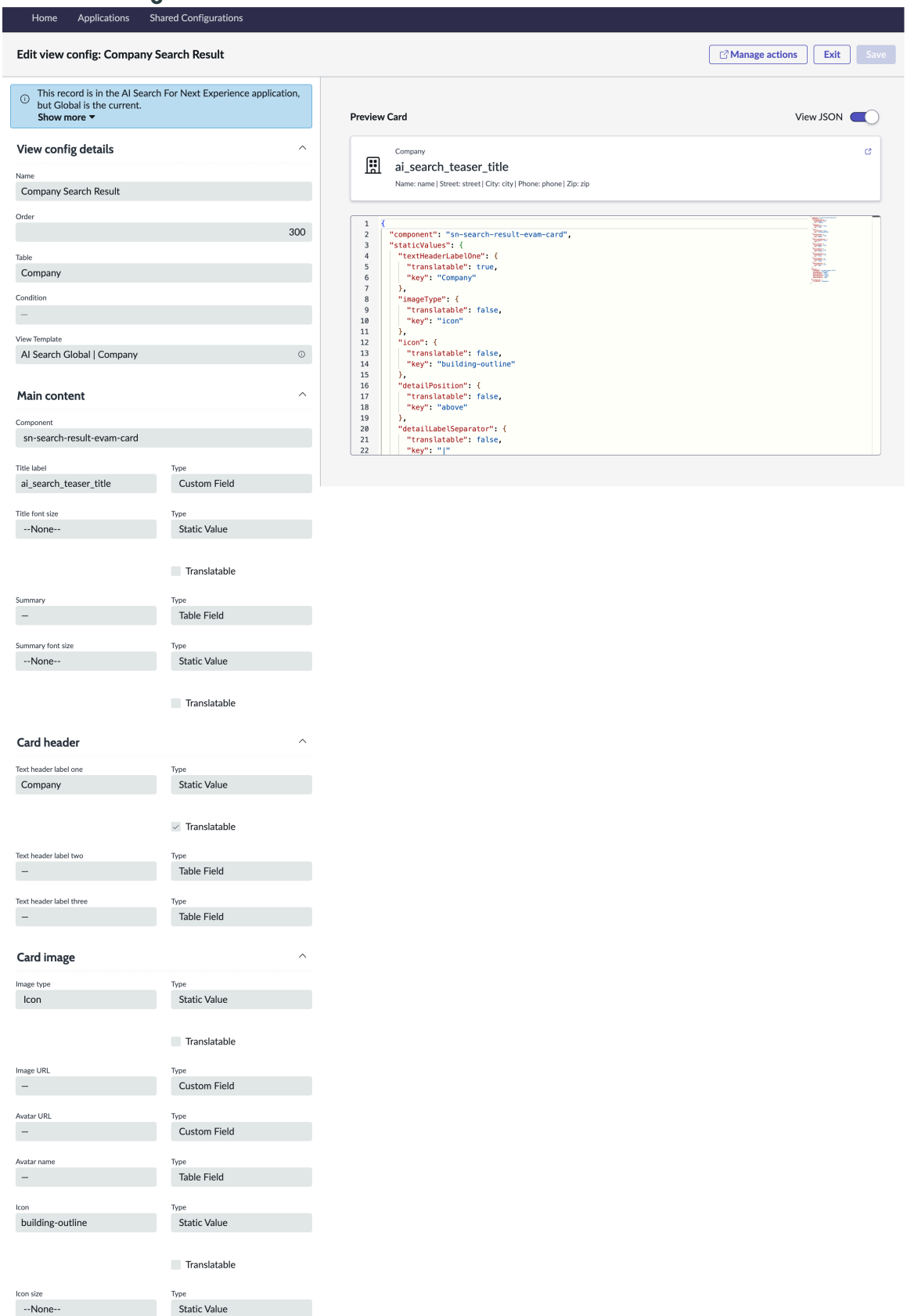
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7. On the form, fill in the fields.
   For a description of the field values, see Edit view config form.
8. In the Preview Card section, review the auto-generated JSON to verify the edits that you made to the view configuration.

   The following example shows the Edit view config form that helps you review the layout of your result-card interface in the Preview Card section.

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Edit view config form



9. Select **Save**.

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Result
Changes made to search result EVAM cards take effect immediately in AI Search applications.

What to do next
After creating a view configuration, you must activate it. For more information, see Activate or deactivate an EVAM view configuration.

Create a copy of an EVAM view configuration

Modify the search results of your AI Search application by creating a copy of an existing Entity View Action Mapper (EVAM) view and then changing the copy. This process is efficient, especially when the changes are minimal.

Before you begin
Role required: ais_admin

About this task
If the view configuration is shared and you need to change the result-card interface without impacting other shared instances, create a copy of the view configuration. You can verify if the view configuration is shared. For more information, see Track how your EVAM view configurations are used.

Procedure
1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. On the **Applications** tab, select the application card that you want to copy.
3. In the left pane, select **Result-card Interface**.
4. From the Select a bundle to edit list, select an EVAM configuration bundle.
   The list of view configurations that are associated with the selected bundle are displayed.
5. Hover over the desired view configuration and select the **More Actions icon** > **Create a copy**.
6. In the Copy view config dialog box, review the auto-populated values and then select **Copy**.

Result
A copy of the view configuration is added to the list.

What to do next
After copying a view configuration, you can modify it based on your requirements, such as updating the EVAM definition for the result-card interface. For more information, see Create or edit an EVAM view definition.

Track how your EVAM view configurations are used

Track where Entity View Action Mapper (EVAM) view configurations are being used in the AI Search application. EVAM helps you understand search result layouts, identify shared settings, and make adjustments for better search results.

Before you begin
Role required: admin or ais_admin

About this task
Tracking where a view configuration is used helps you:

- Understand the overall structure of the view configuration and open each component directly from the ServiceNow AI Platform record page.
- Check whether the view configuration is shared across search applications.

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Procedure

1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. On the **Applications** tab, select the application card that you want track the usage of.
3. In the left pane, select **Result-card Interface**.
4. From the Select a bundle to edit list, select an EVAM configuration bundle.
   A list of view configurations linked to the selected bundle appears.
5. Hover over the view configuration and select **More Actions (** ⋮ **)** > **View usage**.
6. In the View usage dialog box, review the values.
7. Select **Close**.

Activate or deactivate an EVAM view configuration

Activating or deactivating the Entity View Action Mapper (EVAM) view configurations in the AI Search application helps you to control which view configurations are in use.

Before you begin
Role required: admin or ais_admin

About this task
When you configure a new EVAM view configuration for your AI Search application, you must manually activate it before it can be used.

Procedure

1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. On the **Applications** tab, select the application card that you want to activate or deactivate.
3. In the left pane, select **Result-card Interface**.
4. From the Select a bundle to edit list, select an EVAM configuration bundle.
   A list of view configurations associated with the selected bundle appears.
5. Hover over the view configuration that you want to activate or deactivate and then select **More Actions (** ⋮ **)** > **Activate or deactivate**.

Result
The selected view configuration is activated or deactivated.

Delete an EVAM view configuration

Delete unnecessary Entity View Action Mapper (EVAM) view configuration from your AI Search application at any time to keep the application clean and organized

Before you begin
Role required: admin or ais_admin

Procedure

1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. On the **Applications** tab, select the application card that you want to delete.
3. In the left pane, select **Result-card Interface**.
4. From the Select a bundle to edit list, select an EVAM configuration bundle.

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The list of view configurations that are associated with the selected bundle are displayed.

5. Select the **More Actions icon** > **Delete** at the end of the view configuration row that you want to delete.

Result
The selected view configuration is permanently deleted.

Manage hybrid search in search applications

Control hybrid search settings in AI Search applications to optimize search performance. Activate hybrid search to create context-aware results that provide both search precision and contextual relevance. Deactivating hybrid search generates results that rely solely on keyword-based queries.

Before you begin

- Starting with ServiceNow Otto for AI Search version 15.0.
- Must have at least one indexed source with semantic fields and semantic indexing configured.

Role required: ais-admin

About this task
Hybrid search helps users find relevant content more easily, even when they don't use the exact words in the content. For most experiences, it improves the relevance of results, especially when users search with questions or descriptive phrases. If users typically search for exact values, such as record numbers, IDs, or codes, keyword search may provide more predictable results. For more information, see Hybrid search in AI Search.

Upgrading an existing installation doesn't change current hybrid search settings. Users with the admin role can activate or deactivate hybrid search for individual SACs after installation.

Procedure

1. Navigate to **All** > *AI Search* **Admin** > *AI Search* **Admin Home**.
2. From , select the search application.
3. Manage the hybrid search mode.
   - Enable the **Hybrid search** toggle to switch on the hybrid search mode.
   - Disable the **Hybrid search** toggle to switch off the hybrid search mode.

Result
Hybrid search mode is updated for the selected application.

What to do next

Managing indexed sources from the AI Search Admin console

If you have the ais_admin role, you can create, view, or edit indexed sources directly from the AI Search Admin console.

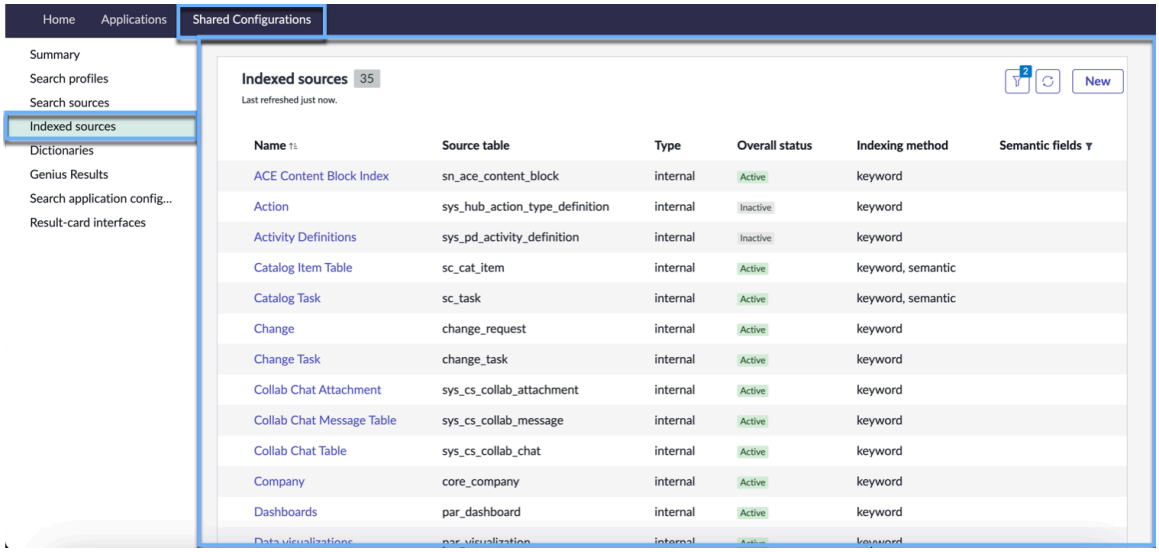
Indexed sources overview

Indexed sources are ServiceNow AI Platform® tables and external documents that you want to make searchable. AI Search then adds the content from these sources to its search index. The configuration for the indexed sources is shared by AI Search and other applications. For more information, see Indexed sources in AI Search.

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Indexed sources table

The following example shows the indexed sources configuration table in the Shared Configuration tab of the AI Search Admin console. From here, you can view, edit, or create indexed sources.



Indexed sources table

The Indexed sources configuration table displays key details of existing indexed source, such as name, source table, type, status, and more.

Indexed sources table

Field	Description
Name	Unique name of the indexed source.
Source table	ServiceNow AI Platform table to index.
Type	Type of the source table selected for indexing. It can be either an internal ServiceNow AI Platform table or an external document.
Overall status	Status of the indexed source: **Inactive** The indexed source isn't searchable and overrides other statuses. **Never indexed** The indexed source is active, but it has never been full indexed. This status can be combined with the **Reindex required** status. **Index in progress** The indexed source is being indexed manually. **Reindex required**

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Indexed sources table (continued)

Field	Description
	The indexed source configuration is updated and the source must be indexed again. **Active** The index is active and no changes have been made to the configuration since the last full index.
Indexing method	Methods used in information retrieval systems, such as AI Search to organize and retrieve text-based data by selecting either keyword or semantic: **Keyword** Helps to identify and index-specific keywords or phrases from the text. **Semantic** An advanced semantic vector search that goes beyond keywords. This method helps to understand the meaning or context of words within a document.
Semantic fields	Name of the fields that are configured to index for a semantic vector search.

Create an indexed source from the AI Search Admin console

Define an indexed source to make content and metadata from ServiceNow AI Platform table records searchable by using AI Search.

Before you begin

Role required: admin or ais_admin

Procedure

1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. On the **Shared Configurations** tab, select the **Indexed Sources** tab.
3. Select **New**.
4. On the form, fill in the fields.
   For a description of the field values, see Indexed Source form.

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Note:

- You may see more field values on the form that aren't visible on your user interface. Make sure that you fill in all the required fields and ignore the extra fields.
- You can't create more than one indexed source for a single ServiceNow AI Platform table.

5. Select **Save**.

What to do next

To control how your new indexed source processes source records and fields during indexing, configure its indexed source attributes and field settings. For more information, see Set up a field configuration for an indexed source.

To make content from internal indexed sources and source records searchable, perform a full table index for your new indexed source. For more information, see Index the content from an indexed source for searchability.

Define the semantic indexing configuration for an indexed source

Define the semantic indexing configuration for your indexed sources so that AI Search can analyze and understand your content accurately. By doing this process, you can help to ensure that you get more relevant search results.

Before you begin

Role required: ais_admin

About this task

AI Search indexes content from the indexed source for use with a semantic vector search. The group of semantic indexing settings for a particular indexed source is called a semantic index configuration. For more information, see Semantic index configuration for indexed sources.

Procedure

1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. On the **Shared Configurations** tab, select the **Indexed Sources** table.
3. Select the indexed source that you want to configure the semantic indexing settings for.
   The selected indexed source opens in the Configuration form view.
4. In the Semantic indexing configurations section, select **Edit**.
5. On the Semantic Indexing form, select **Create**.
6. On the form, fill in the fields.
   For a description of the field values, see Semantic Index Configuration form.
7. Select **Save**.

   The Semantic indexing configuration form reloads and displays your selected field values and the Semantic fields section.

8. In the Semantic fields section, follow these steps for each field that contains the content you want to include in the semantic index for the specified indexed source.

   a. Select **Add**.

   b. On the form, fill in the fields.

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For a description of the field values, see Semantic Index Field form.

c. Select **Add**.

The new semantic field configuration appears in the Semantic fields section.

What to do next

After updating the semantic index configuration settings for an indexed source, you must index or reindex the content from that indexed source. For more information, see Index the content from an indexed source for searchability.

Index the content from an indexed source for searchability

Enable AI Search to index the records from your source tables to make the content searchable.

Before you begin

Role required: ais_admin

About this task

You can index the existing records in the source table and any child tables that you set up for indexing. If you add, change, or remove an indexed source attribute, or update indexed values for fields on referenced tables, you must reindex the content from an internal source. You can do it manually by following the steps given in the procedure again. For more information, see Indexing content from AI Search indexed sources.

You can also index the content from an indexed source for external documents. For more information, see Indexing and searching external content in AI Search.

Procedure

1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. On the **Shared Configurations** tab, select **Indexed Sources** .
3. Select the indexed source that you want to index.
   The selected indexed source opens in the Configuration form view.
4. Select **Start index job**.
5. Start indexing.

Option	Procedure
Enable AI Search indexing content from internal indexed sources, including both parent table and its child tables	**a.** Select **Full index**. **b.** Select **Start**.
Enable AI Search indexing content from the source tables, including only the selected child tables	**a.** Select **Select source tables to index**. **b.** Select the source tables that are defined in the indexed source from the **Tables** field. **c.** Select **Start**.

   The AI Search Indexed Source History page appears.
6. **Optional:** To monitor the progress of the indexing task, refresh the AI Search Indexed Source History form page.
   When the task completes, the **Ingestion State** field of the indexed source shows its status as indexed.
7. Return to the list of indexed sources by selecting the back icon .

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Result
AI Search indexes content from existing records in the indexed source. Indexing continues on a scheduled basis. You must repeat this task for the indexed sources if you want to reindex their content before the next scheduled indexing run.

What to do next
Define search sources to make searchable content from the indexed source available in user search experiences. For details on creating search sources, see Create or edit an EVAM view definition.

Set up a field configuration for an indexed source

Set up indexed source field configurations to control how AI Search indexes content for a specific field in your source table records.

Before you begin
Role required: ais_admin

About this task
A field setting controls the indexing behavior for a specified field (column) on all records from an indexed source. For more information, see Field settings for AI Search.

Procedure
1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. On the **Shared Configurations** tab, select **Indexed Sources**.
3. Select the indexed source that you want to configure the fields for.
   The selected indexed source opens in the Configuration form view.
4. In the Field configurations section, select **Edit**.
5. Select **Create**.
6. On the form, fill in the fields.

Create field configuration form

Field	Description
Field configuration	Options to adjust the indexing behavior for source record fields in anAI Search indexed source. You can select a field setting from the following list of options: • **Exclude field from index**: Option to exclude content from a specific field in your records from being searchable in AI Search. • **Exclude field from search**: Option to disable search matching for content that is indexed from the selected field. • **Include calculated field in index**: Option to enable indexing of searchable content from the calculated field values. • **Include dot-walk fields in index**: Index reference and display values from the reference field's source table for use in search filters and result configurations.

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Field	Description
	• **Remap AI Search fields**: Option to map the selected field from the indexed source table to an AI Search index field. AI Search fills the index field with the value from the source field when indexing records.
Source	Specific table from the indexed source that the field setting applies to.
Field	Record field that the field setting operates on. The name of this field changes based on the selected field configuration. • If you have selected any of the exclude options, the field name is **Field to exclude**. • If you have selected the **Include calculated field in index** option, the field name changes to **Calculated field**. • If you have selected the **Include dot-walk fields in index** option, the field name changes to **Reference field**.
Add dot walk fields	Option to add a dot walk field. This field appears only if the **Include dot-walk fields in index** option is selected in the field configuration.
Searchable	Option to enable the field keyword searchable. This field appears only if the **Include dot-walk fields in index** option is selected in the field configuration.
Map to AI Search field	AI Search index field to match the specific field from your indexed source table.
Map as raw value	Option to map to the underlying sys_id for a reference field.

7. Select **Save**.

Result
The new field setting appears in the Field configurations section.

What to do next
To make the new field configurations take effect, perform a full table reindex for the indexed source. For more information, Index the content from an indexed source for searchability see

Set up an indexed source attribute for indexing the search content

Set up an indexed source attribute to control how AI Search indexes content for all records in a source table.

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Before you begin
Role required: ais_admin

About this task
An indexed source attribute defines how records from an indexed source table are indexed in AI Search. For example, with indexed source attributes, you can control which records to index, how to handle specific data types, such as attachments or tags, and whether to include translated fields in the index. These attributes help customize the indexing process to your needs. For more information, see Indexed source attributes for AI Search.

Procedure
1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. On the **Shared Configurations** tab, select **Indexed Sources**.
3. Select the indexed source that you want to configure the attributes for.
   The selected indexed source opens in the Configuration form view.
4. In the Advanced configurations section, select **Edit**.
5. Select **Create**.
6. On the form, fill in the fields.

Create field configuration form

Field	Description
Attribute	Options to adjust indexing settings for an AI Search indexed source. You can select an attribute from the following list of options: • **Index tags**: Control indexing of tags from indexed records. • **Translated fields**: Control indexing of translated fields from indexed records. • **Translated reference fields**: Control the indexing of translated reference fields from the indexed records. • **Attachments**: Control the indexing of attachments from indexed records.
Source	Specific table from the indexed source that the attribute applies to.
Which tags should be indexed	Type of tags to be indexed. You can select either option, shared tags and globally visible tags, or only globally visible tags, This field appears only if the Index tags option is selected in the attribute field.
Action	Option to enable or disable the indexing of a selected attribute. This field appears for all attributes except the Index tags.

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7. Select **Save**.

Result
The new indexed source attribute is added in the Advanced configurations form.

Configure multimodal captioning for AI Search

Use the AI Search Admin console to select the visual language model (VLM) provider and model for multimodal captioning.

Before you begin

- The Platform Multimodal Service plugin (com.glide.platform_mm_service) must be installed on your instance. If the plugin is not installed, multimodal captioning options will not appear in the AI Search Admin console. For more information, see Activate the Platform Multimodal Service plugin.
- Role required: ais_admin

About this task
When multimodal captioning is activated, attachments retrieved from supported sources are automatically analyzed and given descriptive captions, making visual content, such as images, discoverable through text-based search. You can specify the VLM provider and model to use when generating captions.

Procedure

1. Navigate to **All** > *AI Search* **Admin** > *AI Search* **Admin Home**.
2. Select **System Properties**.
3. In the Multimodal captioning section, select a **Provider** from the drop-down list.
   A provider is the VLM you want to use for captioning.

   Note: If your preferred provider is not listed, use the AI Control Tower (AICT) to configure approved third-party LLMs. For more information, see Configure third-party LLMs using AI Control Tower. NowLLM doesn't support this feature.

   The corresponding **Model** options appear.
4. Select a **Model** from the drop-down list.
   A model is a specific version of AI offered by the provider.
5. Select **Save**.

Result
Changes to the provider and model take effect immediately for multimodal captioning.

What to do next
AI Search administrators have additional configuration options available, as follows:

- AI Search administrators can activate multimodal captioning for individual AI Search indexed sources. For details on this procedure, see Activate multimodal captioning for attachments from an indexed source.
- Connector administrators can activate multimodal captioning in the crawl settings for an external content connector. To learn about configuring crawl settings for external content connectors, see Configuring crawl settings for external content connectors.

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Configure multi-content synthesized sources

Configure indexed sources so that AI Search includes content from multiple sources when generating responses. When you configure a source for synthesis, the large language model draws from that source alongside others to produce more complete, contextually relevant answers.

Before you begin

This task assumes you have completed the ServiceNow Otto for AI Search setup and are ready to activate sources for AI-generated responses.

- The ServiceNow Otto for AI Search ServiceNow® Store application must be installed on your instance. For details on installing this application, see Install ServiceNow Otto for AI Search.
- The source must be added to the search profile as a search source. For more information, see Create a search source for AI Search.
- The source must be configured as a hybrid source with semantic fields and semantic indexing configured. For more information, see Manage hybrid search in search applications.

Role required: admin

Procedure

1. Navigate to **All** > *AI Search* **Admin** > *AI Search* **Admin Home**.
2. Select **Application** > **Service Portal** > **Search Sources**.
3. Select the **Include in AI responses** toggle next to the source you want to activate.

   Sources that aren't configured as hybrid sources with semantic indexing can't be activated for synthesis and won't display the toggle.

   Selecting the toggle triggers a confirmation dialog to complete the activation.
4. Select **Submit**.

Result

The toggle now shows as activated and results from this source are now included in AI-generated responses. Citations for the additional sources appear as references within the synthesized answer. Select a citation to view the original record.

What to do next

After activating sources, run a test search to confirm AI-generated responses include content from this source. If results from this source don't appear in AI-generated responses, verify that the source still shows as a hybrid source with semantic indexing active and rerun the steps. Configuration changes after initial setup can affect synthesis eligibility.

For more information about multi-content synthesized sources, see Generate multi-content synthesized responses.

AI Search Admin console reference

Reference information for the AI Search Admin console application.

Components installed with AI Search Admin console

The AI Search Admin console application installs new system components.

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List of all components installed with AI Search Admin console

To view the complete list of system components installed with AI Search Admin console, follow the steps described in Find components installed with an application. The application's package name is *AI Search* **Admin Console**.

AI Search Admin console roles

Roles are associated with the AI Search Admin console.

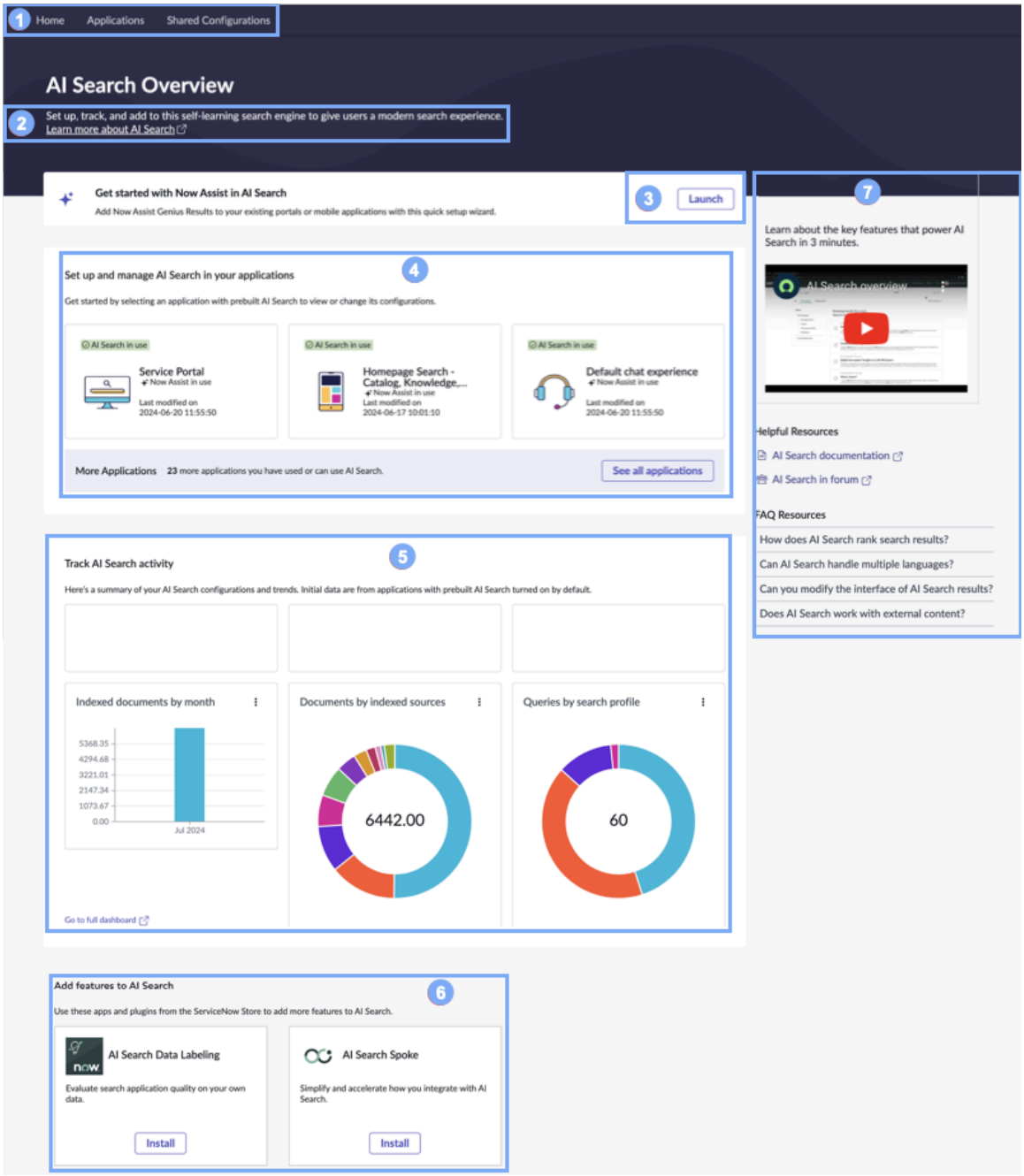
- ServiceNow AI Platform® administrator (admin):
  - Install and activate AI Search Admin console.
  - Install additional applications to add AI Search features.
- AI Search administrator (ais_admin):
  - Manage and configure AI Search settings for search applications.
  - Review AI Search activity.
  - View AI Search documentation.
  - Access AI Search forum on ServiceNow Community.
  - See answers to common questions about AI Search.

AI Search Admin console Home page

The AI Search Admin console Home page is where you can oversee all AI Search activity. You can set up and manage AI Search across applications, track activity, and get more information on the AI Search feature.

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AI Search Admin console Home



Legend

Field	Description
1. Navigation bar	Tabs to navigate between Home, Applications, and Shared Configurations pages.
2. Learn more about AI Search	Link that opens documentation for AI Search.
3. Launch	Button that opens Now Assist UI page where you can set up Now Assist in AI Search for various applications.

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Legend (continued)

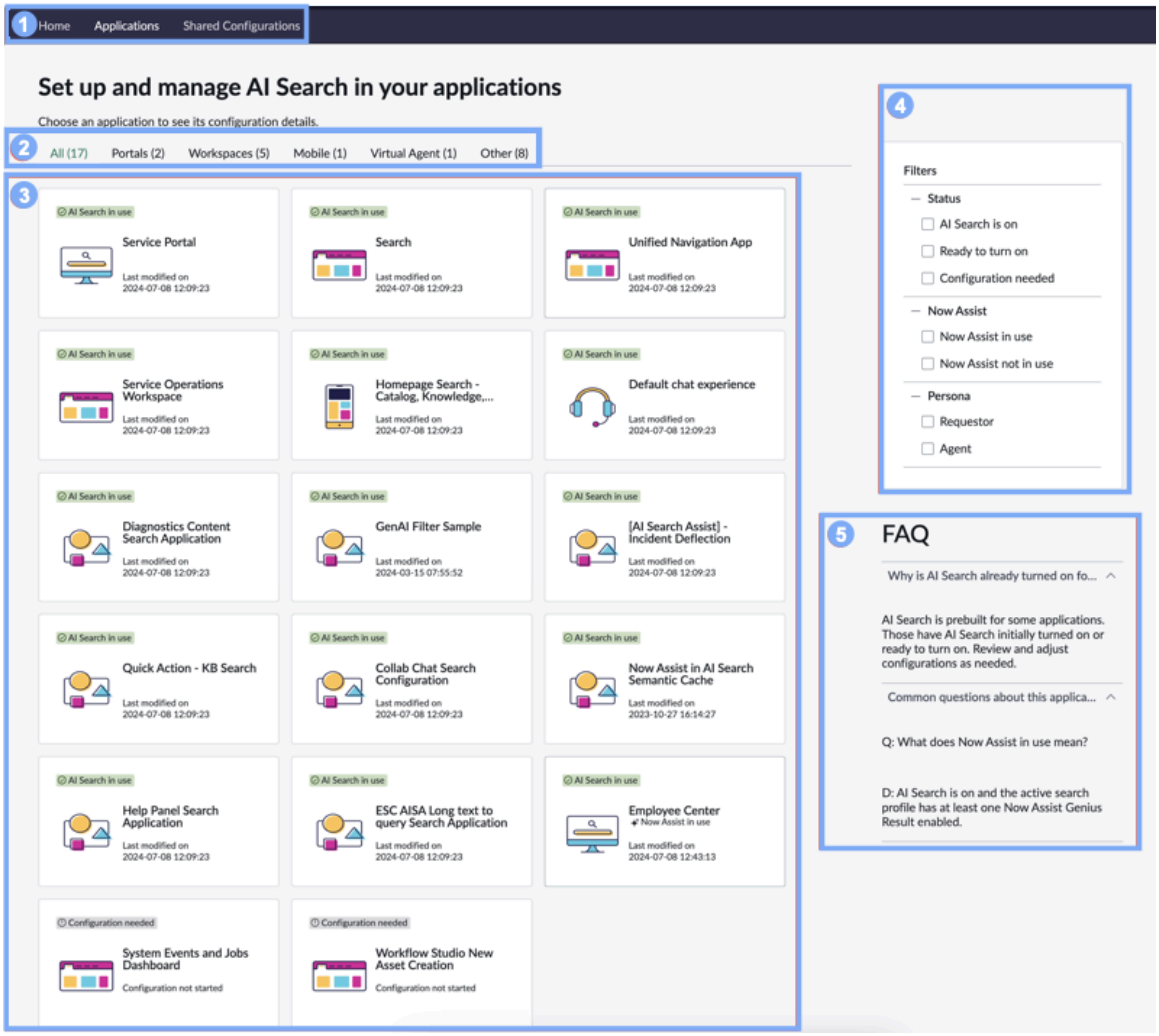
Field	Description
4. Set up and manage AI Search in your applications	Sample row of applications that have AI Search prebuilt. Select a given card to open the application's configuration view. Select **See all applications** to open the Applications page view.
5. Track AI Search activity	Panel showing a summary of AI Search configurations such as *Indexed documents by month* or *Queries by search profile*. Select the More actions icon to refresh the view on a given configuration. Select **Go to full dashboard** to open the full dashboard forAI Search configurations.
6. Add features to AI Search	List of apps and plugins that expand AI Search capability. Select **Install** on a given app to begin the setup.
7. Introduction	Sidebar with AI Search overview video, Helpful Resources links to AI Search documentation and community forum, and FAQs.

AI Search Admin console Applications page

The AI Search Admin console Applications page is where you monitor all the applications which use AI Search, as well as create and adjust AI Search configurations.

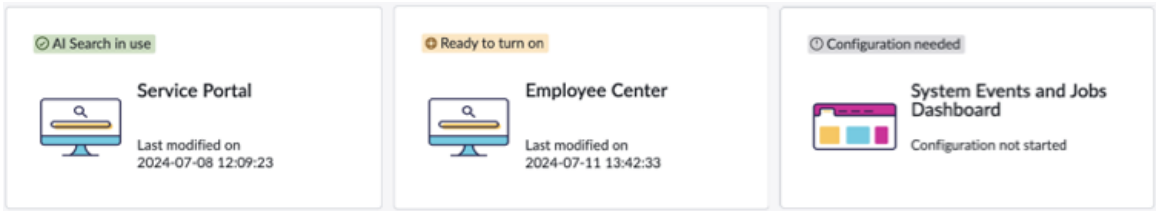
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AI Search Admin console Applications



Each application is represented by a card on the Applications page. Each card shows the AI Search status of the application, its name, and the date when it was last modified or if its configuration isn't started yet. Selecting a card takes you to the application's Configuration view.

AI Search Admin console Applications cards



Legend

Field	Description
1. Navigation bar	Tabs to navigate between Home, Applications, and Shared Configurations pages.
2. AI Search Applications tabs	Tabs to filter AI Search applications by type: • All • Portals

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Legend (continued)

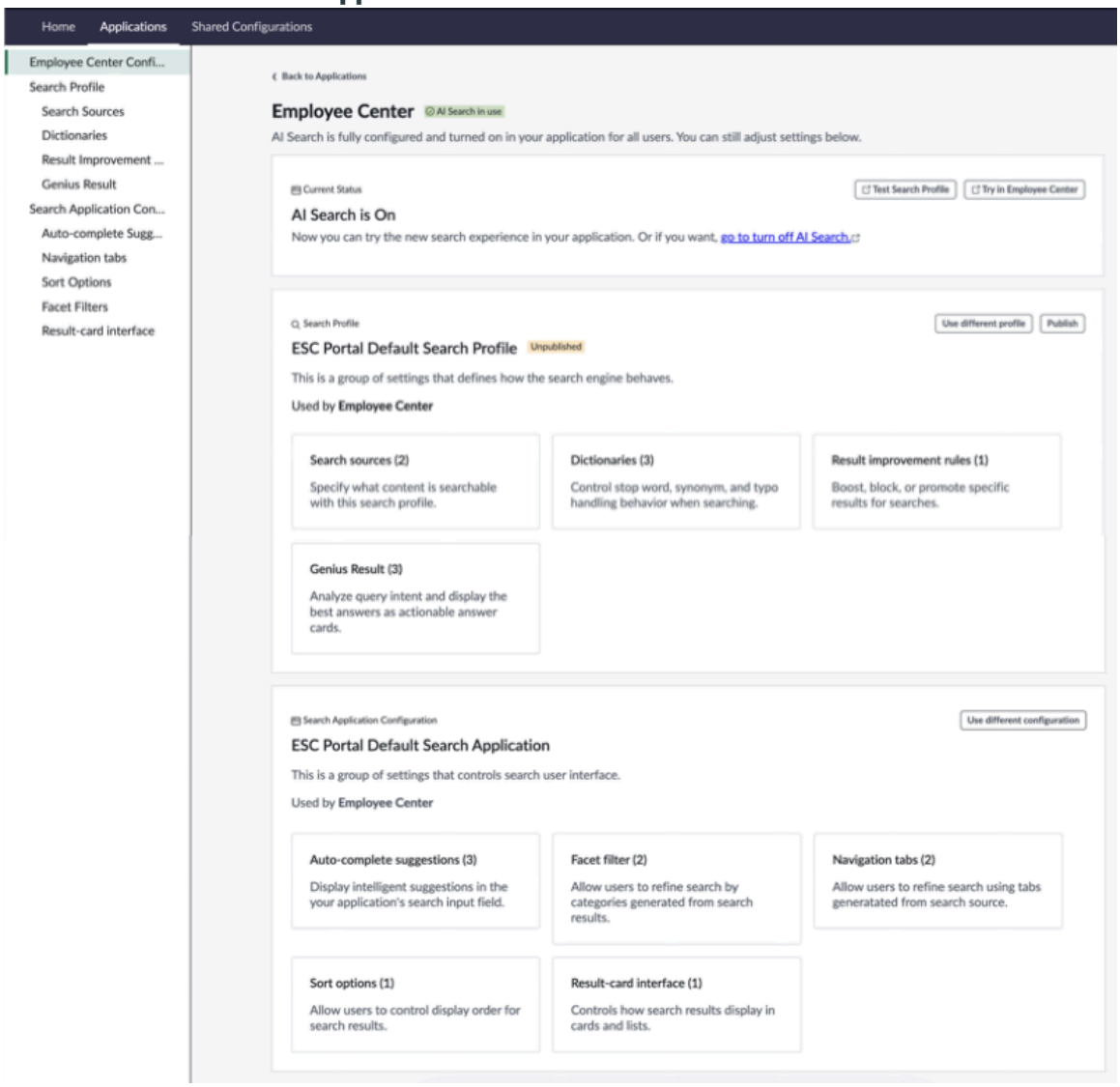
Field	Description
	• Workspaces • Mobile • Virtual Agent • Other
3. AI Search Applications cards	List of cards for applications with AI Search prebuilt. Select a card to go to the application's AI Search configuration page.
4. Filters	Check boxes for filtering applications: • Status ○ AI Search is on ○ Ready to turn on ○ Configuration needed • Now Assist ○ Now Assist in use ○ Now Assist not in use • Persona ○ Requester ○ Agent
5. FAQ	Frequently asked questions related to AI Search.

Application Configuration view

When you select an application's card in the Applications page, the application's configuration data appears. In the Configuration view, you can turn AI Search on and off for the application, choose and test search profiles and application configurations before publishing, and publish profiles. Select **Search Profile** or **Search Application Configuration** to view profile summaries. You can also select an individual option from the sidebar or its matching card on the main view to display it in detail.

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AI Search Admin console Applications



Note: The Applications view varies if you select a Search Profile with Genius Results activated. For more information, see Genius Results in Assistants overview

Application Configuration controls

Field	Description
Home	Navigation bar button to go to AI Search Admin console Home page.
Applications	Navigation bar button to go to AI Search Admin console Applications page.
Shared Configurations	Navigation bar button to go to AI Search Admin console Shared Configurations page.
Application Configuration	Sidebar tab to view the application's configuration summary.
Search Profile	Sidebar tab to view Search Profile summary info: • Search Sources • Dictionaries

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Application Configuration controls (continued)

Field	Description
	• Result Improvement Rules • Genius Results
Search Sources	Sidebar tab to view the list of Search Sources for this application. Alternatively, select the card with the same name on the summary view.
Dictionaries	Sidebar tab to view the list of Dictionaries for this application. Alternatively, select the card with the same name on the summary view.
Result Improvement Rules	Sidebar tab to view the list of result improvement rules for this application. Alternatively, select the card with the same name on the summary view.
Genius Results	Sidebar tab to view the list of Genius Results for this application. Alternatively, select the card with the same name on the summary view.
Search Application Configuration	Sidebar tab to view Search Application Configuration summary info: • Auto-complete Suggestions • Navigation tabs • Sort Options • Facet Filters • Result-card Interface
Auto-complete Suggestions	Sidebar tab to view the list of Auto-complete Suggestions for this application. Alternatively, select the card with the same name on the summary view.
Navigation tabs	Sidebar tab to view the list of Navigation tabs for this application. Alternatively, select the card with the same name on the summary view.
Sort Options	Sidebar tab to view the list of Sort Options for this application. Alternatively, select the card with the same name on the summary view.
Facet Filters	Sidebar tab to view the list of Facet Filters for this application. Alternatively, select the card with the same name on the summary view.
Result-card Interface	Sidebar tab to view the list of Result-card Interfaces for this application. Alternatively, select the card with the same name on the summary view.
Test Search Profile	Option to test the currently selected Search Profile.
Try in application	Option to test the Search Profile in its application.
Turn off AI Search	Link to the application's Service Portal record. If you deactivate *`Enable AI Search`* in the application's record and select **Update**, **Turn off AI Search** disappears and **Try in application** deactivates. The AI Search status display also changes and a **Go to turn on** button appears. Select this button to return to the application record and reactivate *`Enable AI Search`*.
Use different profile	Option to select a different Search Profile.

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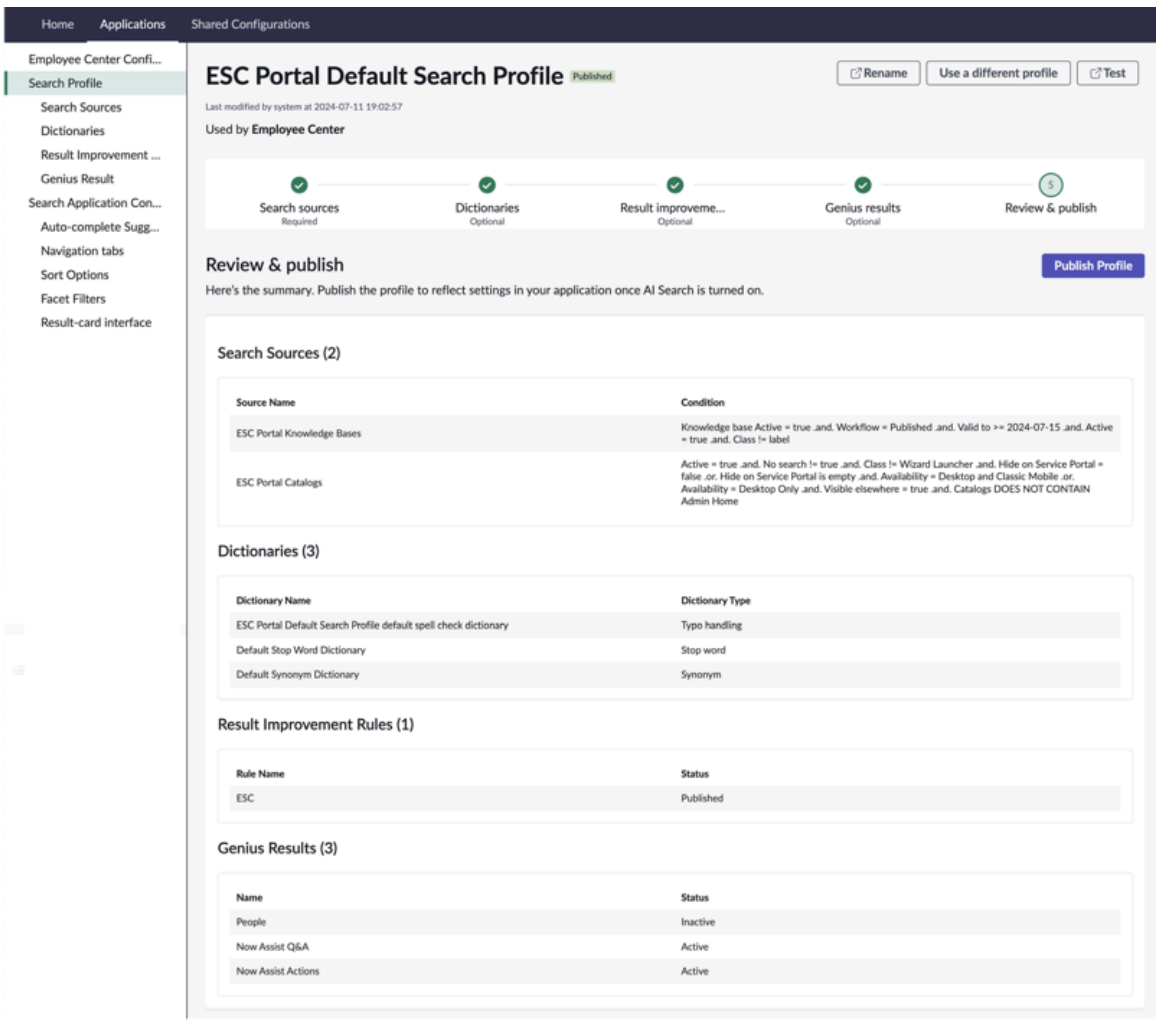
Application Configuration controls (continued)

Field	Description
Publish	Option to publish the current Search Profile being tested or used. If the Search Profile is already published, the **Publish** button deactivates.
Use different configuration	Option to select a different Search Application Configuration.

Search Profile

The Search Profile view is where you review and publish your search profile. You get a summary view from the Search Profile tab, and you select each of the four subsections to review them before publishing. For more information on creating and publishing a search profile, see Create a search profile and Publish an AI Search search profile.

Search Profile view



Search Profile controls

Field	Description
Rename	Button to rename your search profile.
Use a different profile	Button to select a different search profile.

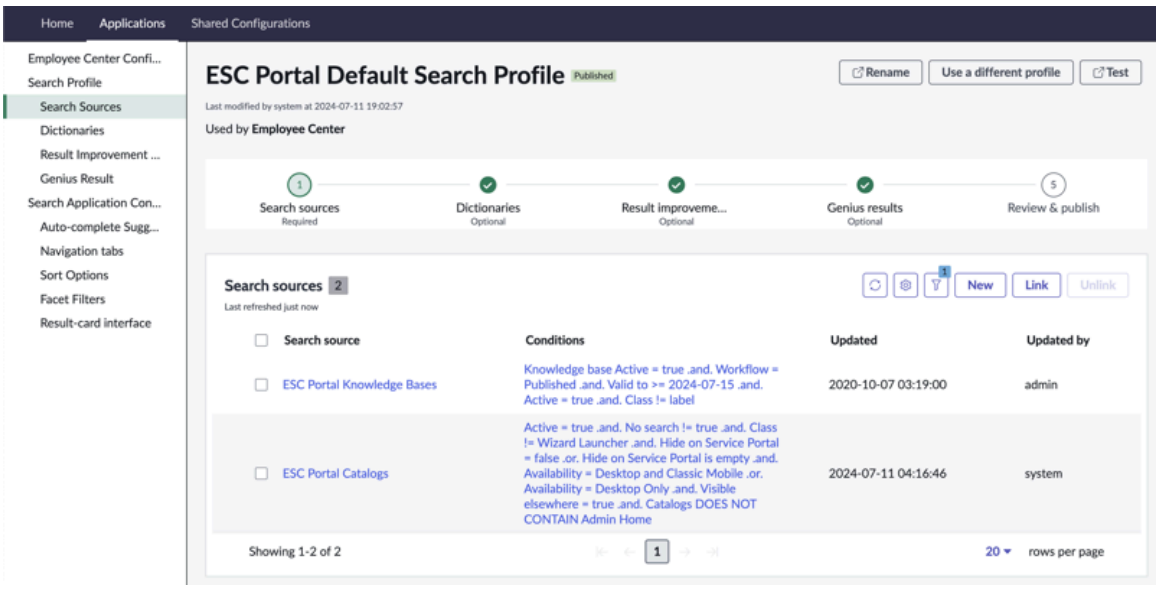
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Search Profile controls (continued)

Field	Description
Test	Button to test your search profile.
Publish profile	Button to publish your search profile.

Search Sources

You use Search Sources to make your searchable content available in search experiences. For more information, see Search sources in AI Search and Create a search source for AI Search.



Search Sources controls

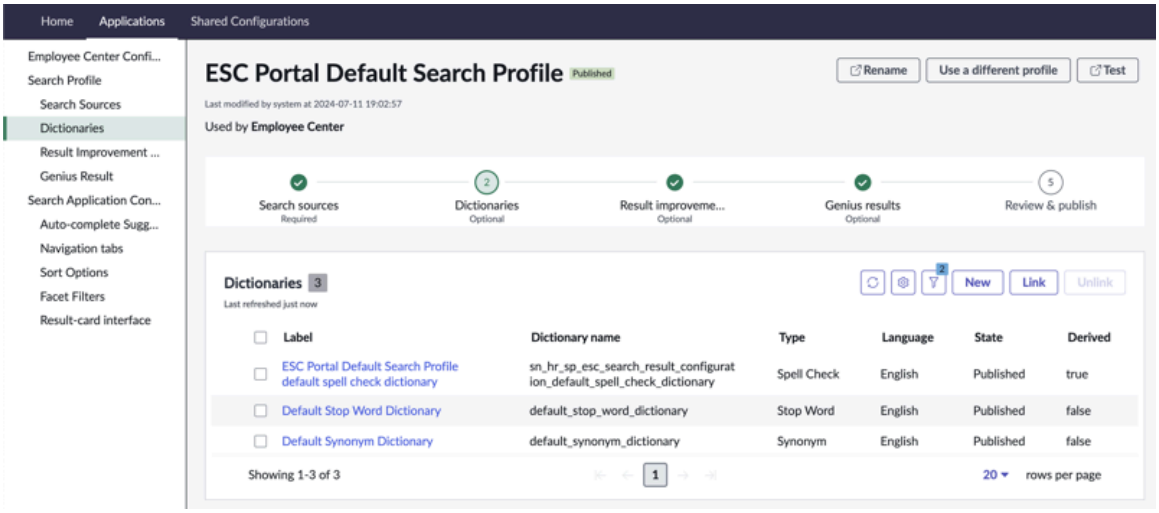
Field	Description
Refresh list	Button to refresh list of search sources.
List Actions	Button to open list actions. Select **Edit columns** to add or remove columns from the table. Select **Reset widths** if you have adjusted any column widths.
Show/ Hide Filter panel	Button to open filter conditions panel. Select the clear input icon next to any defined conditions to remove them. Select **Restore defaults** to reset default filters, or **Advanced view** to define filter conditions. For more information, see Set filter conditions.
New	Button to create a Search Source.
Link	Button to select a Search Source to add to the list.
Unlink	Button to unlink a Search Source from the list. Select one or more Search Sources from the list before selecting **Unlink**.

Dictionaries are an optional part of your search profile that guide your searches with synonyms, stop words, and spell checking options. For more information on synonyms, see Synonyms,

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Create synonyms, and Create a synonym dictionary linked to a search profile. For more information on stop words, see Stop words, Create stop words, and Create a stop word dictionary linked to a search profile.

Dictionaries view



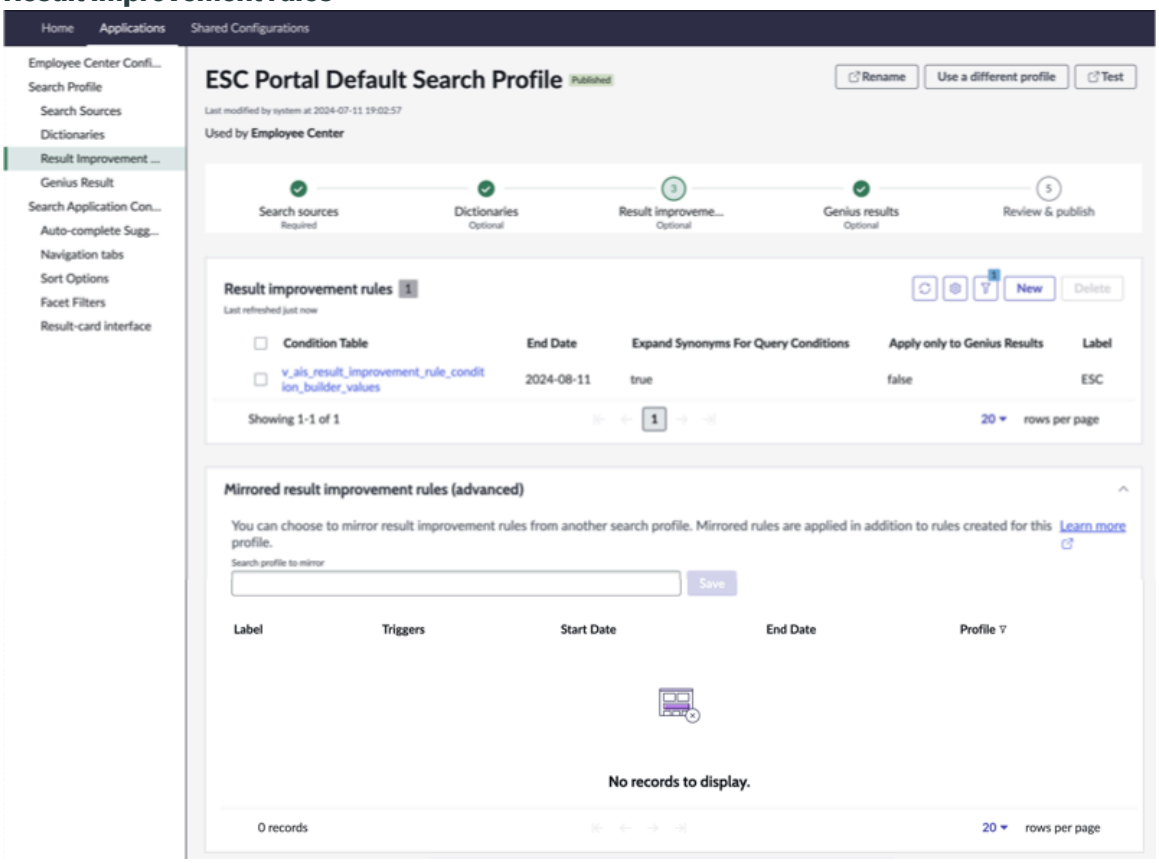
Dictionaries controls

Field	Description
Refresh list	Button to refresh list of Dictionaries.
List Actions	Button to open list actions. Select **Edit columns** to add or remove columns from the table. Select **Reset widths** if you have adjusted any column widths.
Show/ Hide Filter panel	Button to open filter conditions panel. Select the clear input icon next to any defined conditions to remove them. Select **Restore defaults** to reset default filters, or **Advanced view** to define filter conditions. For more information, see Set filter conditions.
New	Button to create a Dictionary.
Link	Button to select a Dictionary to add to the list.
Unlink	Button to unlink a Dictionary from the list. Select one or more Dictionaries from the list before selecting **Unlink**.

Result improvement rules are an optional part of the search profile that boost, block, or improve search results based on various trigger conditions. For more information, see Result improvement rules and Create a result improvement rule.

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Result Improvement rules



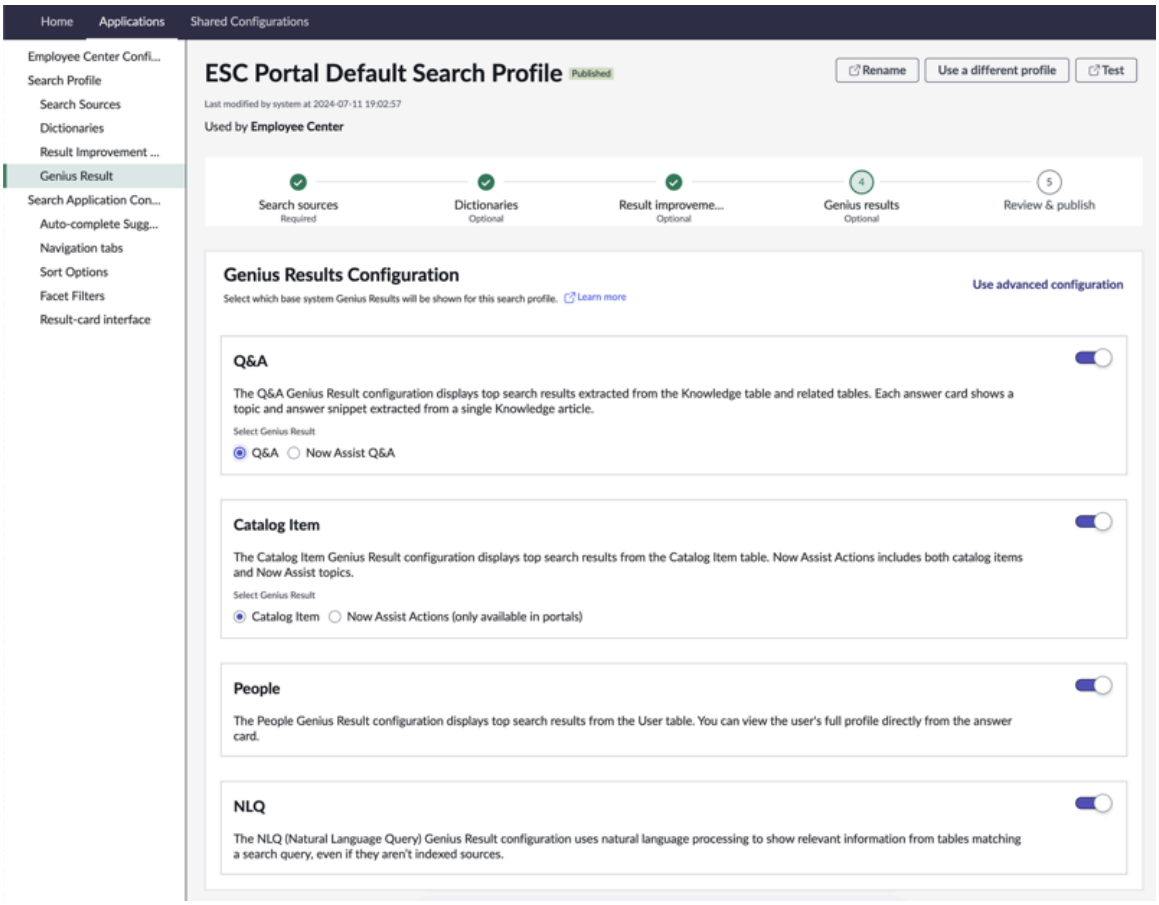
Result Improvement rules controls

Field	Description
Refresh list	Button to refresh list of result improvement rules.
List Actions	Button to open list actions. Select **Edit columns** to add or remove columns from the table. Select **Reset widths** if you have adjusted any column widths.
Show/Hide Filter panel	Button to open filter conditions panel. Select the clear input icon ✕ next to any defined conditions to remove them. Select **Restore defaults** to reset default filters, or **Advanced view** to define filter conditions. For more information, see Set filter conditions.
New	Button to create a result improvement rule.
Link	Button to select a result improvement rule to add to the list.
Unlink	Button to unlink a Result improvement rule from the list. Select one or more result improvement rules from the list before selecting **Unlink**.
Mirrored Result Improvement rules (advanced)	List of result improvement rules mirrored from another Search Profile. Use the search window to find one or more Result Improvement rule, and select **Save**. For more information, see Share result improvement rules between search profiles.

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Genius Results

Genius Results are an optional part of your Search Profile that displays the best results for search queries. You can view Genius Results configuration in basic and advanced configuration. For more information, see Genius Results and Create a Genius Result configuration.



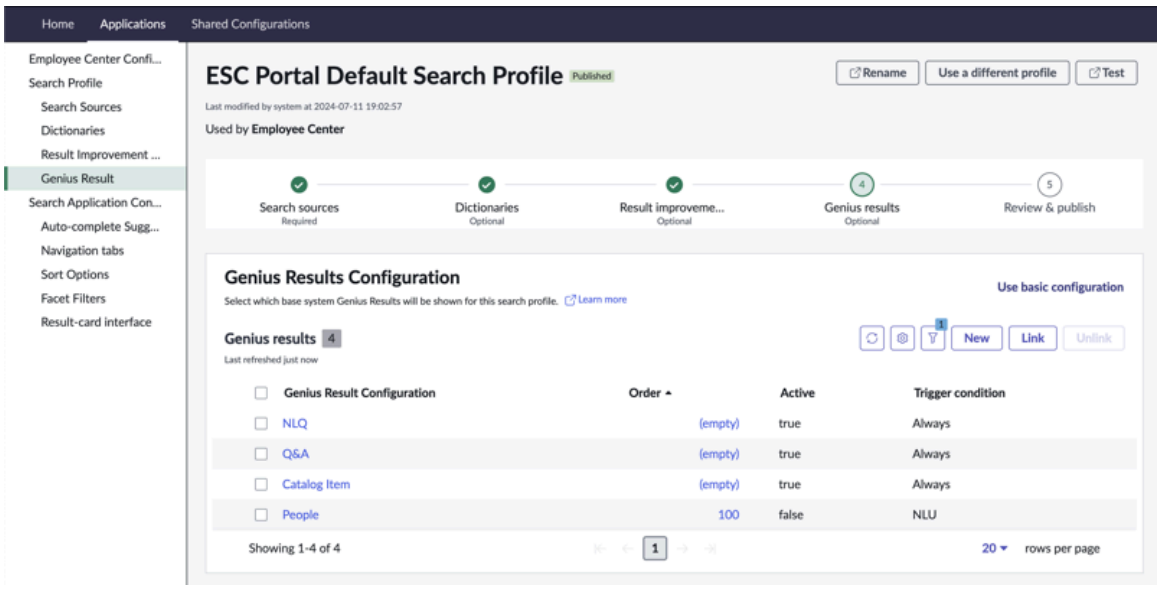
Genius Results basic configuration controls

Field	Description
Use advanced configuration	Select to switch to advanced configuration.
Q&A	Toggle to display top search results from the Knowledge table and related tables. Select from two options: • Q&A • Knowledge base articles **Note:** If you activate Q&A, the selected Genius Result is set with the default order. You can change the order by going to the advanced configuration. Knowledge base articles and Actions are only available to select if you have a Pro Plus license, otherwise they are greyed out.
Catalog Item	Toggle to display top search results from the Catalog Item table. Select from two options:

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Genius Results basic configuration controls (continued)

Field	Description
	• Catalog Item • Actions (only available in portals)
People	Toggle to display top search results from the User table.
NLQ	Toggle to use natural language processing to show information from tables, including non-indexed tables, that match a search query.



Genius Results advanced configuration controls

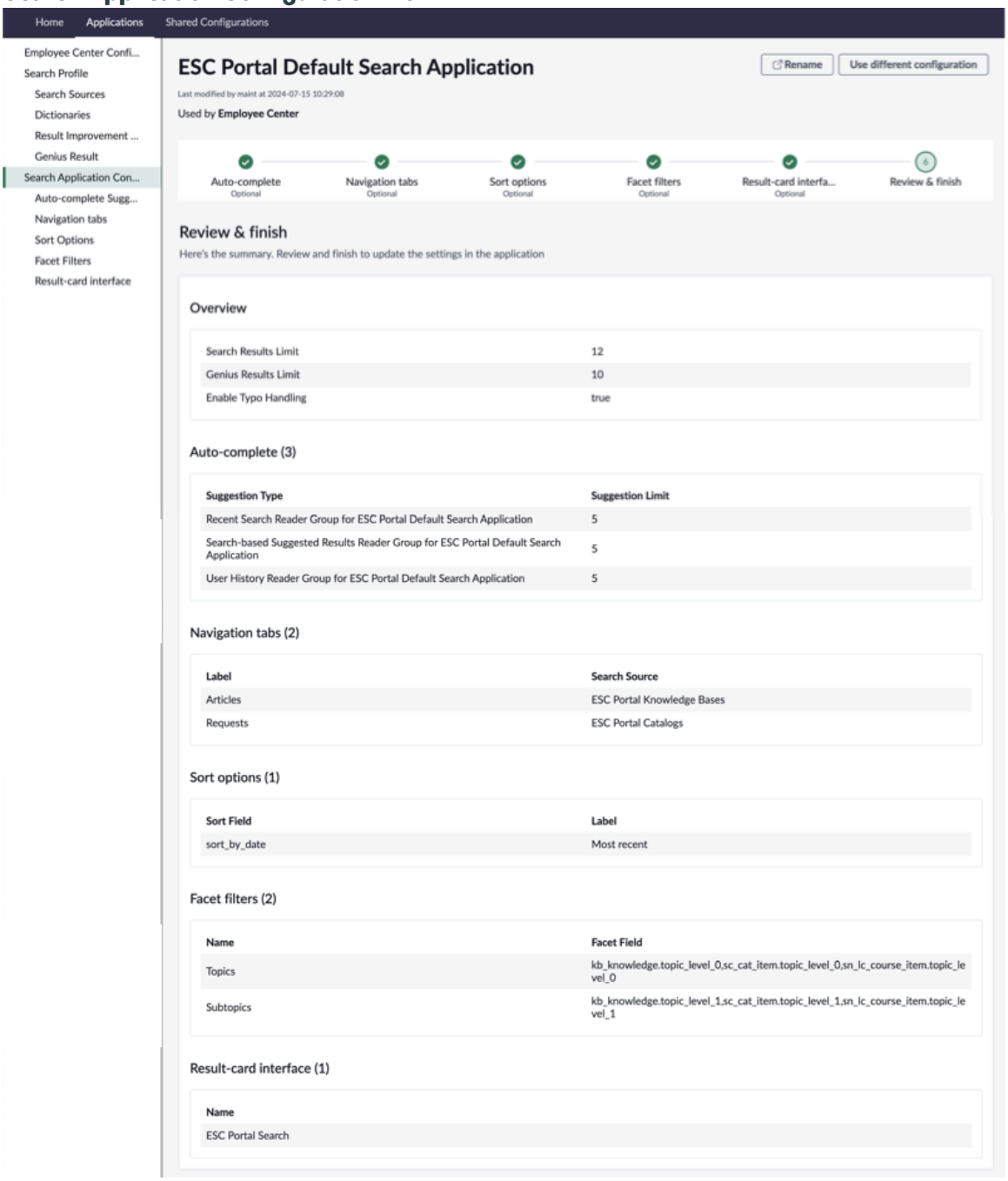
Field	Description
Use basic configuration	Select to switch to basic configuration.
Refresh list	Button to refresh list of Genius Results.
List Actions	Button to open list actions. Select **Edit columns** to add or remove columns from the table. Select **Reset widths** if you have adjusted any column widths.
Show/Hide Filter panel	Button to open filter conditions panel. Select the clear input icon ✕ next to any defined conditions to remove them. Select **Restore defaults** to reset default filters, or **Advanced view** to define filter conditions. For more information, see Set filter conditions.
New	Button to create a Genius Result.
Link	Button to select a Genius Result to add to the list.
Unlink	Button to unlink a Genius Result from the list. Select one or more Genius Results from the list before selecting **Unlink**.

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Search Application Configuration

The Search Application Configuration view is where you review how your Search Application is set up. You get a summary view from the Search Application Configuration tab, and you select each of the five subsections to review them in detail. For more information, see Search application configurations and Create a search application configuration for AI Search.

Search Application Configuration view



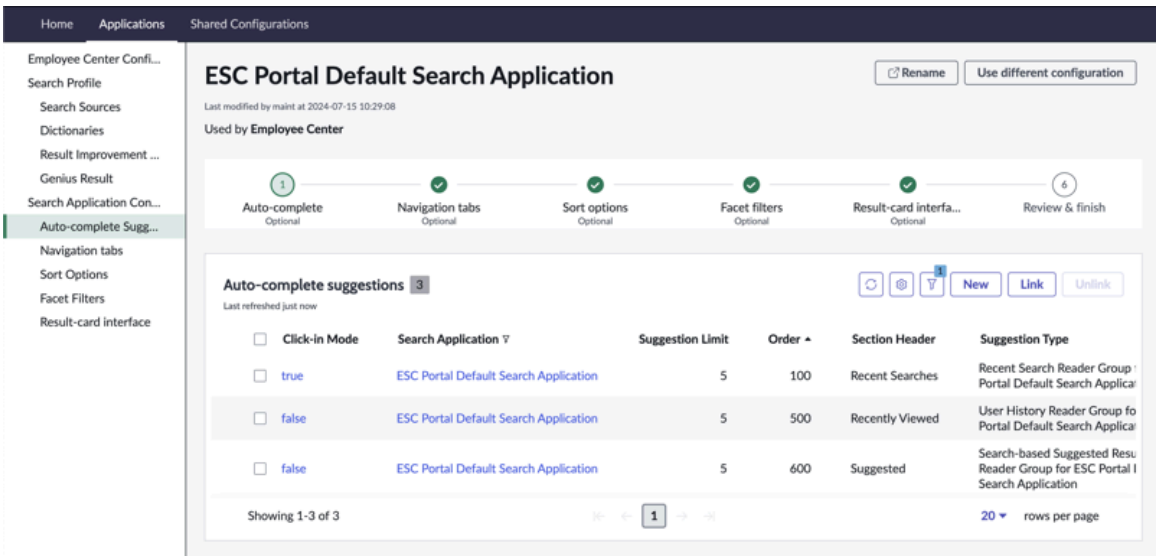
Search Application Configuration controls

Field	Description
Rename	Button to rename your search profile.
Use different configuration	Button to select a different Search application configuration.

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Auto-complete suggestions

Auto-complete Suggestions are an optional part of your search application configuration to display intelligent suggestions in your search application's input field. For more information, see Auto-complete suggestions in AI Search applications.



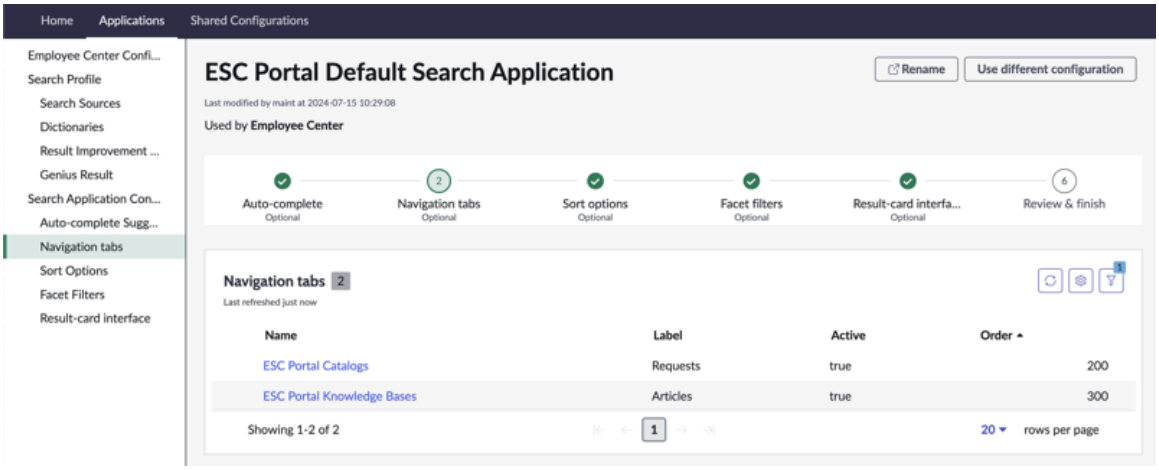
Auto-complete suggestions controls

Field	Description
Refresh list	Button to refresh list of auto-complete suggestions.
List Actions	Button to open list actions. Select **Edit columns** to add or remove columns from the table. Select **Reset widths** if you have adjusted any column widths.
Show/ Hide Filter panel	Button to open filter conditions panel. Select the clear input icon next to any defined conditions to remove them. Select **Restore defaults** to reset default filters, or **Advanced view** to define filter conditions. For more information, see Set filter conditions.
New	Button to create a auto-complete suggestion.
Link	Button to select an auto-complete suggestion to add to the list.
Unlink	Button to unlink a auto-complete suggestion from the list. Select one or more auto-complete suggestions from the list before selecting **Unlink**.

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Navigation tabs

Navigation tabs are an optional part of your search application configuration that refine your search query results by search source. For more information, see Configure source facet buckets in an AI Search application configuration.

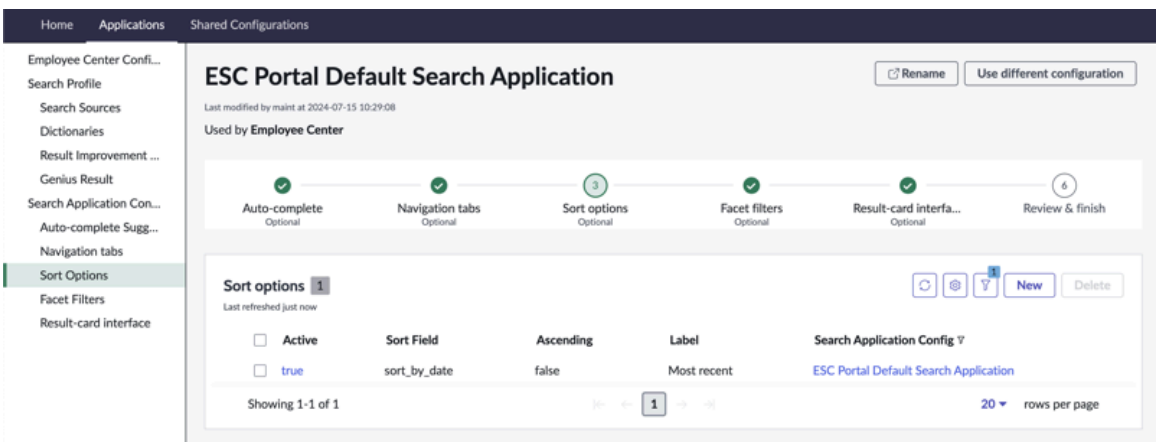


Navigation tabs controls

Field	Description
Refresh list	Button to refresh list of Navigation tabs.
List Actions	Button to open list actions. Select **Edit columns** to add or remove columns from the table. Select **Reset widths** if you have adjusted any column widths.
Show/ Hide Filter panel	Button to open filter conditions panel. Select the clear input icon next to any defined conditions to remove them. Select **Restore defaults** to reset default filters, or **Advanced view** to define filter conditions. For more information, see Set filter conditions.

Sort Options

Sort options are an optional part of your search application configuration that refine your search query results by search source. For more information, see Configure source facet buckets in an AI Search application configuration.



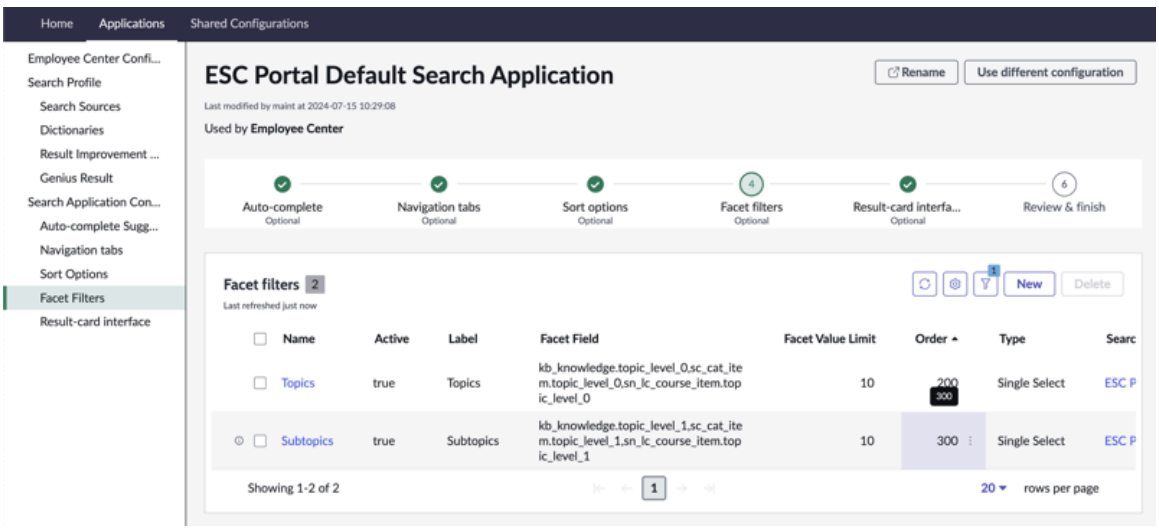
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Sort options controls

Field	Description
Refresh list	Button to refresh list of Sort options.
List Actions	Button to open list actions. Select **Edit columns** to add or remove columns from the table. Select **Reset widths** if you have adjusted any column widths.
Show/ Hide Filter panel	Button to open filter conditions panel. Select the clear input icon next to any defined conditions to remove them. Select **Restore defaults** to reset default filters, or **Advanced view** to define filter conditions. For more information, see Set filter conditions.
New	Button to create a Sort option.
Delete	Button to delete Sort options. Select one or more Sort options before selecting **Delete**.

Facet Filters

Facet filters are an optional part of your search application configuration that refine searches by dynamically generating categories from your search results. For more information, see Create a facet in an AI Search application configuration.



Facet Filters controls

Field	Description
Refresh list	Button to refresh list of Facet Filters.
List Actions	Button to open list actions. Select **Edit columns** to add or remove columns from the table. Select **Reset widths** if you have adjusted any column widths.

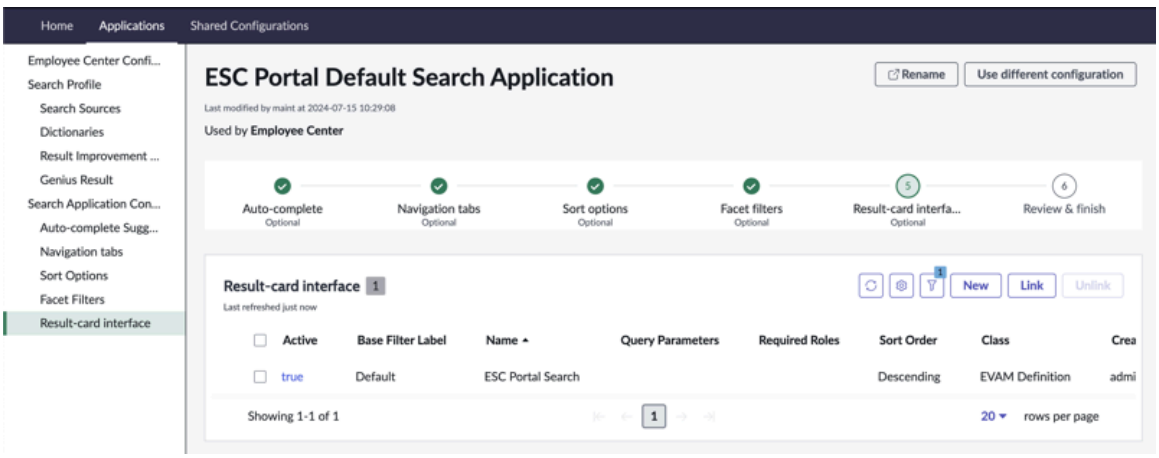
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Facet Filters controls (continued)

Field	Description
Show/ Hide Filter panel	Button to open filter conditions panel. Select the clear input icon next to any defined conditions to remove them. Select **Restore defaults** to reset default filters, or **Advanced view** to define filter conditions. For more information, see Set filter conditions.
New	Button to create a Facet Filter.
Delete	Button to delete Facet Filters. Select one or more Facet Filters before selecting **Delete**.

Result-card interfaces

Result-card interfaces are an optional part of your search application configuration that provides a standardized display of search results in cards and lists. For more information, see Exploring Entity View Action Mapper and Create an EVAM definition.



Facet Filters controls

Field	Description
Refresh list	Button to refresh list of result-card interfaces.
List Actions	Button to open list actions. Select **Edit columns** to add or remove columns from the table. Select **Reset widths** if you have adjusted any column widths.
Show/ Hide Filter panel	Button to open filter conditions panel. Select the clear input icon next to any defined conditions to remove them. Select **Restore defaults** to reset default filters, or **Advanced view** to define filter conditions. For more information, see Set filter conditions.
New	Button to create a result-card interface.
Link	Button to select a result-card interface to add to the list.

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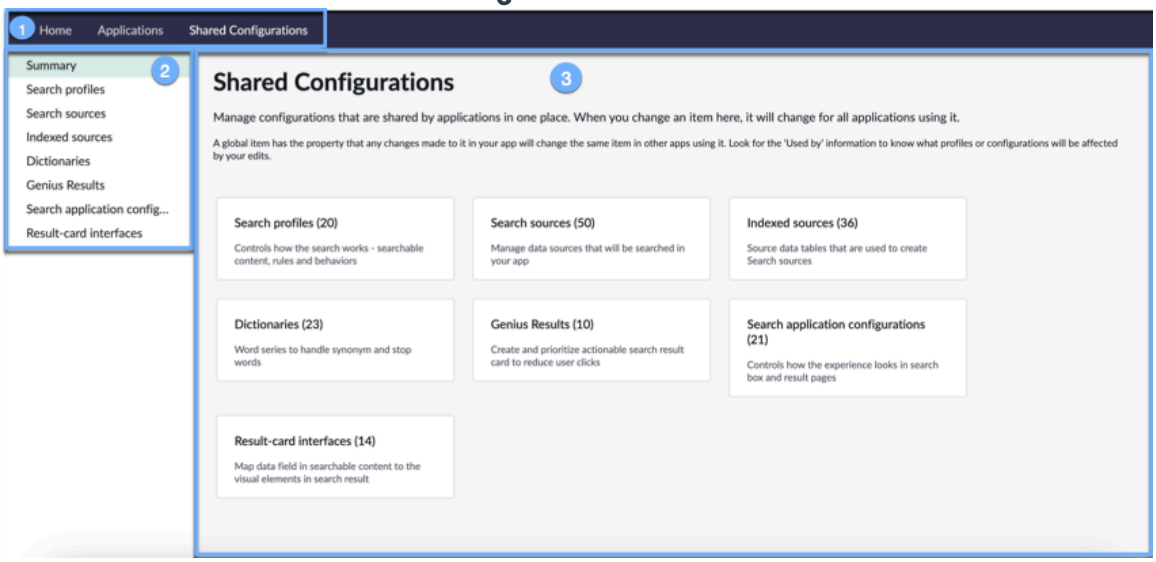
Facet Filters controls (continued)

Field	Description
Unlink	Button to unlink a result-card interface from the list. Select one or more Navigation tabs from the list before selecting **Unlink**.

AI Search Admin console Shared Configurations page

This page is where you view and manage all configurations shared by AI Search and other applications.

AI Search Admin console Shared Configurations



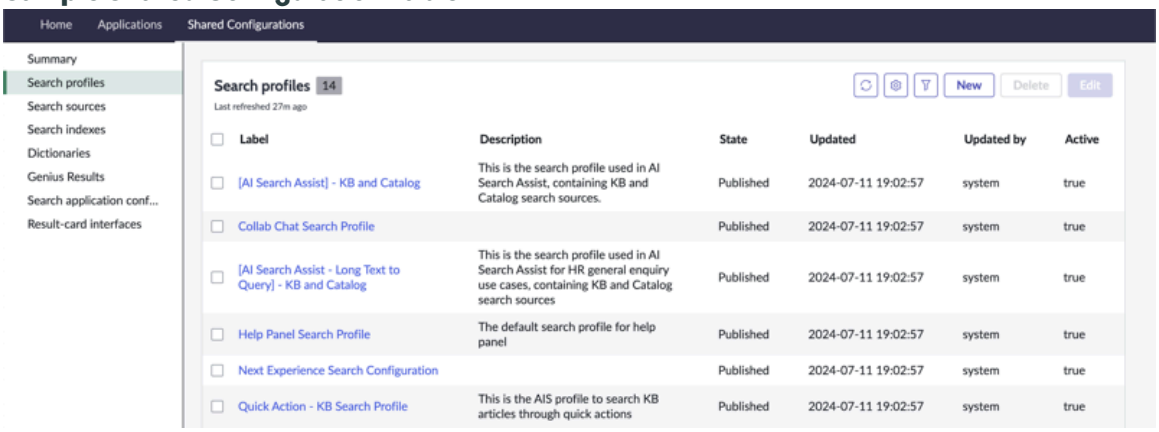
Legend

Field	Description
1. Navigation bar	Tabs to navigate between Home, Applications, and Shared Configurations pages.
2. Configurations sidebar	Tabs for navigating the types of Shared Configurations tables. Select a tab to view the table: • Summary • Search profiles [ais_search_profile] table • Search sources [ais_search_source] table • Indexed Sources [ais_datasource] table • Dictionaries [ais_dictionary] table • Genius Results [ais_genius_result_configuration] table • Search application configurations [sys_search_context_config] table • Result-card interfaces [sys_ux_composite_data]
3. Shared Configurations	Cards for navigating the types of Shared Configurations tables. These cards match the entries in the Tab sidebar. Select a card to view the table.

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Shared Configurations tables

Sample Shared Configuration Table



All Shared Configurations tables use the same controls to manage their entries.

Shared Configurations table controls

Field	Description
Refresh list	Button to refresh list of table entries.
List Actions	Button to open list actions. Select **Edit columns** to add or remove columns from the table. Select **Reset widths** if you have adjusted any column widths.
Show/ Hide Filter panel	Button to open filter conditions panel. Select the clear input icon next to any defined conditions to remove them. Select **Restore defaults** to reset default filters, or **Advanced view** to define filter conditions. For more information, see Set filter conditions.
New	Button to create a record.
Delete	Button to delete records. Select one or more entries before selecting **Delete**

For further information on using these tables, see Create an AI Search configuration.

Create an AI Search configuration

Create search profiles, search sources, and other configurations for any of your applications that use AI Search.

Before you begin

Role required: admin or ais_admin

Procedure

1. Navigate to **All** > **AI Search Admin** > **AI Search Admin Home**.
2. Select the Shared Configurations tab.
3. Select the table tab where you want to create the configuration.
4. Select **New**.
5. Fill in the form fields, depending on your preferred configuration.

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Table	Form
Search profiles	Search Profile form
Search sources	Search Source form
Search indexes	Indexed Source form
Dictionaries	Dictionary form
Genius Results	AI Search Genius Result Configuration form
Search application configurations	Search Application Configuration form
Result-card interfaces	

6. Select **Save**.

Edit view config form

The Edit view config form contains information about Entity View Action Mapper (EVAM) view configurations defined for search application configurations in AI Search. Use this form when creating or modifying a view configuration.

For details on creating or modifying a view configuration, see Create or edit an EVAM view definition.

Edit view config form

View config details fields

Field	Description
Name	Unique name for the EVAM view configuration.
Order	Order of appearance for a view configuration in the context of the search application configuration.
Table	Table to associate with the EVAM view configuration.
Condition	Conditions for when to use the EVAM view configuration.
View Template	Template to associate with the EVAM view configuration.

Main content fields

Field	Description
Component	Name of the component to be added to the EVAM view configuration.
Title label	Title of the EVAM view result card.

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Main content fields (continued)

Field	Description
Type	Determines how title is handled within the EVAM view, select either Model Field or Static Value. **Static Value** A fixed or constant value that you manually enter. **Table Field** Dynamically generated value based on a specific columns from the selected table. **Custom Field** Specific information that is returned as part of the search results. By default, there are four custom fields available: • ai_search_teaser_title • ai_search_teaser_text • document_index • navigation_url **Note:** This field appears multiple times throughout the form. Choose its value according to the configuration of the preceding field.
Title font size	The font size for the title text in an EVAM view to control the visual appearance of the title.
Translatable	Option to translate the text based on the preferred language of a user. **Note:** This field appears multiple times throughout the form.
Summary	Additional information to display in the result card after the title.
Summary font size	The font size for the text in an EVAM view result card to control the visual appearance of the information.

Card header fields

Field	Description
Text header label one	Unique title one for a specific EVAM view that communicates the purpose or content of the view.

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Card header fields (continued)

Field	Description
Text header label two	Unique title two for a specific EVAM view that communicates the purpose or content of the view.
Text header label three	Unique title three for a specific EVAM view that communicates the purpose or content of the view.

Card image fields

Field	Description
Image type	Determine the format or type of an image you want to display, such as icon, image, or avatar.
Image URL	Determine the web address (URL) of an image that you want to display within a particular component or element of your application.
Avatar URL	Determine the web address (URL) of an avatar image. Avatars are typically used to represent users, characters, or entities within an application.
Avatar name	Name given to the avatar.
Icon	Represents a visual symbol that displays in the EVAM view result card interface. /The icon to display next to the breakdown-related field on the form.
Icon size	Determines the size of the icon
Hide icon	An option to hide icon in the EVAM view result card interface.

Card details fields

Field	Description
Aria label	An attribute that enhances web accessibility by supplying titles for screen readers.
Detail label type	Specifies how the details are displayed on the EVAM view result card, either inline or stacked.
Detail position	Specifies where the details are displayed on the EVAM view result card, either above the summary text or below.
Detail label separator	Specifies the character or string used to separate labels on the EVAM view result card.
Detail label	Describes each detail displayed on the EVAM view result card.

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Card details fields (continued)

Field	Description
Detail value	Specifies the information that is displayed for each detail on the EVAM view result card.
Open in new tab	An option to display and enable the Open in New Tab icon on the EVAM view result card.
Is global	Indicates whether the view configuration is for a portal.

Platform Analytics Solution for Advanced AI Search Management Tools

ServiceNow® Platform Analytics Solutions contain prepackaged Performance Analytics and Reporting content for use with other ServiceNow AI Platform® products. This Platform Analytics Solution helps AI Search administrators analyze search query traffic trends, review indexed record and configuration settings, and preview search query results.

Required roles

The following roles are associated with this solution:

- ServiceNow AI Platform administrator (admin): Install and activate this Platform Analytics Solution and make any necessary changes to system properties.
- AI Search administrator (ais_admin): Review the AI Search dashboards. Share the dashboards with appropriate stakeholders. Test search queries using the Search Preview UI module.
- Usage Insights administrator (analytics_admin), Usage Insights viewer (analytics_viewer), User Portal Analytics administrator (portal_analytics_admin), Portal Analytics viewer(portal_analytics_viewer), Web Analytics administrator (web_analytics_admin), or Web Analytics viewer(web_analytics_viewer): View the AI Search Analytics dashboard metrics and reports.
- Impersonator (impersonator): View NLU intents detected in queries, enable debugging, or search as another user in the Search Preview UI module.

Related topics

Platform Analytics solutions

Activate the Platform Analytics Solution for Advanced AI Search Management Tools

Activate the content pack ServiceNow® Store application for the Platform Analytics Solution.

Before you begin

The Usage Insights API application from the ServiceNow Store must be activated in your instance.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **Available To Obtain From Store**.
2. Browse for Advanced AI Search Management Tools and verify that you have the necessary valid entitlements.

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You need a Now Support account and permission to request applications for the instances under consideration. The Now Support account and the instance must be part of the same company. For more information, see Install a ServiceNow Product on the ServiceNow Store.

3. Search for `Advanced AI Search Management Tools`.
4. Install the application.

Result

The following application menus and modules appear in the application navigator:

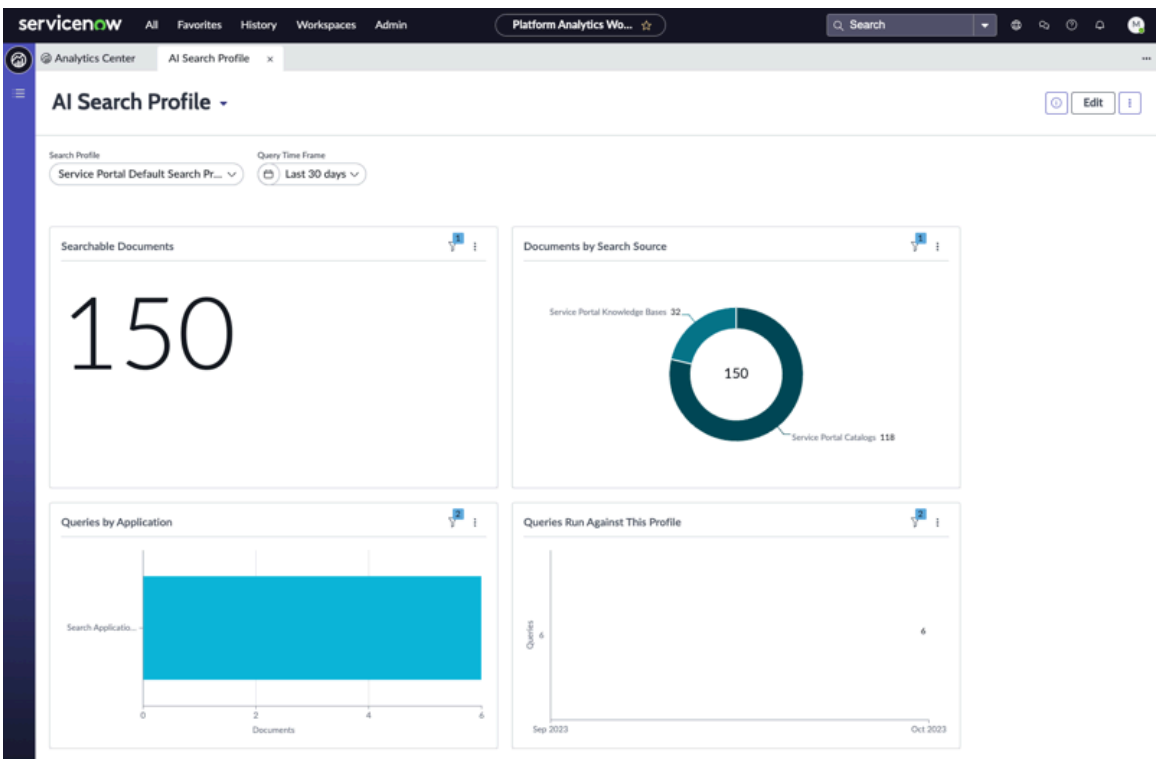
Application	Application navigator path
AI Search Profile dashboard	*AI Search* > *AI Search* **Analytics** > **Search Profile Analytics**
AI Search dashboard	*AI Search* > *AI Search* **Analytics** > **Search Index Analytics**
Search preview UI	*AI Search* > **Preview** > **Search Preview**

Note: Immediately after installation, the AI Search dashboards will be empty. The dashboards may take up to an hour to populate with results.

AI Search Profile dashboard

The AI Search Profile dashboard summarizes indexed record counts and search query traffic associated with a search profile defined in AI Search. Interactive filters enable users to choose a search profile and select the time frame for analysis of search query traffic.

AI Search Profile dashboard



To access the dashboard, navigate to **All** > *AI Search* > *AI Search* **Analytics** > **Search Profile Analytics**.

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Note: If the dashboard displays a `Read operation on table '<name>' from scope 'Advanced AI Search Management Tools' was denied` informational message, ask your administrator to perform the steps described in Create a cross-scope access privilege for the AI Search dashboards for the listed table.

Required ServiceNow AI Platform® roles

To view or edit the dashboard, you must have the ais_admin role.

You may need additional roles to view and select search profiles for some AI Search applications or portals. For example, the **ESC Portal Default Search Profile** for the ESC portal is only visible in the search profile list if you have Employee Center administrator [sn_hr_sp.esc_admin] role.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

User	Dashboard use
AI Search administrator	Reviews indexed record counts and follows search query traffic trends for search profiles defined in AI Search.

Data visualizations

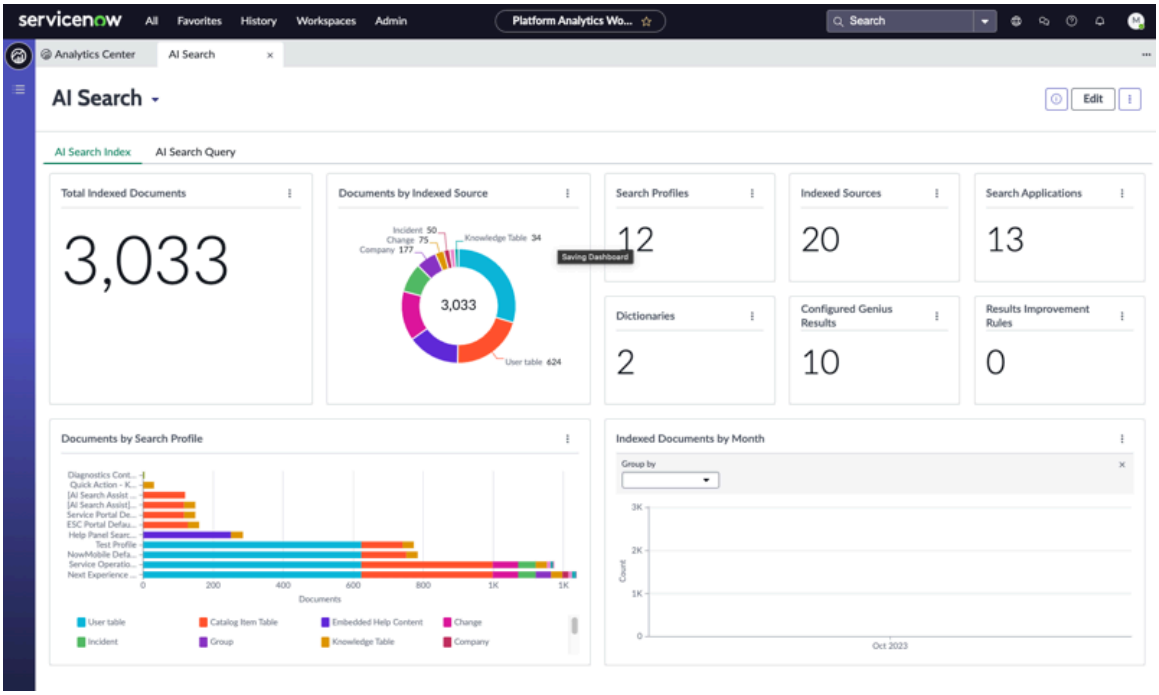
Title	Type	Source table	Description
Queries by Application	Bar	sys_search_event	Shows the number of search queries that used the selected search profile in the selected query time frame, grouped by search application.
Queries Run Against This Profile	Line	sys_search_event	Shows the number of search queries that used the selected search profile in the selected query time frame, grouped by month.

AI Search dashboard

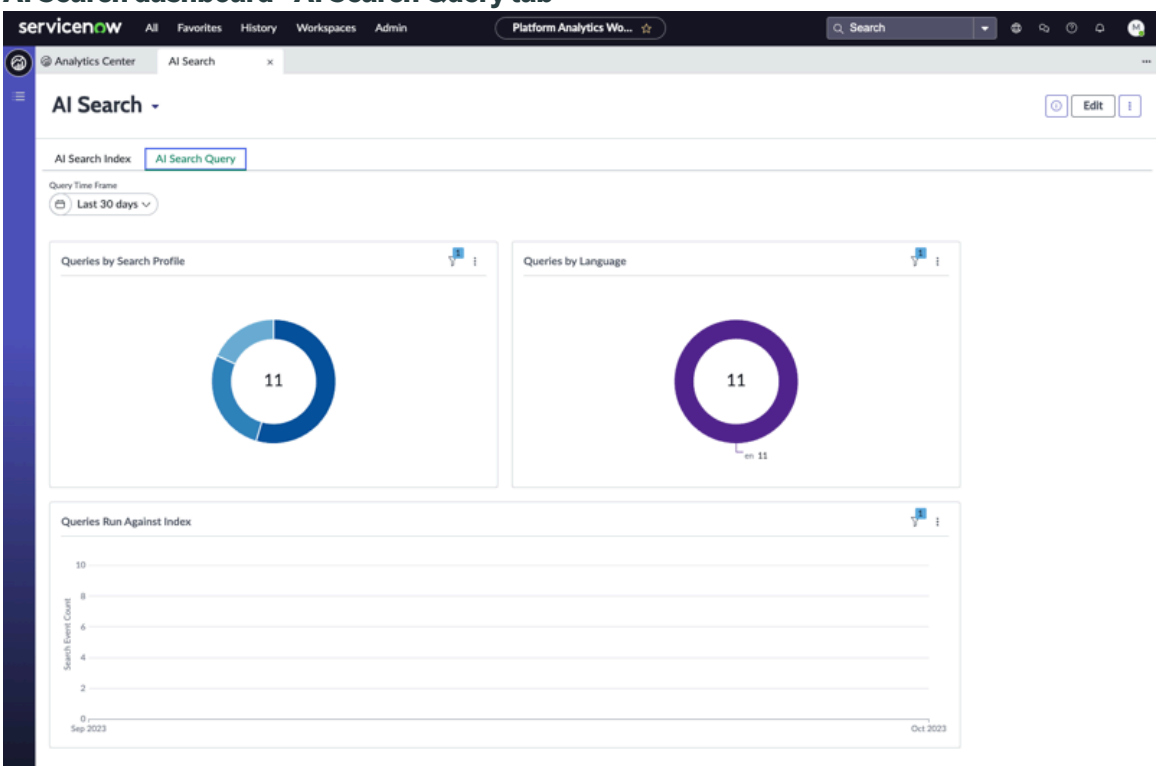
The AI Search dashboard summarizes AI Search indexed documents, configuration settings in use, and search query traffic. An interactive filter enables users to select the time frame for analysis of search query traffic.

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AI Search dashboard - AI Search Index tab



AI Search dashboard - AI Search Query tab



To access the dashboard, navigate to **All** > *AI Search* > *AI Search* **Analytics** > **Search Index Analytics**.

Note: If the dashboard displays a `Read operation on table '<name>' from scope 'Advanced AI Search Management Tools' was denied` informational message, ask your administrator to perform the steps described in Create a cross-scope access privilege for the AI Search dashboards for the listed table.

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Required ServiceNow AI Platform® roles

To view or edit the dashboard, you must have the ais_admin role.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

User	Dashboard use
AI Search administrator	Reviews indexed record counts and follows search query traffic trends for AI Search.

Data visualizations

AI Search Index tab

Title	Type	Source table	Description
Total Indexed Documents	Single Score	sn_ais_admin_tools_st_a[illegible]_analytics_latest_index	Shows the total number of records indexed by AI Search. **Note:** Because search source filters can exclude indexed records, this number may exceed the total number of searchable records in the index.
Documents by Indexed Source	Donut	sn_ais_admin_tools_ai_s[illegible]_total_indexed_docu	Shows the number of records indexed by AI Search, grouped by indexed source. To drill down and view the number of records for an indexed source grouped by source table, select the graph segment for that indexed source. Refresh the report to return to the top-level view.

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AI Search Index tab (continued)

Title	Type	Source table	Description
			Note: Because search source filters can exclude indexed records, the number of records reported for an indexed source may exceed the total number of searchable records from that indexed source.
Search Profiles	Single Score	ais_search_profile	Shows the number of search profiles defined in AI Search.
Indexed Sources	Single Score	ais_datasource	Shows the number of indexed sources defined in the AI Search index.
Search Applications	Single Score	sys_search_context_config	Shows the number of search application configurations defined that use the AI Search search engine.
Dictionaries	Single Score	ais_dictionary	Shows the number of synonym and stop word dictionaries defined in AI Search.
Configured Genius Results	Single Score	ais_genius_result_configuration	Shows the number of Genius Result configurations defined in AI Search.
Results Improvement Rules	Single Score	ais_rule	Shows the number of result improvement rules defined in AI Search.
Documents by Search Profile	Bar	sn_ais_admin_tools_ai_search_dashboard_documents_by_search_profile	Shows the number of indexed records searchable through each search profile defined in AI Search.
Indexed Documents by Month	Bar	sn_ais_admin_tools_ai_search_dashboard_documents_by_month	Shows the number of newly indexed records grouped by month.

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AI Search Query tab

Title	Type	Source table	Description
Queries by Search Profile	Donut	sys_search_event	Shows the number of search queries in the selected time frame, grouped by search profile used.
Queries by Language	Donut	sys_search_event	Shows the number of search queries in the selected time frame, grouped by query language (ServiceNow AI Platform language context).
Queries Run Against Index	Line	sys_search_event	Shows the number of search queries in the selected time frame, grouped by month.

Create a cross-scope access privilege for the AI Search dashboards

Enable the AI Search dashboards to read records from tables that cannot be accessed from the Advanced AI Search Management Tools application scope.

Before you begin

The Platform Analytics Solution for Advanced AI Search Management Tools must be activated on your instance. For details on activating this solution, see Activate the Platform Analytics Solution for Advanced AI Search Management Tools.

Role required: admin

About this task

The AI Search Profile and AI Search dashboards belong to the Advanced AI Search Management Tools application scope.

If an indexed source or search source table can't be accessed from this scope, the dashboards display the following informational message:

```
Read operation on table '<name>' from scope 'Advanced AI Search Management Tools' was denied. The application 'Advanced AI Search Management Tools' must declare a cross scope access privilege. Please contact the application author to update their privilege requests.
```

To resolve this issue, define a cross-scope table access privilege for the Advanced AI Search Management Tools application.

For more information on cross-scope privileges, see Cross-scope privilege record.

Procedure

1. Set your current application scope context to Advanced AI Search Management Tools using the application picker.
2. Navigate to **All** > **System Applications** > **Application Cross-Scope Access**.

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3. Select **New**.
4. On the Cross scope privilege form, enter the following field values.

Field	Value
Target Scope	<table scope>
Target Name	<table name>
Target Type	Table
Operation	Read
Status	Allowed

5. Select **Submit**.

Result
The new cross-scope privilege appears in the Cross scope privilege table.

AI Search analytics dashboard

The AI Search analytics dashboard displays key performance metrics, trends, and reports for AI Search usage. Analysts can apply interactive filters to view performance analytics for individual search applications and to select the time frame to analyze.

To access the AI Search analytics dashboard, navigate to **All** > *Usage Insights*, select an application's **Launch Dashboard** link, then select the Search Analytics icon  or link in the modules menu. To learn more about the Usage Insights dashboard, see Overview of the dashboard.

Note: If the dashboard doesn't load, follow the steps from Configure Service Portal to send analytics data to enable it.

In the **Queries** section of the dashboard, you can view the query lists on their own page by selecting **View all**. To return to the main dashboard from the sub-page, select **AI Search Analytics**.

You can improve the visual experience by using the dark theme. For more information, see Working with themes in Next Experience.

Required ServiceNow AI Platform roles

To view the AI Search analytics dashboard, you must have the ais_admin role and one of the following roles:

- analytics_admin
- analytics_viewer
- portal_analytics_admin
- portal_analytics_viewer
- web_analytics_admin
- web_analytics_viewer

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Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

User	Dashboard use
Any of the following: • Service Portal Analytics administrator or viewer • Usage Insights administrator or viewer • Web Analytics administrator or viewer	• View and monitor search usage and search performance for a specified search application and date range • Review search trends to better understand the needs of search application end users • Gain insights on how to improve search experience and knowledge coverage by identifying common search queries that yield no results or low-quality results

Interactive filters

Filter	Description
Search application	Specifies the search application configuration for which you want to see search analytics metrics, trends, and reports. You can search for a search application configuration or select its name in the list. Select **Apply** to make your filter selection take effect. **Note:** You can only select a single search application configuration in this filter. The filter list includes search application configurations that are configured to use AI Search and that are used in any of the following contexts: • A service portal • A Next Experience workspace search • Next Experience global search • Mobile Platform search • Now Assist in Virtual Agent enhanced chat • Recommended Actions The dashboard reports metrics for all search queries in the selected search application configuration that satisfy your **Date range** constraint. These may include user searches submitted directly to a search application that uses the configuration and searches submitted through interaction with other

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Filter	Description
	ServiceNow AI Platform features, such as Virtual Agent.
Date range	Specifies the range of dates for which you want to see search analytics metrics, trends, and reports. By default, the dashboard displays data from the last 30 days. You can choose one of the preset date ranges or set your own start and end dates. Select **Apply** to make your filter selection take effect. The dashboard retains data from the last 180 days. If you select a date from outside of this range, the system displays an error message and the dashboard reverts to the last valid date range selection. If you haven't selected any valid date range, the dashboard reverts to its default date range. **Note:** When you select a custom date range, the dashboard may take longer to load than when you select a preset date range. The dashboard reports metrics for all search queries in the selected date range that satisfy your **Search application** constraint. These may include user searches submitted directly to the search application and searches submitted through interaction with other ServiceNow AI Platform features, such as Virtual Agent.

Metrics, trends, and reports

The dashboard includes a main page and a Queries sub-page accessible from the **View all** link in the **Queries** section. The **View all** link in the **Search queries** section opens the Search Events [sys_search_event] table in list view.

Note: To improve performance, the AI Search analytics dashboard caches results from its source tables for 60 minutes. As a result, you may not see search queries from the last 60 minutes reflected in the dashboard's metrics, trends, and visualizations.

Overview section

Title	Description
Search users	This numeric metric shows the total number of unique users who submitted search queries. The trend describes how the number of unique search users has changed since the start of your selected date range.

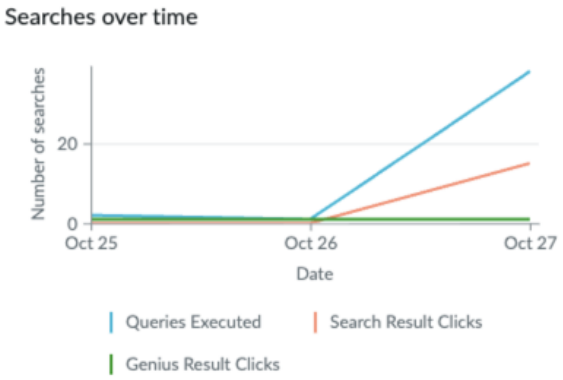
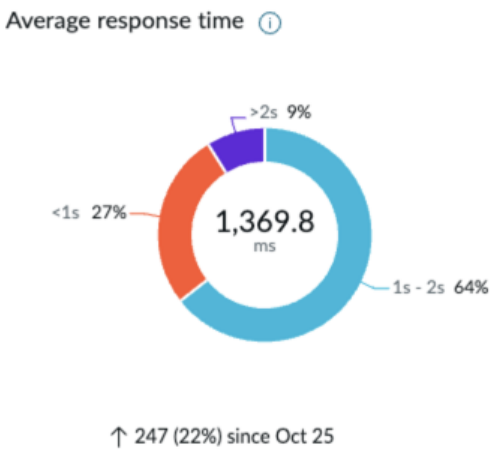
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Overview section (continued)

Title	Description
	The chart shows the number of unique search users for dates in your selected date range.  **Note:** Searches performed while impersonating another user are ignored for this metric, trend, and chart.
Total queries	This numeric metric shows the total number of search queries submitted. The trend describes how the number of search queries has changed since the start of your selected date range. The chart shows the number of search queries submitted for dates in your selected date range. 
Searches over time	This chart shows counts for searches in your selected date range. It includes three sets of values: **1.** The number of search queries executed **2.** The number of search results that users clicked (selected) **3.** The number of Genius Result answers that users clicked (selected)

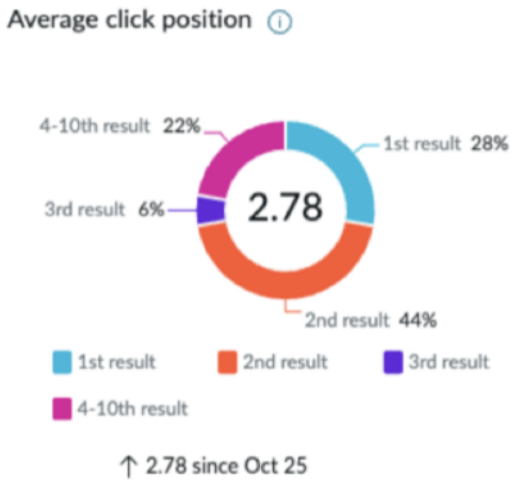
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Overview section (continued)

Title	Description
	
Average response time	This numeric metric shows the average response time for search queries in milliseconds. The chart shows the distribution of search query response times, broken out into buckets. The trend describes how the average response time for search queries has changed since the start of your selected date range. 
Average click position	This numeric metric indicates the average position of user-selected search query results. The chart shows the distribution of positions for user selected search query results. The trend describes how the average click position has changed since the start of your selected date range.

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Overview section (continued)

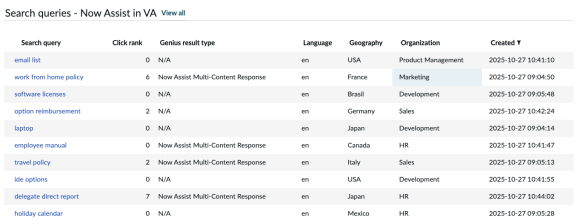
Title	Description
	
Self-Solved Rate	This metric indicates the percentage of search queries that produced a search result click (selection). The chart shows the distribution of search queries that did and didn't produce search result clicks. The trend describes how the self-solved rate has changed since the start of your selected date range. 

Search queries section

Title	Description
Search queries	This list shows user-submitted search queries. Each entry displays the following details:

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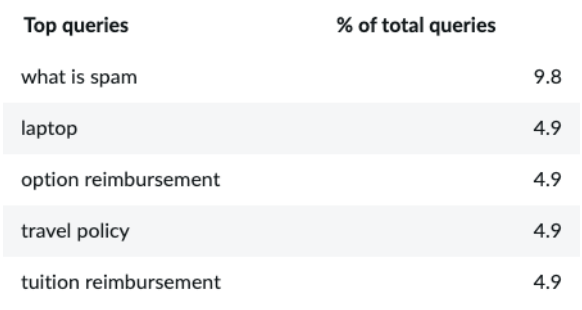
Search queries section (continued)

Title	Description
	• **Search query**: The search query. • **Click position**: The result number for the first search result the user selected, or 0 if the user didn't select any search result. • **Genius Result type**: The Genius Result configuration that generated the first Genius Result answer for the search query, or **N/A** if no Genius Result answer was displayed for the search query. • **Language**: The language in which the search query was submitted. • **Geography**: The geographical region associated with the user who submitted the search query. • **Organization**: The organization that the user who submitted the search query belongs to. • **Date**: The date the search query was executed. To view entries for these search queries in the Search Events [sys_search_event] table, select **View all**. 

Search queries - Now Assist in VA View all

Search query	Click rank	Genius result type	Language	Geography	Organization	Created ▼
email list	0	N/A	en	USA	Product Management	2025-10-27 10:41:10
work from home policy	6	Now Assist Multi-Content Response	en	France	Marketing	2025-10-27 09:04:50
software licenses	0	N/A	en	Brasil	Development	2025-10-27 09:05:48
option reimbursement	2	N/A	en	Germany	Sales	2025-10-27 10:42:24
laptop	0	N/A	en	Japan	Development	2025-10-27 09:04:14
employee manual	0	Now Assist Multi-Content Response	en	Canada	HR	2025-10-27 10:41:47
travel policy	2	Now Assist Multi-Content Response	en	Italy	Sales	2025-10-27 09:05:13
ide options	0	N/A	en	USA	Development	2025-10-27 10:41:55
delegate direct report	7	Now Assist Multi-Content Response	en	Japan	HR	2025-10-27 10:44:02
holiday calendar	0	N/A	en	Mexico	HR	2025-10-27 09:05:28

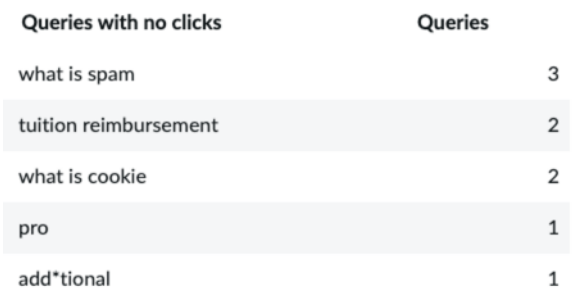
Queries section

Title	Description
Top queries	This list shows the most frequently submitted search queries. 

Top queries	% of total queries
what is spam	9.8
laptop	4.9
option reimbursement	4.9
travel policy	4.9
tuition reimbursement	4.9

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Queries section (continued)

Title	Description
	To view this list on its own sub-page, select **View all**. To return to the main dashboard from the sub-page, select **AI Search Analytics**.
Queries with no clicks	This list shows the most frequently submitted search queries for which users didn't select any search result.  To view this list on its own sub-page, select **View all**. To return to the main dashboard from the sub-page, select **AI Search Analytics**.
Queries with no results	This list shows the most frequently submitted search queries that produced no results.  To view this list on its own sub-page, select **View all**. To return to the main dashboard from the sub-page, select **AI Search Analytics**.

Top clicked results section

Title	Description
Top clicked results	This list shows the most frequently clicked search results. 

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Customize the banner logo for the AI Search Analytics dashboard

Add your own logo to the banner for the AI Search Analytics dashboard.

Before you begin

The Platform Analytics Solution for Advanced AI Search Management Tools must be activated on your instance. For details on activating this solution, see Activate the Platform Analytics Solution for Advanced AI Search Management Tools.

Role required: admin

About this task

The AI Search Analytics dashboard displays the ServiceNow logo in the banner. You can modify the UX theme assets for the dashboard to display your own logo instead.

Procedure

1. Switch to the Advanced AI Search Management Tools application.
   For details on switching applications, see Switch between applications.
2. To replace the default **header_for_dashboard** UX theme asset with a version containing your logo, perform the following steps.
   a. Navigate to the UX Theme Asset [sys_ux_theme_asset] table's list view by selecting **All**, entering `sys_ux_theme_asset.list` in the **Filter** field, and pressing Enter.
   b. Open the **header_for_dashboard** record.
   c. Select **Delete**.
   d. Select **New**.
   e. On the UX Theme Asset form, enter the following field values.

Field	Value
Category	Image
Name	header_for_dashboard

   f. In the form header, select the Manage Attachments icon and attach your logo image to the new record.
   To learn more about managing record attachments, see Manage attachments.
   g. Select **Submit**.
3. To link your new UX theme asset to the banner for the AI Search Analytics dashboard, perform the following steps.
   a. Navigate to the UX Theme [sys_ux_theme] table's list view by selecting **All**, entering `sys_ux_theme.list` in the **Filter** field, and pressing Enter.
   b. Open the **SearchAnalytics Dashboard Theme** record.
   c. Select the **Legacy: Experience Theme** tab.

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d. In the UX Theme Assets list, edit the existing asset record.

> **Note:** If you don't see the UX Theme Assets list, configure the form layout, adding **UX Theme Assets->Theme** to the list of selected fields. When prompted, switch to editing the form section in the Global application. For details on this procedure, see Configuring the form layout.

e. On the UX Theme Assets form, in the **Asset** field, enter the value `header_for_dashboard`.

f. Select **Update**.

Result
Your custom logo image appears in the banner for the AI Search Analytics dashboard.

Configure Service Portal to send analytics data

Enable loading of the AI Search Analytics dashboard by configuring Service Portal to send analytics data.

Before you begin
The Platform Analytics Solution for Advanced AI Search Management Tools must be activated on your instance. For details on activating this solution, see Activate the Platform Analytics Solution for Advanced AI Search Management Tools.

Role required: admin

About this task
If the AI Search Analytics dashboard doesn't load, you must configure tracking of Usage Insights data in the Service Portal. This configuration is a prerequisite for the dashboard.

Procedure
1. Navigate to **All** > **Service Portal** > **Portals**.
2. Edit the **Service Portal** record.
3. Select **Create Analytics Settings**.
4. On the Usage Insights Settings form, select the **Enable Unauthenticated User Tracking** option, then select **Update**.

Result
The AI Search Analytics dashboard should now load correctly.

Search Preview UI for AI Search

The Search Preview UI enables you to test AI Search queries using settings from a selected search profile. Administrator tools help you review search query performance data and feedback, debug queries, and override default query settings for testing purposes.

Access the Search Preview UI by navigating to *AI Search* > **Preview** > **Search Preview**.

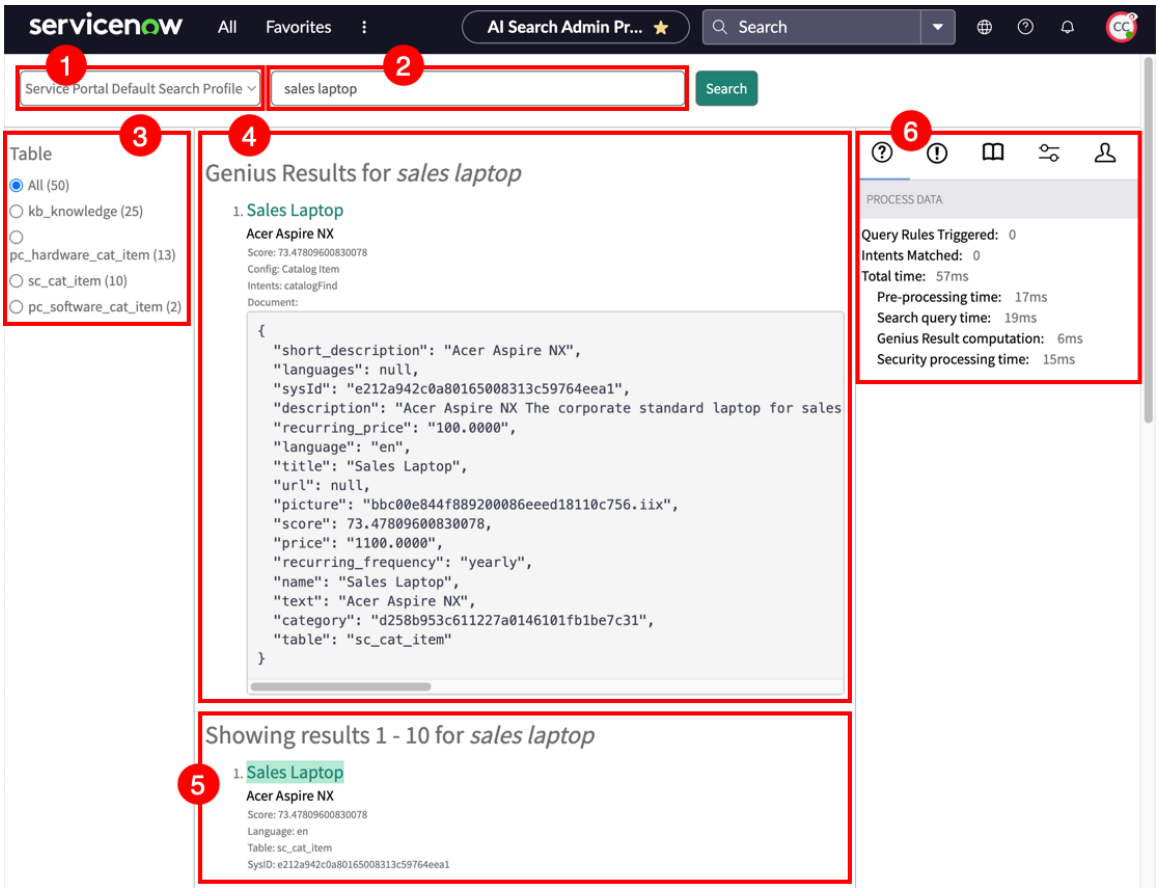
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Required ServiceNow AI Platform® roles

- The ais_admin role is required to view and use the Search Preview UI.
- The impersonator role is required for some AI Search administrator tools.
- The ais_high_security_admin role is required to bypass search source and content security filtering. For details on this procedure, see Diagnose search result access issues using the Search Preview UI.

Search Preview UI components

Search Preview UI



Search Preview UI components

Component	Description
1. Search profile list	Select the search profile to apply when previewing search queries. The list only includes published search profiles that have one or more linked search sources. **Note:** If a search profile has unpublished changes, the list displays a warning icon and shows [DRAFT] after the profile's name. Publish the search profile to see these changes reflected in the search query preview.

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Search Preview UI components (continued)

Component	Description
2. Search input field	Enter search query terms and operators in this field. To preview the query's results using settings from the selected search profile, select **Search**.
3. Table facet filter	View the distribution of search query results by source table. To filter the query results by table, select a table's name. To remove the table facet filter, select **All**.
4. Genius Result answers	Review the key-value pairs for each Genius Result answer the search query produces when executed with the selected search profile. **Note:** Genius Result answers may not appear for all search queries.
5. Search query results	Review the results the search query produces when executed with the selected search profile. To page through results, select **Next** or **Previous**.
6. AI Search administrator tools	Select the icon for the administrator tool that you want to use: • Process data tool: View summary information on the search query's triggered result improvement rules, matched NLU model intents, and processing time. • Alerts tool: Review alert feedback messages produced during processing of the search query. • Dictionary and query feedback tool: Review dictionary and query feedback messages and NLU model intent data for the search query. Enable debugging. • Context settings tool: Specify user context values for the search query to trigger result improvement rules. • User impersonation tool: Change the search query's user or locale to test access settings and view translated documents. For more detailed descriptions of each administrator tool's output, controls, and fields, see the following reference section.

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Search preview admin tools

Understand the output, controls, and fields provided by admin tools in the search preview UI.

Process data tool

Entry	Description
Query Rules Triggered	Count of result improvement rules triggered by the search query.
Intents Matched	Count and names of NLU model intents detected in the search query.
Total time	Total time spent processing the search query. Includes pre-processing, search query, Genius Result computation, and security processing times.
Pre-processing time	Time spent preparing the search query for execution. Includes time spent looking up the user's access permissions for content security.
Search query time	Time spent retrieving records that match the search query and generating the result set.
Genius Result computation	Time spent computing Genius Result answers for the search query.
Security processing time	Time spent filtering inaccessible records out of the search query's result set based on the user's access permissions.

Alerts tool

This tool displays a list of alert feedback messages produced while processing the search query.

If the search query produced no alert feedback messages, the tool instead displays `No Alert Feedback`.

Dictionary and query feedback tool

This tool displays separate panes for dictionary feedback entries and query feedback controls.

Dictionary feedback

Entry	Description
Stop words	List of feedback messages relating to stop word removal for the search query.
Spellcheck	List of feedback messages relating to typo handling auto-correction for the search query.
Synonyms	List of feedback messages relating to synonym expansion for the search query.

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Query feedback

Control	Description
Show all feedback	Display a JSON array of feedback messages produced for the search query.
Show all intent data	Display a JSON array of NLU model intents detected in the search query. **Note:** To use this tool, you must have the impersonator role.
Debug	Enable this option to set *sysparm_debug* to *true* when submitting search preview queries. **Note:** To use this tool, you must have the impersonator role.

Context settings tool

With these tools, you can specify user context values to test user context triggers for result improvement rules.

Field	Description
User Domain	To set a domain in the user context for search preview, enter the name of a group from the Group [sys_user_group] table.
User Company	To set a company in the user context for search preview, enter the name of a company from the Company [core_company] table.
User Office	To set an office in the user context for search preview, enter the name of a building from the Building [cmn_building] table.
User Department	To set a department in the user context for search preview, enter the name of a department from the Department [cmn_department] table.
User Title	To set a title in the user context for search preview, select it from the list. This list includes all Title values found in the User [sys_user] table.
User Location	To set a location in the user context for search preview, enter the name of a location from the Location [cmn_location] table.
User Role	To set a role in the user context for search preview, enter the name of a role from the Role [sys_user_role] table.

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Field	Description
User Country	To set a country in the user context for search preview, select it from the list. This list includes all countries found in user locations from the User [sys_user] table.
User Language	To set a language in the user context for search preview, select it from the list of supported languages.
User Office Country	To set an office country in the user context for search preview, select it from the list. This list includes all countries found in user locations from the User [sys_user] table.
User Office City	To set an office city in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User Office State	To set an office state in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User OS	To set an operating system in the user context for search preview, enter its name in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User Device Type	To set a user device type in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User OS Version Type	To set an operating system version type in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User Browser Agent	To set a browser agent string in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User Browser	To set a browser name in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to review values submitted for this user context field in user queries.
User Device Form	To set a device form in the user context for search preview, enter it in this field. You can enable session debugging for AI Search to

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Field	Description
	review values submitted for this user context field in user queries.

User impersonation tool

Field	Description
Search as	To submit search preview queries as another user, enter the user's name from the User [sys_users] table. You must have the impersonator role. Use this control to see how content security affects search query results for specific user accounts. Searches performed while impersonating another user don't affect the **Search users** metric, trend, and report on the AI Search Analytics dashboard. **Note:** Changing the value of this field terminates elevated privileges for the ais_high_security_admin role. To bypass filters after changing this field's value, you must re-elevate to the ais_high_security_admin role.
Query Locale	To submit search preview queries using a specific supported language, select the language from the list. Use this control to observe differences in search query results for different languages.

Advanced AI Search Management Tools reference

This reference topic describes system components installed with the Advanced AI Search Management Tools application.

Plugins installed with Advanced AI Search Management Tools

Plugin	Description
Advanced AI Search Management Tools (sn_ais_admin_tools)	Includes AI Search dashboards and Search Preview tool.

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Scheduled jobs installed with Advanced AI Search Management Tools

Scheduled job	Description
Load AI Search Dashboard Documents by Month	Populates the Indexed Documents by Month data visualization on the AI Search dashboard. Runs every minute.
Load AI Search Dashboard Documents by Profile	Populates the Documents by Search Profile data visualization on the AI Search dashboard. Runs every hour.
Load AI Search Dashboard Total Indexed Documents	Populates the Total Indexed Documents data visualization on the AI Search dashboard. Runs every hour.
Update Search Analytics Data	Pre-calculates metrics to improve load time for the AI Search Analytics dashboard. Runs every hour. **Note:** If you pause or disable this scheduled job, the AI Search Analytics dashboard takes longer to load and displays the metrics calculated by the last scheduled job run. You can specify a new date range for the dashboard to force recalculation of metrics.

List of all components installed with Advanced AI Search Management Tools

To view the complete list of components installed with Advanced AI Search Management Tools, follow the steps described in Find components installed with an application. The application's package name is **Advanced** *AI Search* **Management Tools**.

External Content Connectors

The External Content Connectors ServiceNow® Store application enables AI Search applications to search content and metadata from supported external source systems, such as Atlassian Confluence Cloud and Microsoft SharePoint Online.

Get started

Explore	Install	Configure
		
Learn about features offered by External Content Connectors	Activate External Content Connectors plugins on your instance	Set up connectors to access your external source systems

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Crawl	Review	Reference
		
Schedule and start connector crawls to retrieve searchable content and security principals from your external source systems	Review crawl histories, analytics, and user permissions for your external content connectors	View components installed with External Content Connectors and supported file extensions

Exploring External Content Connectors

Using External Content Connectors, AI Search applications can search content and metadata from external content repositories such as Atlassian Confluence Cloud and Microsoft SharePoint Online. Expanding search recall to include external content helps search users locate the information they need.

External Content Connectors overview

The External Content Connectors application adds support for indexing content and metadata from external source systems to make those systems searchable in AI Search applications. Indexing preserves the content's original user access permissions from the source system using AI Search's content security model.

This release includes the following external content connectors:

- Adobe Acrobat Sign external content connector
- Adobe Experience Manager as a Cloud Service external content connector
- Aha! Roadmaps external content connector
- Amazon S3 external content connector
- Asana external content connector
- Atlassian Confluence Cloud external content connector
- Atlassian Jira Cloud external content connector
- Box external content connector
- Cornerstone external content connector
- Docusign external content connector
- Fluid Topics external content connector
- Dropbox external content connector
- GitHub Enterprise Cloud external content connector
- GitLab external content connector
- Google Drive external content connector
- HubSpot external content connector
- Lucidchart external content connector
- ManageEngine external content connector

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- Microsoft OneDrive external content connector
- Microsoft SharePoint Online external content connector
- Microsoft Teams external content connector
- Microsoft Viva Engage external content connector
- Miro external content connector
- monday.com external content connector
- Notion external content connector
- SAP DMS external content connector
- SAP SuccessFactors external content connector
- ServiceNow documentation external content connector
- ServiceNow instance external content connector
- Slack external content connector
- Smartsheet external content connector
- Trello external content connector
- Webcrawler external content connector
- WordPress external content connector
- Workday external content connector
- Workvivo external content connector
- Zendesk Guide external content connector
- Zoom external content connector

Connector administrators can schedule content and user permission crawls to suit your indexing requirements. If the need arises, connector administrators can also run either type of crawl on demand.

Important: The External Content Connectors application consumes Integration Hub transactions when feeding crawled content to AI Search. You can monitor available and used transactions for your Integration Hub subscription packages in the Integration Hub Usage Dashboard. For details on transaction monitoring, see Transaction reports in Integration Hub Usage Dashboard.

All external content connectors support semantic vector indexing of content retrieved from crawled source systems. Only features which use semantic vector search with the Now LLM Service can take advantage of this support. For details on semantic vector indexing and search, see Semantic vector search in AI Search.

External Content Connectors indexed sources and search sources

Each external content connector has its own indexed source for crawled content. It also has a default search source that specifies no filter conditions and so includes all items from its indexed source. To apply filter conditions to an external content connector's indexed content, create your own search sources for that connector's indexed source.

To make a connector's content searchable in an AI Search application, include one of its search sources in the search profile used for that application. For more information about creating and using indexed sources and search sources, see Indexed sources in AI Search and Search sources in AI Search.

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External Content Connectors availability

The External Content Connectors application is only supported on cloud-hosted ServiceNow AI Platform® instances. It's not supported on on-premise (self-hosted) instances.

External Content Connectors workflow

The following illustration shows a sample workflow of how users in an organization interact with External Content Connectors to enable indexing and search of content and metadata from supported external sources.

Configuring and using External Content Connectors

In this External Content Connectors workflow:

1. Connector administrators configure connection settings for external content connectors. They configure crawl start points and inclusion/exclusion filters to define the scope of connector crawls. They define schedules that specify when crawls run.
2. The system runs connectors at their scheduled times or when connector administrators start one-time crawls. When crawling, connectors retrieve searchable content and security principals from their source systems and feed them to AI Search for indexing.
3. Search users are presented with content and metadata from external content source systems when interacting with AI Search applications. AI Search's content security model retains user and group access permissions set in the source system, so users can only view content that they have permission to access.
4. Connector administrators review and analyze crawl metrics, crawl histories, and user permission data. They use this information to understand how external data is crawled and indexed, allowing for more effective tuning of crawl settings for their external content connectors.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

External Content Connectors benefits

Benefit	Feature	Users
Configure source systems for external content indexing	Configuring source systems for external content indexing	Source system administrators
Create connectors to retrieve searchable content and metadata and user permissions from supported external data source systems	Creating external content connectors	Connector administrators
Control the scope of external content connector crawls by specifying source system locations to crawl and content types to feed to AI Search for indexing	Configuring crawl settings for external content connectors	Connector administrators
Update searchable content and metadata from source systems on demand or on a scheduled recurring basis	Create a content crawl for an external content connector	Connector administrators
Update user and group access permissions from source systems on demand or on a scheduled recurring basis	Create a user permission crawl for an external content connector	Connector administrators
Review metrics for source system items retrieved by content crawls	Review crawl history for an external content connector	Connector administrators
Review user and group access permissions retrieved by user permission crawls	Review user permissions for an external content connector	Search high security administrators
Search content and metadata indexed from external data source systems	Searching in AI Search	AI Search users

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Interaction with ServiceNow Otto® Genius Results

If you have the ServiceNow Otto for AI Search and ServiceNow Otto for Virtual Agent ServiceNow Store applications installed, external content search results are eligible for inclusion in Summary Genius Result answers. This includes answers generated in ServiceNow Otto for Virtual Agent chats.

External content search results are ignored when generating answers for Knowledge base articles Genius Results and Actions Genius Results.

Estimating document volume for source systems

Source system tools enable you to estimate the number of documents available for retrieval by external content connectors. By estimating the available document count for a source system, you can determine whether you need to apply crawl scope restrictions when configuring an external content connector for that source system.

Related topics

- Estimate document volume for Atlassian Confluence Cloud
- Estimate document volume for Microsoft SharePoint Online

Configuring source systems for external content indexing

Source system administrators configure settings to allow external content connectors to index your documents and security settings for search. These settings must be configured for a source system before you create an external content connector to crawl that source system.

Each external content connector has its own source system configuration requirements, as shown in the following topics.

Note: The following external content connectors don't require any source system configuration.

- ServiceNow® documentation external content connector
- Webcrawler external content connector

Related topics

- Configure Adobe Acrobat Sign for external content indexing
- Configure Adobe Experience Manager as a Cloud Service for external content indexing
- Configure Aha! Roadmaps for external content indexing
- Configure Amazon S3 for external content indexing
- Configure Asana for external content indexing
- Configure Atlassian Confluence Cloud for external content indexing
- Configure Atlassian Jira Cloud for external content indexing
- Configure a connector user in Atlassian Jira Cloud
- Configure Box for external content indexing
- Create a public/private key pair for the Box external content connector
- Configure Cornerstone for external content indexing
- Configure Docusign for external content indexing
- Configure Dropbox for external content indexing
- Configure Fluid Topics for external content indexing

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- Configure GitHub Enterprise Cloud for external content indexing
- Configure GitLab for external content indexing
- Configure Google Drive for external content indexing
- Configure HubSpot for external content indexing
- Configure Lucidchart for external content indexing
- Configure ManageEngine for external content indexing
- Configure Microsoft OneDrive for external content indexing
- Create a public/private key pair for the Microsoft OneDrive external content connector
- Configure Microsoft SharePoint Online for external content indexing
- Create a public/private key pair for the Microsoft SharePoint Online external content connector
- Configure site and site collection access for the Microsoft SharePoint Online external content connector
- Configure Microsoft Teams for external content indexing
- Create a public/private key pair for the Microsoft Teams external content connector
- Configure Microsoft Viva Engage for external content indexing
- Configure Miro for external content indexing
- Configure monday.com for external content indexing
- Configure Notion for external content indexing
- Configure SAP DMS for external content indexing
- Export SAP SuccessFactors Learning data for external content indexing
- Configure your ServiceNow AI Platform instance for external content indexing
- Configure Slack for external content indexing
- Configure Smartsheet for external content indexing
- Configure Trello for external content indexing
- Configure WordPress for external content indexing
- Configure Workday security settings
- Configure access to help articles in Workday
- Configure a Learning assignment custom report in Workday
- Configure a payslip report in Workday
- Configure Workday for external content indexing
- Configure Workvivo for external content indexing
- Configure Zendesk for external content indexing
- Configure Zoom for external content indexing

Creating external content connectors

Connector administrators can create external content connectors to retrieve searchable content and metadata and security permissions from supported source systems.

Related topics

- Create an Adobe Acrobat Sign external content connector
- Create an Adobe Experience Manager as a Cloud Service external content connector

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Create an Aha! Roadmaps external content connector
Create an Amazon S3 external content connector
Create an Asana external content connector
Create an Atlassian Confluence Cloud external content connector
Create an Atlassian Jira Cloud external content connector
Create a Box external content connector
Create a Cornerstone external content connector
Create a Docusign external content connector
Create a Dropbox external content connector
Create a Fluid Topics external content connector
Create a GitHub Enterprise Cloud external content connector
Create a GitLab external content connector
Create a Google Drive external content connector
Create a HubSpot external content connector
Create a Lucidchart external content connector
Create a ManageEngine external content connector
Create a Microsoft OneDrive external content connector
Create a Microsoft SharePoint Online external content connector
Create a Microsoft Teams external content connector
Create a Microsoft Viva Engage external content connector
Create a Miro external content connector
Create a monday.com external content connector
Create a Notion external content connector
Create a SAP DMS external content connector
Create a SAP SuccessFactors external content connector
Create a ServiceNow instance external content connector
Create a ServiceNow product documentation external content connector
Create a Slack external content connector
Create a Smartsheet external content connector
Create a Trello external content connector
Create a Webcrawler external content connector
Create a WordPress external content connector
Create a Workday external content connector
Create a Workvivo external content connector
Create a Zendesk Guide external content connector
Create a Zoom external content connector

Creating multiple external content connectors of the same type

Admins can create multiple external content connectors of the same type on a single ServiceNow AI Platform® instance. These connectors can crawl different source systems or the

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same source system. Connectors that crawl the same source system can include overlapping crawl locations.

Supported configurations

The system supports these configurations for multiple external content connectors of the same type running on the same ServiceNow AI Platform instance.

Multiple external content connectors of the same type that crawl different source systems

For example, one Microsoft SharePoint Online external content connector crawls sites 1A and 1B in source system 1, while a second Microsoft SharePoint Online external content connector crawls sites 2A and 2B in source system 2. The two external content connectors have no sites in common, so there's no duplication of retrieved content.

Multiple external content connectors of the same type that crawl the same source system with distinct crawl scopes

For example, one Microsoft SharePoint Online external content connector crawls sites 1A and 1B in source system 1, while a second Microsoft SharePoint Online external content connector crawls sites 1C and 1D in source system 1. The two external content connectors have no sites in common, so there's no duplication of retrieved content.

Multiple external content connectors of the same type that crawl the same source system with overlapping crawl scopes

For example, one Microsoft SharePoint Online external content connector crawls sites 1A and 1B in source system 1, while a second Microsoft SharePoint Online external content connector crawls sites 1B and 1C in source system 1. The two external content connectors have site 1B in common, so content from that site may be retrieved by both connectors. There's no duplication of retrieved content from the other sites.

Behavior notes

When you create multiple external content connectors of the same type on the same ServiceNow AI Platform instance, they behave as described in the following list.

All external content connectors of the same type feed their retrieved content to the same indexed source

In the previous examples, all content retrieved by either of the two Microsoft SharePoint Online external content connectors would be fed to the SharePoint Online indexed source.

During indexing of crawled content, retrieved items are deduplicated across all external content connectors of the same type

As an example, if two different Microsoft SharePoint Online external content connectors both retrieve the same file from the same site, only one copy of the retrieved file is indexed and appears in your search results.

User permissions are specific to an individual external content connector, not shared between all external content connectors of the same type

Admins need to run a separate user permission crawl for each external content connector of the same type. In the preceding examples, each Microsoft SharePoint Online external content connector requires its own user permission crawl. Running a user permission crawl for the first Microsoft SharePoint Online external content connector doesn't populate security principals for the second connector.

The system executes crawl jobs for external content connectors of the same type in parallel if sufficient resources are available

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If sufficient resources for parallel execution aren't available, the system executes the crawl jobs sequentially instead.

The crawl limit of one million items applies separately to each external content connector of the same type

In the preceding examples, each individual Microsoft SharePoint Online external content connector can crawl up to one million items.

Considerations for parallel execution

When creating multiple external content connectors of the same type on the same ServiceNow AI Platform instance, bear the following considerations in mind.

Increased request load on source system

Creating multiple external content connectors that crawl the same source system in parallel can increase the rate at which requests are made to the source system. This may trigger rate-limit issues on the source system.

Indexed source contention when running in parallel

Running crawl jobs for multiple external content connectors of the same type in parallel can cause contention when they send retrieved content to their shared indexed source. This contention may reduce the connectors' retrieval rate when their crawl jobs are run in parallel.

Configuring crawl settings for external content connectors

Connector administrators can configure crawl settings for each external content connector, such as which source system locations it crawls and which types of content it sends to AI Search for indexing.

Related topics

- Configure crawl settings for an Adobe Acrobat Sign external content connector
- Configure crawl settings for an Adobe Experience Manager as a Cloud Service external content connector
- Configure crawl settings for an Aha! Roadmaps external content connector
- Configure crawl settings for an Amazon S3 external content connector
- Configure crawl settings for an Asana external content connector
- Configure crawl settings for an Atlassian Confluence Cloud external content connector
- Configure crawl settings for an Atlassian Jira Cloud external content connector
- Configure crawl settings for a Box external content connector
- Configure crawl settings for a Cornerstone external content connector
- Configure crawl settings for a Docusign external content connector
- Configure crawl settings for a Dropbox external content connector
- Configure crawl settings for a Fluid Topics external content connector
- Configure crawl settings for a GitHub Enterprise Cloud external content connector
- Configure crawl settings for a GitLab external content connector
- Configure crawl settings for a Google Drive external content connector
- Configure crawl settings for a HubSpot external content connector
- Configure crawl settings for a Lucidchart external content connector
- Configure crawl settings for a ManageEngine external content connector

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Configure crawl settings for a Microsoft OneDrive external content connector
Configure crawl settings for a Microsoft SharePoint Online external content connector
Configure crawl settings for a Microsoft Teams external content connector
Configure crawl settings for a Microsoft Viva Engage external content connector
Configure crawl settings for a Miro external content connector
Configure crawl settings for a monday.com external content connector
Configure crawl settings for a Notion external content connector
Configure crawl settings for a SAP DMS external content connector
Configure crawl settings for a ServiceNow instance external content connector
Configure crawl settings for a ServiceNow product documentation external content connector
Configure crawl settings for a Slack external content connector
Configure crawl settings for a Smartsheet external content connector
Configure crawl settings for a Trello external content connector
Configure crawl settings for a Webcrawler external content connector
Configure crawl settings for a WordPress external content connector
Configure crawl settings for a Workday external content connector
Configure crawl settings for a Workvivo external content connector
Configure crawl settings for a Zendesk Guide external content connector
Configure crawl settings for a Zoom external content connector

Delta content crawls for external content connectors

Delta content crawls improve content crawl performance by only retrieving newly added, changed, or deleted items from an external content connector's source system.

Delta content crawls overview

By default, an external content connector's content crawl examines all content items from its source system to determine which ones to retrieve and index for search. If the source system contains many items, a full content crawl can take a long time to complete. This remains true even if the number of items with actual updates is fairly small.

Starting with External Content Connectors 9.0, the External Content Connectors application supports delta content crawl operations for some external content connectors. When running a delta content crawl, an external content connector only examines, retrieves, and indexes newly added, changed, or deleted items from its source system. By ignoring unchanged items, delta content crawling can significantly reduce the time taken to crawl content from the source system. This means you can refresh your searchable content more often by running delta content crawls between your scheduled full or partial content crawls.

Note: Delta content crawls don't replace full content crawls. They're supplemental crawls that enable you to refresh searchable content more frequently in between full content crawls.

By default, delta content crawls aren't active for any external content connector. Connector admins can activate or deactivate delta content crawls for individual connectors of supported types. To view the activation procedure, see Activate delta content crawling for an external content connector.

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Note: In External Content Connectors 9.0, delta content crawls are only supported for the Google Drive external content connector.

Scheduling of delta content crawls

When you activate delta content crawling for an external content connector, the system begins scheduling delta content crawls for that connector after it completes a full content crawl. Until that full content crawl is completed, no delta content crawls will be scheduled.

Note: If you upgrade to a new External Content Connectors major release, run a full content crawl in the new version for each connector that has delta content crawling activated. Full content crawls run in a previous External Content Connectors release don't retrieve all of the metadata needed for delta content crawling. As an example, after upgrading from External Content Connectors version 8.0 to version 9.0, you must complete a full content crawl in version 9.0 for each connector that has delta content crawls activated. Until you complete that full content crawl, delta content crawls won't run for the connector.

The system automatically schedules delta content crawls for connectors that have them activated. You can't override the automatic scheduling.

Scheduled delta content crawls aren't guaranteed to run at any particular time. The system may pause, delay, or skip a scheduled delta content crawl. In particular, delta crawls won't run if a full or partial content crawl is already running for the external content connector.

Delta content crawls have a time limit. If a delta content crawl doesn't complete within its specified time, the next delta content crawl attempts to pick up where the previous one stopped. If delta content crawls are consistently unable to keep up with changes made in the connector's source system, you may need to run more frequent full content crawls to keep your searchable content up-to-date with the source data.

Interaction with other content crawls

Full, partial, and delta content crawls can't run in parallel. The system won't start a delta content crawl for a connector if it has a full or partial content crawl running.

If you try to start a one-time full or partial content crawl while a delta content crawl is running, the system offers you the following options:

- Queue the one-time full or partial content crawl so that it doesn't start until the current delta content crawl completes.
- Cancel the current delta content crawl and start the one-time full or partial content crawl immediately.

Delta content crawl history

In the connector editor's **Crawl history** tab, a summary of delta content crawl activity over the last 30 days appears in the **Delta content crawls** section. Delta content crawl history doesn't appear in the **Crawl history** listing.

Limitations of delta content crawls

Delta content crawls may not detect all relevant changes to items in the source system. As an example, a delta content crawl may not detect that a source system content item has been deleted. Other similar detection issues are specific to the connector type.

In all of these cases, running a new full connector content crawl detects the overlooked changes and brings your AI Search index up to date.

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Domain separation and External Content Connectors

Domain separation is unsupported for External Content Connectors. 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.

Overview of domain separation in External Content Connectors

The External Content Connectors ServiceNow® Store application enables you to make content from external source system documents searchable in AI Search applications. External content connectors don't support domain separation.

Note: The External Content Connectors application includes an External Content Connectors Service Account user that's assigned to the global domain by default. If your instance has domain separation configured, assigning this user to another domain can prevent user permission crawls from correctly mapping permissions to users in your instance. To correct this behavior, reassign the External Content Connectors Service Account user to the global domain. For details on this procedure, see Reassign the External Content Connectors Service Account user to the global domain.

Related topics

Domain separation for service providers

Install External Content Connectors

Install the External Content Connectors applications 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.

Your ServiceNow AI Platform® instance must be cloud-hosted. The External Content Connectors applications aren't supported on on-premise (self-hosted) instances.

Role required: admin

About this task

To make content from your external source systems accessible in AI Search, you must install the External Content Connectors Application Suite plugin from the ServiceNow Store.

When you install this plugin, it automatically installs plugins for the following applications:

- External Content Connectors
- External Content Connectors Admin
- All available External Content Connectors connector applications except for the following, which you must install separately if you want them:

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- ServiceNow product documentation external content connector
- Webcrawler external content connector

Your instance needs inbound mTLS support to run external content connector crawls. If inbound mTLS support isn't already activated for your instance, it should be automatically activated after you install the External Content Connectors Application Suite plugin.

Note: Automatic activation of inbound mTLS support on your instance may take up to 24 hours. To check the activation status for this feature, see Verify whether inbound mTLS support is activated for your instance.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the External Content Connectors Application Suite application (sn_ext_conn_suite) 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. Select **Install**.
4. **Optional:** If you want to use the ServiceNow product documentation external content connector, repeat the preceding steps to find and install the External Content Connectors SN Docs (sn_ext_conn_sndocs) application.
   See the External Content Connectors SN Docs application on the ServiceNow Store.
5. **Optional:** If you want to use the Webcrawler external content connector, repeat the preceding steps to find and install the External Content Connectors Web Crawler (sn_ext_conn_wc) application.
   See the External Content Connectors Web Crawler application on the ServiceNow Store.

What to do next

With the External Content Connectors applications installed, connector admins can configure connectors to crawl content, metadata, users, and group memberships from supported external content repositories. They can also configure crawl settings and create and schedule crawls for those connectors. For details on external content connector configuration, see Configuring External Content Connectors.

Verify whether inbound mTLS support is activated for your instance

Check whether inbound mTLS support is activated for your ServiceNow AI Platform® instance. You need this feature activated to run crawls for external content connectors.

Before you begin

Role required: none

About this task

To run crawls for external content connectors, your ServiceNow AI Platform instance must have inbound mTLS support activated. You can check the activation status for this feature on your instance from a web browser or the curl command-line tool.

If inbound mTLS support isn't activated on your instance, you can open a service request case to ask Customer Service and Support to activate it for you.

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Procedure

1. In a web browser, navigate to the `https://<instance-name>.service-now.com/adcv2/supports_tls` status page, where `<instance-name>` is the name of your ServiceNow AI Platform instance.
   You can also access this status page using the curl command-line tool, replacing `<instance-name>` with the name of your ServiceNow AI Platform instance:

   ```
   curl -k
    "https://<instance-name>.service-now.com/adcv2/supports_tls"
   ```

2. Check the response from the `adcv2/supports_tls` request.

What to do next

If the response from the `adcv2/supports_tls` request is `true`, inbound mTLS support is activated on your instance. You don't need to do anything else.

If the response from the `adcv2/supports_tls` request is anything other than `true`, inbound mTLS support isn't activated on your instance. Open a service request case at https://support.servicenow.com/now to ask Customer Service and Support to activate inbound mTLS support on your instance.

Configuring External Content Connectors

Plan and configure your External Content Connectors implementation.

External Content Connectors configuration overview

Configuring retrieval and indexing of content from your external content source systems requires the following steps:

Configuration step	Description
Source system administrator configures access settings for your external content source system	• Configure Adobe Acrobat Sign for external content indexing • Configure Adobe Experience Manager as a Cloud Service for external content indexing • Configure Aha! Roadmaps for external content indexing • Configure Amazon S3 for external content indexing • Configure Asana for external content indexing • Configure Atlassian Confluence Cloud for external content indexing • Configure a connector user in Atlassian Jira Cloud • Configure Atlassian Jira Cloud for external content indexing • Create a public/private key pair for the Box external content connector • Configure Cornerstone for external content indexing

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Configuration step	Description
	• Configure Box for external content indexing • Configure Docusign for external content indexing • Configure Dropbox for external content indexing • Configure Fluid Topics for external content indexing • Configure GitHub Enterprise Cloud for external content indexing • Configure GitLab for external content indexing • Configure Google Drive for external content indexing • Configure HubSpot for external content indexing • Configure Lucidchart for external content indexing • Configure ManageEngine for external content indexing • Create a public/private key pair for the Microsoft OneDrive external content connector • Configure Microsoft OneDrive for external content indexing • Create a public/private key pair for the Microsoft SharePoint Online external content connector • Configure Microsoft SharePoint Online for external content indexing • Configure site and site collection access for the Microsoft SharePoint Online external content connector • Create a public/private key pair for the Microsoft Teams external content connector • Configure Microsoft Teams for external content indexing • Configure Microsoft Viva Engage for external content indexing • Configure Miro for external content indexing • Configure monday.com for external content indexing • Configure Notion for external content indexing • Configure SAP DMS for external content indexing

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Configuration step	Description
	• Configure your ServiceNow AI Platform instance for external content indexing • Configure Slack for external content indexing • Configure Smartsheet for external content indexing • Configure Trello for external content indexing • Configure WordPress for external content indexing • Configure Workday security settings • Configure access to help articles in Workday • Configure a Learning assignment custom report in Workday • Configure a payslip report in Workday • Configure Workday for external content indexing • Configure Workvivo for external content indexing • Configure Zendesk for external content indexing • Configure Zoom for external content indexing
ServiceNow AI Platform admin creates external content connectors	• Create an Adobe Acrobat Sign external content connector • Create an Adobe Experience Manager as a Cloud Service external content connector • Create an Aha! Roadmaps external content connector • Create an Amazon S3 external content connector • Create an Asana external content connector • Create an Atlassian Confluence Cloud external content connector • Create an Atlassian Jira Cloud external content connector • Create a Box external content connector • Create a Cornerstone external content connector • Create a Docusign external content connector

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Configuration step	Description
	• Create a Dropbox external content connector • Create a Fluid Topics external content connector • Create a GitHub Enterprise Cloud external content connector • Create a GitLab external content connector • Create a Google Drive external content connector • Create a HubSpot external content connector • Create a Lucidchart external content connector • Create a ManageEngine external content connector • Create a Microsoft OneDrive external content connector • Create a Microsoft SharePoint Online external content connector • Create a Microsoft Teams external content connector • Create a Microsoft Viva Engage external content connector • Create a Miro external content connector • Create a monday.com external content connector • Create a Notion external content connector • Create a SAP DMS external content connector • Create a ServiceNow instance external content connector • Create a ServiceNow product documentation external content connector • Create a Slack external content connector • Create a Smartsheet external content connector • Create a Trello external content connector • Create a Webcrawler external content connector • Create a WordPress external content connector • Create a Workday external content connector

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Configuration step	Description
	• Create a Workvivo external content connector • Create a Zendesk Guide external content connector • Create a Zoom external content connector
AI Search administrator configures external content connector crawl settings for external content connectors	• Configure crawl settings for an Adobe Acrobat Sign external content connector • Configure crawl settings for an Adobe Experience Manager as a Cloud Service external content connector • Configure crawl settings for an Aha! Roadmaps external content connector • Configure crawl settings for an Amazon S3 external content connector • Configure crawl settings for an Asana external content connector • Configure crawl settings for an Atlassian Confluence Cloud external content connector • Configure crawl settings for an Atlassian Jira Cloud external content connector • Configure crawl settings for a Box external content connector • Configure crawl settings for a Cornerstone external content connector • Configure crawl settings for a Docusign external content connector • Configure crawl settings for a Dropbox external content connector • Configure crawl settings for a Fluid Topics external content connector • Configure crawl settings for a GitHub Enterprise Cloud external content connector • Configure crawl settings for a GitLab external content connector • Configure crawl settings for a Google Drive external content connector • Configure crawl settings for a HubSpot external content connector • Configure crawl settings for a Lucidchart external content connector • Configure crawl settings for a ManageEngine external content connector

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Configuration step	Description
	• Configure crawl settings for a Microsoft OneDrive external content connector • Configure crawl settings for a Microsoft SharePoint Online external content connector • Configure crawl settings for a Microsoft Teams external content connector • Configure crawl settings for a Microsoft Viva Engage external content connector • Configure crawl settings for a Miro external content connector • Configure crawl settings for a monday.com external content connector • Configure crawl settings for a Notion external content connector • Configure crawl settings for a SAP DMS external content connector • Configure crawl settings for a ServiceNow instance external content connector • Configure crawl settings for a ServiceNow product documentation external content connector • Configure crawl settings for a Slack external content connector • Configure crawl settings for a Smartsheet external content connector • Configure crawl settings for a Trello external content connector • Configure crawl settings for a Webcrawler external content connector • Configure crawl settings for a WordPress external content connector • Configure crawl settings for a Workday external content connector • Configure crawl settings for a Workvivo external content connector • Configure crawl settings for a Zendesk Guide external content connector • Configure crawl settings for a Zoom external content connector

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Configuration step	Description
AI Search administrator creates (and optionally schedules) crawls for external content connectors	• Create a content crawl for an external content connector • Create a user permission crawl for an external content connector

Adobe Acrobat Sign external content connector

The Adobe Acrobat Sign external content connector retrieves documents from agreements in your Adobe Acrobat Sign source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure Adobe Acrobat Sign for external content indexing

Create and authorize an OAuth 2.0 application in Adobe Acrobat Sign to allow the Adobe Acrobat Sign external content connector to access your Adobe Acrobat Sign source system.

Before you begin

You need to be an administrator in Adobe Acrobat Sign.

Role required: none

About this task

The Adobe Acrobat Sign external content connector retrieves documents from agreements in your Adobe Acrobat Sign source system using the Adobe Acrobat Sign REST API.

To allow the connector to access your Adobe Acrobat Sign content via the REST API, you must configure and authorize an API application with OAuth 2.0 in Adobe Acrobat Sign. Your connector administrator can use settings copied from this application to configure the Adobe Acrobat Sign external content connector for proper connection to your source system.

Procedure

1. In Adobe Acrobat Sign, create a new API application for the Adobe Acrobat Sign external content connector.

   a. Navigate to your Adobe Acrobat Sign instance and log in with administrator credentials.

   b. In the application menu, select **API**.
   If the **API** menu item isn't visible, select **Account** instead.

   c. In the account menu, navigate to *Adobe* **Sign API** > **API Applications**.

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d. Select the Create icon .

e. On the Create form, fill in the fields.

Field	Description
Name	Name for your API application. As an example, you might enter *ServiceNow* **external content connector**.
Display Name	Display name for your API application. As an example, you might enter *ServiceNow***external content connector**.
Domain	Domain for your API application. Select **CUSTOMER**.

f. Select **Save**.

Adobe Acrobat Sign creates your new API application.

2. Copy the application ID and secret for your new API application.

a. On the API Applications page, copy the application ID for your new API application and store it in a secure location.

> **Important:** Your external content connector administrator needs this application ID when configuring the Adobe Acrobat Sign external content connector.

b. Select the API Applications entry for your new API application.
The action menu for your new API application appears.

c. In the action menu, select **View/Edit**.

d. Copy the application secret for your new API application and store it in a secure location.

> **Important:** Your external content connector administrator needs this application secret when configuring the Adobe Acrobat Sign external content connector.

3. Configure OAuth 2.0 settings for your new API application.

a. On the API Applications page, select the entry for your new API application.
The action menu for your new API application appears.

b. In the action menu, select **Configure OAuth for Application**.

c. On the Configure OAuth form, fill in the fields.

Field	Description
Redirect URI	Enter `https://<instance-name>.service-now.com/oauth_redirect.do`, replacing `<instance-name>` with your ServiceNow AI Platform instance name.
Enabled Scopes	For each of the following scopes, select the **Enabled?** option and set the **Modifier** to **account**:

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Field	Description
	▪ user_read ▪ agreement_read

What to do next

Provide the following items to your connector administrator:

- The base URL for your Adobe Acrobat Sign instance. This URL is typically `https://<host>.<data-center>.adobesign.com/`, where `<host>` is `secure` or your organization name and `<data-center>` is the shard ID for your Adobe Acrobat Sign data center. For a list of Adobe Acrobat Sign data centers, see https://helpx.adobe.com/sign/using/adobesign-data-centers.html.
- The API application ID that you copied in step 2.a.
- The API application secret that you copied in step 2.d.

Your connector administrator needs these items to configure an Adobe Acrobat Sign external content connector to retrieve documents and security principals from your Adobe Acrobat Sign source system.

For details on creating and configuring a Adobe Acrobat Sign external content connector, see Create an Adobe Acrobat Sign external content connector.

Create an Adobe Acrobat Sign external content connector

Create an external content connector to retrieve searchable content and security principals from your Adobe Acrobat Sign source system.

Before you begin

A source system administrator must have already configured your Adobe Acrobat Sign source system to allow access by the Adobe Acrobat Sign external content connector. For the required source system configuration steps, see Configure Adobe Acrobat Sign for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Adobe Acrobat Sign* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Adobe Acrobat Sign external content connector.
Host URL	Base URL for your Adobe Acrobat Sign instance. This URL is typically `https://<host>.<data-center>.adobesign.com/`, where `<host>` is `secure` or your organization name and `<data-center>` is the shard

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Connection setting	Description
	ID for your Adobe Acrobat Sign data center. For a list of Adobe Acrobat Sign data centers, see https://helpx.adobe.com/sign/using/adobesign-data-centers.html. If you don't have the host URL, ask your *Adobe Acrobat Sign* administrator for it.
API application ID	Application ID for the API application that grants access to your *Adobe Acrobat Sign* content. If you don't have the client ID, ask your *Adobe Acrobat Sign* administrator for it.
API application secret	Application secret for the API application that grants access to your *Adobe Acrobat Sign* content. If you don't have the client secret, ask your *Adobe Acrobat Sign* administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for an Adobe Acrobat Sign external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page.

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For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for an Adobe Acrobat Sign external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for an Adobe Acrobat Sign external content connector

Specify the agreement documents you want your Adobe Acrobat Sign external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin
A connector administrator must have already created the Adobe Acrobat Sign external content connector that you want to configure crawl settings for. To learn about this procedure, see Create an Adobe Acrobat Sign external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the Adobe Acrobat Sign external content connector crawls all agreements from its specified source system and sends all documents to AI Search for indexing. Only perform this task if you want the connector to use inclusion or exclusion filters for the agreements to crawl when running content crawls.

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Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Adobe Acrobat Sign external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. In the Agreements section, select one of the following agreement creation date filter options:
   - To crawl only agreements created in the last year, select **Created last year**.
   - To crawl only agreements created in the last quarter, select **Created last quarter**.
   - To crawl only agreements created in the last month, select **Created last month**.
   - To crawl only agreements created in the last week, select **Created last week**.
5. In the Agreements section, select one of the following status filter options:
   - To crawl agreements with all statuses from the source system, select **Crawl all statuses**.
   - To crawl only agreements with a specified set of statuses from the source system, select **Include only these statuses**, then use the **Statuses to include** field to enter statuses you want the connector to include when crawling.

     As an example, you might enter `Approved` to only retrieve searchable content from agreements with this status.

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- To crawl agreements with all but a specified set of statuses from the source system, select **Exclude only these statuses**, then use the **Statuses to exclude** field to enter statuses you want the connector to exclude when crawling.

  As an example, you might enter `Cancelled` to exclude searchable content from agreements with this status.

6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save and validate**.

Result

The Adobe Acrobat Sign external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your Adobe Acrobat Sign source system using your modified crawl settings, create and run a one-time content crawl for your Adobe Acrobat Sign external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Adobe Experience Manager as a Cloud Service external content connector

The Adobe Experience Manager as a Cloud Service external content connector retrieves assets from nodes in your Adobe Experience Manager as a Cloud Service source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to update searchable content and metadata from your source system. Content crawls feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Limitations

The Adobe Experience Manager as a Cloud Service external content connector only crawls assets. It doesn't crawl web page content or social content such as reviews, blog posts, or comments. All asset content retrieved by the connector is treated as public, meaning that it's searchable by all users with access to your configured AI Search experience.

Related topics

Create a content crawl for an external content connector

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Configure Adobe Experience Manager as a Cloud Service for external content indexing

Create Service Credentials in Adobe Cloud Manager to allow the Adobe Experience Manager as a Cloud Service external content connector to access nodes and assets in your source system.

Before you begin

You need an Adobe Cloud Manager account with Adobe IMS Org administrator privileges. This account must be a member of the **AEM Administrators** IMS Product Profile on **AEM Author**. The **AEM Assets API Users service** option must be selected for the **AEM Administrators** IMS Product Profile.

Role required: none

About this task

The Adobe Experience Manager as a Cloud Service external content connector retrieves assets from nodes in your Adobe Experience Manager as a Cloud Service source system.

To allow the connector to access your Adobe Experience Manager as a Cloud Service source system, you must create a Technical Account in Adobe Cloud Manager. Your connector administrator can use the Service Credentials from this Technical Account to configure the Adobe Experience Manager as a Cloud Service external content connector for proper connection to your source system.

Procedure

1. Create a Technical Account in Adobe Cloud Manager.
   a. Log in to https://my.cloudmanager.adobe.com/ with your Adobe IMS Org administrator credentials.
   b. In the My Programs console, select the Program that contains the Adobe Experience Manager as a Cloud Service environment you want the connector to access.
   c. Navigate to **...** > **Developer Console**.
   d. Select the **Integrations** tab, then select the **Technical Accounts** tab.
   e. Select **Create new technical account**.
   Adobe Cloud Manager creates your new Technical Account and initializes its Service Credentials.
2. Download the Service Credentials for your new Technical Account as a JSON-format file.
   a. On the Technical Accounts tab, select the arrow icon to expand the private key entry for your new Technical Account.
   The private key name varies. As an example, the private key entry name for your new Technical Account might be `PRIVATE-KEY-1873000081275`.
   b. In the expanded private key entry, select the **...** > **View** link for the private key.
   Adobe Cloud Manager displays the Service Credentials JSON for your new Technical Account.
   c. In the displayed Service Credentials, select the download icon.
   d. When prompted, download the JSON-format Service Credentials file to a secure location.

> **Important:** Your external content connector administrator needs this JSON-format Service Credentials file when configuring the Adobe Experience Manager as a Cloud Service external content connector.

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What to do next

Provide the following items to your connector administrator:

- The hostname for your Adobe Experience Manager as a Cloud Service tenant.

  Note: As an example, if the URL for your tenant is `https://example.adobeaemcloud.com`, your tenant hostname is `example`.

- The JSON-format Service Credentials file that you copied in step 2.d.

Your connector administrator needs these items to configure an Adobe Experience Manager as a Cloud Service external content connector to retrieve assets from your Adobe Experience Manager as a Cloud Service source system.

For details on creating and configuring an Adobe Experience Manager as a Cloud Service external content connector, see Create an Adobe Experience Manager as a Cloud Service external content connector.

Create an Adobe Experience Manager as a Cloud Service external content connector

Create an external content connector to retrieve searchable content from your Adobe Experience Manager as a Cloud Service source system.

Before you begin

A source system administrator must have already configured your Adobe Experience Manager as a Cloud Service source system to allow access by the Adobe Experience Manager as a Cloud Service external content connector. For the required source system configuration steps, see Configure Adobe Experience Manager as a Cloud Service for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Adobe* **Experience Manager as a Cloud Service (AEM)** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Adobe Experience Manager as a Cloud Service external content connector.
Adobe AEM Tenant URL	URL for your Adobe Experience Manager as a Cloud Service tenant. This URL typically has the format `https://example.adobeaemcloud.com/`. If you don't know the tenant URL, ask your Adobe Experience Manager administrator for it.
Service Account JSON file	JSON-format file containing Service Credentials for a Technical Account created in Adobe Cloud Manager. The external content connector uses these Service Credentials to authenticate via the Technical Account when running crawls.

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Connection setting	Description
	If you don't have this JSON-format Service Credentials file, ask your Adobe Experience Manager administrator for it.
I agree to the following disclaimer	Option acknowledging that the Adobe Experience Manager as a Cloud Service external content connector makes all crawled content accessible by all search users.

6. Save your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection setting entries fails, the system shows an error message. Verify your connection settings to ensure they're correct.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for an Adobe Experience Manager as a Cloud Service external content connector.
9. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
10. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content with your new connector, you must configure and run content crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for an Adobe Experience Manager as a Cloud Service external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector.

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To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for an Adobe Experience Manager as a Cloud Service external content connector

Specify the nodes you want your Adobe Experience Manager as a Cloud Service external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Adobe Experience Manager as a Cloud Service external content connector that you want to configure crawl settings for. To learn about this procedure, see Create an Adobe Experience Manager as a Cloud Service external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Adobe Experience Manager as a Cloud Service external content connector crawls all nodes located beneath the `/content/dam` node of its specified source system and sends assets with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the nodes to crawl when running content crawls
- Inclusion or exclusion filters for the file extensions of assets to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Adobe Experience Manager as a Cloud Service external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Nodes** options:
   - To crawl all nodes that descend from the specified start node, select **Crawl all nodes**.
   - To crawl only a specified set of nodes that descend from the specified start node, select **Include only these nodes**, then use the **Add node path to include** field and **Add** button to enter paths for nodes you want the connector to include when crawling.

     As an example, you might enter `/content/dam/en/documentation` to only retrieve searchable content from this descendant node.
   - To crawl all but a specified set of nodes that descend from the specified start node, select **Exclude only these nodes**, then use the **Add node path to exclude** field and **Add** button to enter paths for nodes you want the connector to exclude when crawling.

     As an example, you might enter `/content/dam/en/engineering-ui-assets` to exclude searchable content from this descendant node.
5. Select one of the following **Assets** options:
   - To retrieve all assets with supported file extensions from the source system, select **Crawl all assets**.
   - To retrieve only assets with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter asset file extensions you want the connector to include when crawling.

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As an example, you might enter `.pdf` to retrieve only assets with the Portable Document Format file type.

- To retrieve all assets except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter asset file extensions you want the connector to exclude when crawling.

  As an example, you might enter `.csv` to exclude assets with the Comma-Separated Values (CSV) file format.

For details on the supported asset file extensions, see Binary file extensions supported in External Content Connectors.

6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save and validate**.

Result

The Adobe Experience Manager as a Cloud Service external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your Adobe Experience Manager as a Cloud Service source system using your modified crawl settings, create and run a one-time content crawl for your Adobe Experience Manager as a Cloud Service external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Aha! Roadmaps external content connector

The Aha! Roadmaps external content connector retrieves Features, Goals, Ideas, Notes, and Releases from workspaces in your Aha! Roadmaps source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

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Configure Aha! Roadmaps for external content indexing

Generate an API key in Aha! Roadmaps to allow the Aha! Roadmaps external content connector to access content from your workspaces.

Before you begin

Your organization must have already set up a custom Aha! domain.

Your Aha! Roadmaps account needs either the owner role for your organization's workspace or the account admin role. To learn about non-administrator and administrator roles in Aha! Roadmaps, see https://support.aha.io/aha-roadmaps/account/billing-and-users/user-permissions~7444657360296913475.

Role required: none

About this task

The Aha! Roadmaps external content connector retrieves Features, Goals, Ideas, Notes, and Releases from workspaces in your Aha! Roadmaps source system using the Aha! REST API.

To allow the connector to access your Aha! Roadmaps content via the REST API, you must generate an API key in Aha! Roadmaps. Your connector administrator can use this API key to configure the Aha! Roadmaps external content connector for proper connection to your source system.

Procedure

In Aha! Roadmaps, generate a new API key for use by the Aha! Roadmaps external content connector.

a. Navigate to https://secure.aha.io/settings/api_keys and log in with your administrator or workspace owner credentials when prompted.

b. Select **Generate API Key**.

c. Enter a name for your new API key, then select **Generate API Key**.

d. Copy your new API key and store it in a secure location.

> **Important:** Your external content connector administrator needs this API key when configuring the Aha! Roadmaps external content connector.

What to do next

Provide the following items to your connector administrator:

- The host URL for your Aha! Roadmaps instance. This is typically `https://<organization>.aha.io/`, where `<organization>` is the name of your organization.
- The API key value that you copied in step 1.d.

Your connector administrator needs these items to configure a Aha! Roadmaps external content connector to retrieve Features, Goals, Ideas, Notes, and Releases and security principals from your Aha! Roadmaps source system.

For details on creating and configuring a Aha! Roadmaps external content connector, see Create an Aha! Roadmaps external content connector.

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Create an Aha! Roadmaps external content connector

Create an external content connector to retrieve searchable content and security principals from your Aha! Roadmaps source system.

Before you begin

A source system administrator must have already configured your Aha! Roadmaps source system to allow access by the Aha! Roadmaps external content connector. For the required source system configuration steps, see Configure Aha! Roadmaps for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Aha !* **Roadmaps** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Aha! Roadmaps external content connector.
Host URL	URL for your Aha! Roadmaps instance host. This is typically `https://<organization>.aha.io`, where `<organization>` is the name of your organization. If you don't have the host URL, ask your Aha! Roadmaps administrator for it.
API token	API key generated in Aha! Roadmaps. If you don't have the API token, ask your Aha! Roadmaps administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for an Aha! Roadmaps external content connector.

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9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for an Aha! Roadmaps external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

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Configure crawl settings for an Aha! Roadmaps external content connector

Specify the products you want your Aha! Roadmaps external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Aha! Roadmaps external content connector that you want to configure crawl settings for. To learn about this procedure, see Create an Aha! Roadmaps external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Aha! Roadmaps external content connector crawls all products from its specified source system and sends all Features, Goals, Ideas, Notes, and Releases to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the products to crawl when running content crawls
- Inclusion or exclusion filters for the content types to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Aha! Roadmaps external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. In the Products section, select one of the following options:

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- To crawl content found in all products from the source system, select **Crawl all products**.

- To crawl only content found in a specified set of products from the source system, select **Include only these products**, then use the **Add products to include** field and **Add** button to enter URLs for products whose content you want the connector to include when crawling.

  As an example, you might enter `https://example.aha.io/future-innovations` and `https://example.aha.io/launchpad-initiatives` to only retrieve searchable content from the specified products.

- To crawl content found in all but a specified set of products from the source system, select **Exclude only these products**, then use the **Add products to exclude** field and **Add** button to enter URLs for products whose content you want the connector to exclude when crawling.

  As an example, you might enter `https://example.aha.io/internal` and `https://example.aha.io/test` to exclude searchable content from the specified products.

5. In the Crawl content types section, select the options for the Aha! Roadmaps content types (Features, Goals, Ideas, Notes, and Releases) that you want the connector to retrieve from products when running content crawls.
6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save and validate**.

Result

The Aha! Roadmaps external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your Aha! Roadmaps source system using your modified crawl settings, create and run a one-time content crawl for your Aha! Roadmaps external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Amazon S3 external content connector

The Amazon S3 external content connector retrieves files from buckets in your Amazon S3 source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to update searchable content and metadata from your source system. Content crawls feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

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Important: All content the connector retrieves from your Amazon S3 buckets is treated as public content, searchable by everyone who has access to your configured AI Search experience.

Advanced connection settings

You can optionally specify the following connection settings for an Amazon S3 external content connector.

- The AWS region for the connector.

  Note: For regulatory market compliance, specify a regulated market AWS region, such as `us-gov-east-1` or `us-gov-west-1`.

- Automatic selection or manual specification of the Amazon S3 endpoint used for connection and authentication operations. For AWS regions that offer endpoints compliant with the Federal Information Processing Standards (FIPS), you can optionally restrict automatic selection to those endpoints.
- A list of Amazon S3 buckets that the connector can access content from. If you leave this list empty, the connector finds buckets using auto-discovery. If you populate this list, the connector only accesses content from the specified buckets.

For the full list of supported Amazon S3 endpoints and regions, see the Amazon Simple Storage Service endpoints and quotas Amazon documentation resource.

Related topics

Create a content crawl for an external content connector

Configure Amazon S3 for external content indexing

Create an Identity and Access Management (IAM) user in the Amazon Web Services (AWS) Management Console. Define an access key for your new user to allow the Amazon S3 external content connector to access your Amazon S3 source system.

Before you begin

You need AWS Management Console credentials for your AWS account. You must have sufficient privileges to create an IAM user, define policy permissions for that user, and create an access key for that user. To learn more about these tasks, see the Amazon Web Services IAM users, Define custom IAM permissions with customer managed policies, Permissions required to access IAM resources, Manage access keys for IAM users, and Secure access keys resources.

Role required: none

About this task

The Amazon S3 external content connector retrieves content from buckets in your Amazon S3 source system using the Amazon Web Services (AWS) API. To access your Amazon S3 buckets, the connector uses an access key ID and secret access key that you define for a new Identity and Access Management (IAM) user. You specify bucket access permissions for this IAM user with an IAM policy.

Your ServiceNow AI Platform administrator needs this IAM user's access key ID and secret access key to configure the Amazon S3 external content connector for proper connection to your AWS account.

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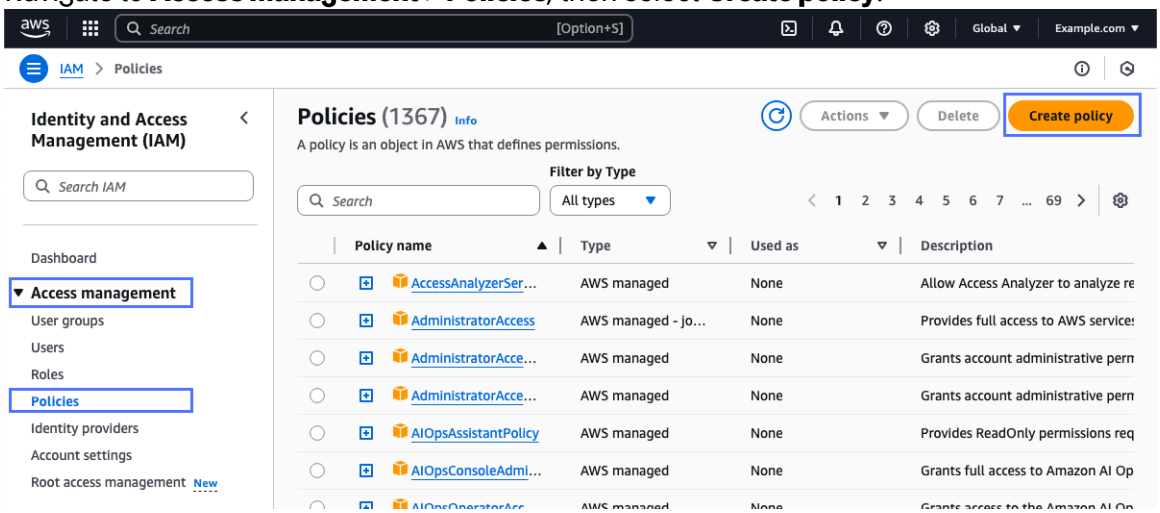
Important: All content the connector retrieves from your Amazon S3 buckets is treated as public content, searchable by everyone who has access to your configured AI Search experience.

Procedure

1. Create a new IAM policy that defines permissions needed for the Amazon S3 external content connector user.

   a. Log in to the Identity and Access Management page of the AWS Management Console at https://console.aws.amazon.com/iam/.

   b. Navigate to **Access management** > **Policies**, then select **Create policy**.

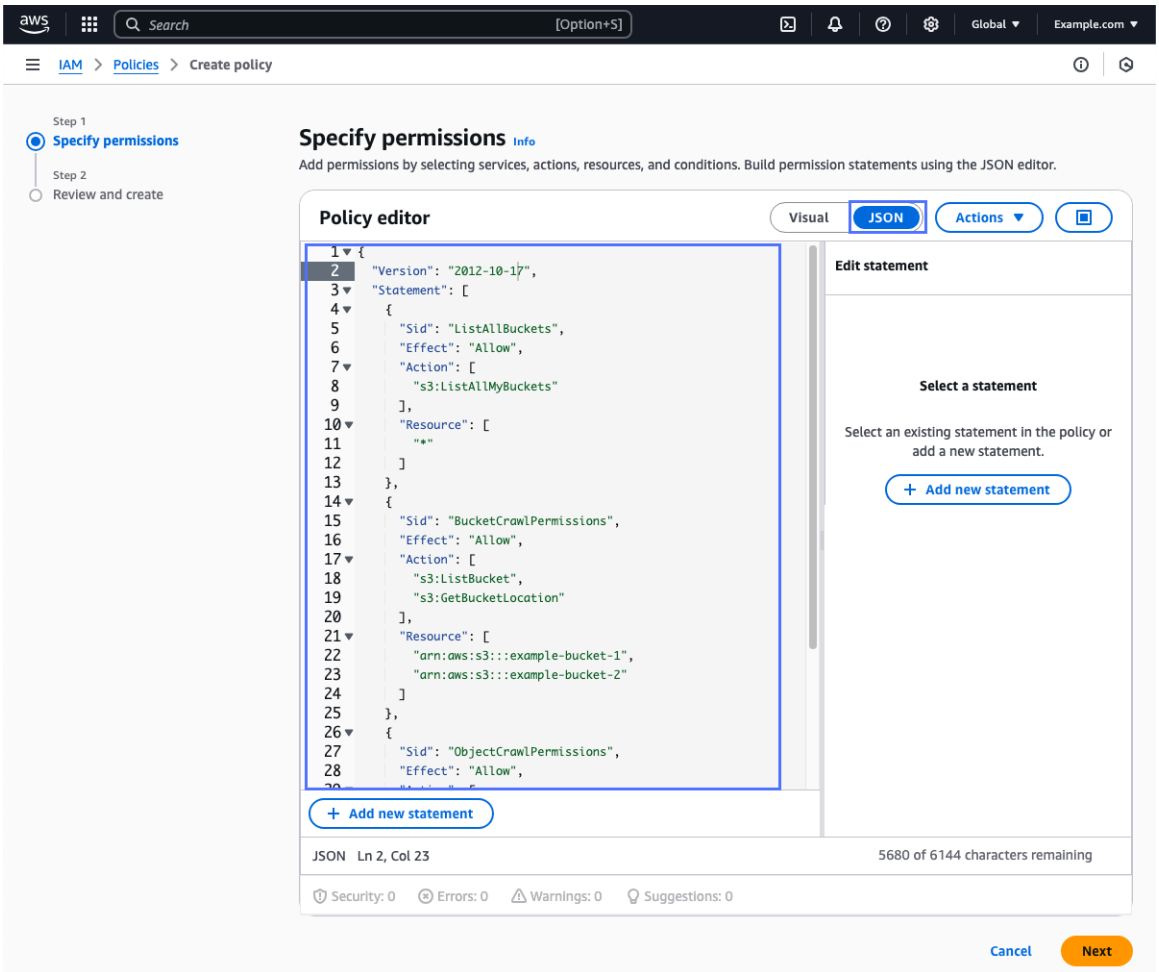


   c. In the Policy editor, select **JSON**, then paste the following JSON-format policy description into the editor, replacing the default policy description:

```
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Sid": "ListAllBuckets",
         "Effect": "Allow",
         "Action": [
            "s3:ListAllMyBuckets"
         ],
         "Resource": [
            "*"
         ]
      },
      {
         "Sid": "BucketCrawlPermissions",
         "Effect": "Allow",
         "Action": [
            "s3:ListBucket",
            "s3:GetBucketLocation"
         ],
         "Resource": [
            "arn:aws:s3:::example-bucket-1",
            "arn:aws:s3:::example-bucket-2"
         ]
```

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```
    },
    {
      "Sid": "ObjectCrawlPermissions",
      "Effect": "Allow",
      "Action": [
        "s3:GetObject"
      ],
      "Resource": [
        "arn:aws:s3:::example-bucket-1/*",
        "arn:aws:s3:::example-bucket-2/*"
      ]
    }
  ]
}
```



d. In the Policy editor, update the `Resource` array for the `BucketCrawlPermissions` object to include Amazon Resource Names (ARNs) for all of the Amazon S3 buckets you want the external content connector to be able to crawl.
This array should only contain ARNs for the Amazon S3 bucket resource type. For details on ARNs, see https://docs.aws.amazon.com/IAM/latest/UserGuide/reference-arns.html. To learn more about resource types defined for Amazon S3, see https://docs.aws.amazon.com/service-authorization/latest/reference/list_amazons3.html#amazons3-resources-for-iam-policies. When granting access to your Amazon S3 buckets, remember that all content crawled by the connector is searchable by everyone who has access to your configured AI Search experience.

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e. In the Policy editor, update the `Resource` array for the `ObjectCrawlPermissions` object to include ARNs for all of the Amazon S3 resources you want the external content connector to be able to retrieve.
This array should only contain ARNs for the Amazon S3 object resource type. You can use wildcards to grant access to all objects in a bucket, as shown in the example ARNs. For details on ARNs, see https://docs.aws.amazon.com/IAM/latest/UserGuide/reference-arns.html. To learn more about resource types defined for Amazon S3, see https://docs.aws.amazon.com/service-authorization/latest/reference/list_amazons3.html#amazons3-resources-for-iam-policies. When granting access to your Amazon S3 bucket resources, remember that all content crawled by the connector is searchable by everyone who has access to your configured AI Search experience.



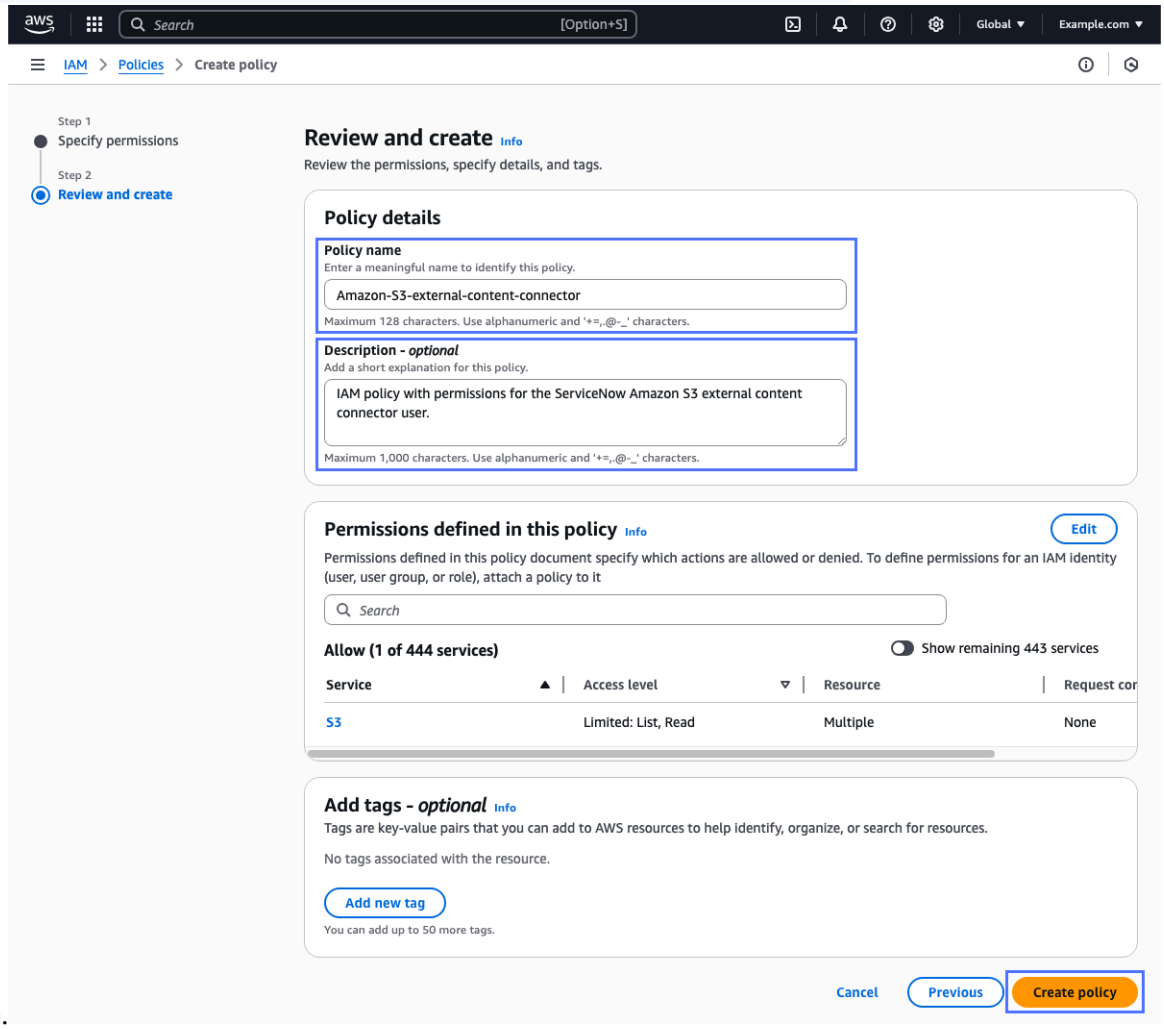
```
{
  "Sid": "BucketCrawlPermissions",
  "Effect": "Allow",
  "Action": [
    "s3:ListBucket",
    "s3:GetBucketLocation"
  ],
  "Resource": [
    "arn:aws:s3:::example-bucket-1",
    "arn:aws:s3:::example-bucket-2"
  ]
},
{
  "Sid": "ObjectCrawlPermissions",
  "Effect": "Allow",
  "Action": [
    "s3:GetObject"
  ],
  "Resource": [
    "arn:aws:s3:::example-bucket-1/*",
    "arn:aws:s3:::example-bucket-2/*"
  ]
}
]
}
```

f. Select **Next**.

g. On the Review and create page, enter a **Policy name** and optionally a **Description** for your new policy, then select **Create policy**.

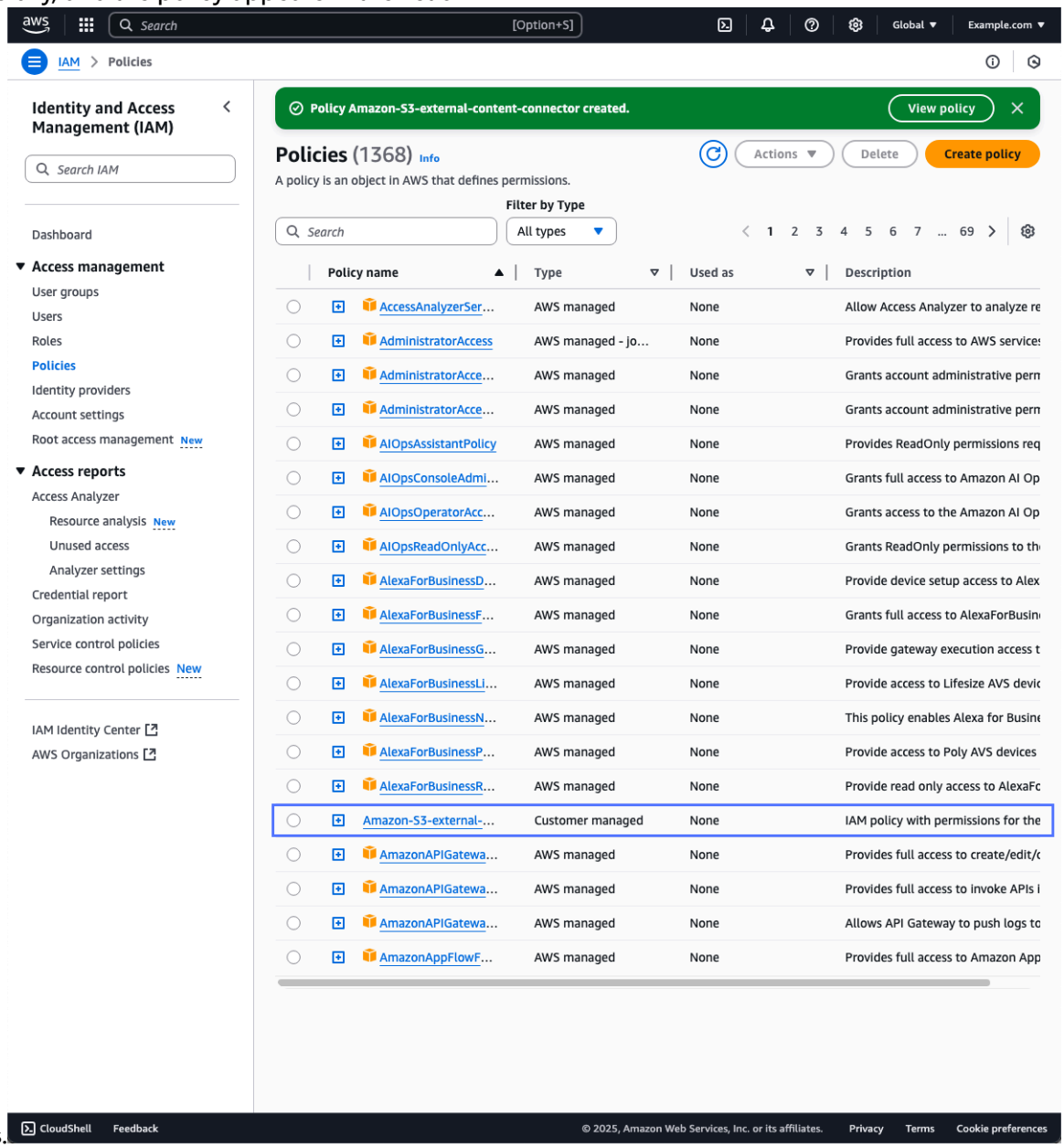
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As an example, you might enter `Amazon-S3-external-content-connector` as the policy name and `IAM policy with permissions for the ServiceNow Amazon S3 external content connector user.` as the definition.



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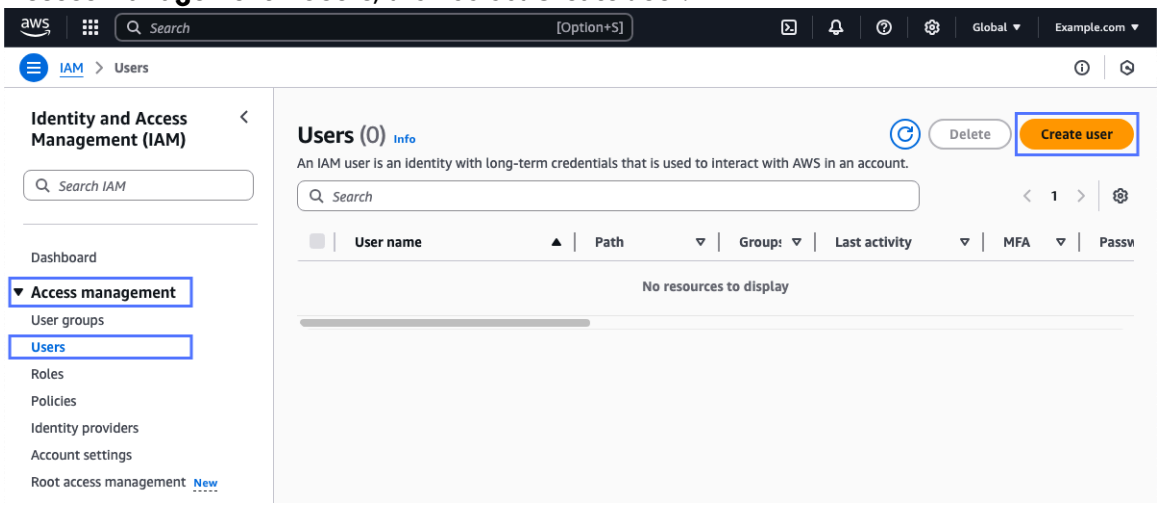
A message confirms that your new IAM policy was created successfully, and the policy appears in the list of IAM policies.



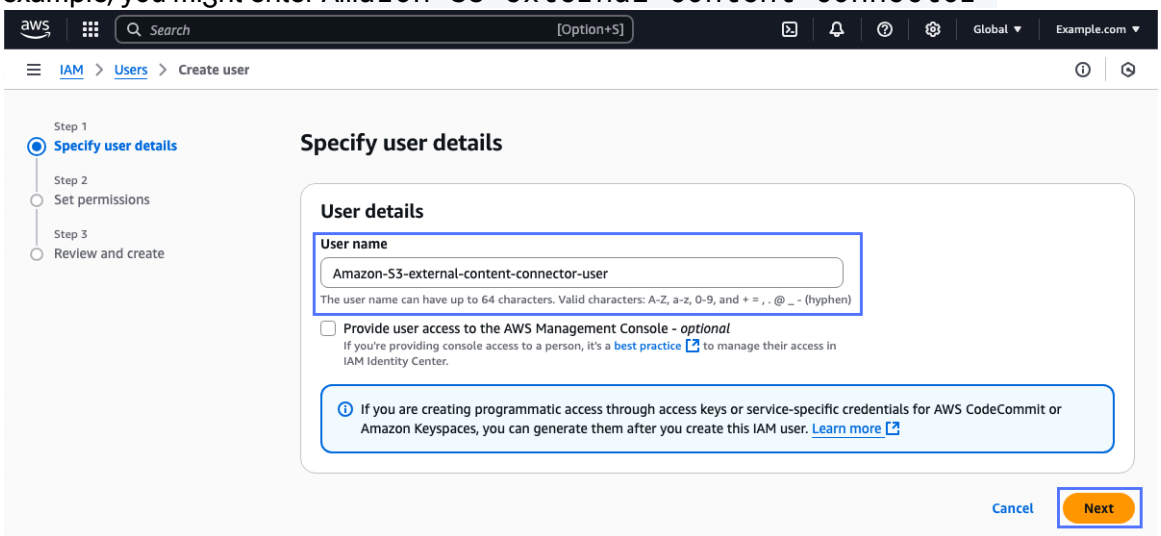
2. Create a new IAM user in your AWS account:

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a. In the Identity and Access Management page of the AWS Management Console, navigate to **Access management** > **Users**, then select **Create user**.



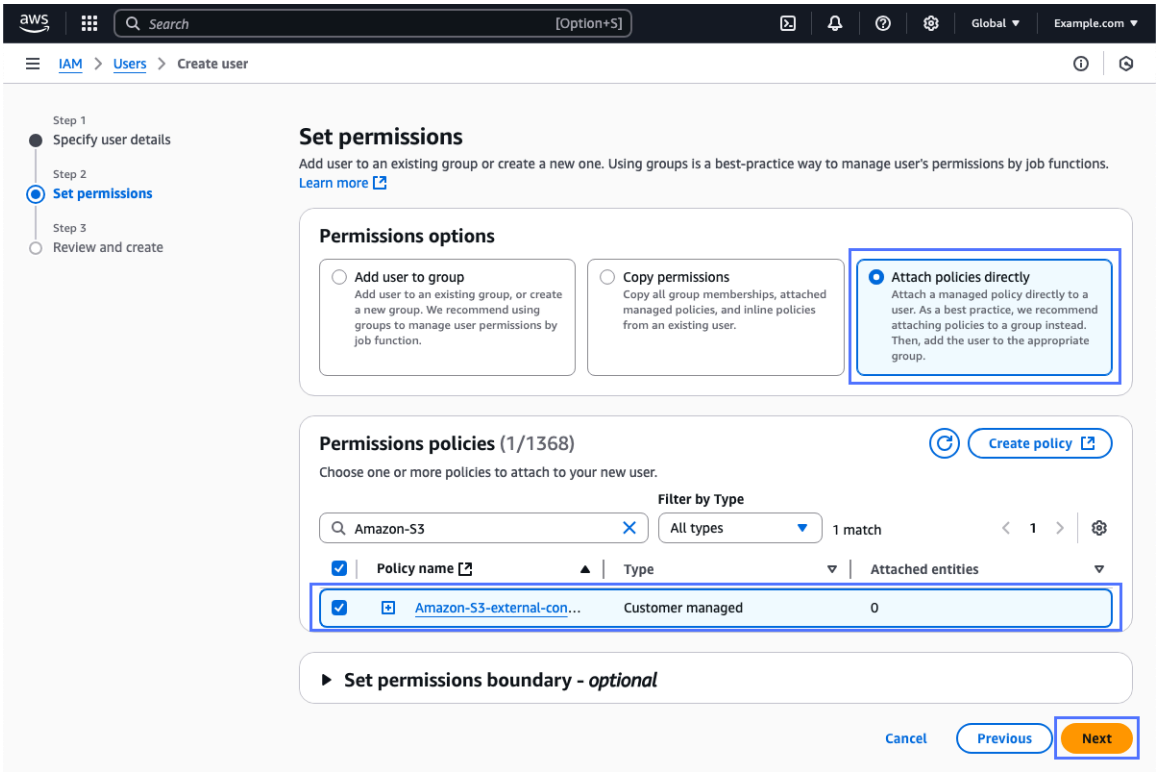
b. On the Specify user details page, enter a name for your new IAM user, then select **Next**. As an example, you might enter `Amazon-S3-external-content-connector-user`.



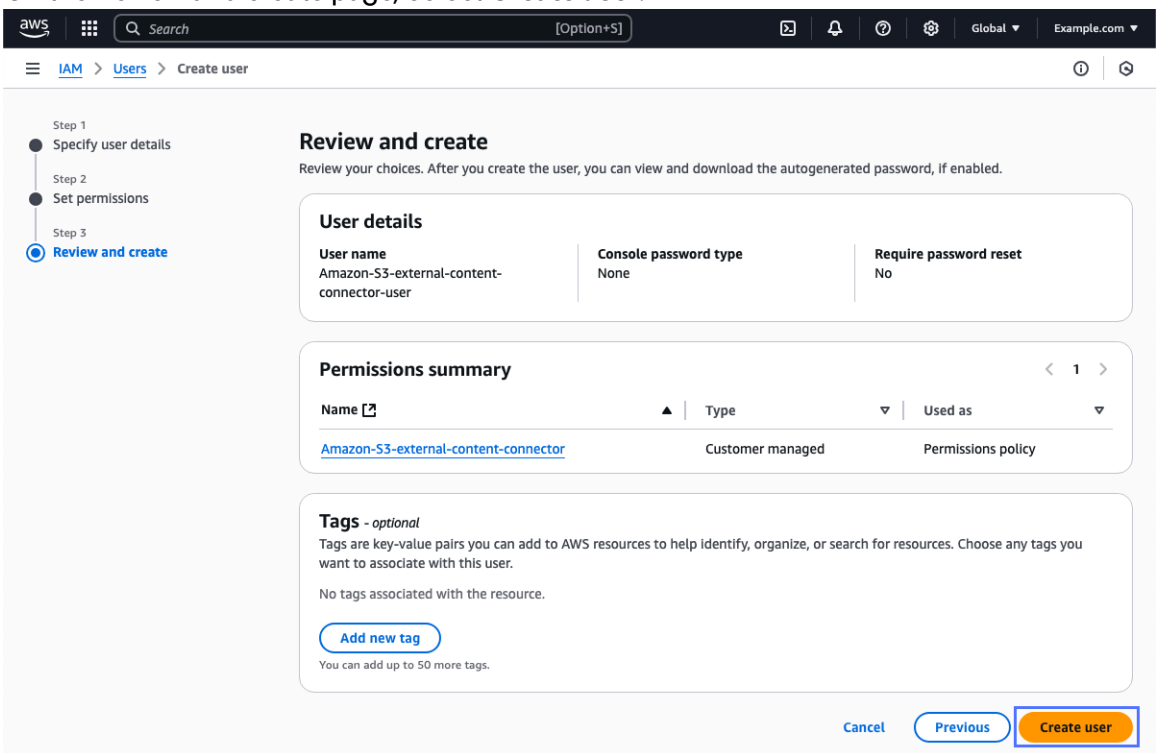
c. On the Set permissions page, select **Attach policies directly** in the Permissions options section.

d. In the Permissions policies list, select the option for the new IAM policy that you created in step 1, then select **Next**.

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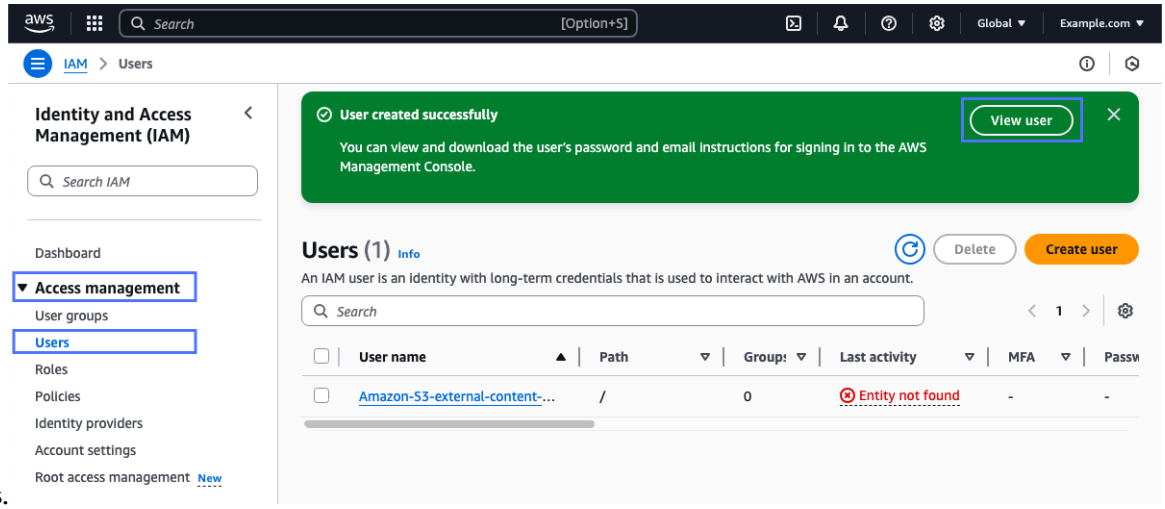


e. On the Review and create page, select **Create user**.



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A message confirms that your new IAM user was created successfully, and the user appears in the list of IAM users.

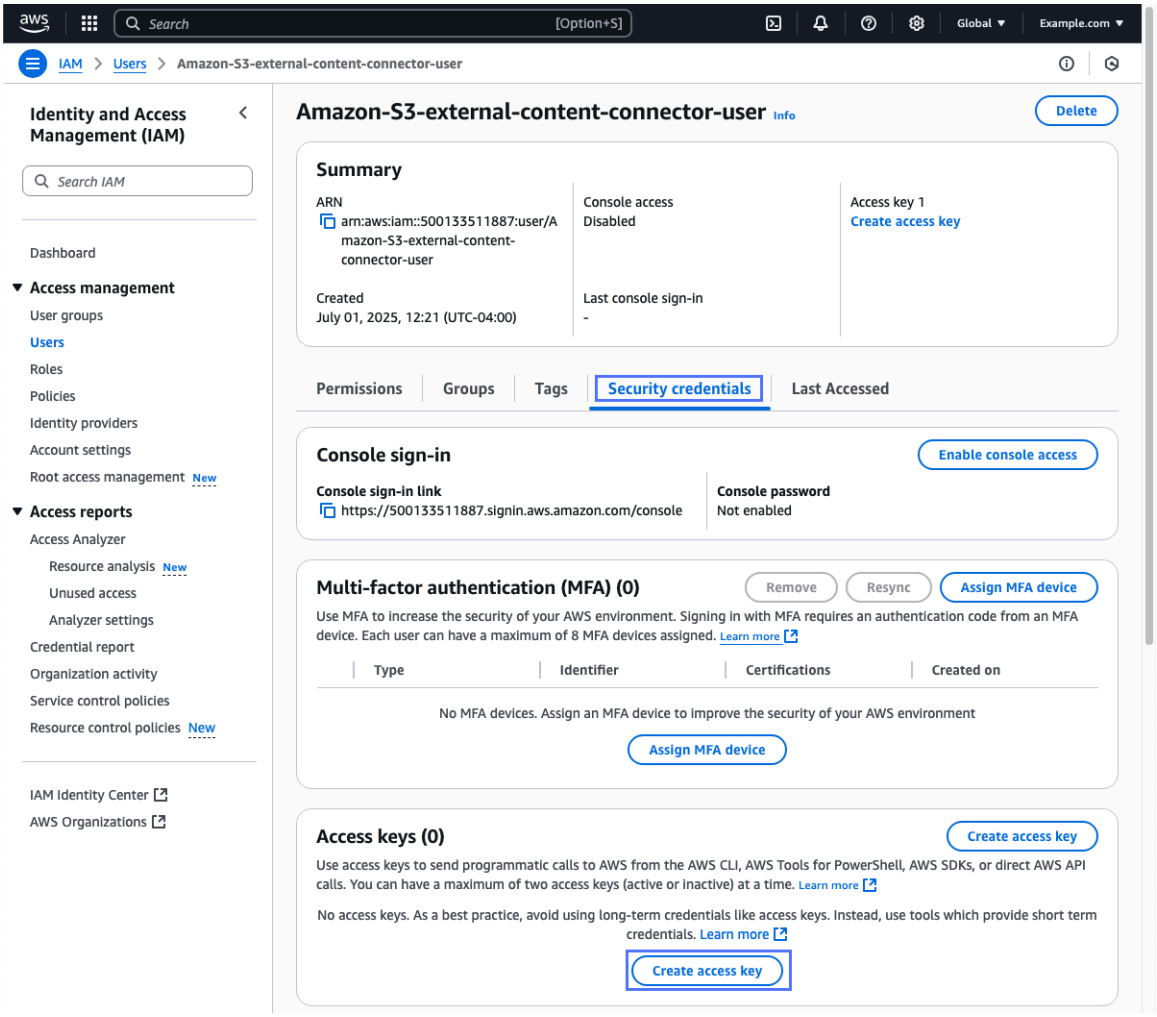


3. Create an access key for your new IAM user:

   a. Select **View user** in the message that appeared when you completed step 2.
   If the message and **View user** link are no longer visible, navigate to **Access management** > **Users** in the AWS Management Console, then select the user that you created in step 2.

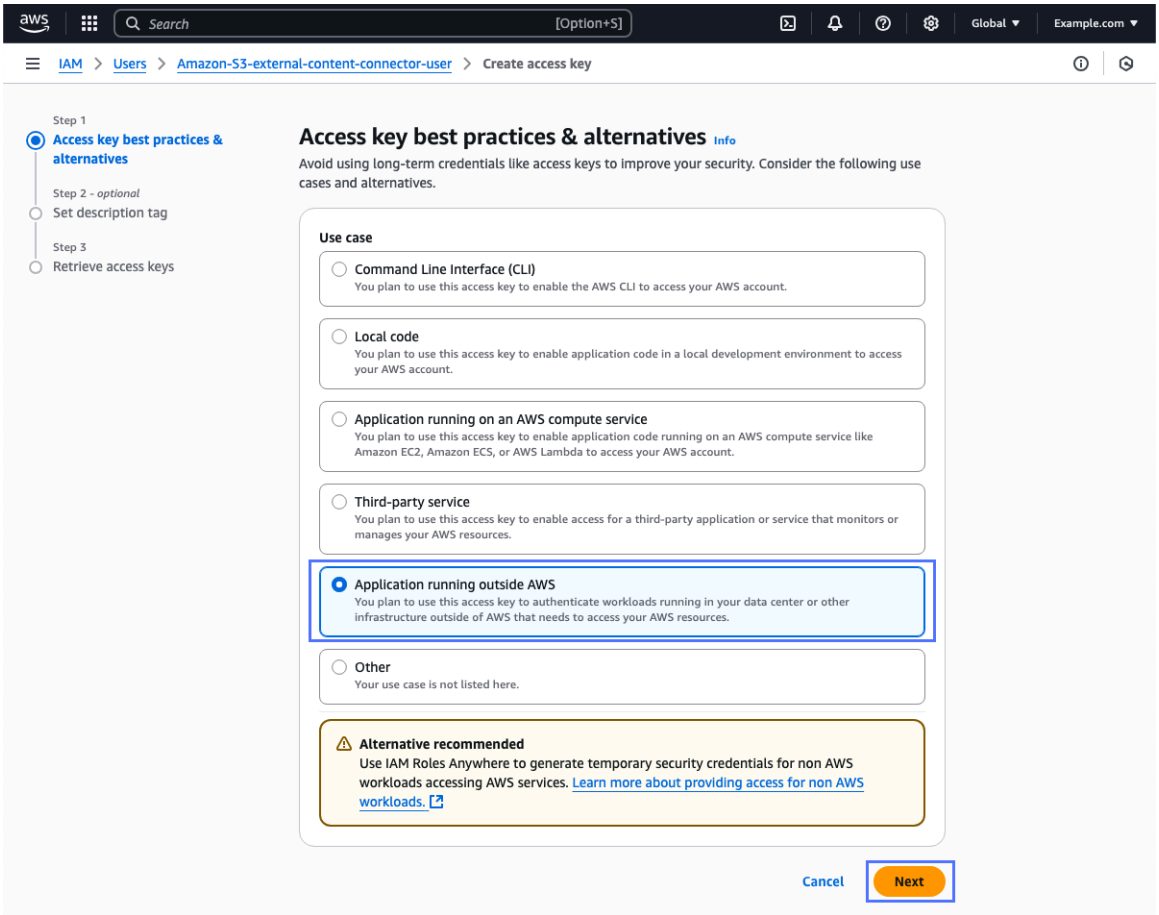
   b. In the Security credentials tab, navigate to the Access keys section and select **Create access key**.

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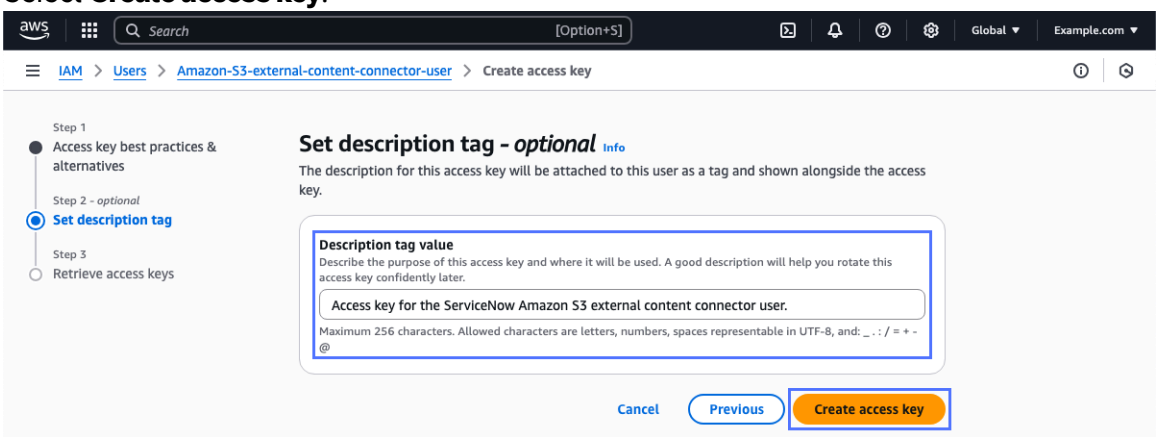
c. On the Access key best practices & alternatives page, select the **Application running outside AWS** use-case, then select **Next**.

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d. Enter a description tag value for your new access key.
As an example, you might enter `Access key for the ServiceNow Amazon S3 external content connector user.`

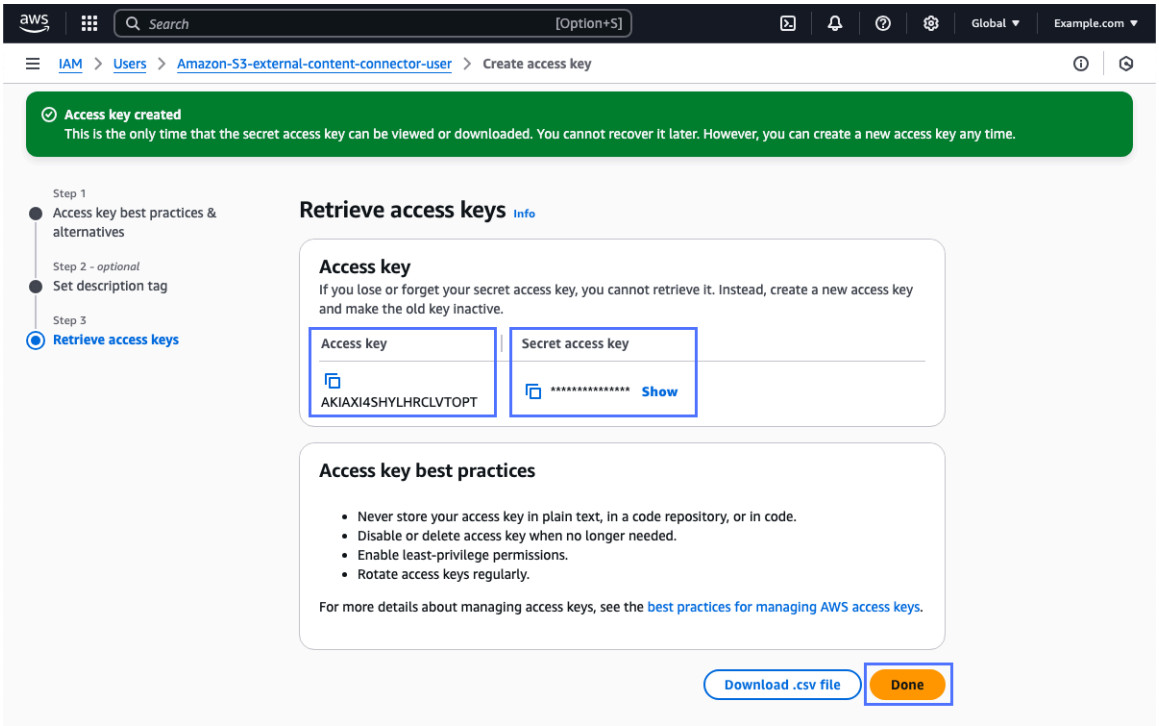
e. Select **Create access key**.



A message confirms that your new access key was created.

f. On the Retrieve access keys page, copy the new key's **Access key** and **Secret access key** values and store them in a secure location.

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Important: Your connector administrator needs this access key and secret access key when configuring the Amazon S3 external content connector.

g. Select **Done**.

What to do next

Provide the IAM user access key and secret access key that you copied in step 3.f to your ServiceNow AI Platform admins. Your admin needs these items to configure an Amazon S3 external content connector to retrieve searchable content and security principals from your Amazon S3 buckets.

For details on creating and configuring an Amazon S3 external content connector, see Create an Amazon S3 external content connector.

Create an Amazon S3 external content connector

Create an external content connector to retrieve searchable content from your Amazon S3 source system.

Before you begin

A source system administrator must have already configured your Amazon S3 source system to allow access by the Amazon S3 external content connector. For the required source system configuration steps, see Configure Amazon S3 for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Amazon S3** tile, then select **Next**.

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5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Amazon S3 external content connector.
Access Key Id	Access key ID for the Amazon Web Services (AWS) IAM user account used by the Amazon S3 external content connector. If you don't have this access key ID, ask your AWS administrator for it.
Secret Access Key	Secret access key for the Amazon Web Services (AWS) IAM user account used by the Amazon S3 external content connector. If you don't have this secret access key, ask your AWS administrator for it.
I agree to the following legal disclaimer	Option acknowledging that the Amazon S3 external content connector makes all crawled content accessible by all search users. Amazon S3 content access permissions don't rely on users' email addresses, as retrieved in user permission crawls. As a result, user permission crawls aren't supported for the Amazon S3 external content connector.

6. **Optional:** Expand the **Advanced connection settings** section and fill in the fields.

Advanced connection settings

Connection setting	Description
Endpoint resolution	Selection mode for the AWS endpoint to use for connection and authentication. Supported values: ○ **Automatic**: The connector uses the AWS SDK and your *AWS* **region** and **Use FIPS compliant endpoints** settings to automatically select the AWS endpoint to use. ○ **Manual**: The connector uses the AWS endpoint and region that you specify in the **Endpoint** and *AWS* **region** fields.
Use FIPS compliant endpoints	Option to force connection and authentication operations to use an AWS endpoint host that conforms to the Federal Information Processing Standards. This option appears only when you set **Endpoint resolution** to *Automatic*. It's only accessible when the region specified in the *AWS* **region** field supports FIPS endpoints.
Endpoint	URL for the AWS endpoint host you want the connector to use for connection and authentication. As an example, to make the connector use the `s3.us-east-1.amazonaws.com` endpoint with the HTTPS protocol, you might enter `https://s3.us-east-1.amazonaws.com`. This field appears only when you set **Endpoint resolution** to *Manual*.

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Connection setting	Description
	For the full list of supported endpoints, see the Amazon Simple Storage Service endpoints and quotas Amazon documentation resource. **Note:** The Amazon resource lists endpoint hostnames. This field's value must be a valid URL, with the HTTP or HTTPS protocol prefix included.
AWS region	AWS region containing your Amazon S3 buckets. As an example, you might specify `us-west-1`. When **Endpoint resolution** is set to *`Automatic`*, the connector uses this region and the **Use FIPS compliant endpoints** option to determine the correct AWS endpoint to use for connection and authentication. To view the list of AWS regions, see the Amazon Simple Storage Service endpoints and quotas Amazon documentation resource. **Note:** For regulatory market compliance, specify a regulated market AWS region, such as `us-gov-east-1` or `us-gov-west-1`.
Buckets	List of Amazon S3 buckets containing your content. Enter a bucket name and press **Add** to add it to the list. You must populate this field when using an AWS endpoint that doesn't support automatic bucket discovery, such as a FIPS endpoint or an Amazon S3 Outposts endpoint. For other endpoints, you can leave this field empty to enable auto-discovery of buckets. When this list is populated, the connector only retrieves searchable content and metadata from the specified Amazon S3 buckets.

7. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for an Atlassian Confluence Cloud external content connector.
9. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
10. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.

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If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content with your new connector, you must configure and run content crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for an Amazon S3 external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector.

Important: All content the connector retrieves from your Amazon S3 buckets is treated as public content, searchable by everyone who has access to your configured AI Search experience.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for an Amazon S3 external content connector

Define inclusion and exclusion filters to specify the buckets and file types you want your Amazon S3 external content connector to retrieve when running content crawls.

Before you begin
A connector administrator must have already created the Amazon S3 external content connector that you want to configure crawl settings for. To learn about this procedure, see Create an Amazon S3 external content connector.

Role required: sn_ext_conn.xcc_admin

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About this task

This task is optional. By default, the Amazon S3 external content connector crawls all buckets and file types from its specified source system and sends files with all supported extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the buckets to crawl when running content crawls
- Inclusion or exclusion filters for the file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Amazon S3 external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Content filtering** options:
   - To crawl all buckets from the source system, select **Crawl all content**.
   - To crawl only a specified set of buckets from the source system, select **Include only these buckets**, then use the **Add S3 bucket URLs to include** field and **Add** button to enter URLs for buckets you want the connector to include when crawling.

     As an example, you might enter `https://s3.amazonaws.com/published` to only include searchable content from a bucket with name `published`.

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- To crawl all but a specified set of buckets from the source system, select **Exclude only these buckets**, then use the **Add S3 bucket URLs to exclude** field and **Add** button to enter URLs for buckets you want the connector to exclude when crawling.

  As an example, you might enter `https://s3.amazonaws.com/legacy_bucket` to exclude searchable content from a bucket with name `legacy_bucket`.

5. Select one of the following **Filetype filtering** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

   For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save and validate**.

Result

The Amazon S3 external content connector is updated with your modified crawl settings.

> **Important:** All content the connector retrieves from your Amazon S3 buckets is treated as public content, searchable by everyone who has access to your configured AI Search experience.

What to do next

To retrieve content from your Amazon S3 source system using your modified crawl settings, create and run a one-time content crawl for your Amazon S3 external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

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Asana external content connector

The Asana external content connector retrieves projects, tasks, and comments from your Asana source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

- Create a content crawl for an external content connector
- Create a user permission crawl for an external content connector

Configure Asana for external content indexing

Create and authorize an OAuth 2.0 application in the Asana developer console to allow the Asana external content connector to access your Asana source system.

Before you begin

You need the super admin role for your organization's Asana instance. To learn about this role, see the Admin and super admin roles in Asana Asana help resource.

Role required: none

About this task

The Asana external content connector retrieves projects, tasks, and comments from your Asana source system using the Asana API.

To allow the connector to access your Asana source system via the Asana API, you must configure and authorize an OAuth 2.0 application in the Asana developer console. Your connector administrator can use settings copied from the OAuth 2.0 application to configure the Asana external content connector for proper connection to your source system.

Procedure

1. Log in to Asana and access the Asana developer console.
   a. Navigate to https://app.asana.com/ and log in with your super admin credentials.
   b. Select your user avatar, then select **Settings** from the context menu.
   c. In the Apps tab of the Settings modal window, find the Build new apps section and select **View developer console**.
   The Asana developer console opens.
2. In the Asana developer console, create a new OAuth 2.0 application for the Asana external content connector.
   a. Select **Create new app**.
   b. In the Create new app modal window, enter a name for your app.
   As an example, you might enter `Asana external content connector`.
   c. Select the **Integrate Asana and another tool** option.

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d. Select the **I agree to the Asana API Terms** option.

e. Select **Create app**.

The Basic information page for your new app appears.

3. On the Basic information page, record the client ID and client secret for your new OAuth 2.0 application.

a. In the Client ID field, select **Copy** to copy your new app's client ID, then record its value in a secure location.

> **Important:** Your external content connector administrator needs this client ID when configuring the Asana external content connector.

b. In the Client secret field, select **Copy** to copy your new app's client secret, then record its value in a secure location.

> **Important:** Your external content connector administrator needs this client secret when configuring the Asana external content connector.

4. Configure an OAuth redirect URL for your new app.

a. Navigate to **Configure** > **OAuth**.
The OAuth page for your new app appears.

b. In the Redirect URLs section, select **Add redirect URL**.

c. In the Add redirect URL modal window, enter `https://<instance-name>.service-now.com/oauth_redirect.do`, replacing `<instance-name>` with the name of your ServiceNow AI Platform® instance, then select **Add**.

The new redirect URL appears on the OAuth page.

5. Configure Asana API permission scopes for your new app.

a. On the OAuth page, in the Permission scopes section, select the options for all of the following permission scopes:

- Goals: Read (`goals:read`)
- Portfolios: Read (`portfolios:read`)
- Projects: Read (`projects:read`)
- Stories: Read (`stories:read`)
- Tasks: Read (`tasks:read`)
- Team memberships: Read (`team_memberships:read`)
- Teams: Read (`teams:read`)
- Users: Read (`users:read`)
- Workspaces: Read (`workspaces:read`)

b. Select **Save changes**.

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6. Share your new app with your Asana workspaces.

   a. Navigate to **Test & distribute** > **Manage distribution**.
   The Manage distribution page for your new app appears.

   b. Select **Specific workspaces**.

   c. Select **Add workspace**, then choose the Asana workspace that you want to distribute the new app to and select **Add**.

   d. Repeat the preceding step if you want to distribute your new app to multiple Asana workspaces.

What to do next

Provide the following items to your connector administrator:

- The client ID for your new OAuth 2.0 application that you copied in step 3.a.
- The client secret for your new OAuth 2.0 application that you copied in step 3.b.

Your connector administrator needs these items to configure an Asana external content connector to retrieve projects, tasks, comments, and security principals from your Asana source system.

For details on creating and configuring an Asana external content connector, see Create an Asana external content connector.

Create an Asana external content connector

Create an external content connector to retrieve searchable content and security principals from your Asana source system.

Before you begin

A source system administrator must have already configured your Asana source system to allow access by the Asana external content connector. For the required source system configuration steps, see Configure Asana for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Asana** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Asana external content connector.

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Connection setting	Description
Client ID	Client ID for the OAuth 2.0 Asana application that grants the connector access to your Asana content. If you don't have the client ID, ask your Asana administrator for it.
Client Secret	Client secret for the OAuth 2.0 Asana application that grants the connector access to your Asana content. If you don't have the client secret, ask your Asana administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for an Asana external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

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What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for an Asana external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for an Asana external content connector

Specify the projects you want your Asana external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Asana external content connector that you want to configure crawl settings for. To learn about this procedure, see Create an Asana external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Asana external content connector crawls all projects from its specified source system and sends documents with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the projects to crawl when running content crawls
- Inclusion or exclusion filters for the file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Asana external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Content** options:
   - To crawl all projects from the source system, select **Crawl all content**.
   - To crawl only a specified set of projects from the source system, select **Include only these projects**, then use the **Add Projects** field and **Add** button to enter names for projects you want the connector to include when crawling.

     As an example, you might enter `Production` to only retrieve searchable content from the project with the specified name.
   - To crawl all but a specified set of projects from the source system, select **Exclude only these projects**, then use the **Add Projects** field and **Add** button to enter names for projects you want the connector to exclude when crawling.

     As an example, you might enter `Test` to exclude searchable content from the project with the specified name.
5. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

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- For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
- To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.

6. Select **Save and validate**.

Result
The Asana external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your Asana source system using your modified crawl settings, create and run a one-time content crawl for your Asana external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Atlassian Confluence Cloud external content connector

The Atlassian Confluence Cloud external content connector retrieves pages and attachments from spaces in your Atlassian Confluence Cloud source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Note:

When running crawls for the Atlassian Confluence Cloud external content connector, run your content crawl first, before running a user permission crawl. If you run the user permission crawl before the content crawl completes, some Confluence Cloud content may not be searchable.

The connector automatically runs a user permission crawl after its first full content crawl completes. It also automatically runs a user permission crawl if you modify its connection settings and then run a complete full content crawl. In all other cases, you need to run or schedule the user permission crawl so that it starts after your latest content crawl has completed.

Role-Based Access Control (RBAC) beta support

The Atlassian Confluence Cloud external content connector only offers limited support for the Role-Based Access Control (RBAC) feature that's available in beta in Atlassian Confluence Cloud.

- The connector maps user and group read permissions assigned via RBAC roles just as it does for non-RBAC read permissions.
- The connector ignores user and group read permissions assigned via RBAC user classes. These include the anonymous permission assigned via the anonymous user class. If RBAC user class permissions are the only read permissions assigned on a page or attachment, the content from that page or attachment is not searchable in AI Search applications.

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Atlassian recommends enabling the RBAC feature for testing in a non-production Atlassian Confluence Cloud environment. Connector admins should test the connector's behavior with RBAC in non-production ServiceNow AI Platform® instances before deploying to production.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Estimate document volume for Atlassian Confluence Cloud

Estimate the number of documents included in your Atlassian Confluence Cloud source system. Use this information to determine crawl scope settings needed for your Atlassian Confluence Cloud external content connector.

Before you begin

You need the following credentials and permissions for your organization's Atlassian Confluence Cloud source system:

- Login credentials for an administrator account
- Permission to create reports

Role required: none

About this task

Before configuring an Atlassian Confluence Cloud external content connector, you may find it helpful to estimate the number of documents available in your Atlassian Confluence Cloud source system.

By estimating the count of available documents, you can determine whether you need to restrict the crawl scope for your Atlassian Confluence Cloud external content connector to avoid exceeding the indexed-document limit.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

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Procedure

1. Log in to your Atlassian Confluence Cloud administration console using administrator credentials.
   The URL for the Atlassian Confluence Cloud administration console is typically `https://<hostname>.atlassian.net/wiki/admin`, where `<hostname>` is your organization-specific hostname.
2. In the administration page's menu, navigate to **Settings** > **Data management** > **Space reports**.
3. Select **Create report** and wait for the new report's **Download** link to appear.
   The report may take a few minutes to generate.
4. Select the **Download** action for the new report, then save the space report CSV file to a convenient location when prompted.
5. Open the downloaded space report CSV file in a tool of your choice.
6. For each space listed in the space report CSV file, find the number of available documents in the space by adding its listed Content Count and Attachments figures.
   As an example, if a space's entry in the space report CSV file shows Content Count 3571 and Attachments 258, the total number of available documents for that space is 3,829.
7. Sum the available-document counts for all spaces to find the total number of available documents in your Atlassian Confluence Cloud source system.

> **Note:** The counts in the space report include all document and attachment types. Some of these may be types that aren't supported by the Atlassian Confluence Cloud external content connector, so the number of documents and attachments retrieved by the connector may be lower than the numbers in the report.

What to do next

If your Atlassian Confluence Cloud source system's total available document count exceeds the connector limit of one million (1,000,000) documents, you will need to limit the crawl scope for the Atlassian Confluence Cloud external content connector. Choose a set of spaces whose total document count is less than the connector limit, and inform your ServiceNow AI Platform admin so they can configure the external content connector's crawl settings to include only those spaces.

For details on configuring the Atlassian Confluence Cloud connector's crawl settings, see Configure crawl settings for an Atlassian Confluence Cloud external content connector.

Configure Atlassian Confluence Cloud for external content indexing

Register an OAuth 2.0 integration in the Atlassian Developer console and create an API key in Atlassian Administration to allow the Atlassian Confluence Cloud external content connector to crawl spaces and security principals in your Atlassian Confluence Cloud source system.

Before you begin

You need the following credentials and permissions for your organization's Atlassian management applications:

Atlassian portal	Required credentials and permissions
Atlassian Developer console (https://developer.atlassian.com/console/myapps/)	• Login credentials • Permission to view settings for registered applications • Permission to register a new application

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Atlassian portal	Required credentials and permissions
	• Permission to set granular Confluence API scopes for an application • Permission to set the OAuth 2.0 callback URL for an application
Atlassian Administration (https://admin.atlassian.com/)	• Organization admin login credentials

Role required: none

About this task

The Atlassian Confluence Cloud external content connector retrieves content from your Atlassian Confluence Cloud source system using the Confluence Cloud API.

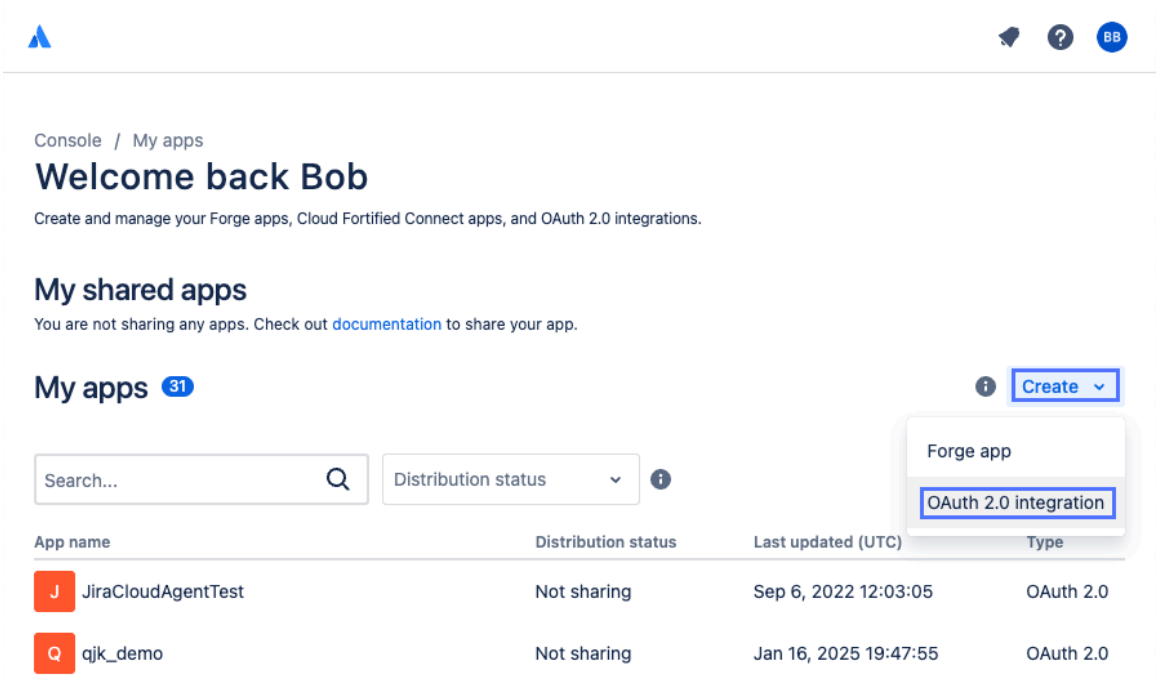
To allow the connector to access your Atlassian Confluence Cloud source system via the Confluence Cloud API, you must configure an OAuth 2.0 integration in the Atlassian Developer console and an API key in Atlassian Administration. Your connector administrator can use settings copied from the OAuth 2.0 integration and the API key to configure the Atlassian Confluence Cloud external content connector for proper connection to your Atlassian Confluence Cloud source system.

Procedure

1. In the Atlassian Developer console, register a new OAuth 2.0 integration for the Atlassian Confluence Cloud external content connector.

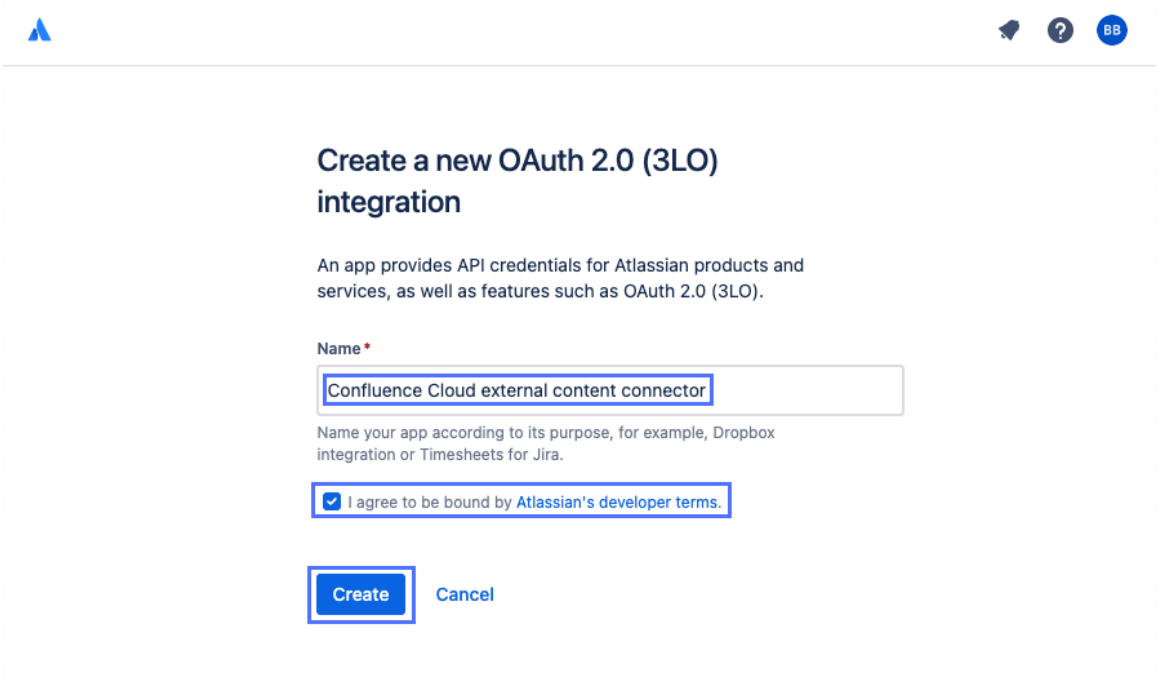
   a. Log in to the Atlassian Developer console at https://developer.atlassian.com/console/myapps/.

   b. In the My apps section, select **Create** > **OAuth 2.0 integration**.



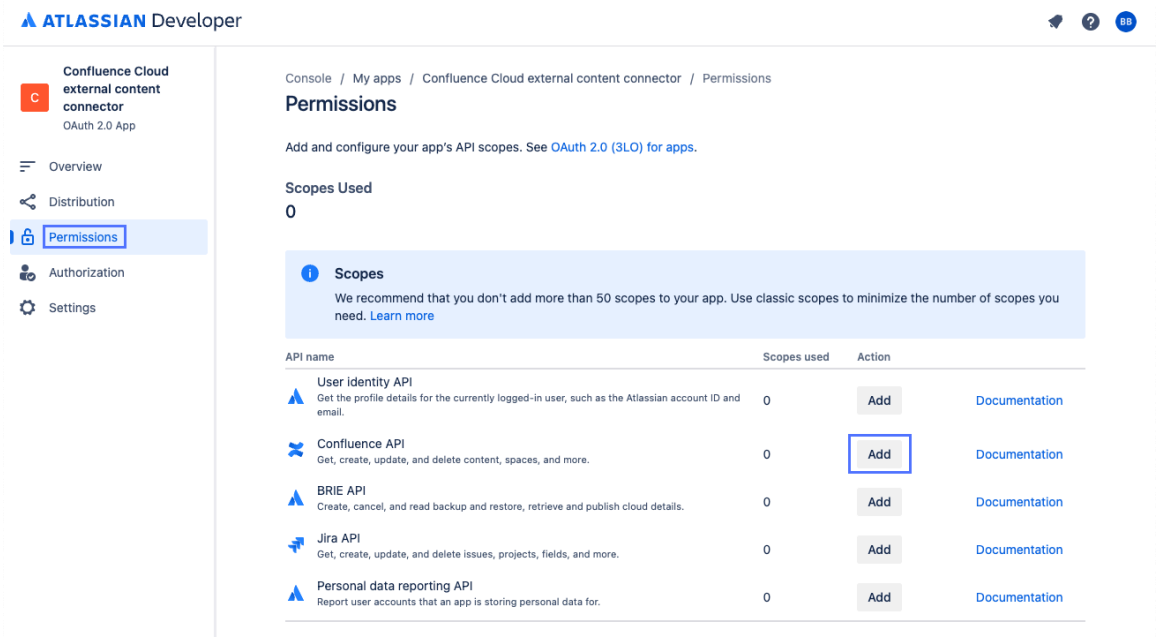
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c. Enter a name for your OAuth 2.0 integration, select the option to agree to Atlassian's developer terms, and select **Create**.



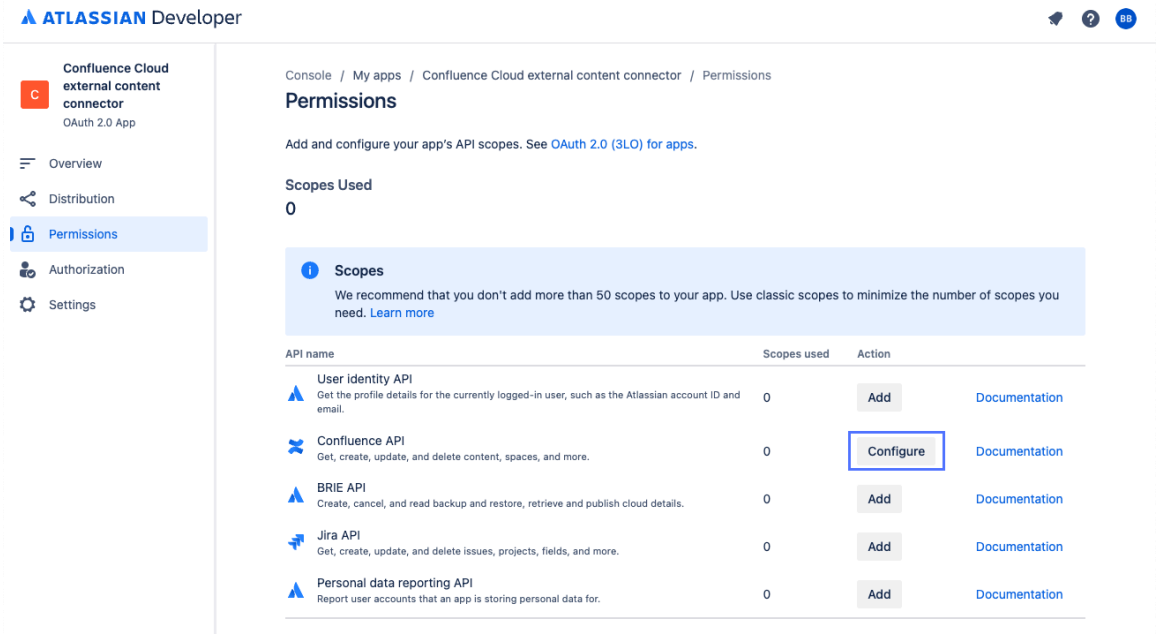
As an example, you might enter `Confluence Cloud external content connector` as the name for your OAuth 2.0 integration.

d. Navigate to the OAuth 2.0 integration's Permissions page, then select **Add** in the Confluence API row.



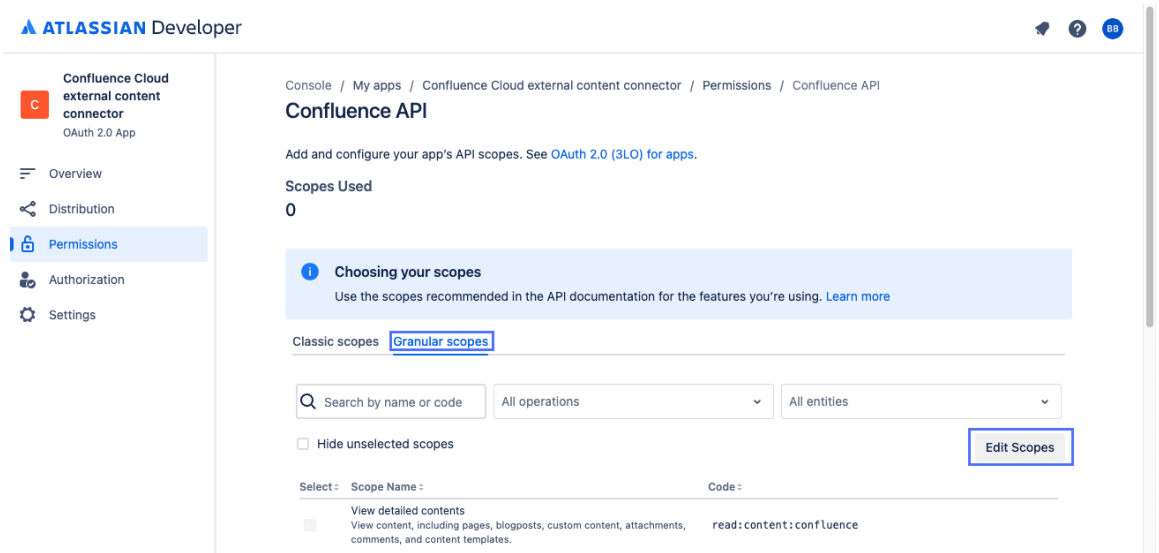
e. In the Confluence API row, select **Configure**.

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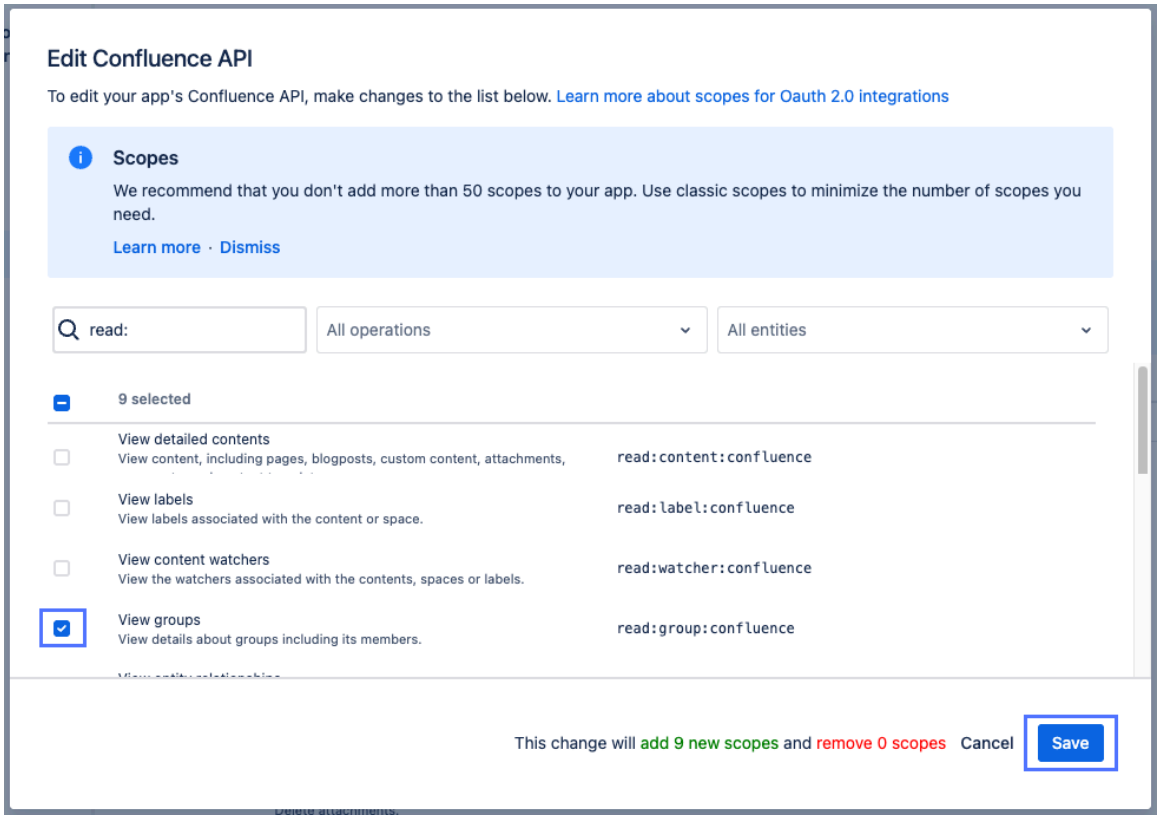
f. On the Granular scopes tab, select **Edit Scopes** and then select the options for each of the following scopes:

- read:attachment:confluence
- read:blogpost:confluence
- read:content-details:confluence
- read:content.metadata:confluence
- read:folder:confluence
- read:group:confluence
- read:page:confluence
- read:space:confluence
- read:user:confluence

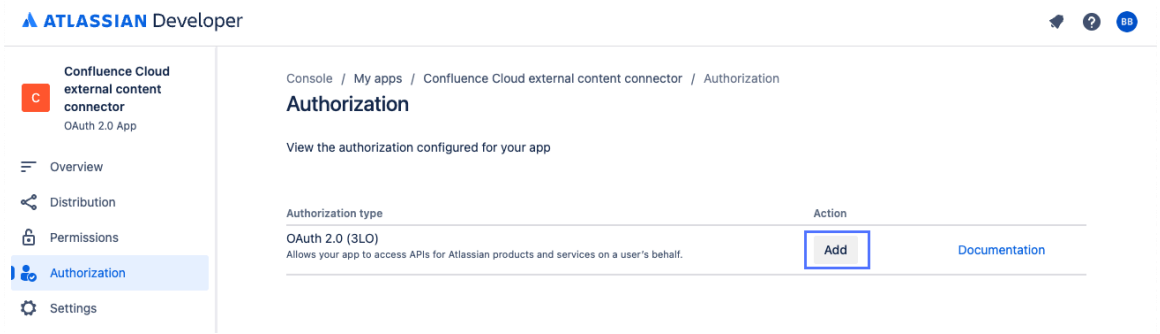


g. Select **Save**.

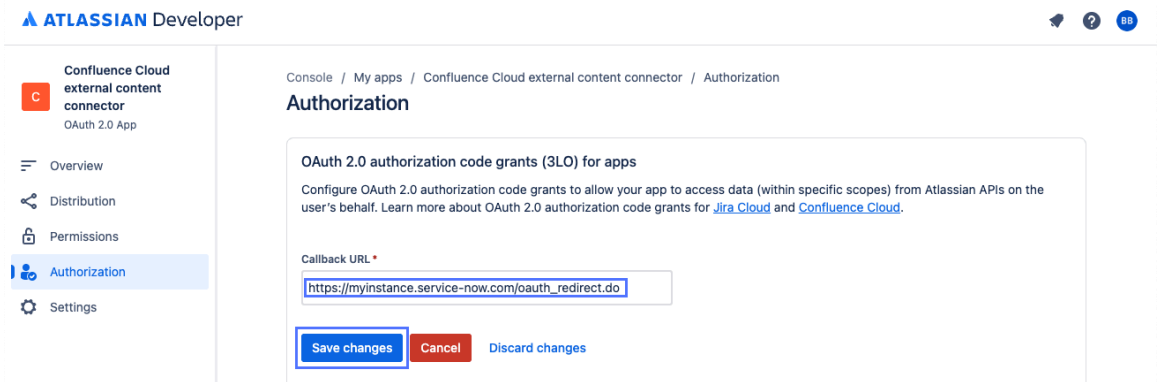
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h. Navigate to the OAuth 2.0 integration's Authorization page, then select **Add** in the row for the OAuth 2.0 (3LO) authorization type.

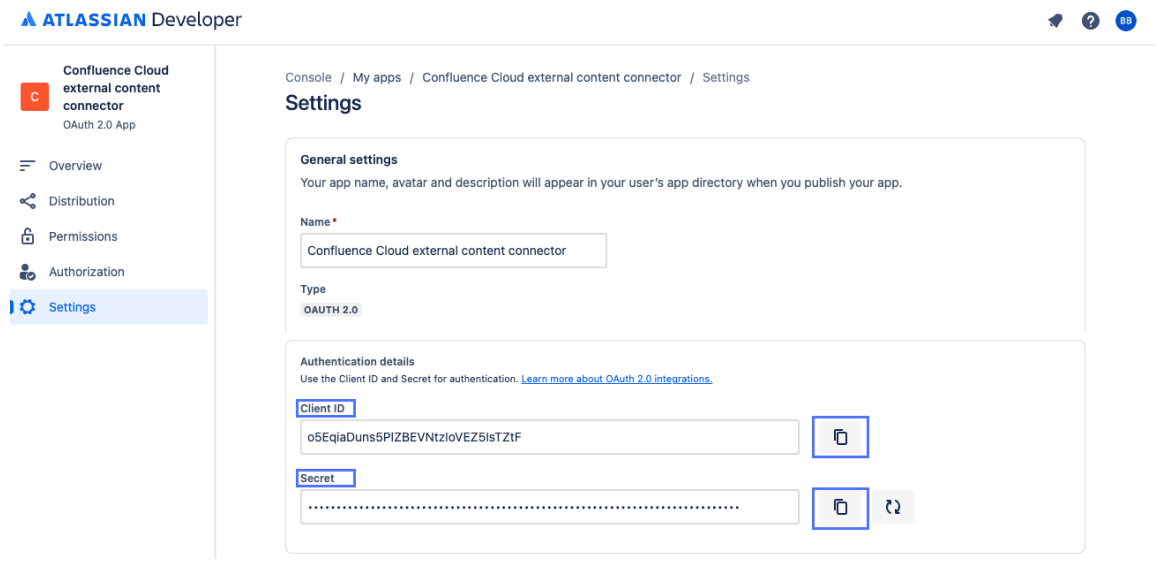


i. Enter `https://<instance-name>.service-now.com/oauth_redirect.do` as the callback URL, replacing `<instance-name>` with your ServiceNow AI Platform® instance name, then select **Save changes**.



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j. Navigate to the OAuth 2.0 integration's Settings page and record the Client ID and Secret values in a secure location.



Important: Your connector administrator needs these Client ID and Secret values when configuring the Atlassian Confluence Cloud external content connector.

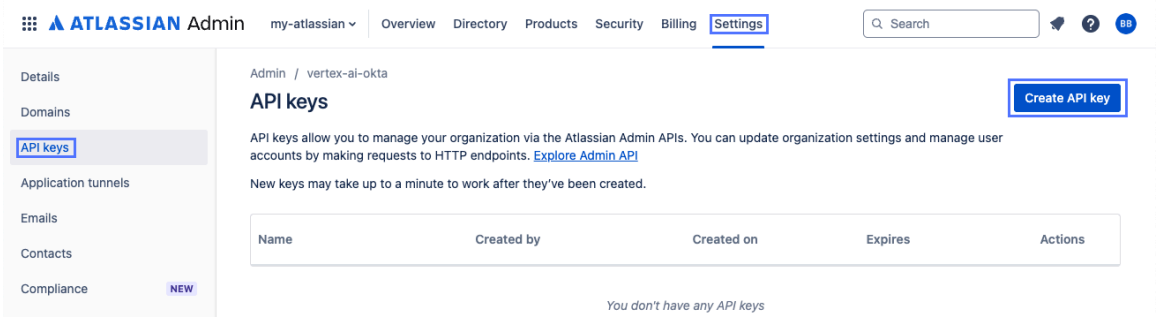
2. In Atlassian Administration, create a new admin API key.

a. Log in to Atlassian Administration at https://admin.atlassian.com/.

b. Select **Settings** in the tab list.

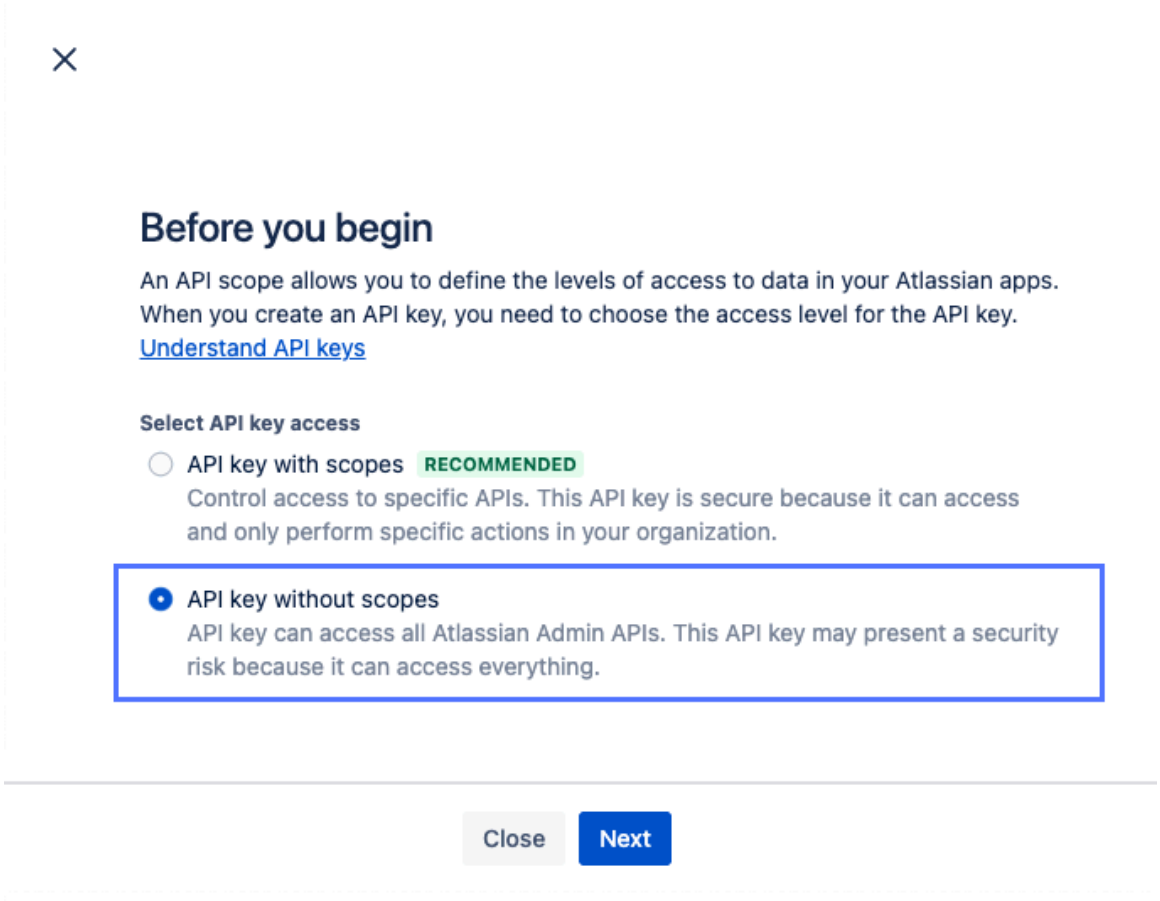


c. Select **API keys**, then select **Create API key**.

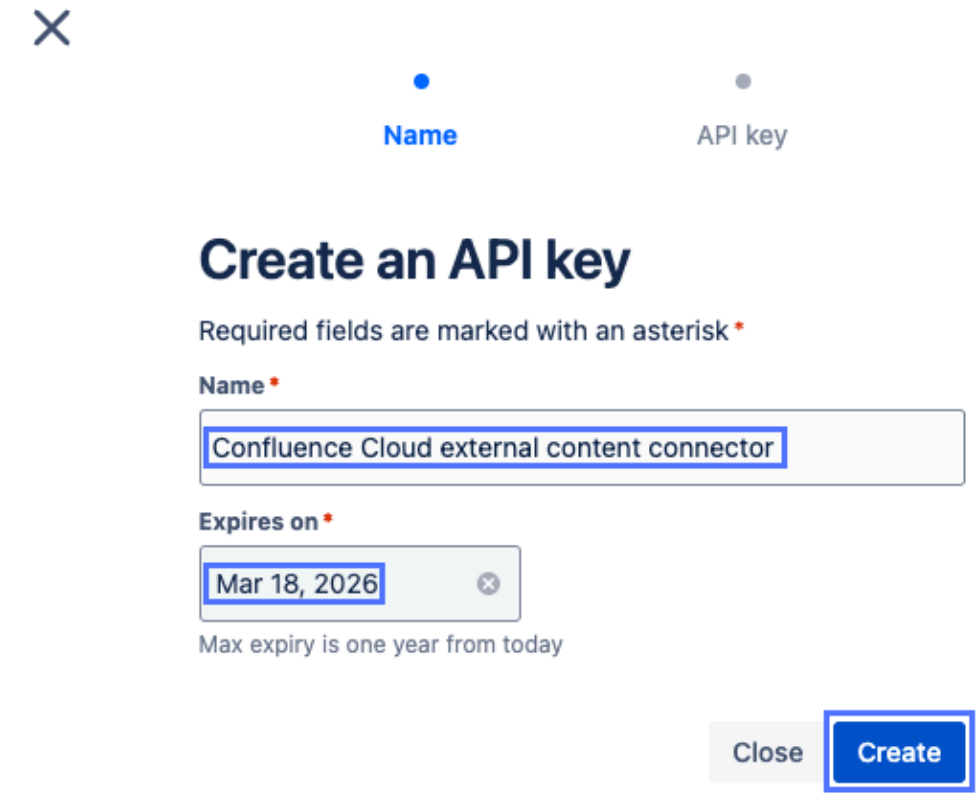


d. On the Before you begin page, select **API key without scopes**, then select **Next**.

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e. Enter a name and an expiration date for your new API key.

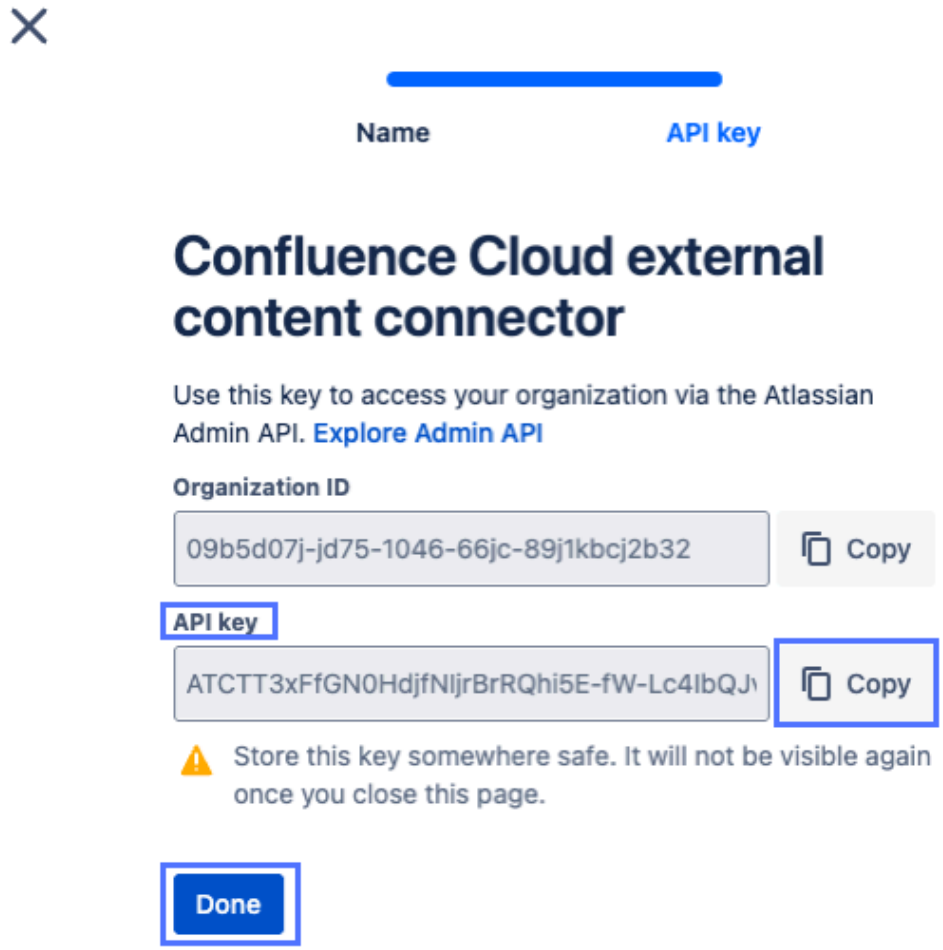


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As an example, you might enter `Confluence Cloud external content connector` as the name for your API key and set its expiration date to be one year in the future.

f. Select **Create**.

g. Record the value of the API key in a secure location.



Important: Your connector administrator needs the API key's value when configuring the Atlassian Confluence Cloud external content connector.

h. Select **Done**.

What to do next

Provide the following items to your connector administrator:

- The OAuth 2.0 integration's Client ID and Secret values that you recorded in step 1.j.
- The API key's value that you recorded in step 2.g.

Your connector administrator needs these items to configure an Atlassian Confluence Cloud external content connector to retrieve searchable content and security principals from your Atlassian Confluence Cloud instance.

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For details on creating and configuring an Atlassian Confluence Cloud external content connector, see Create an Atlassian Confluence Cloud external content connector.

Note: By default, the Atlassian Confluence Cloud external content connector only retrieves content access permissions for Confluence Cloud users who are managed by your organization. Other Confluence Cloud users can allow the connector to retrieve their content access permissions by setting their own email visibility to **Anyone** as explained in the https://support.atlassian.com/confluence-cloud/docs/configure-user-email-visibility/ Atlassian support resource.

Create an Atlassian Confluence Cloud external content connector

Create an external content connector to retrieve searchable content and security principals from your Atlassian Confluence Cloud source system.

Before you begin

A source system administrator must have already configured your Atlassian Confluence Cloud source system to allow access by the Atlassian Confluence Cloud external content connector. For the required source system configuration steps, see Configure Atlassian Confluence Cloud for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Confluence Cloud** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

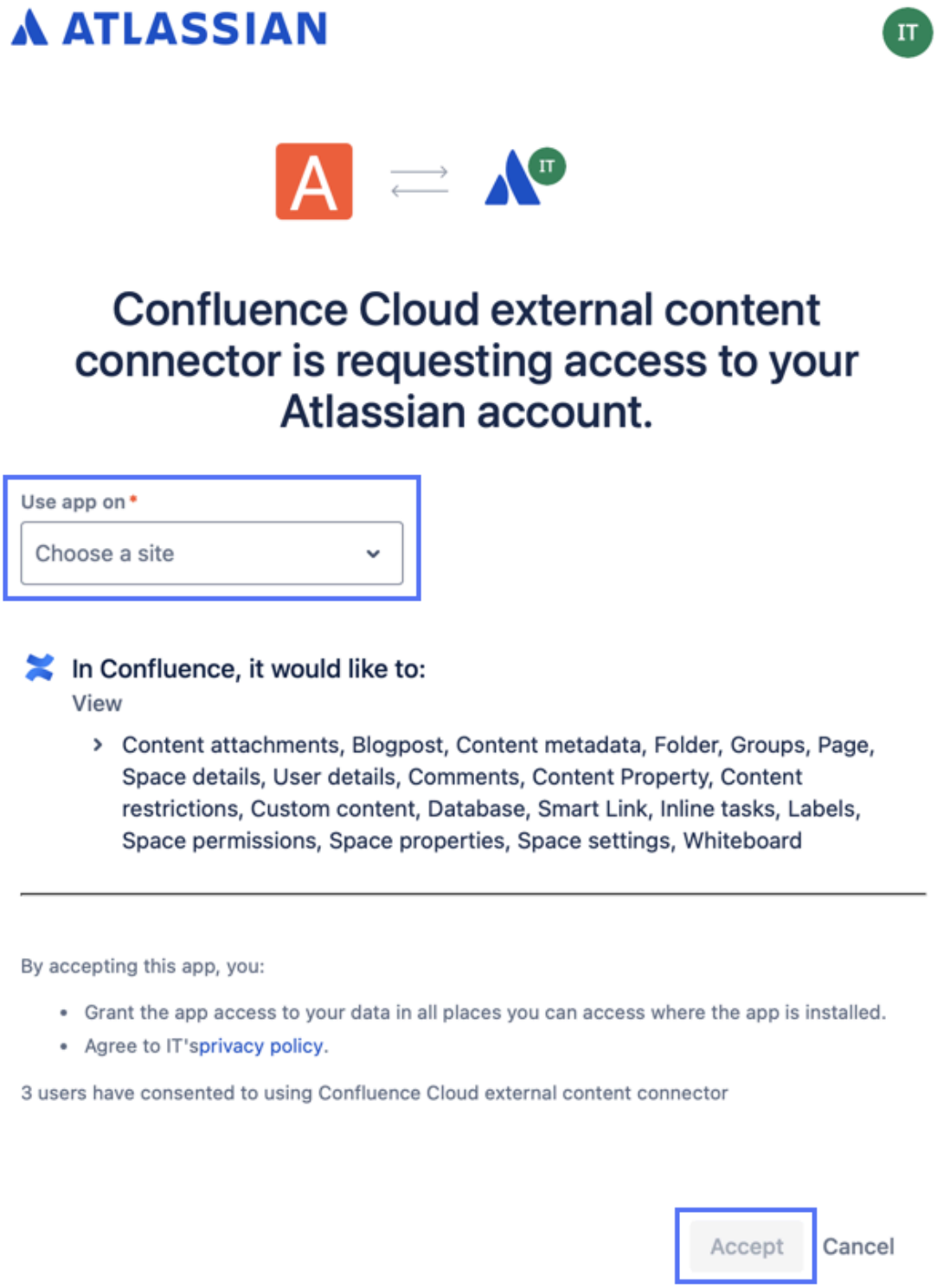
Connection setting	Description
Connector name	Unique name for this Atlassian Confluence Cloud external content connector.
URL	URL for your Atlassian Confluence Cloud source system, in this format: `https://<your-instance-name>.atlassian.net`.
API Key	API key from your Atlassian Administration console. If you don't have this API key, ask your Atlassian administrator for it.
Client ID	Client identifier for the OAuth 2.0 Atlassian developer application that grants Confluence API access to your Atlassian Confluence Cloud source system. If you don't have this client identifier, ask your Atlassian administrator for it.
Client Secret	OAuth 2.0 client secret for the OAuth 2.0 Atlassian developer application that grants Confluence API access to your Atlassian Confluence Cloud source system. If you don't have this client secret, ask your Atlassian administrator for it.

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6. Save and validate your connection settings.

   a. Select **Validate Connection**.
   A pop-up window reports that the connector is requesting access to your Atlassian account.

   b. In the **Use app on** field of the pop-up window, select the site that you specified the URL for in step 5, then select **Accept**.



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Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for an Atlassian Confluence Cloud external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for an Atlassian Confluence Cloud external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search

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application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for an Atlassian Confluence Cloud external content connector

Specify the spaces you want your Atlassian Confluence Cloud external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Atlassian Confluence Cloud external content connector that you want to configure crawl settings for. To learn about this procedure, see Create an Atlassian Confluence Cloud external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Atlassian Confluence Cloud external content connector crawls all spaces from its specified source system and sends documents with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the spaces to crawl when running content crawls
- Inclusion or exclusion filters for the attachment file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Atlassian Confluence Cloud external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Spaces** options:
   - To crawl all spaces from the source system, select **Crawl all spaces**.
   - To crawl only a specified set of spaces from the source system, select **Include only these spaces**, then use the **Add URL** field and **Add** button to enter URLs for spaces that you want to include in the crawl.

     For example, you might enter `https://example.atlassian.net/wiki/spaces/Z6BU8S2J2LQRS` to include only searchable content from the specified space.
   - To crawl all except a specified set of spaces from the source system, select **Exclude only these spaces**, then use the **Add URL** field and **Add** button to enter URLs for spaces that you want to exclude from the crawl.

     For example, you might enter `https://example.atlassian.net/wiki/spaces/V3TXFZNUFD5YI` to exclude searchable content from the specified space.
5. Select one of the following **Attachment filtering** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

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As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.

- To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

  As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.

6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save**.

Result

The Atlassian Confluence Cloud external content connector is updated with your crawl scope and file extension filter settings.

What to do next

To retrieve content from your Atlassian Confluence Cloud source system using your modified crawl settings, create and run a one-time content crawl for your Atlassian Confluence Cloud external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Atlassian Jira Cloud external content connector

The Atlassian Jira Cloud external content connector retrieves work items and attachments from projects in your Atlassian Jira Cloud source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

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Configure a connector user in Atlassian Jira Cloud

Create a user and group in your Atlassian Jira Cloud tenant with access and permissions required by the Atlassian Jira Cloud external content connector. The connector runs as this user when accessing data from your tenant.

Before you begin

You must have Jira administrator global permissions in your Atlassian Jira Cloud tenant.

To ensure that you grant the correct access to the connector user, you should be familiar with the project roles and issue security levels defined in your Atlassian Jira Cloud tenant.

Role required: none

About this task

When creating an Atlassian Jira Cloud external content connector, search administrators need to supply credentials for an Atlassian Jira Cloud user that can access all necessary data in the tenant.

Atlassian administrators need to create and configure this user as part of configuration for the Atlassian Jira Cloud source system.

Procedure

1. Log in to your Atlassian Jira Cloud tenant.
2. Create a new user for the Atlassian Jira Cloud external content connector.
   For information on creating a user, see the Create, edit, or remove a user Atlassian resource.
3. Create a new group that includes only the connector user.
   To learn about creating and populating groups, see the View, create, or delete a group and Modify group membership Atlassian resources.
4. Assign the new group access to all project roles needed to view issue comments and worklogs.
   For information on assigning group access to project roles, see the Assign group access to a project role and Managing project role membership Atlassian resources.
5. Add the **Jira administrators** and **Jira users** global permissions to the new group.
   To learn about adding global permissions to a group, see the Managing global permissions Atlassian resource.
6. Add the **Browse Projects** permission to the new group for each project that you want the external content connector to crawl.
   For information on adding project permissions to a group, see the Manage project permissions Atlassian resource.
7. Include the new group in all issue security levels defined for all your issue security schemes.
   To learn about including groups in issue security levels, see the Configuring issue-level security Atlassian resource.

What to do next

Provide the technical user credentials to your search administrators so they can use them when creating Atlassian Jira Cloud external content connectors.

Configure Atlassian Jira Cloud for external content indexing

Register an OAuth 2.0 integration in the Atlassian Developer console and create an API key in Atlassian Administration to allow the Atlassian Jira Cloud external content connector to crawl projects and security principals in your Atlassian Jira Cloud source system.

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Before you begin

You need the following credentials and permissions for your organization's Atlassian management applications:

Atlassian portal	Required credentials and permissions
Atlassian Developer console (https://developer.atlassian.com/console/myapps/)	• Login credentials • Permission to view settings for registered applications • Permission to register a new application • Permission to set granular Jira API scopes for an application • Permission to set the OAuth 2.0 callback URL for an application
Atlassian Administration (https://admin.atlassian.com/)	• Login credentials • Permission to create a new admin API key

Role required: none

About this task

The Atlassian Jira Cloud external content connector retrieves content from your Atlassian Jira Cloud source system using the Jira API.

To allow the connector to access your Atlassian Jira Cloud source system via the Jira API, you must configure an OAuth 2.0 integration in the Atlassian Developer console and an API key in Atlassian Administration. Your connector administrator can use settings copied from the OAuth 2.0 integration and the API key to configure the Atlassian Jira Cloud external content connector for proper connection to your Atlassian Jira Cloud source system.

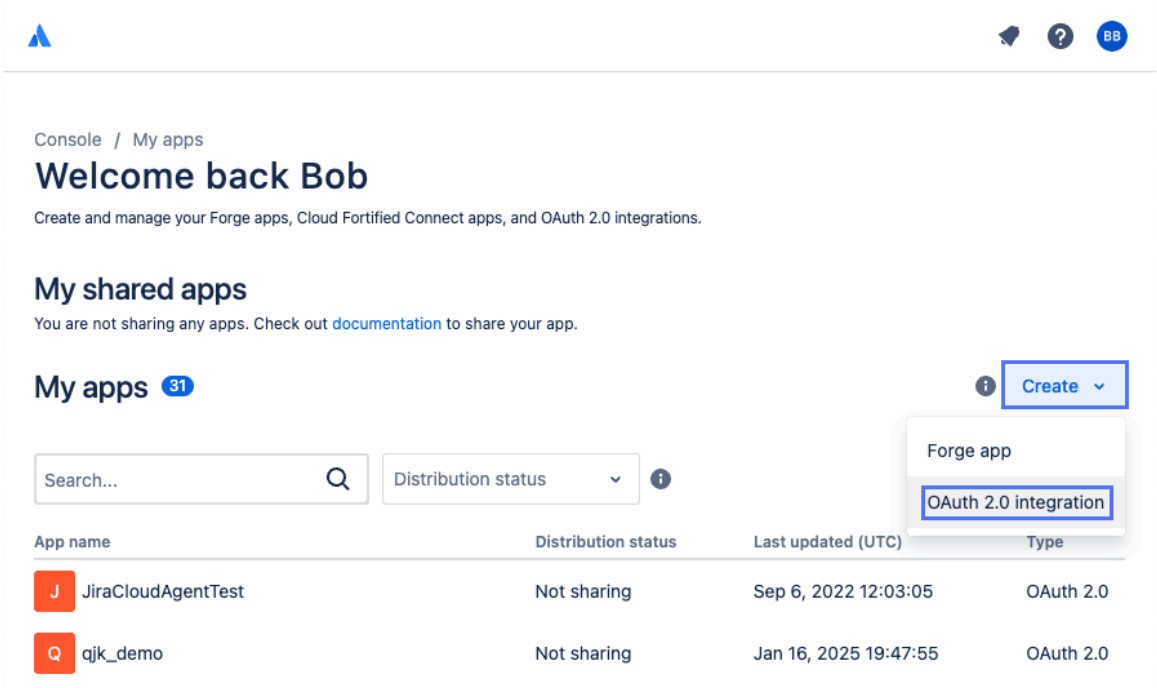
Procedure

1. In the Atlassian Developer console, register a new OAuth 2.0 integration for the Atlassian Jira Cloud external content connector.

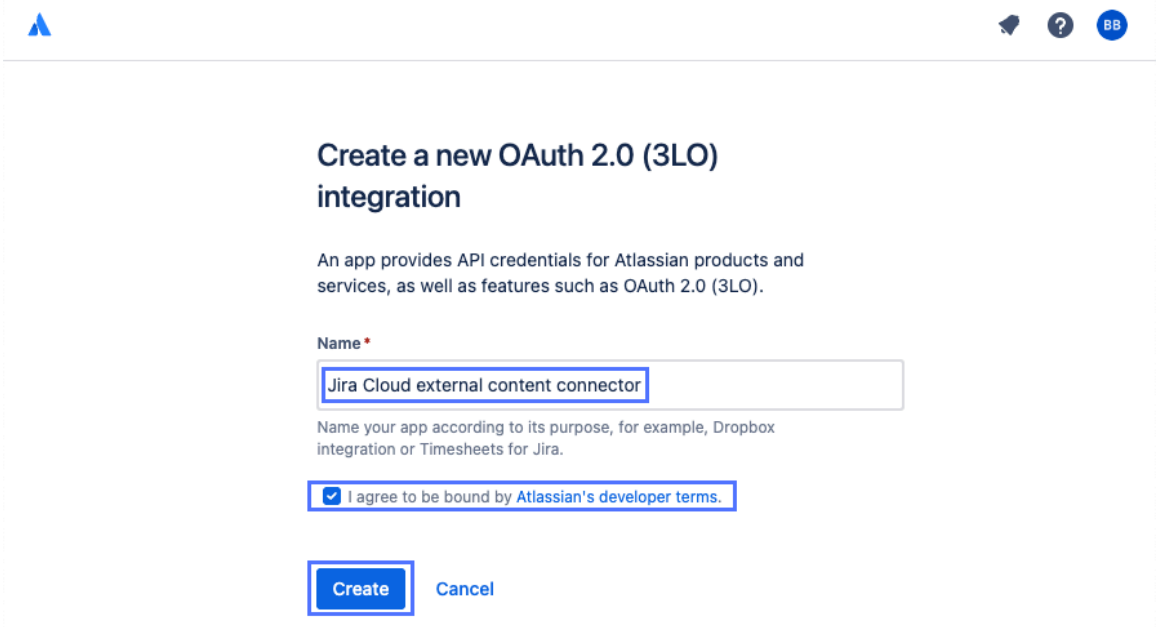
   a. Log in to the Atlassian Developer console at https://developer.atlassian.com/console/myapps/.

   b. In the My apps section, select **Create** > **OAuth 2.0 integration**.

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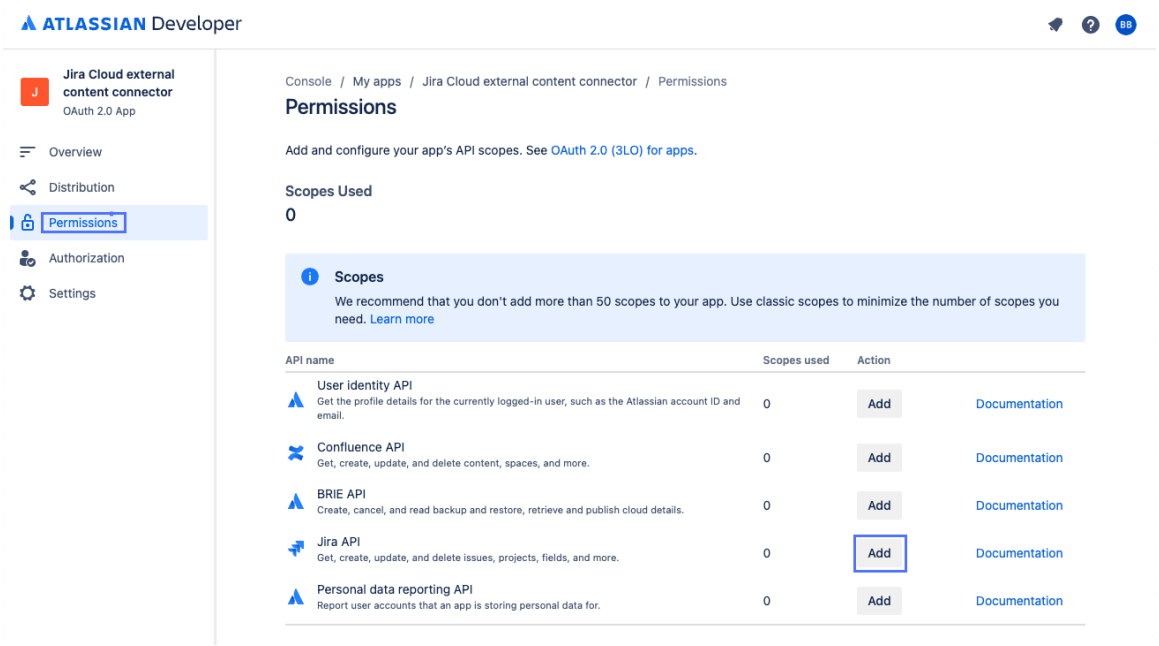
c. Enter a name for your OAuth 2.0 integration, select the option to agree to Atlassian's developer terms, and select **Create**.



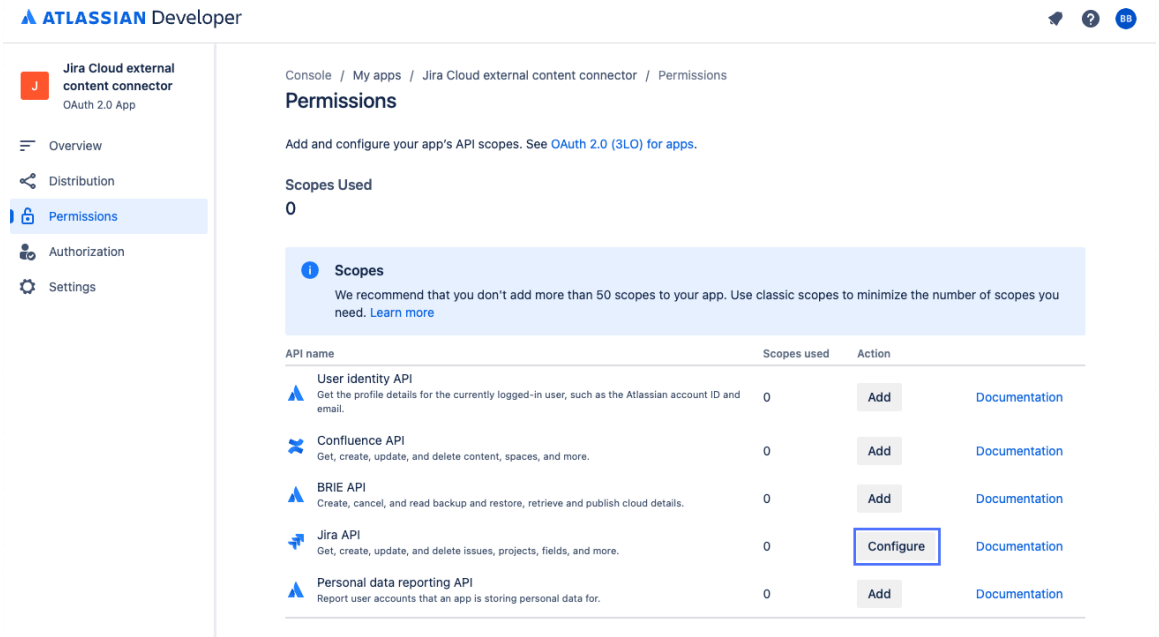
As an example, you might enter `Jira Cloud external content connector` as the name for your OAuth 2.0 integration.

d. Navigate to the OAuth 2.0 integration's Permissions page, then select **Add** in the Jira API row.

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e. In the Jira API row, select **Configure**.

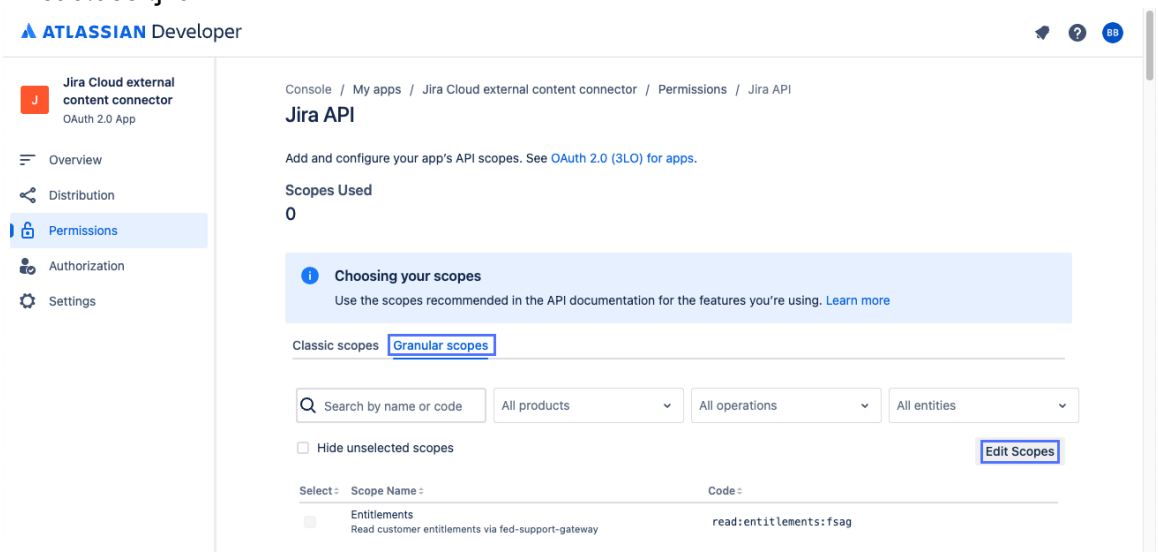


f. On the Granular scopes tab, select **Edit Scopes** and then select the options for each of the following scopes:

- read:application-role:jira
- read:attachment:jira
- read:audit-log:jira
- read:avatar:jira
- read:comment.property:jira
- read:comment:jira
- read:field-configuration:jira
- read:field:jira

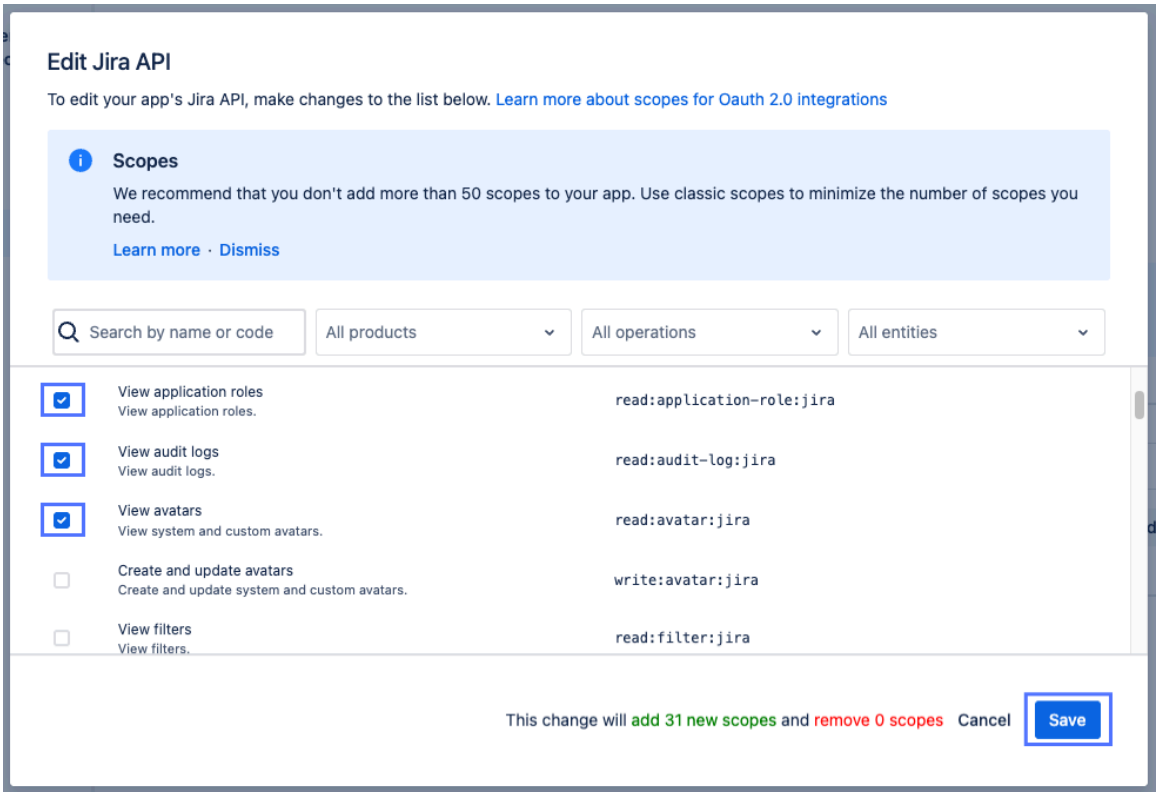
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- read:group:jira
- read:issue-details:jira
- read:issue-meta:jira
- read:issue-security-level:jira
- read:issue-security-scheme:jira
- read:issue-type-hierarchy:jira
- read:issue-type:jira
- read:issue.changelog:jira
- read:issue.vote:jira
- read:issue:jira
- read:permission-scheme:jira
- read:permission:jira
- read:project-category:jira
- read:project-role:jira
- read:project-type:jira
- read:project-version:jira
- read:project.component:jira
- read:project.feature:jira
- read:project.property:jira
- read:project:jira
- read:status:jira
- read:user.property:jira
- read:user:jira

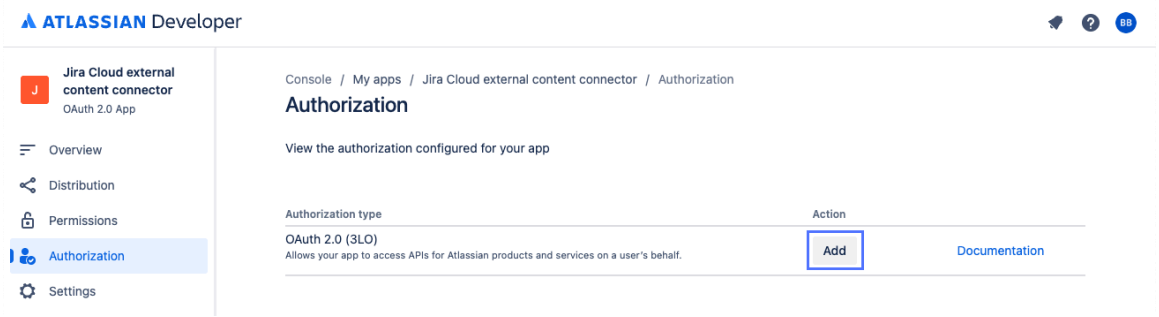


g. Select **Save**.

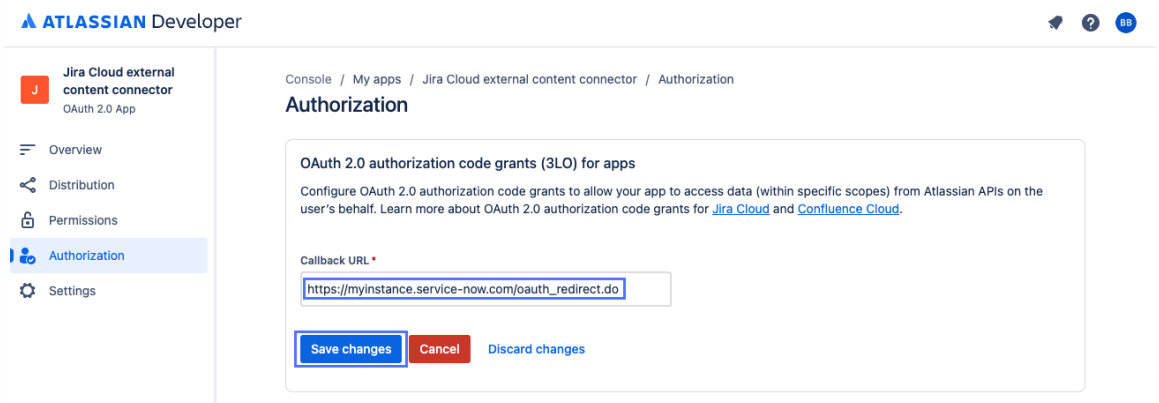
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h. Navigate to the OAuth 2.0 integration's Authorization page, then select **Add** in the row for the OAuth 2.0 (3LO) authorization type.

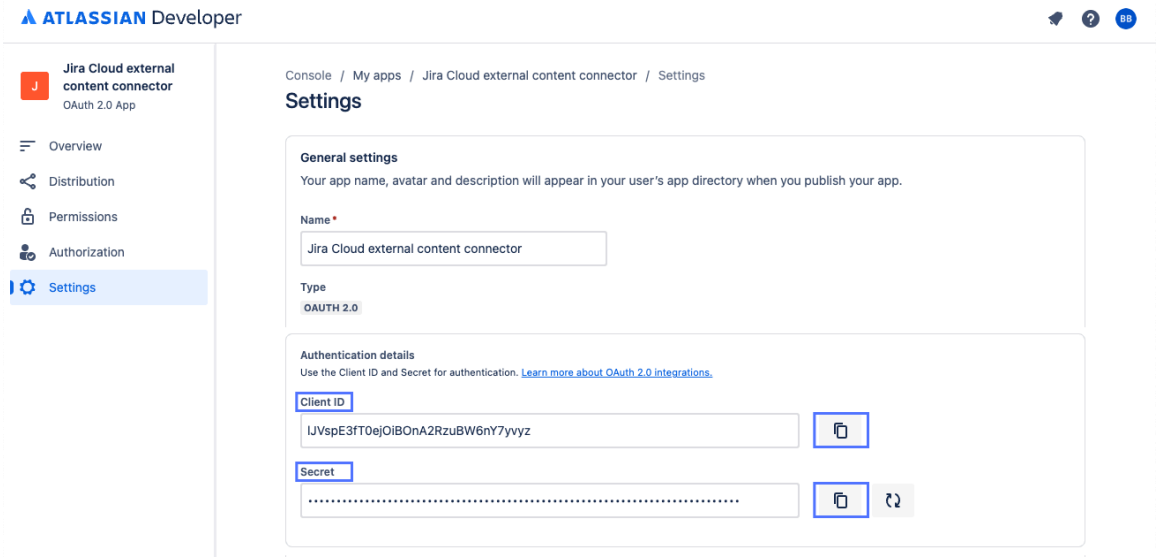


i. Enter `https://<instance-name>.service-now.com/oauth_redirect.do` as the callback URL, replacing `<instance-name>` with your ServiceNow AI Platform® instance name, then select **Save changes**.



j. Navigate to the OAuth 2.0 integration's Settings page and record the Client ID and Secret values in a secure location.

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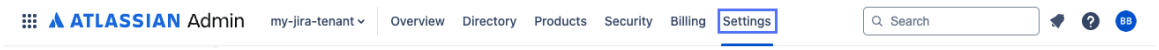


Important: Your connector administrator needs these Client ID and Secret values when configuring the Atlassian Jira Cloud external content connector.

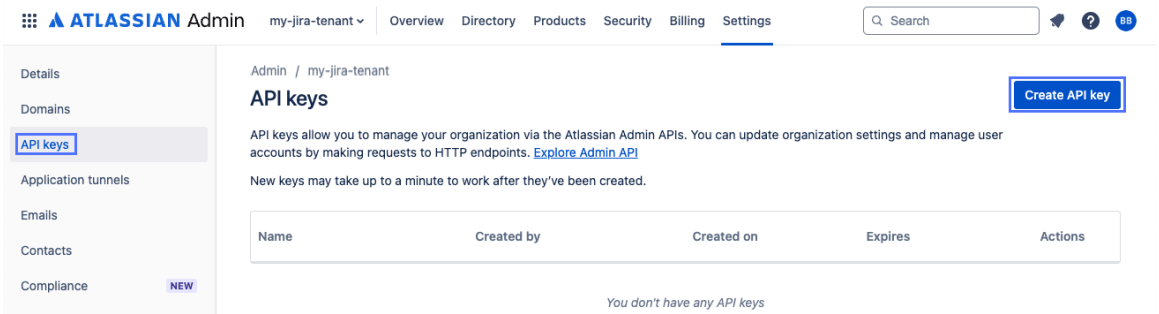
2. In Atlassian Administration, create a new admin API key.

   a. Log in to Atlassian Administration at https://admin.atlassian.com/.

   b. Select **Settings** in the tab list.

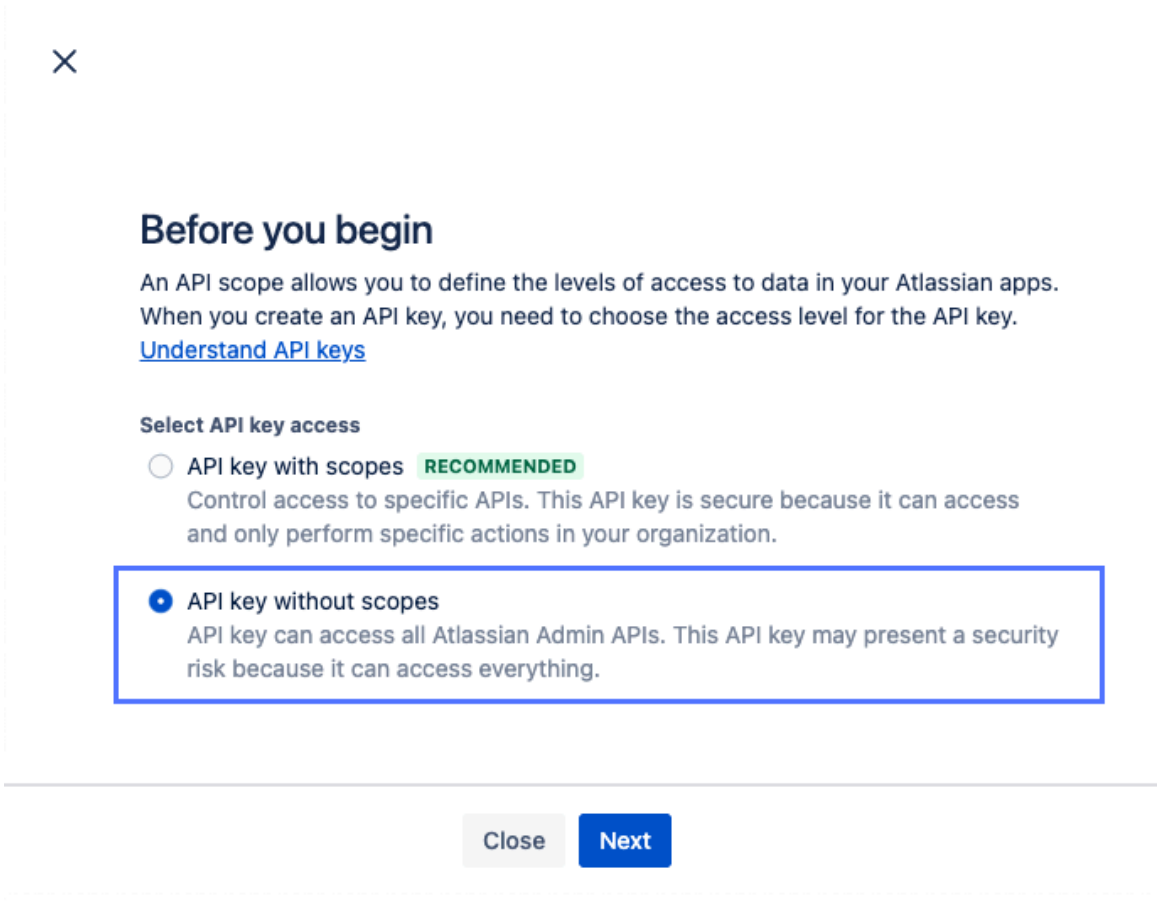


   c. Select **API keys**, then select **Create API key**.



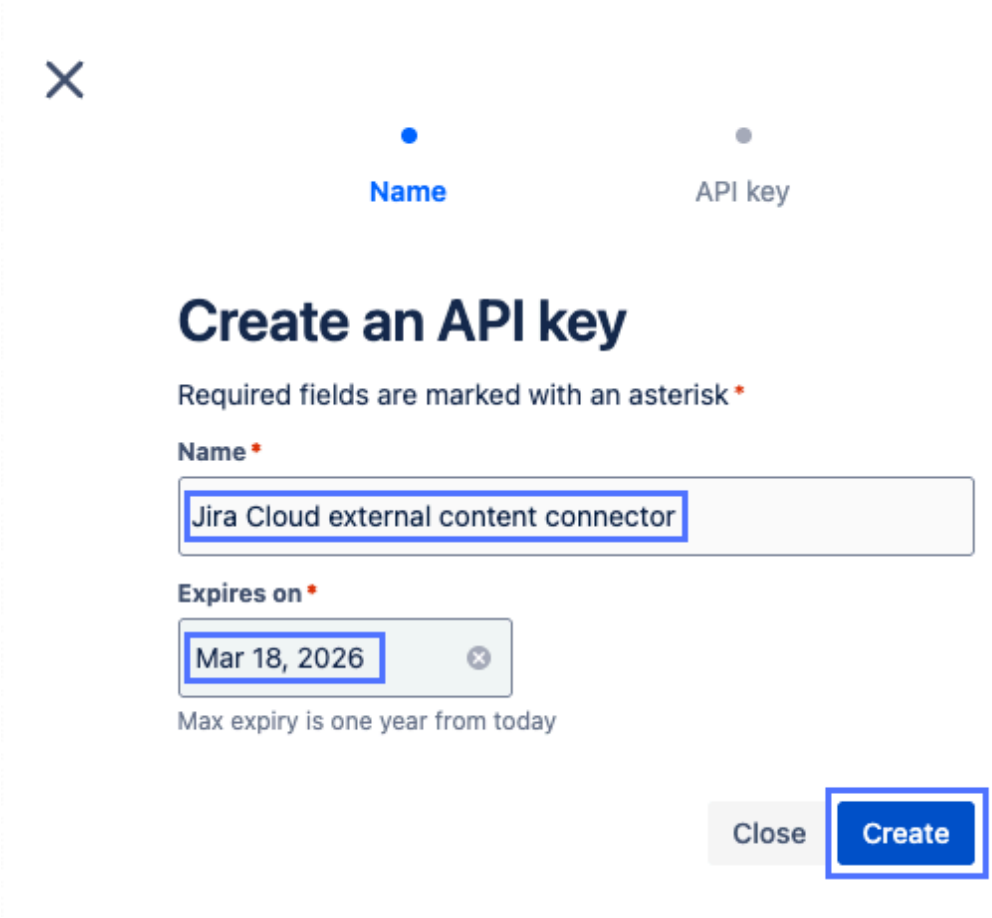
   d. On the Before you begin page, select **API key without scopes**, then select **Next**.

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e. Enter a name and an expiration date for your new API key.

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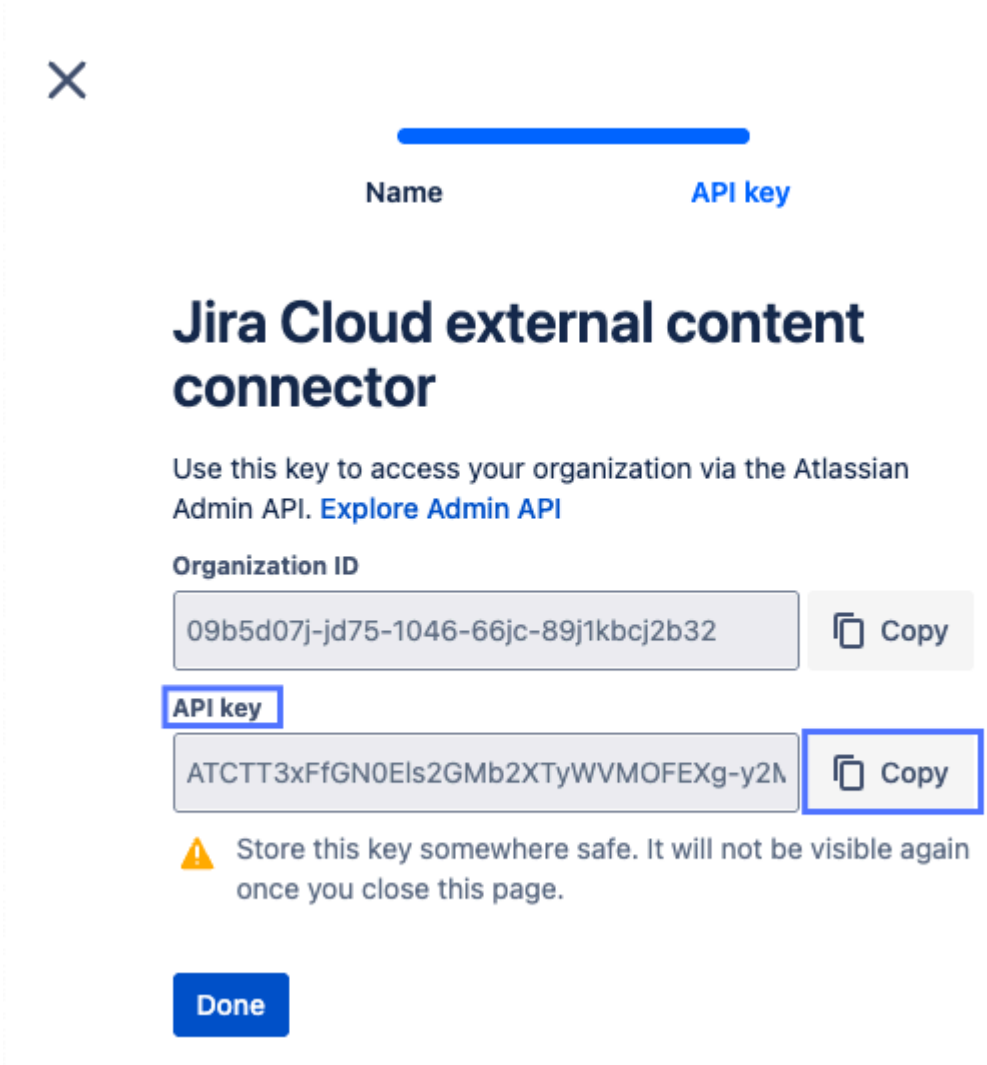


As an example, you might enter `Jira Cloud external content connector` as the name for your API key and set its expiration date to be one year in the future.

f. Select **Create**.

g. Record the value of the API key in a secure location.

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Important: Your connector administrator needs the API key's value when configuring the Atlassian Jira Cloud external content connector.

h. Select **Done**.

3. Configure a technical user in your Atlassian Jira Cloud tenant to allow access by the Atlassian Jira Cloud external content connector.
   For details on this procedure, see Configure a connector user in Atlassian Jira Cloud.

What to do next

Provide the following items to your connector administrator:

- The OAuth 2.0 integration's Client ID and Secret values that you recorded in step 1.j.
- The API key's value that you recorded in step 2.g.
- The credentials for the Atlassian Jira Cloud user that you created in step 3.

Your connector administrator needs these items to configure an Atlassian Jira Cloud external content connector to retrieve projects and security principals from your Atlassian Jira Cloud instance.

For details on creating and configuring an Atlassian Jira Cloud external content connector, see Create an Atlassian Jira Cloud external content connector.

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Create an Atlassian Jira Cloud external content connector

Create an external content connector to retrieve searchable content and security principals from your Atlassian Jira Cloud source system.

Before you begin

A source system administrator must have already configured your Atlassian Jira Cloud source system to allow access by the Atlassian Jira Cloud external content connector. For the required source system configuration steps, see Configure Atlassian Jira Cloud for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Jira Cloud** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

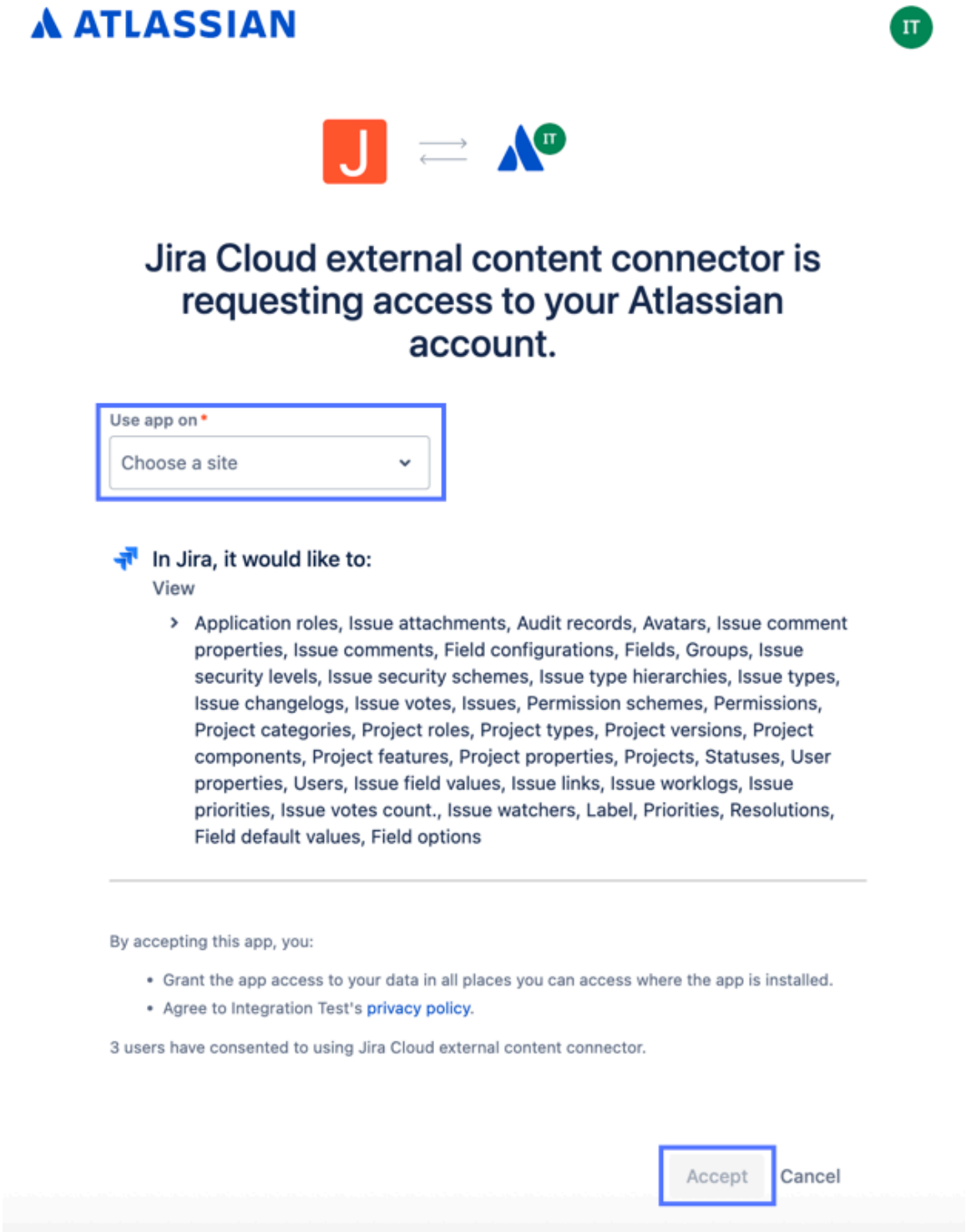
Connection settings

Connection setting	Description
Connector name	Unique name for this Atlassian Jira Cloud external content connector.
URL	URL for your Atlassian Jira Cloud source system, in this format: `https://jira.example.com`.
API Key	API key from your Atlassian Administration console. If you're not sure how to find the API key in your Atlassian Administration console, ask your Atlassian administrator.
Client ID	Client identifier for the OAuth 2.0 Atlassian developer application that grants Confluence API access to your Atlassian Jira Cloud source system. If you're not sure how to find the Client ID for the OAuth 2.0 application in your Atlassian developer console, ask your Atlassian administrator.
Client Secret	OAuth 2.0 client secret for the OAuth 2.0 Atlassian developer application that grants Jira API access to your Atlassian Jira Cloud source system. If you're not sure how to find the Client Secret for the OAuth 2.0 application in your Atlassian developer console, ask your Atlassian administrator.

6. Save and validate your connection settings.
   a. Select **Validate Connection**.
      A pop-up window reports that the connector is requesting access to your Atlassian account.

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b. In the **Use app on** field of the pop-up window, select the site that you specified the URL for in step 5, then select **Accept**.



Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.

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8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for an Atlassian Jira Cloud external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for an Atlassian Jira Cloud external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

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You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for an Atlassian Jira Cloud external content connector

Specify the projects you want your Atlassian Jira Cloud external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Atlassian Jira Cloud external content connector that you want to configure crawl settings for. To learn about this procedure, see Create an Atlassian Jira Cloud external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Atlassian Jira Cloud external content connector crawls all projects from its specified source system and sends documents with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the projects to crawl when running content crawls
- Inclusion or exclusion filters for the attachment file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

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Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Atlassian Jira Cloud external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Content filtering** options:
   - To crawl all projects from the source system, select **Crawl all content**.
   - To crawl only a specified set of projects from the source system, select **Include only these projects**, then use the **Add URL** field and **Add** button to enter URLs for projects that you want to include in the crawl.

     For example, you might enter `https://example.atlassian.net/jira/core/projects/XJR` to include only searchable content from the specified project.
   - To crawl all except a specified set of projects from the source system, select **Exclude only these projects**, then use the **Add URL** field and **Add** button to enter URLs for projects that you want to exclude from the crawl.

     For example, you might enter `https://example.atlassian.net/jira/core/projects/QBY` to exclude searchable content from the specified project.
5. Select one of the following **Attachment filtering** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

   For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

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- For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
- To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.

7. Select **Save**.

Result
The Atlassian Jira Cloud external content connector is updated with your crawl scope and file extension filter settings.

What to do next
To retrieve content from your Atlassian Jira Cloud source system using your modified crawl settings, create and run a one-time content crawl for your Atlassian Jira Cloud external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Box external content connector

The Box external content connector retrieves files and attachments from your Box source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Create a public/private key pair for the Box external content connector

Generate an encrypted private key and a public key for use by the Box external content connector.

Before you begin
You need access to the OpenSSL Library toolkit, version 3. If you don't have this toolkit available, you can install it as follows:

Linux

Install the latest available **openssl** package using your distribution's package manager. As an example, on Ubuntu or Debian, run `sudo apt install openssl`. On Red Hat Enterprise Linux, run `sudo dnf install openssl`.

macOS

macOS ships with a LibreSSL executable binary installed as `/usr/bin/openssl`, but one of the OpenSSL commands for this task requires options that LibreSSL doesn't support. Use Homebrew (https://brew.sh/) to install the **openssl@3** formula. For details on this formula, see https://formulae.brew.sh/formula/openssl@3.

Windows

Install OpenSSL binaries from https://github.com/openssl/openssl/wiki/Binaries.

For more information about the OpenSSL Library, see https://openssl-library.org/.

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Role required: none

About this task

You need to create your own private and public RSA keys for use with the Box external content connector. The keys that the Box developer console generates aren't secure enough to comply with the connector's security requirements.

To configure public/private key authentication for the connector, you need to create the following items:

1. A 4,096-bit RSA private key in encrypted PKCS#8 format.
   - Your connector administrator needs this encrypted private key file and its password when configuring settings for the Box external content connector.
   - When the Box external content connector runs a crawl, it presents the public key certificate from this encrypted private key file to authenticate itself as a valid client of the OAuth 2.0 app in the Box developer console.
2. A public key in PEM-encoded (Base64 ASCII) X.509 certificate format.
   - Your Box administrator needs to upload this certificate file in the Box OAuth 2.0 app that grants API access to the Box external content connector.
   - When the Box external content connector presents its public-key certificate for client authentication, Box uses this uploaded certificate to confirm that the connector is a valid client of the OAuth 2.0 app.

Procedure

1. Generate a 4,096-bit RSA private key in PEM-encoded X.509 certificate format by running this OpenSSL command:

```
openssl genpkey -algorithm RSA -out private_key.pem -pkeyopt
 rsa_keygen_bits:4096
```

2. Generate a secure password to use for the encrypted version of your new private key:

   a. Run this OpenSSL command:

```
openssl rand -base64 20
```

   Note: This command generates a 20-character password. If your organization's standards require longer passwords, replace 20 with the desired password length in characters. The password must have at least 112 bits of entropy.

   b. Copy the generated password and record it in a secure location.

   Important: Your connector administrator needs this password when configuring the Box external content connector.

3. Convert your new private key to the encrypted PKCS#8 format (with AES-256-CBC and PBKDF2):

   a. Run this OpenSSL command:

```
openssl pkcs8 -topk8 -in private_key.pem -out
 encrypted_key.pem -v2 aes-256-cbc -v2prf hmacWithSHA256
 -iter 10000 -saltlen 32
```

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b. When prompted, enter the secure password you generated in step 2.

c. Store the generated `encrypted_key.pem` file in a secure location.

> **Important:** Your connector administrator needs this encrypted key file when configuring the Box external content connector.

4. Extract the public key for your new private key in PEM-encoded X.509 certificate format:

a. Run this OpenSSL command:

```
openssl pkey -in private_key.pem -pubout -out public_key.pem
```

b. View or edit the content of the `public_key.pem` file that you generated in step 2.

c. Copy the PEM-encoded X.509 public key certificate text and store it in a secure location.

The public key consists of all the text in the file, including the `-----BEGIN PUBLIC KEY-----` and `-----END PUBLIC KEY-----` markers.



> **Important:** Your Box admin needs this PEM-encoded X.509 public key certificate text when configuring the OAuth 2.0 application for Box external content connector in the Box developer console.

What to do next

Provide the following items to your Box admin and your connector administrator:

Item	Description
PEM-encoded X.509 public key certificate text	Provide this text to your Box administrator. They will need to upload the PEM-encoded X.509 public key certificate text to the Box developer console when configuring an OAuth 2.0 application for the Box external content connector.

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Item	Description
	For more information on configuring an OAuth 2.0 application in the Box developer console for the Box external content connector, see Configure Box for external content indexing.
Encrypted private key file and password	Provide this encrypted private key file and its password to your connector administrator. They will need the file and password when configuring the Box external content connector. For details on creating and configuring the Box external content connector, see Create a Box external content connector.

Configure Box for external content indexing

Create and authorize an OAuth 2.0 application in the Box developer console to allow the Box external content connector to access your Box source system.

Before you begin

You need administrator access to the Box developer console and the Box Admin UI portal.

You must have created a private/public key pair for the Box external content connector and extracted the public key certificate in PEM-encoded (Base64 ASCII) X.509 format. For details on creating the public/private key pair and extracting the public key certificate, see Create a public/private key pair for the Box external content connector.

Role required: none

About this task

The Box external content connector retrieves documents and user permissions from your Box source system using the Box API.

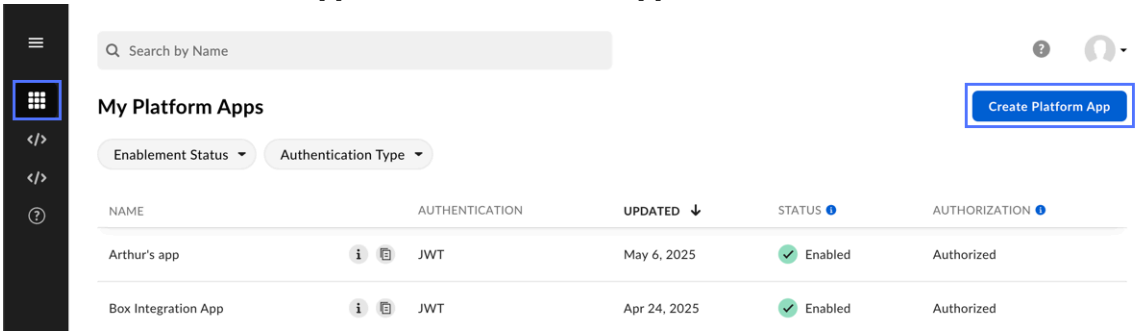
To allow the connector to access your Box source system via the Box API, you must configure and authorize an OAuth 2.0 application in the Box developer console. Your connector administrator can use settings copied from the OAuth 2.0 application and its API key to configure the Box external content connector for proper connection to your source system.

Procedure

1. In the Box developer console, create a new OAuth 2.0 application for the Box external content connector.

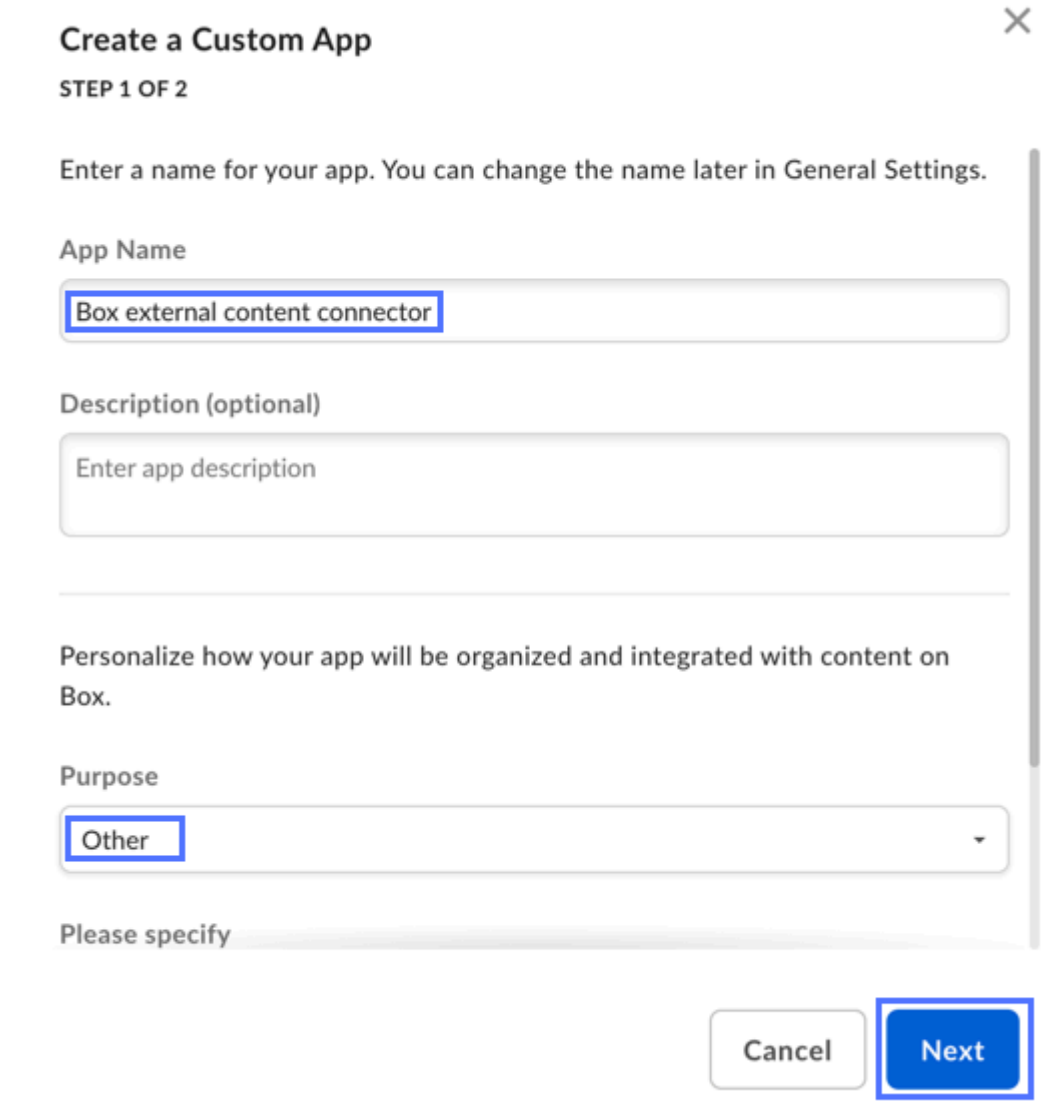
   a. Navigate to https://app.box.com/developers/console and log in with administrator credentials.

   b. Select **Create Platform App**, then select **Custom App**.



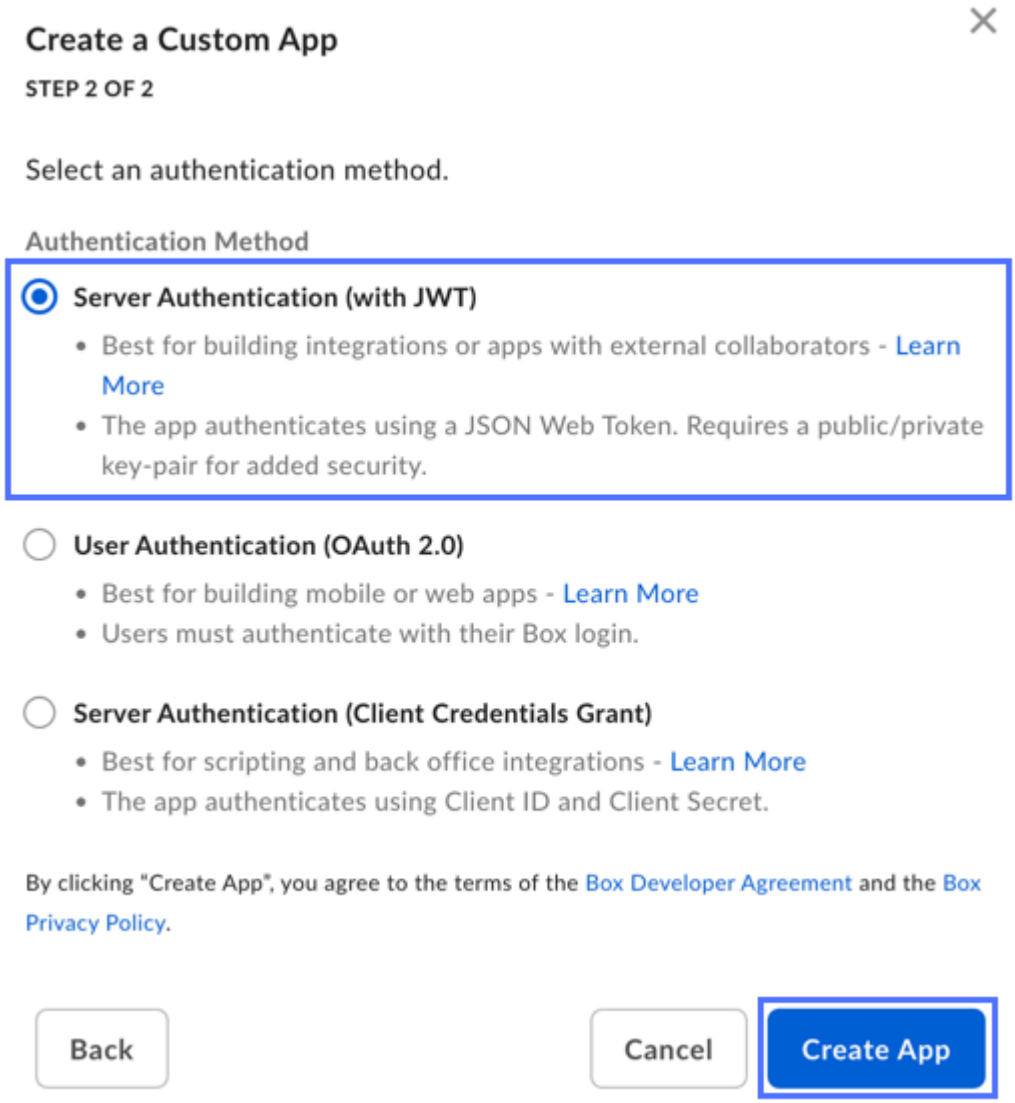
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c. In the Create a Custom App window, enter a name for your app and specify its purpose, then select **Next**.



d. In the Create a Custom App windows, select **Server Authentication (with JWT)**, then select **Create App**.

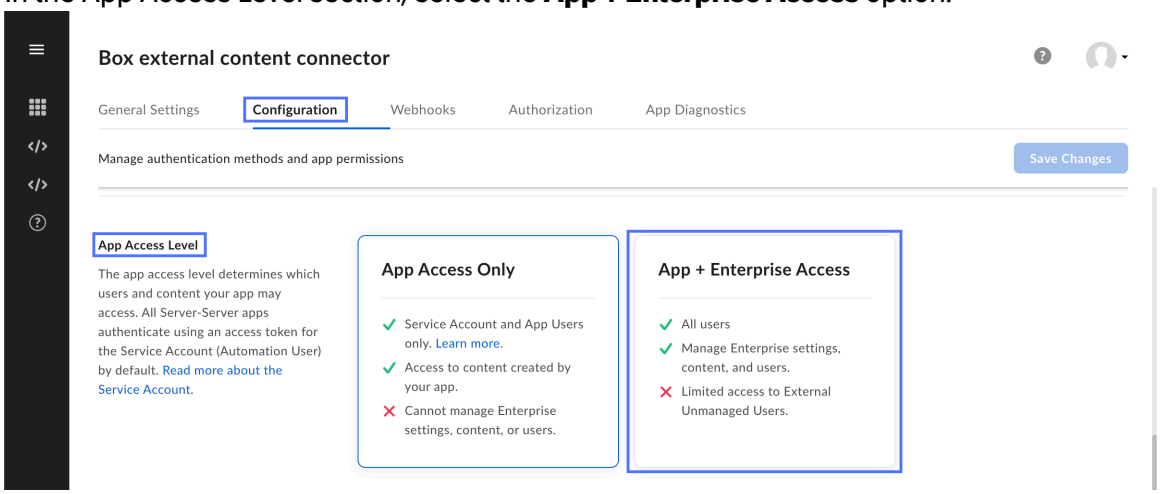
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The **Configuration** screen for your new OAuth 2.0 application appears.

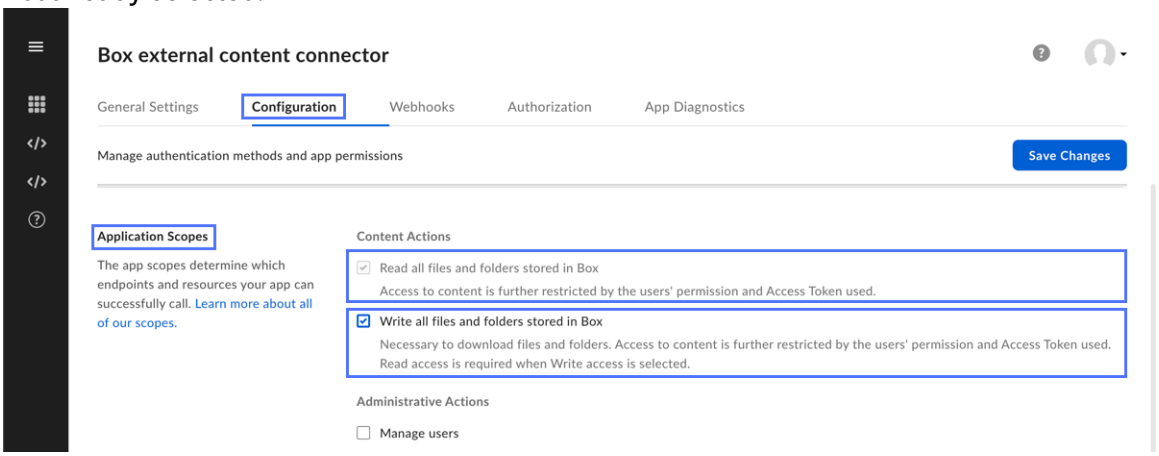
2. Configure your new OAuth 2.0 application with required settings and generate a public/private keypair for it.

   a. In the App Access Level section, select the **App + Enterprise Access** option.

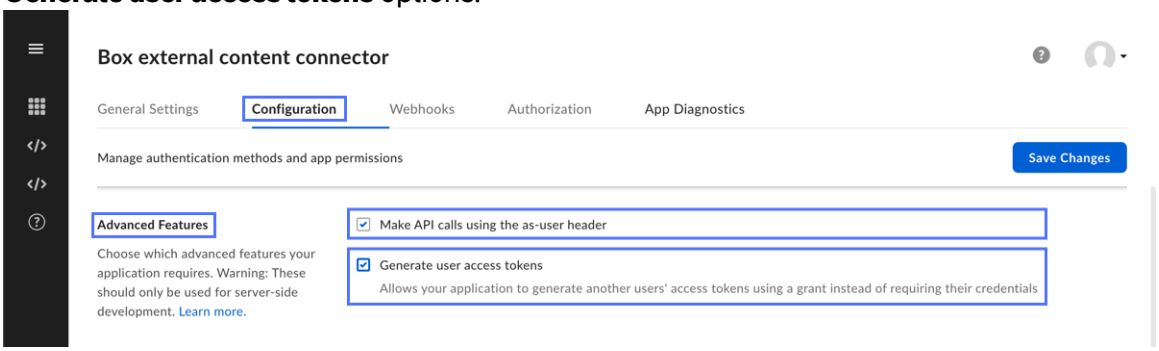


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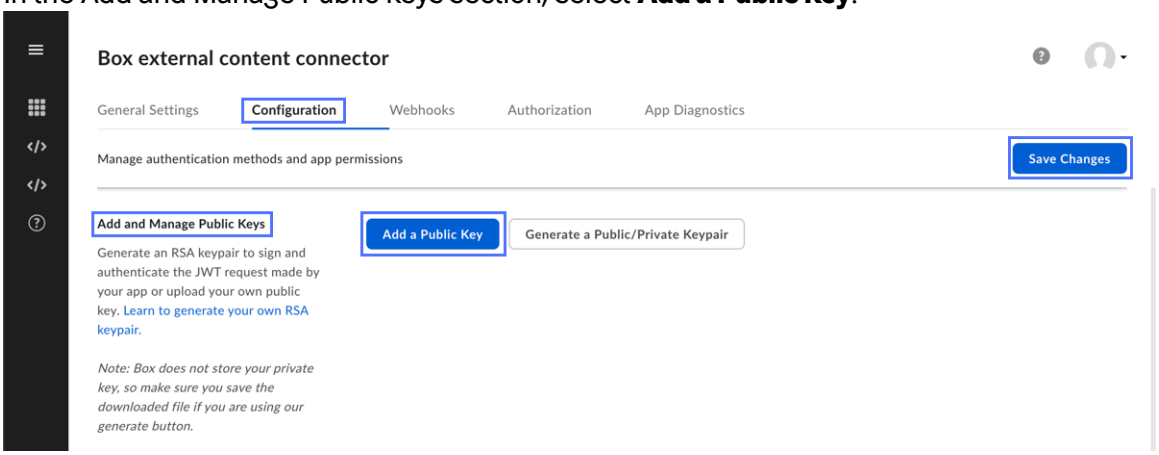
b. In the Application Scopes section, under the **Content Actions** heading, select the **Read all files and folders stored in Box** and **Write all files and folders stored in Box** options if they're not already selected.



c. In the Advanced Features section, select the **Make API calls using the as-is header** and **Generate user access tokens** options.



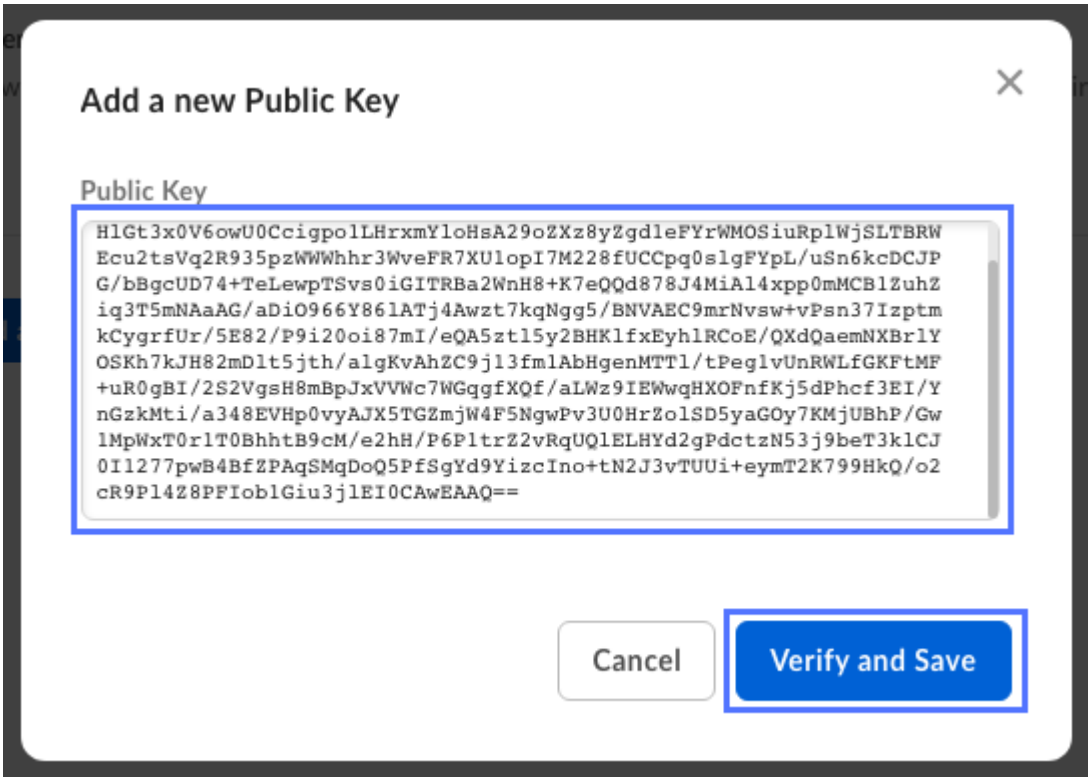
d. In the Add and Manage Public Keys section, select **Add a Public Key**.



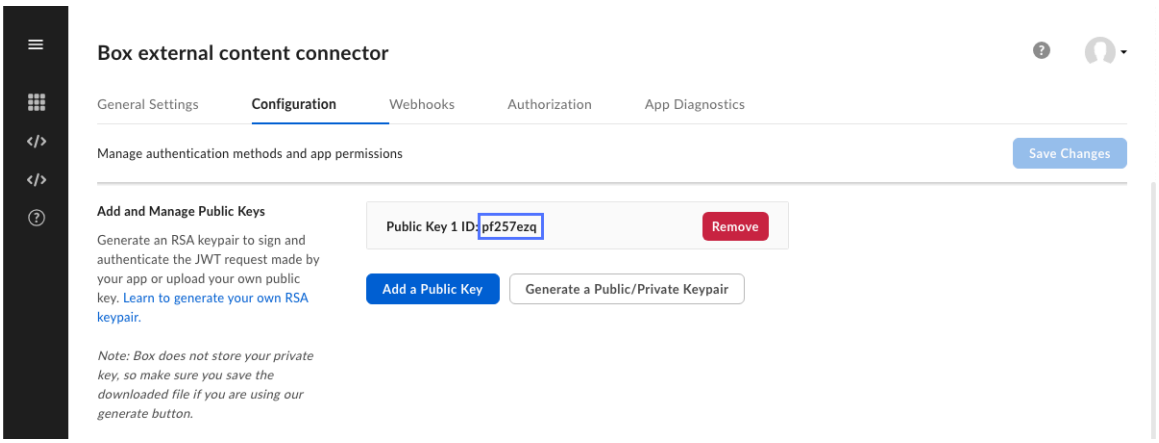
The Add a new Public Key dialog box appears.

e. In the Add a new Public Key dialog box, paste the PEM-encoded public key text, including the `-----BEGIN PUBLIC KEY-----` and `-----END PUBLIC KEY-----` markers, into the **Public Key** field, then select **Verify and Save**.

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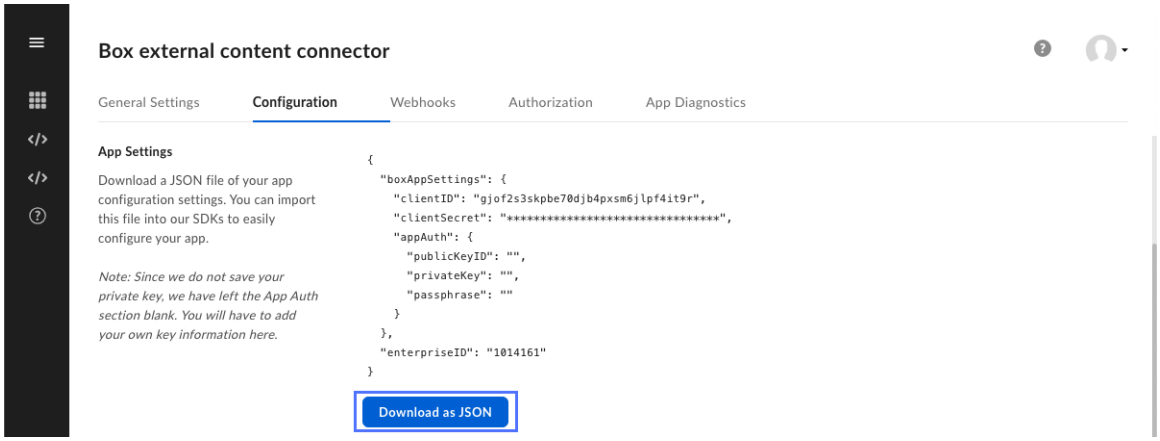
f. Copy the public key ID string that Box displays for the new public key and store it in a secure location.



Important: Your connector administrator needs this public key ID string when configuring the Box external content connector.

g. In the App Settings section, select **Download as JSON**, then save the downloaded JSON-format settings file in a secure location.

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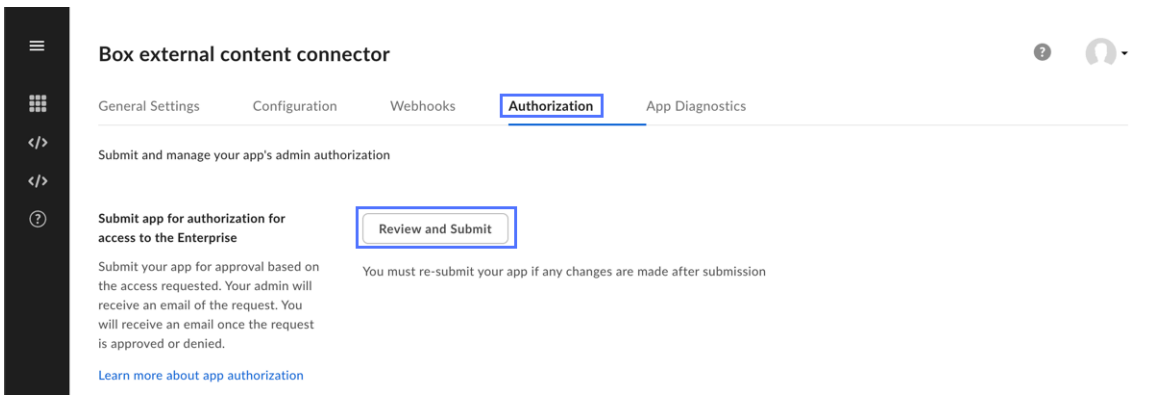
Important: Your connector administrator needs this JSON-format settings file when configuring the Box external content connector.

h. Select **Save Changes**.
A message appears, reporting that the OAuth 2.0 app's configuration has been successfully updated.

3. Submit an authorization request for your new OAuth 2.0 application.

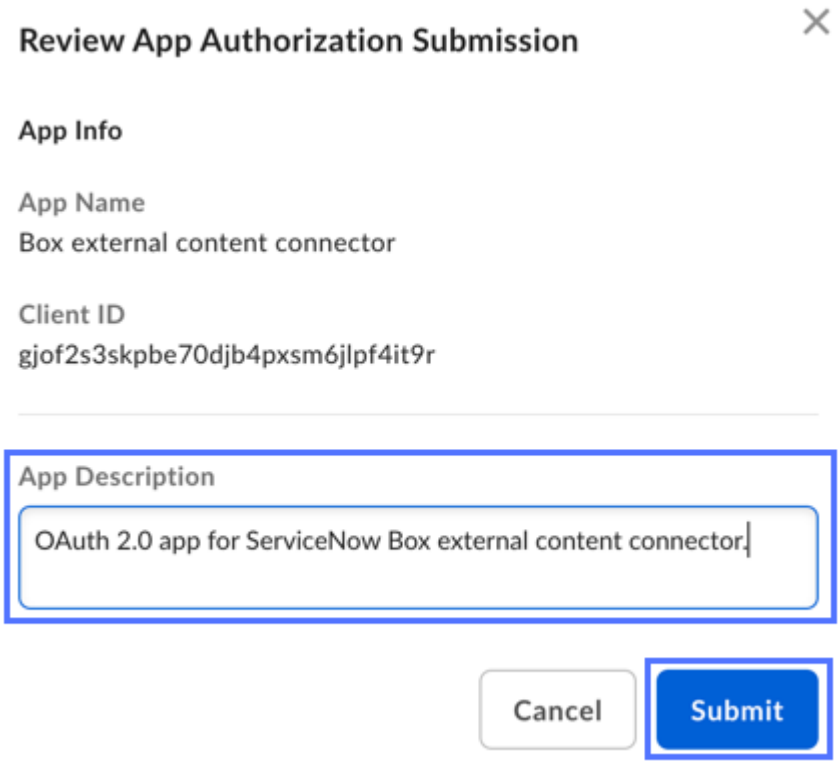
a. Navigate to the **Authorization** screen for your new OAuth 2.0 application.

b. Select **Review and Submit**.



c. On the Review App Authorization Submission screen, enter a description for your OAuth 2.0 application, then select **Submit**.

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The app's Authorization Status shows **Pending Authorization**.

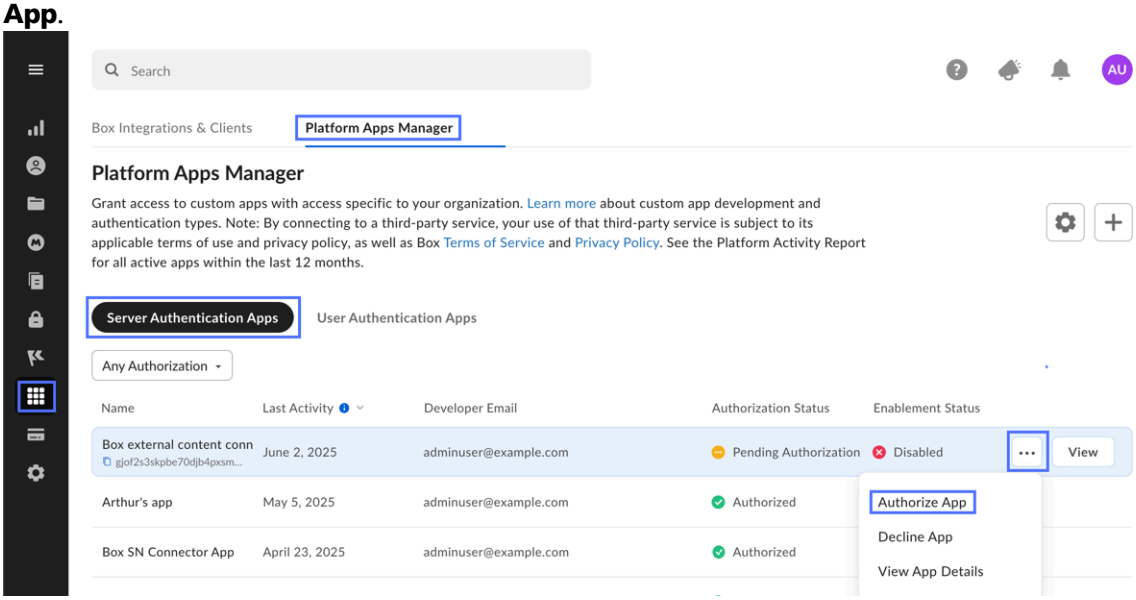
4. In the Box Admin UI portal, authorize your new OAuth 2.0 application.

   a. Navigate to https://app.box.com/master and log in with administrator credentials.

   b. Select the **Integrations** menu icon, then navigate to the **Platform Apps Manager** tab.

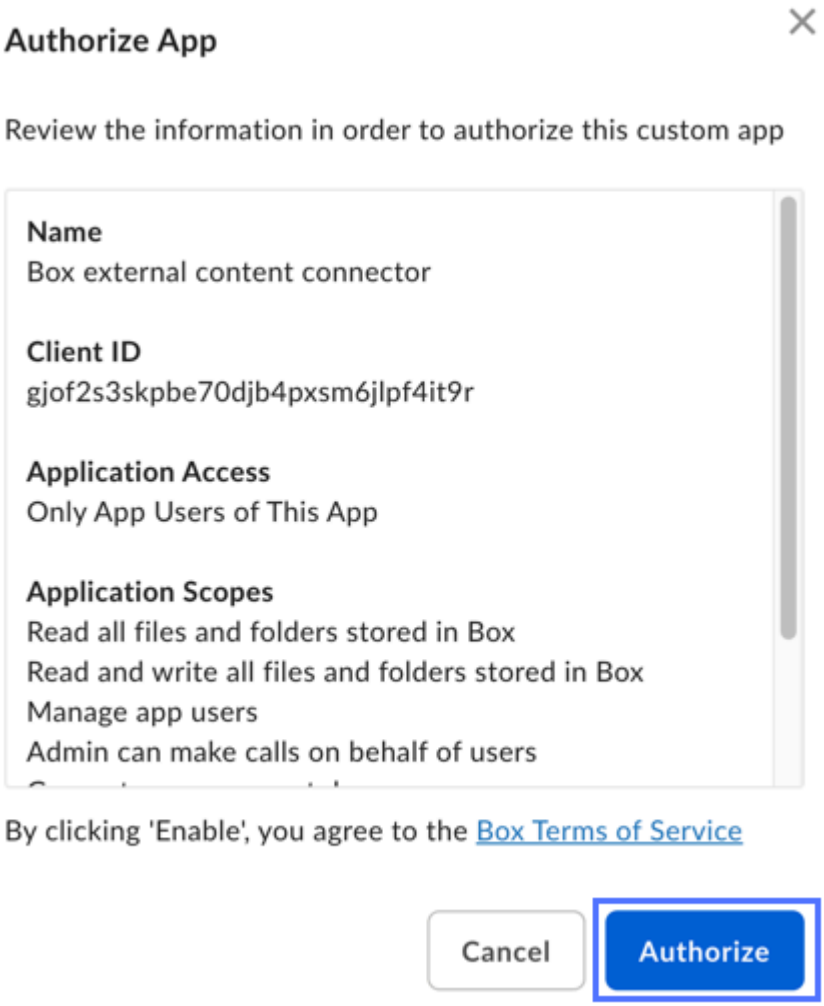
   c. Select **Server Authentication Apps** and find the entry for your new OAuth 2.0 application.

   d. Open the app entry's context menu by selecting its overflow icon ..., then select **Authorize App**.



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e. On the Authorize App screen, select **Authorize**.



The app's Authorization Status changes to **Authorized**.

What to do next

Provide the following items to your connector administrator:

- The email address for the Box administrator account that you used to configure the OAuth 2.0 application.
- The public key ID string that you copied in step 2.f.
- The JSON-format settings file that you downloaded in step 2.g.

Your connector administrator needs these items to configure a Box external content connector to retrieve user boxes and security principals from your Box source system.

For details on creating and configuring a Box external content connector, see Create a Box external content connector.

Create a Box external content connector

Create an external content connector to retrieve searchable content and security principals from your Box source system.

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Before you begin

A source system administrator must have already configured your Box source system to allow access by the Box external content connector. For the required source system configuration steps, see Configure Box for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Box* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Box external content connector.
Admin account email	Email address for a Box administrator account. As an example, you might enter `boxadmin@example.com`. If you don't know the administrator account email address to use, ask your Box administrator for it.
Public Key ID	ID string for the public key that your Box administrator uploaded in the OAuth 2.0 application in the Box developer console. As an example, you might enter `pf257ezq`. If you don't know the public key ID string to use, ask your Box administrator for it.
Passphrase	Passphrase for the encrypted private key file specified in **Encrypted private key file**. If you don't have the passphrase for the encrypted private key file, ask your Box administrator for it.
Encrypted private key file	PKCS#8-format encrypted private key file. If you don't have the encrypted private key file, ask your Box administrator for it.
Service account JSON file	JSON-format file containing configuration settings for the Box external content connector's OAuth 2.0 application in the Box developer console. If you don't have this JSON settings file, ask your Box administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

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Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Box external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Box external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search

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application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Box external content connector

Specify the user boxes you want your Box external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Box external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Box external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Box external content connector crawls all user boxes from its specified source system and sends documents with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the user boxes to crawl when running content crawls
- Inclusion or exclusion filters for the file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Box external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **User box filtering** options:
   - To crawl all user boxes from the source system, select **Crawl all user boxes**.
   - To crawl only a specified set of user boxes from the source system, select **Include only these user boxes**, then use the **Add email addresses for user boxes to include** field and **Add** button to enter email addresses for users whose boxes you want the connector to include when crawling.

     As an example, you might enter `senthil@example.com` to only retrieve searchable content from this user's box.
   - To crawl all but a specified set of user boxes from the source system, select **Exclude only these user boxes**, then use the **Add email addresses for user boxes to exclude** field and **Add** button to enter email addresses for users whose boxes you want the connector to exclude when crawling.

     As an example, you might enter `laura@example.com` to exclude searchable content from this user's box.
5. Select one of the following **Filetype filtering** options:

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- To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.

- To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

  As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.

- To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

  As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.

6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save and validate**.

Result

The Box external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your Box source system using your modified crawl settings, create and run a one-time content crawl for your Box external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Cornerstone external content connector

The Cornerstone external content connector retrieves Catalogue and Learning objects from organization units in your Cornerstone Learning Management System (LMS) and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to update searchable content and metadata from your source system. Content crawls feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

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Configure Cornerstone for external content indexing

Create and authorize an OAuth 2.0 application in Cornerstone OnDemand to allow the Cornerstone external content connector to access your source system.

Before you begin

You need a Cornerstone OnDemand account with the Edge APIs - Manage security permission.

Role required: none

About this task

The Cornerstone external content connector retrieves Catalogue and Learning objects from organization units in your Cornerstone source system using the Cornerstone API.

To allow the connector to access your Cornerstone source system via the API, you must register an OAuth 2.0 application in Cornerstone OnDemand. Your connector administrator can use settings copied from the OAuth 2.0 application to configure the Cornerstone external content connector for proper connection to your source system.

Procedure

1. In Cornerstone OnDemand, register a new OAuth 2.0 application for use by the Cornerstone external content connector.

   a. Log in to your Cornerstone OnDemand with administrator credentials.

   b. Select **Settings** > **Admin** > **Tools**, then select **Edge**.

   c. On the Edge page, in the Develop section, select **API Management**.

   d. On the API Management page, select **Manage OAuth 2.0 Applications**, then select **Register New Application**.

   e. On the new application form, fill in the fields.

Field	Description
Application Name	Name for your new OAuth 2.0 application. As an example, you might enter `Cornerstone-XCC`.
User ID	Identifier for the user account that runs the OAuth 2.0 application. Enter the ID for the administrator account you used to log in to Cornerstone OnDemand.
Access Token Validity Period	Validity period in seconds for access tokens for the OAuth 2.0 application. Enter `86400` (equivalent to 24 hours).

   f. In the drop-down list for the new application form, select *`Cornerstone`* **API**, then select the options for these API scopes.

   - training:read
   - employee:read
   - group:read
   - ou:read

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- outype:read
- learning:read
- catalog:read
- transcript:read
- task:read
- certification:read

g. Select **Register Application**.

The new application appears, with its Client ID and Client Secret fields populated.

2. Copy the Client ID value for your new OAuth 2.0 application and store it in a secure location.

> **Important:** Your external content connector administrator needs this Client ID when configuring the Cornerstone external content connector.

3. Copy the Client Secret value for your new OAuth 2.0 application and store it in a secure location.

> **Important:** Your external content connector administrator needs this Client Secret when configuring the Cornerstone external content connector.

What to do next

Provide the following items to your connector administrator:

- The Client ID value for your new OAuth 2.0 application that you copied in step 2.
- The Client Secret value for your new OAuth 2.0 application that you copied in step 3.

Your connector administrator needs these items to configure a Cornerstone external content connector to retrieve Catalogue and Learning objects from your Cornerstone source system.

For details on creating and configuring a Cornerstone external content connector, see Create a Cornerstone external content connector.

Create a Cornerstone external content connector

Create an external content connector to retrieve searchable content from your Cornerstone source system.

Before you begin

A source system administrator must have already configured your Cornerstone Learning Management System (LMS) instance to allow access by the Cornerstone external content connector. For the required source system configuration steps, see Configure Cornerstone for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Cornerstone* tile, then select **Next**.

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5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Cornerstone external content connector.
Base URL	Base URL for your Cornerstone LMS system. If you don't have the base URL, ask your Cornerstone administrator for it.
Client ID	Client identifier for the OAuth 2.0 application that grants access to your Cornerstone LMS content. If you don't have the client identifier, ask your Cornerstone administrator for it.
Client Secret	Client secret for the OAuth 2.0 application that grants access to your Cornerstone LMS content. If you don't have the client secret, ask your Cornerstone administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Cornerstone external content connector.
9. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
10. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

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Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content with your new connector, you must configure and run content crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Cornerstone external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Cornerstone external content connector

Specify the organization units you want your Cornerstone external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin
A connector administrator must have already created the Cornerstone external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Cornerstone external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the Cornerstone external content connector crawls your Cornerstone Learning Management System (LMS) and sends all Catalogue and Learning objects it finds to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the organization units to retrieve content from when running content crawls
- Inclusion or exclusion filters for the types of Catalogue and Learning objects to retrieve content from when running content crawls

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Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Cornerstone external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Organization units** options:
   - To crawl all organization units from the source system, select **Crawl all organization units**.
   - To crawl only a specified set of organization units from the source system, select **Include only these organization units**, then use the **Add organization units to include** field and **Add** button to enter names for organization units you want the connector to include when crawling.

     As an example, you might enter `Marketing` and `Sales` to only retrieve searchable content from the specified organization units.
   - To crawl all but a specified set of organization units from the source system, select **Exclude only these organization units**, then use the **Add organization units to exclude** field and **Add** button to enter names for organization units you want the connector to exclude when crawling.

     As an example, you might enter `Internal` to exclude searchable content from the specified organization unit.
5. In the Catalog/trainings and User/learner sections, select the options for the Cornerstone LMS content types that you want the connector to retrieve when running content crawls.

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6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save and validate**.

Result
The Cornerstone external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your Cornerstone source system using your modified crawl settings, create and run a one-time content crawl for your Cornerstone external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Docusign external content connector

The Docusign external content connector retrieves agreements from envelopes in your Docusign source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Important:

The Docusign external content connector doesn't support the shared access feature in Docusign. As a result, users in search applications can't see searchable content and metadata from envelopes that they only have shared access to.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure Docusign for external content indexing

Create an app and integration key in Docusign to allow the Docusign external content connector to access your source system.

Before you begin
You need a Docusign account with the DS Admin permission profile. To learn more about permission profiles, see the Permission Profiles Docusign support resource.

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Important: If you have multiple Docusign developer accounts (such as a work account and a personal account), you must set the account you want the external content connector to use as your default account. For details on setting a default Docusign account, see the Set a Default Account Docusign resource.

Role required: none

About this task

The Docusign external content connector retrieves agreements from envelopes in your Docusign source system using the eSignature REST API.

To allow the connector to access your Docusign source system via the eSignature REST API, you must create an app with an integration key in Docusign and generate a secret key for it. Your connector administrator can use this app's integration key and secret key to configure the Docusign external connector for proper connection to your source system.

Procedure

1. In Docusign, create a new app to allow access by the Docusign external content connector.
   a. Navigate to https://apps-d.docusign.com/admin and log in with your DS Admin account credentials.
   b. Navigate to **Integrations** > **Apps and Keys**.
   The Apps and Keys screen appears.
   c. Select **Add App and Integration Key**.
   d. Enter a name for your integration, then select **Create App**.
2. Record the integration key for your new Docusign app.
   a. Navigate to the General Info section to find the integration key for your new Docusign app.
   b. Copy the integration key GUID and record it in a secure location.

   Important: Your external content connector administrator needs this integration key GUID when configuring the Docusign external content connector.
3. Generate a secret key for your new Docusign app.
   a. Navigate to the Authentication section and select **Add Secret Key**.
   Docusign generates a secret key for your new app.
   b. Copy the secret key GUID and record it in a secure location.

   Important: Your external content connector administrator needs this secret key GUID when configuring the Docusign external content connector.
4. Specify the redirect URI for your new Docusign app.

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a. Navigate to **Additional settings** and select **Add URI**.

b. Enter `https://<instance-name>.service-now.com/oauth_redirect.do` as the callback URI, replacing `<instance-name>` with your ServiceNow AI Platform instance name.

c. Save your new redirect URI by selecting outside the URI field.
The new redirect URI appears.

What to do next

Provide the following items to your connector administrator:

- The integration key for your Docusign app that you copied in step 2.b.
- The secret key for your Docusign app that you copied in step 3.b.

Your connector administrator needs these items to configure a Docusign external content connector to retrieve envelopes and security principals from your Docusign source system.

For details on creating and configuring a Docusign external content connector, see Create a Docusign external content connector.

Create a Docusign external content connector

Create an external content connector to retrieve searchable content and security principals from your Docusign source system.

Before you begin

A source system administrator must have already configured your Docusign source system to allow access by the Docusign external content connector. For the required source system configuration steps, see Configure Docusign for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Docusign** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Docusign external content connector.
Authentication URL	Docusign authentication endpoint URL for the connector. This URL depends on which environment you want the connector to crawl: ○ For a development environment: `https://account-d.docusign.com` ○ For a production environment: `https://account.docusign.com`

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Connection setting	Description
	To learn more about endpoint URLs for development and production Docusign environments, see the https://developers.docusign.com/platform/api-endpoint-base-paths/ resource.
Client ID	Integration key GUID for the Docusign app that grants the connector access to your Docusign source system via the eSignature REST API. If you don't have this integration key GUID, ask your Docusign administrator for it.
Client Secret	Secret key GUID for the Docusign app that grants the connector access to your Docusign source system via the eSignature REST API. If you don't have this secret key GUID, ask your Docusign administrator for it.

6. Save and validate your connection settings.

   a. Select **Validate Connection**.
   You're prompted to grant the Docusign app access.

   b. Select **Allow Access**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Docusign external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.

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If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Docusign external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Docusign external content connector

Define inclusion or exclusion filters to control which agreements you want your Docusign external content connector to make searchable.

Before you begin
A connector administrator must have already created the Docusign external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Docusign external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the Docusign external content connector retrieves agreements from all envelopes in its specified source system and sends them to AI Search for indexing. Only

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perform this task if you want to apply any of the following filters to limit which envelopes the connector retrieves agreements from when running content crawls:

- Inclusion or exclusion filter based on the sent date of the envelope
- Inclusion or exclusion filter based on the name of the envelope
- Inclusion or exclusion filter based on the status of the envelope

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Docusign external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Date** options:
   - To only retrieve content from agreements in envelopes that were sent in the last year, select **Sent last year**.
   - To only retrieve content from agreements in envelopes that were sent in the last quarter, select **Sent last quarter**.
   - To only retrieve content from agreements in envelopes that were sent in the last month, select **Sent last month**.
   - To only retrieve content from agreements in envelopes that were sent in the last week, select **Sent last week**.
5. Select one of the following **Envelopes** options:

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- To crawl all envelopes from the source system, select **Crawl all envelopes**.
- To crawl only a specified set of envelopes from the source system, select **Include only these envelopes**, then use the **Add ID to include** field and **Add** button to enter IDs for envelopes you want the connector to include when crawling.

  As an example, you might enter `CS313157`, `CS214083`, and `CS990276` to only retrieve searchable content from the three specified envelopes.
- To crawl all but a specified set of envelopes from the source system, select **Exclude only these envelopes**, then use the **Add ID to exclude** field and **Add** button to enter IDs for envelopes you want the connector to exclude when crawling.

  As an example, you might enter `CS398287` to exclude searchable content from the specified envelope.

6. Select one of the following **Status** options:
   - To crawl envelopes with any status from the source system, select **Crawl all statuses**.
   - To crawl only envelopes with a specified set of statuses from the source system, select **Include only these statuses**, then use the **Status to include** field and **Add** button to enter statuses you want the connector to include when crawling.

     As an example, you might enter `published` to only retrieve searchable content from envelopes with the specified status.
   - To crawl envelopes with all but a specified set of statuses from the source system, select **Exclude only these statuses**, then use the **Status to exclude** field and **Add** button to enter statuses you want the connector to exclude when crawling.

     As an example, you might enter `draft` to exclude searchable content from envelopes with the specified status.
7. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
8. Select **Save and validate**.

Result

The Docusign external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your Docusign source system using your modified crawl settings, create and run a one-time content crawl for your Docusign external content connector. To learn about

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creating and running one-time content crawls, see Create a content crawl for an external content connector.

Dropbox external content connector

The Dropbox external content connector retrieves files from user folders and team folders in your Dropbox source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

- Create a content crawl for an external content connector
- Create a user permission crawl for an external content connector

Configure Dropbox for external content indexing

Create and authorize an OAuth 2.0 application in the Dropbox App Console to allow the Dropbox external content connector to access your Dropbox source system.

Before you begin

You need developer privileges for the Dropbox App Console.

Role required: none

About this task

The Dropbox external content connector retrieves files from user folders and team folders in your Dropbox source system using the Dropbox APIs.

To allow the connector to access your Dropbox source system via the Dropbox APIs, you must configure and authorize an OAuth 2.0 application in the Dropbox App Console. Your connector administrator can use settings copied from the OAuth 2.0 application to configure the Dropbox external connector for proper connection to your source system.

Procedure

1. In the Dropbox App Console, create a new OAuth 2.0 application for the Dropbox external content connector.
   a. Navigate to https://www.dropbox.com/developers/apps and log in with developer credentials.
   b. Select **Create app**.
   c. In the Choose an API step, select **Scoped access**.
   d. In the Choose the type of access you need step, select **Full Dropbox**.
   e. Enter a name for your new app.

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As an example, you might enter `ServiceNow external content connector`.

f. Select **Create app**.

You're taken to the Settings page for your new OAuth 2.0 application.

2. Copy the app key and app secret for your new OAuth 2.0 application.

a. On the Settings screen, copy the app key value and record it in a secure location.

> **Important:** Your external content connector administrator needs this app key when configuring the Dropbox external content connector.

b. To view the app secret, select **Show**.

c. Copy the app secret value and record it in a secure location.

> **Important:** Your external content connector administrator needs this app secret when configuring the Dropbox external content connector.

3. Configure the OAuth 2 redirect URI for your new OAuth 2.0 application.

a. In the OAuth 2 entry, enter `https://<instance-name>.service-now.com/oauth_redirect.do`, replacing `<instance-name>` with the name of your ServiceNow AI Platform® instance.
As an example, you might enter `https://example.service-now.com/oauth_redirect.do`.

b. Select **Add**.

The new redirect URI appears on the page for your application.

4. Configure permissions for your new OAuth 2.0 application.

a. Navigate to the Permissions page for your new OAuth 2.0 application.

b. Select the options for each of the following scopes.

- account_info.read
- files.metadata.read
- files.content.read
- sharing.write
- sharing.read
- team_info.read
- team_data.member
- team_data.content.read
- files.team_metadata.read
- members.read
- groups.read

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Note: Some of these scope options may be automatically selected by default or when you select other scope options.

c. Select **Submit**.

A message indicates that your permissions change was successful.

What to do next

Provide the following items to your connector administrator:

- The app key that you copied in step 2.a.
- The app secret that you copied in step 2.c.

Your connector administrator needs these items to configure a Dropbox external content connector to retrieve files in user folders, files in team folders, and security principals from your Dropbox source system.

For details on creating and configuring a Dropbox external content connector, see Create a Dropbox external content connector.

Create a Dropbox external content connector

Create an external content connector to retrieve searchable content and security principals from your Dropbox source system.

Before you begin

A source system administrator must have already configured your Dropbox source system to allow access by the Dropbox external content connector. For the required source system configuration steps, see Configure Dropbox for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Dropbox** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Dropbox external content connector.
App key	App key for the OAuth 2.0 application that grants the connector access to your Dropbox content. If you don't have the app key, ask your Dropbox administrator for it.
App secret	App secret for the OAuth 2.0 application that grants the connector access to your Dropbox content.

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Connection setting	Description
	If you don't have the app secret, ask your Dropbox administrator for it.

6. Save and validate your connection settings.

   a. Select **Validate Connection**.
   A warning message reports that you're connecting an app to your Dropbox account.

   b. Select **Continue**, then select **Allow**.
   You're returned to the connector creation page.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Dropbox external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

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What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Dropbox external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Dropbox external content connector

Specify the user and team folders you want your Dropbox external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Dropbox external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Dropbox external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Dropbox external content connector crawls all user and team folders from its specified source system and sends all content and binary files with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to ignore user or team folder content, or to use any of the following non-default settings:

- Inclusion or exclusion filters for the user folders to crawl when running content crawls
- Inclusion or exclusion filters for the team folders to crawl when running content crawls
- Inclusion or exclusion filters for the binary file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Dropbox external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. **Optional:** Deselect the **Crawl user content** option or the **Crawl team content** option depending on what content type you want the connector to retrieve.

   Note: If you deselect both content options, the connector won't retrieve any content from your source system.

5. If you selected **Crawl user content**, select one of the following **User content** options:
   - To crawl all user folders from the source system, select **Crawl all users**.
   - To crawl only a specified set of user folders from the source system, select **Include only these users**, then use the **Include only these users** field and **Add** button to enter email addresses for users whose folders you want the connector to include when crawling.

     As an example, you might enter `beth.anglin@example.com` to only retrieve searchable content from this user's folder.
   - To crawl all but a specified set of user folders from the source system, select **Exclude only these users**, then use the **Exclude only these users** field and **Add** button to enter email addresses for users whose folders you want the connector to exclude when crawling.

     As an example, you might enter `abel.tuter@example.com` to exclude searchable content from this user's folder.
6. If you selected **Crawl team content**, select one of the following **Team folder content** options:

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- To crawl all team folders from the source system, select **Crawl all team folders**.
- To crawl only a specified set of team folders from the source system, select **Include only these team folders**, then use the **Include only these team folders** field and **Add** button to enter names for team folders you want the connector to include when crawling.

  As an example, you might enter `Marketing` and `AI Ambassadors` to only retrieve searchable content from these team folders.
- To crawl all but a specified set of team folders from the source system, select **Exclude only these team folders**, then use the **Exclude only these team folders** field and **Add** button to enter names for team folders you want the connector to exclude when crawling.

  As an example, you might enter `Legal` to exclude searchable content from this team folder.

7. Select one of the following **Files** options:
   - To retrieve all files with supported extensions from the source system, select **Crawl all files**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only files with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude files with the Comma-Separated Values (CSV) file format.

   For details on the supported file extensions, see Binary file extensions supported in External Content Connectors.
8. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
9. Select **Save and validate**.

Result

The Dropbox external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your Dropbox source system using your modified crawl settings, create and run a one-time content crawl for your Dropbox external content connector. To learn about

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creating and running one-time content crawls, see Create a content crawl for an external content connector.

Fluid Topics external content connector

The Fluid Topics external content connector retrieves Topics, Articles, Publications, and associated content pages delivered through portals in your Fluid Topics source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Note: Default retrieval limits in the Fluid Topics API may prevent the connector from indexing all of your source system content. To learn about these retrieval limits and how you can request to have them increased, see Request limits in Fluid Topics Knowledge Hub web services.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure Fluid Topics for external content indexing

Generate an API key in your Fluid Topics tenant to allow the Fluid Topics external content connector to access your Fluid Topics source system.

Before you begin

You need administrator access and API access for your Fluid Topics tenant.

Role required: none

About this task

The Fluid Topics external content connector retrieves Topics, Articles, Publications, and associated content pages delivered through portals from your Fluid Topics source system using the Fluid Topics API.

To allow the connector to access your source system via the API, you must generate an API key in Fluid Topics. Your connector administrator can use this API key and the URL for your Fluid Topics tenant to configure the Fluid Topics external connector for proper connection to your source system.

Procedure

1. Navigate to your Fluid Topics tenant and log in with administrator credentials.
2. Generate an API key.
   a. Navigate to **Administration** > **Integrations** > **API keys**.
   b. Select **Create & Add**.
   c. In the Name field, enter a unique name for your new API key.

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The API key name can only contain alphanumeric characters, hyphens, and underscores.

d. Select **Create & Add**.
Fluid Topics displays your new API key.

3. Copy the generated API key and store its value in a secure location.

> **Important:** Your external content connector administrator needs this API key when configuring the Fluid Topics external content connector.

4. **Optional:** Create a new Fluid Topics source and assign your new API key to it.

> **Note:** You only need to perform this step if there are no sources in your Fluid Topics tenant for this external indexing configuration.

a. Navigate to **Administration** > **Knowledge Hub** > **Sources**.
b. Select **New source**.
c. Select the **Exact Source Type Name** source type.
d. Enter a unique ID and unique name for your new source.
e. **Optional:** Enter a category and description for your new source.
f. Select **Next**.
g. Select **Admins and KHUB Admins**.
h. In the Allowed API keys section, select your new API key as an allowed API key for your new source.
i. Select **Save**.

What to do next

Provide the following items to your connector administrator:

- The URL for your Fluid Topics tenant.
- The API key that you copied in step 3.

Your connector administrator needs these items to configure a Fluid Topics external content connector to retrieve content and security principals from your Fluid Topics source system.

For details on creating and configuring a Fluid Topics external content connector, see Create a Fluid Topics external content connector.

Create a Fluid Topics external content connector

Create an external content connector to retrieve searchable content and security principals from your Fluid Topics source system.

Before you begin

A source system administrator must have already configured your Fluid Topics source system to allow access by the Fluid Topics external content connector. For the required source system configuration steps, see Configure Fluid Topics for external content indexing.

Role required: sn_ext_conn.xcc_admin

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Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Fluid Topics* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Fluid Topics external content connector.
Portal URL	URL for your Fluid Topics tenant. This is typically `https://<organization>.fluidtopics.net`, where `<organization>` is the name of your organization. If you don't have the portal URL, ask your Fluid Topics administrator for it.
API Key	API key used to authenticate requests to your Fluid Topics tenant. If you don't have the API key, ask your Fluid Topics administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Fluid Topics external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.

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11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Fluid Topics external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Fluid Topics external content connector

Specify restrictions on source content status, visibility, category/collection, tags, languages, and modification dates for the Fluid Topics external content connector's content crawls. Define inclusion or exclusion filters to limit the content the crawl retrieves and feeds to AI Search for indexing.

Before you begin
A connector administrator must have already created the Fluid Topics external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Fluid Topics external content connector.

Role required: sn_ext_conn.xcc_admin

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About this task

This task is optional. By default, the Fluid Topics external content connector crawls all content found in its specified source system and sends all retrieved items and binary files with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Filter retrieved content by status when running content crawls
- Filter retrieved content by visibility when running content crawls
- Filter retrieved content based on its category/collection, tags, languages, or modification dates when running content crawls
- Filter attachment binary files by extension when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Fluid Topics external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Status** options:
   - To retrieve content with any status, select **All**.
   - To retrieve only content with Published status, select **Published**.
   - To retrieve only content with Draft status, select **Draft**.
5. **Optional:** To crawl only content with public visibility, select the **Public visibility only** option. Selecting this option excludes all content that has user or group permission restrictions. With this option selected, the external content connector only retrieves content that's visible to all users in the source system.

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6. In the **Content** section, select one of the following category/collection options:
   - To retrieve source system content from all categories and collections, select **Crawl all categories/collections**.
   - To retrieve only source system content from a specified set of categories and collections, select **Include only these categories/collections**, then use the **Add categories/collections to include** field and **Add** button to enter names for categories or collections you want the connector to include when crawling.

     As an example, you might enter `Wiki` to only retrieve searchable content from this category or collection.
   - To retrieve source system content from all but a specified set of categories and collections, select **Exclude only these categories/collections**, then use the **Add categories/collections to exclude** field and **Add** button to enter names for categories or collections you want the connector to exclude when crawling.

     As an example, you might enter `Confidential` to exclude searchable content from this category or collection.
7. In the **Content** section, select one of the following tags options:
   - To retrieve source system content with all tags, select **Crawl all tags**.
   - To retrieve only source system content with a specified set of tags from the source system, select **Include only these tags**, then use the **Add tags to include** field and **Add** button to enter tags you want the connector to include when crawling.

     As an example, you might enter `Glossary` and `New` to only retrieve searchable content with the specified tags.
   - To retrieve source system content with all but a specified set of tags, select **Exclude only these tags**, then use the **Add tags to exclude** field and **Add** button to enter tags you want the connector to exclude when crawling.

     As an example, you might enter `Draft` to exclude searchable content with the specified tag.
8. In the **Content** section, select one of the following language options:
   - To retrieve source system content in all languages, select **Crawl all languages**.
   - To retrieve source system content in only a specified set of languages, select **Include only these languages**, then use the **Languages to include** field to enter two-letter identifier codes for languages you want the connector to include when crawling.

     As an example, you might enter `en` and `ja` to retrieve only searchable content in English or Japanese.
   - To retrieve source system content in all but a specified set of languages from the source system, select **Exclude only these languages**, then use the **Languages to exclude** field to enter two-letter identifier codes for languages you want the connector to exclude when crawling.

     As an example, you might enter `en` and `fr` to exclude searchable content in English and French.

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9. In the **Content** section, select one of the following modification date options:
   - To retrieve content modified within the last year, select **Modified last year**.
   - To retrieve content modified within the last quarter, select **Modified last quarter**.
   - To retrieve content modified within the last month, select **Modified last month**.
   - To retrieve content modified within the last week, select **Modified last week**.
10. Select one of the following **Files** options:
    - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
    - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

      As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
    - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

      As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

    For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
11. **Optional:** In the **Files** options, change the **Max file size (MB)** value to your desired value.
    AI Search only indexes content and metadata from retrieved attachment files that satisfy this file size limit. It ignores attachment files that exceed this file size limit.
12. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
    When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

    This option is only available when the Platform Multimodal Service plugin is activated on your instance.
    - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
    - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
13. Select **Save and validate**.

Result
The Fluid Topics external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your Fluid Topics source system using your modified crawl settings, create and run a one-time content crawl for your Fluid Topics external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

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Request limits in Fluid Topics Knowledge Hub web services

By default, the Fluid Topics API limits the number of maps, topics, and unstructured documents retrieved by requests to Knowledge Hub web services. These default limits may prevent the Fluid Topics external content connector from indexing all of your source system content. To request increases to these limits, open a ticket in the Fluid Topics Help Center.

Default retrieval limits in the Fluid Topics API

The Fluid Topics external content connector retrieves content from your source system using requests submitted to Knowledge Hub web services provided by the Fluid Topics API. In particular, it retrieves your maps, topics, and unstructured documents via these web services.

By default, the Fluid Topics API imposes limits on how many items can be retrieved per web service request, as follows:

Item type	Default limit
Maps	Limit of 1,000 maps per request to the API's List maps Knowledge Hub web service. For details on this web service, including the limit, see the List maps topic in the Fluid Topics API Reference Guide.
Topics	Limit of 1,000 topics per request to the API's Search topics Knowledge Hub web service. For details on this web service, including the limit, see the Search topics topic in the Fluid Topics API Reference Guide.
Unstructured documents	Limit of 1,000 documents per request to the API's List unstructured documents Knowledge Hub web service. For details on this web service, including the limit, see the List unstructured documents topic in the Fluid Topics API Reference Guide.

If your source system contains more than 1,000 maps, topics, or unstructured documents, these default limits prevent the Fluid Topics external content connector from indexing all of your source system content. The connector must retrieve all of your maps, topics, or unstructured documents in a single request.

Increasing retrieval limits in the Fluid Topics API

To request increases to these Knowledge Hub web service retrieval limits, you can open a ticket in the Fluid Topics Help Center at https://helpcenter.fluidtopics.com/. Be sure to request increases to all of the retrieval-relevant limits so that the Fluid Topics external content connector can retrieve all of your source system content.

As an example, if your source system includes 544 maps, 1,817 topics, and 1,193 unstructured documents, you must request increases to the default retrieval limits for both the Search topics and List unstructured documents Knowledge Hub web services.

GitHub Enterprise Cloud external content connector

The GitHub Enterprise Cloud external content connector retrieves commits, issues, and pull requests from public and internal repositories in your GitHub Enterprise Cloud source system and makes their content and metadata searchable in AI Search applications.

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Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure GitHub Enterprise Cloud for external content indexing

Create and authorize a GitHub App to allow the GitHub Enterprise Cloud external content connector to access your GitHub Enterprise Cloud content.

Before you begin

You need all of the following:

- The Organization Owner role for your GitHub Enterprise Cloud organization. For details on this role, see the https://docs.github.com/en/organizations/managing-peoples-access-to-your-organization-with-roles/roles-in-an-organization and https://docs.github.com/en/organizations/managing-peoples-access-to-your-organization-with-roles/maintaining-ownership-continuity-for-your-organization GitHub documentation resources.
- Access to a programming language that you can use to create a JSON Web Token (JWT) for a GitHub App, such as Ruby, Python, bash, or PowerShell. For details on this procedure and the supported programming languages, see the https://docs.github.com/en/enterprise-cloud@latest/apps/creating-github-apps/authenticating-with-a-github-app/generating-a-json-web-token-jwt-for-a-github-app GitHub documentation resource.
- Access to the curl command-line tool.

Role required: none

About this task

The GitHub Enterprise Cloud external content connector retrieves searchable content and metadata from commits, issues, and pull requests found in your GitHub Enterprise Cloud source system's public and internal repositories using the GitHub REST API.

To allow the connector to access your GitHub Enterprise Cloud source system via the REST API, you must configure and authorize a GitHub App for your organization in GitHub Enterprise Cloud. Your connector administrator can use settings copied from the GitHub App to configure the GitHub Enterprise Cloud external connector for proper connection to your source system.

Procedure

1. Create a new GitHub App for the GitHub Enterprise Cloud external content connector.

   a. Navigate to https://github.com/ and log in with your GitHub Enterprise Cloud credentials.

   b. Select your profile picture, then select **Your enterprise** from the context menu.
   If you don't use Enterprise Managed Users, select **Your enterprises**, then select **Settings**.

   c. In the menu, navigate to **Settings** > **Developer Settings** > *GitHub* **Apps**.

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d. Select **New *GitHub* App**.

e. On the Register new GitHub App page, enter a name for your new GitHub App.
As an example, you might enter `External content connector`.

> **Note:** The App name can't exceed 34 characters in length.

f. In the **Homepage URL** field, enter the URL for your organization's GitHub account.
As an example, you might enter `https://github.com/example`.

g. In the Webhook section, clear the **Active** option.

h. In the Permissions section, expand the Repository permissions list and select **Read-only** access for each of these permissions.

- Commit statuses
- Contents
- Discussions
- Issues
- Merge queues
- Pull requests

i. In the Permissions section, expand the Organization permissions list and select **Read-only** access for the **Members** permission.

j. In the **Where can this *GitHub* App be installed?** field, select the **Only on this account** option.

k. Select **Create *GitHub* App**.

A message indicates that your new GitHub App was successfully registered, and you're taken to its General settings page.

2. Get the client ID and private key for your new GitHub App from its General settings page.

a. In the About section, copy the client ID for your new GitHub App and store it in a secure location.

> **Important:** Your external content connector administrator needs this client ID when configuring the GitHub Enterprise Cloud external content connector.

b. In the Private keys section, select **Generate a private key**.

c. When prompted, download the PEM-format private key certificate file to a secure location.

> **Important:** Your external content connector administrator needs this PEM-format private key certificate file when configuring the GitHub Enterprise Cloud external content connector.

3. Install your new GitHub App.

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a. In the menu for your new GitHub App, select **Install App**.

b. In the entry for your GitHub organization account, select **Install**.

c. On the Install page for your new GitHub App, choose which repositories you want the external content connector to have access to.

- To grant the external content connector access to all repositories owned by your organization, select **All repositories**.
- To grant the external content connector access to a specified set of repositories owned by your organization, select **Only select repositories**, then use the **Select repositories** drop-down list to find and select the repositories you want to grant the connector access to.

d. Select **Install**.

4. Get the App Installation ID for your new GitHub App.

a. Get the identifier for your GitHub organization from the URL for your GitHub organization page.
The identifier for your organization is the URL element after the third slash in the URL for your GitHub organization page. As an example, if the URL for your GitHub organization page is `https://github.com/example`, the identifier for your organization is `example`.

b. Generate a JSON Web Token (JWT) for your new GitHub App.
For details on generating a JWT for a GitHub App using Ruby, Python, bash, or PowerShell, see the https://docs.github.com/en/enterprise-cloud@latest/apps/creating-github-apps/authenticating-with-a-github-app/generating-a-json-web-token-jwt-for-a-github-app GitHub documentation resource.

To generate a JWT, you need the client ID that you copied in step 2.a and the PEM-format client secret certificate file that you downloaded in step 2.c.

> **Important:** Your JWT expires 10 minutes after creation. If it expires before you can perform the next step, repeat this step to generate a new JWT.

c. Execute the following curl command, replacing `<org>` with the identifier for your GitHub organization and `<json-web-token>` with the JWT you generated.

```
curl --request GET \
  --url "https://api.github.com/orgs/<org>/installation" \
  --header "Accept: application/vnd.github+json" \
  --header "Authorization: Bearer <json-web-token>" \
  --header "X-GitHub-Api-Version: 2022-11-28"
```

d. In the JSON response object, find the application installation's `id` key-value pair, copy its value, and store it in a secure location.

> **Important:** Your external content connector administrator needs this App Installation ID when configuring the GitHub Enterprise Cloud external content connector.

What to do next

Provide the following items to your connector administrator:

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- The client ID that you copied in step 2.a.
- The PEM-format private key certificate file that you downloaded in step 2.c.
- The app installation ID that you copied in step 4.d.

Your connector administrator needs these items to configure a GitHub Enterprise Cloud external content connector to retrieve items and security principals from your GitHub Enterprise Cloud source system.

For details on creating and configuring a GitHub Enterprise Cloud external content connector, see Create a GitHub Enterprise Cloud external content connector.

Create a GitHub Enterprise Cloud external content connector

Create an external content connector to retrieve searchable content and security principals from your GitHub Enterprise Cloud source system.

Before you begin

A source system administrator must have already configured your GitHub Enterprise Cloud source system to allow access by the GitHub Enterprise Cloud external content connector. For the required source system configuration steps, see Configure GitHub Enterprise Cloud for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *GitHub Enterprise* **Cloud** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this GitHub Enterprise Cloud external content connector.
Client ID	Client ID for the GitHub App that grants the connector access to your GitHub Enterprise Cloud content. If you don't have the client ID, ask your GitHub Enterprise Cloud administrator for it.
App installation ID	App Installation ID for the GitHub App that grants the connector access to your GitHub Enterprise Cloud content. If you don't have the App Installation ID, ask your GitHub Enterprise Cloud administrator for it.
Certificate	PEM-format certificate file containing the private key for the GitHub App that grants the connector access to your GitHub Enterprise Cloud content.

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Connection setting	Description
	If you don't have the PEM-format private key certificate file, ask your GitHub Enterprise Cloud administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a GitHub Enterprise Cloud external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

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- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a GitHub Enterprise Cloud external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a GitHub Enterprise Cloud external content connector

Specify the public and internal repositories you want your GitHub Enterprise Cloud external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the GitHub Enterprise Cloud external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a GitHub Enterprise Cloud external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the GitHub Enterprise Cloud external content connector crawls all public and internal repositories from its specified source system and sends all commits, issues, and pull requests to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Ignore one or more of the default content types when running content crawls
  - Commits
  - Issues
  - Pull requests
- Inclusion or exclusion filters for the repositories to crawl when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the GitHub Enterprise Cloud external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. In the Repositories section, select the options for the types of item you want the connector to retrieve searchable content and metadata from.
5. Select one of the following **Repositories** options:
   - To include content from items in all repositories from the source system, select **Crawl all repositories**.
   - To include only content from items in a specified set of repositories, select **Include only these repositories**, then use the **Add repository URLs to include** field and **Add** button to enter URLs for repositories you want the connector to include when crawling.

     As an example, you might enter `https://github.com/example/production` to only retrieve searchable content from items in the specified repository.
   - To exclude content from items in a specified set of repositories, select **Exclude only these repositories**, then use the **Add repository URLs to exclude** field and **Add** button to enter URLs for repositories you want the connector to exclude when crawling.

     As an example, you might enter `https://github.com/example/beta` to exclude searchable content from items in the specified repository.
6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

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This option is only available when the Platform Multimodal Service plugin is activated on your instance.

- For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
- To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.

7. Select **Save and validate**.

Result

The GitHub Enterprise Cloud external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your GitHub Enterprise Cloud source system using your modified crawl settings, create and run a one-time content crawl for your GitHub Enterprise Cloud external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

GitLab external content connector

The GitLab external content connector retrieves issues, wikis, merge requests, tags, branches, and commits from groups, projects, and repositories in your GitLab.com source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Prerequisites for the GitLab external content connector

To use the GitLab external content connector, your GitLab plan must satisfy all of these conditions:

Offering

You must be using the GitLab.com offering, not GitLab Dedicated or GitLab Self-Managed.

To learn more about GitLab offerings, see https://docs.gitlab.com/subscriptions/choosing_subscription/#choose-an-offering.

Group owner user account

You need a GitLab.com user account that owns all the public and private top-level groups you want the external content connector to crawl. The connector impersonates this user when retrieving searchable content, user access permissions, and security principals from your GitLab source system.

Public content requirements

Public content you want to retrieve must be in public top-level groups owned by your group owner user.

Private content requirements

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Private content you want to retrieve must be in a private top-level group on the Ultimate subscription tier. This group must be owned by your group owner user, and you must have configured access permissions for enterprise users in this private group. (The connector only retrieves user access permissions and security principals for enterprise users.)

To learn more about GitLab subscription tiers, see https://docs.gitlab.com/subscriptions/choosing_subscription/#choose-a-subscription-tier. For information about GitLab enterprise users, see https://docs.gitlab.com/user/enterprise_user/.

Limitations for the GitLab external content connector

The GitLab external content connector doesn't retrieve searchable content from personal GitLab.com projects.

When retrieving security principals from your GitLab.com source system, the GitLab external content connector doesn't support any of these security features:

- Custom roles
- Group access tokens
- Users that aren't Enterprise users
- Users with the Minimal Access role

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure GitLab for external content indexing

Create a personal access token for a group owner user account on GitLab.com to allow the GitLab external content connector to access your GitLab source system.

Before you begin

To use the GitLab external content connector, your GitLab plan must satisfy all of these conditions:

Offering

You must be using the GitLab.com offering, not GitLab Dedicated or GitLab Self-Managed.

To learn more about GitLab offerings, see https://docs.gitlab.com/subscriptions/choosing_subscription/#choose-an-offering.

Group owner user account

You need a GitLab.com user account that owns all the public and private top-level groups you want the external content connector to crawl. The connector impersonates this user when retrieving searchable content, user access permissions, and security principals from your GitLab source system.

Public content requirements

Public content you want to retrieve must be in public top-level groups owned by your group owner user.

Private content requirements

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Private content you want to retrieve must be in a private top-level group on the Ultimate subscription tier. This group must be owned by your group owner user, and you must have configured access permissions for enterprise users in this private group. (The connector only retrieves user access permissions and security principals for enterprise users.)

To learn more about GitLab subscription tiers, see https://docs.gitlab.com/subscriptions/choosing_subscription/#choose-a-subscription-tier. For information about GitLab enterprise users, see https://docs.gitlab.com/user/enterprise_user/.

You need login credentials for the group owner user account in your organization's GitLab.com instance.

Role required: none

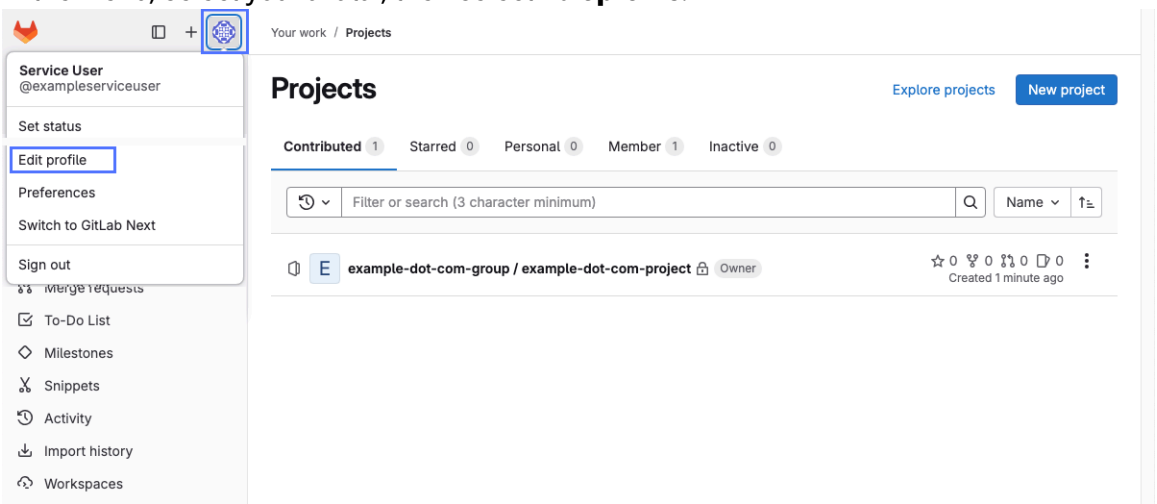
About this task

The GitLab external content connector retrieves content from your GitLab.com source system using the GitLab API and a personal access token with the *read_api* scope configured for the user account that owns all top-level groups you want to crawl. The connector uses this personal access token to impersonate the specified user when retrieving searchable content and security principals from your GitLab.com source system.

Your ServiceNow AI Platform instance admin needs this personal access token to configure the GitLab external content connector for proper connection to your GitLab.com source system.

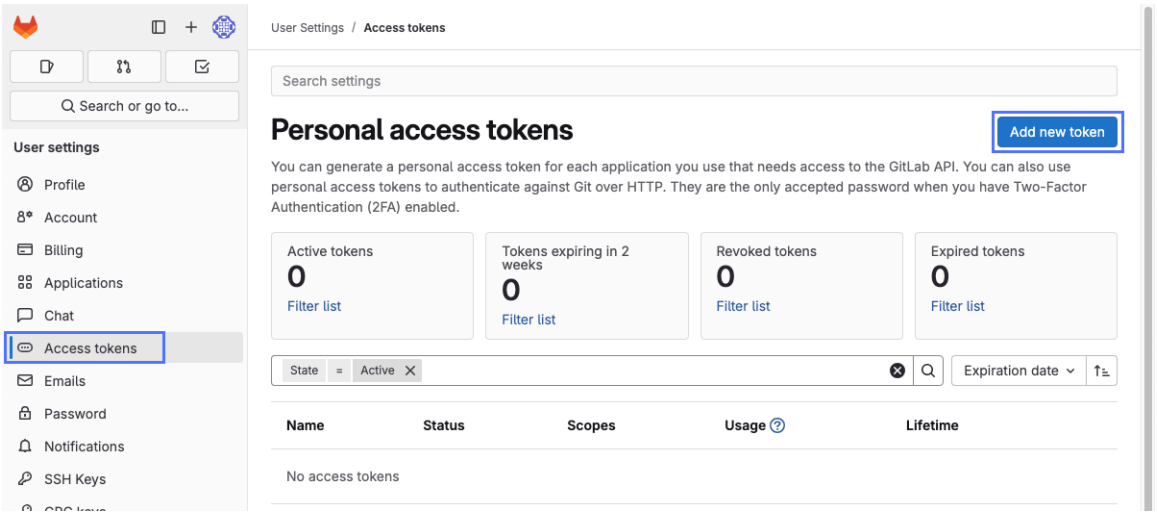
Procedure

1. Log in to https://gitlab.com/ as the user that owns all top-level groups you want to retrieve searchable content from.
2. In the menu, select your avatar, then select **Edit profile**.



3. Select **Access tokens**, then select **Add new token**.

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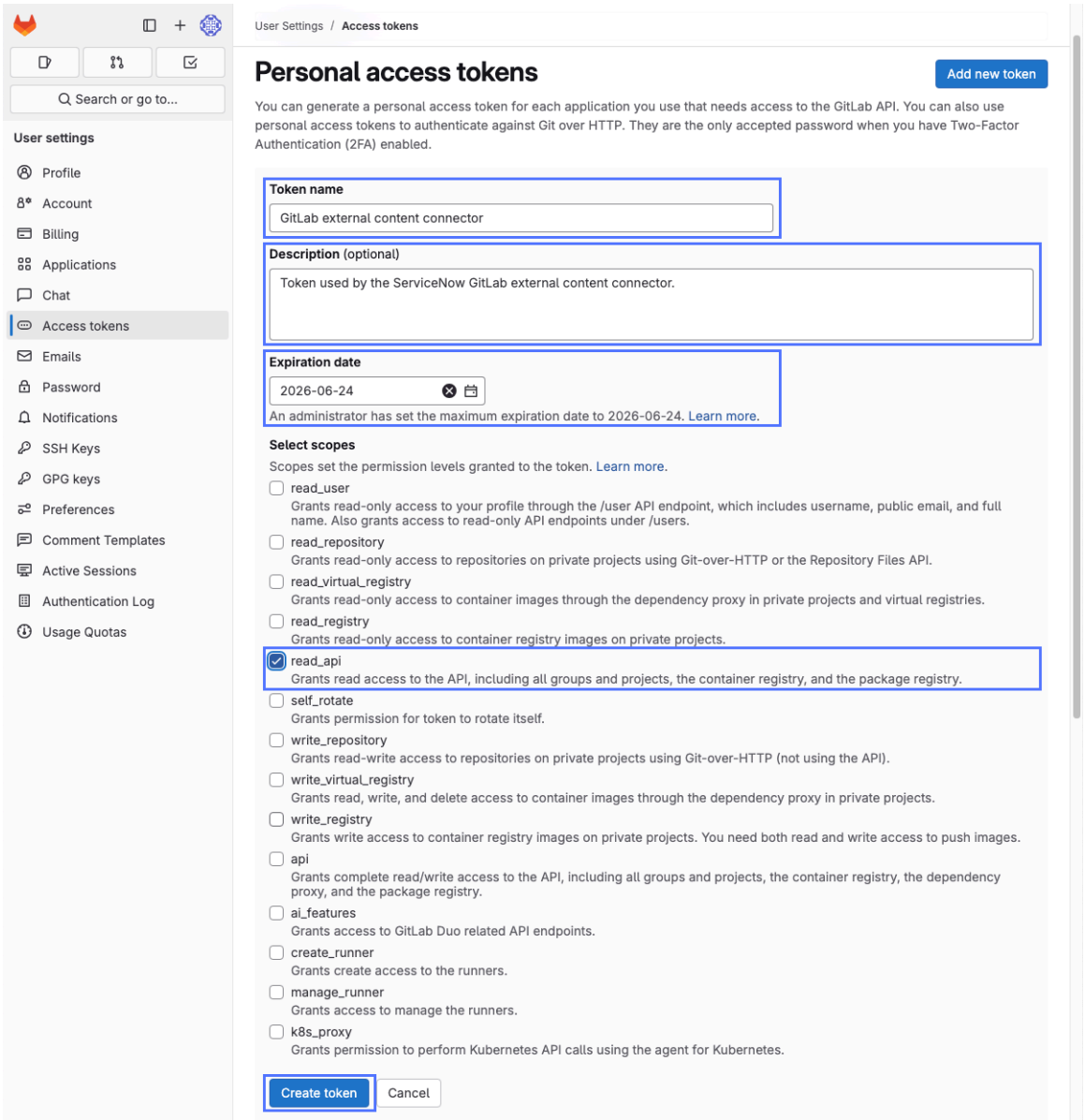


4. Enter a name, optional description, and expiration date for your new personal access token.

   Note: If you don't enter an expiration date, the token's expiration date is automatically set to 365 days later than the current date.

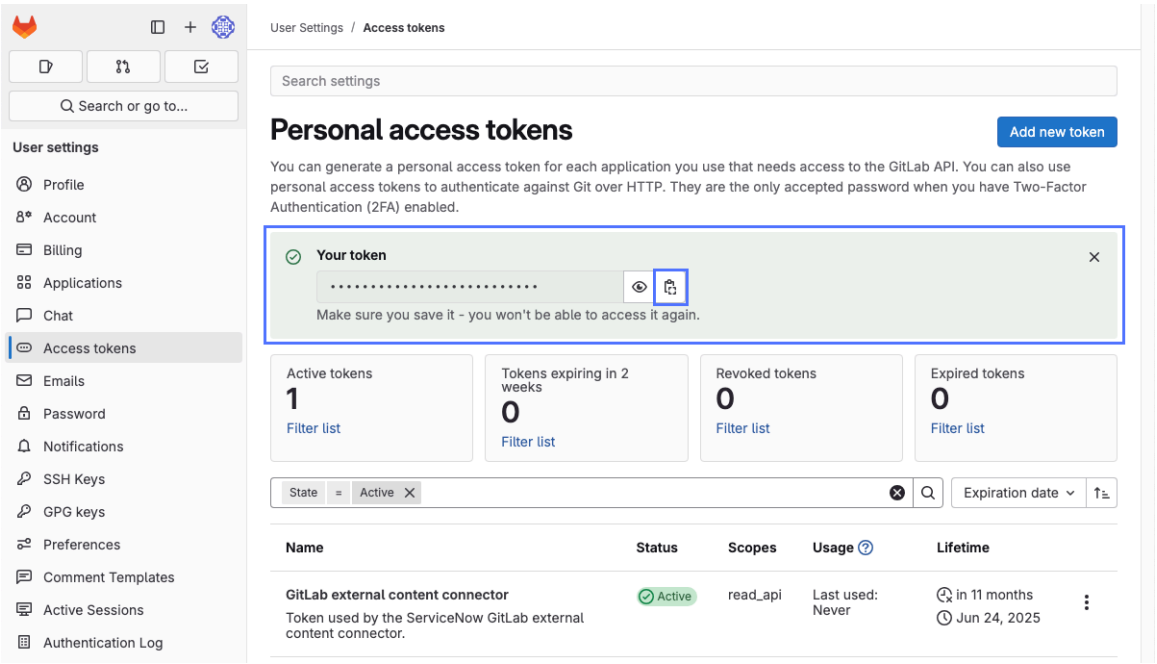
5. Select the **read_api** scope for your new personal access token.
6. Select **Create token**.

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7. When prompted, select the copy icon to copy your new personal access token, then save it in a secure location.

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Important: Your connector administrator needs this personal access token to create a GitLab external content connector. You won't be able to access the token again after creating it.

What to do next

Provide the following items to your connector administrator:

- The URL for your GitLab instance. This is typically https://gitlab.com/.
- The personal access token for the group owner user that you copied in step 7.

Your connector administrator needs these items to configure a GitLab external content connector to retrieve searchable content and security principals from your GitLab.com instance.

For details on creating and configuring a GitLab external content connector, see Create a GitLab external content connector.

Create a GitLab external content connector

Create an external content connector to retrieve searchable content and security principals from your GitLab source system.

Before you begin

A source system administrator must have already configured your GitLab source system to allow access by the GitLab external content connector. For the required source system configuration steps, see Configure GitLab for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Gitlab** tile, then select **Next**.

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5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this GitLab external content connector.
GitLab instance URL	GitLab.com instance URL for your source system, in this format: `https://gitlab.com`. The GitLab external content connector crawls content from your groups, projects, and repositories found in this source system.
Authentication token	Authentication token for a GitLab.com user that owns all top-level groups you want the external content connector to crawl. If you don't have the authentication token, ask your GitLab administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

> **Note:** If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a GitLab external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page.

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For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a GitLab external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a GitLab external content connector

Specify the groups, projects, and repositories you want your GitLab external content connector to crawl. Select the issues, wikis, merge requests, tags, branches, and commits you want the crawl to retrieve and feed to AI Search for indexing.

Before you begin
A connector administrator must have already created the GitLab external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a GitLab external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the GitLab external content connector crawls content from all subgroups, projects, and repositories found in top-level groups owned by the GitLab.com user that it's configured to impersonate, and sends all supported content types (issues, wikis, merge

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requests, tags, branches, and commits) to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the subgroups to crawl when running content crawls
- Inclusion or exclusion filters for the projects/repositories to crawl when running content crawls
- Inclusion or exclusion filters for the types of content to retrieve from the source system when running content crawls
- Inclusion or exclusion filters for the branches to retrieve from the source system when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the GitLab external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Group filtering** options:
   - To crawl all subgroups found in top-level groups owned by the connector's impersonated GitLab.com user account, select **Crawl all groups**.
   - To crawl only a specified set of subgroups found in top-level groups owned by the connector's impersonated GitLab.com user account, select **Include only these groups**, then use the **Add group URLs to include** field and **Add** button to enter URLs for the groups that you want to include in the crawl.

     For example, you might enter `https://gitlab.com/example-dot-com/production` to include only searchable content from the `production` subgroup and all subgroups that it contains.

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- To crawl all except a specified set of groups found in top-level groups owned by the connector's impersonated GitLab.com user account, select **Exclude only these groups**, then use the **Add group URLs to exclude** field and **Add** button to enter URLs for the groups that you want to exclude from the crawl.

  For example, you might enter `https://gitlab.com/example-dot-com/test-*` to exclude searchable content from all subgroups with names that start with `test-`.

Note: Subgroup inclusion URLs can be specified as prefixes, with the wildcard character `*` at the end of the URL matching any string.

5. Select one of the following **Project/repository filtering** options:
   - To crawl all projects and repositories owned by the connector's impersonated GitLab.com user account, select **Crawl all projects/repositories**.
   - To crawl only a specified set of projects and repositories owned by the connector's impersonated GitLab.com user account, select **Include only these projects/repositories**, then use the **Add project/repository URLs to include** field and **Add** button to enter URLs for the projects and repositories that you want to include in the crawl.

     Note: Project and repository inclusion URLs can be specified as prefixes, with the wildcard character `*` at the end of the URL matching any string.

     For example, you might enter `https://gitlab.com/example-dot-com/prod-*` to include only searchable content from projects whose names start with `prod-`.
   - To crawl all except a specified set of projects and repositories owned by the connector's impersonated GitLab.com user account, select **Exclude only these projects/repositories**, then use the **Add project/repository URLs to exclude** field and **Add** button to enter URLs for the projects and repositories that you want to exclude from the crawl.

     Note: Project and repository exclusion URLs can be specified as prefixes, with the wildcard character `*` at the end of the URL matching any string.

     For example, you might enter `https://gitlab.com/example-dot-com/confidential273` to exclude searchable content from the `confidential273` project.
6. Enable the **Crawl content types** options for the types of content you want to retrieve when you run content crawls.
   The GitLab external content connector supports indexing of searchable content for these content types:

Content type	Searchable content indexed
Issues	Issue description
Wikis	MarkDown content converted to HTML (without attachments)
Merge requests	Merge request description (MarkDown) and discussions
Tags	Tag message
Branches	Commit message of head commit
Commits	Commit message

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Important: The GitLab external content connector doesn't support indexing of searchable content from any of these content types:

- Commit, issue, and wiki discussions
- Commit diffs
- Content from archived groups or projects
- Content from groups or projects in the pending deletion state
- Content from subgroups of top-level groups that aren't owned by the impersonated GitLab.com user
- Content of files attached to issues or merge requests
- Content of wiki attachments in formats other than plain text (.txt)
- Internal or confidential notes in merge request discussions
- Repository files

7. If you included the Branches content type in step 6, use the **Add branches to include in regex format** field and the **Add** button to specify Java regular expression patterns matching the names of branches you want to include in content crawls.
   As an example, you might specify `^2025.*$` to include branches with names that start with 2025, or specify `^.*$` to crawl all branches. To learn about Java regular expression pattern syntax, see the Javadoc for the java.regex.util.Pattern class.

   Note: The branch name expressions *`^main$`* and *`^master$`* are included by default. You can't remove these branches from the list.

8. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.

9. Select **Save and validate**.

Result

The GitLab external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your GitLab source system using your modified crawl settings, create and run a one-time content crawl for your GitLab external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Google Drive external content connector

The Google Drive external content connector retrieves files and attachments from eligible shared drives in your Google Drive source system and makes their content and metadata searchable in AI Search applications.

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Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Drive eligibility

To be eligible for crawling, a shared drive must be accessible by at least one member who is a user in the Directory and who has the Manager role (or is a member of a group with the Manager role). To learn more about the Directory, see https://support.google.com/a/answer/1628009. For details on the Manager role, see https://support.google.com/a/users/answer/12380484.

Delta content crawls

The Google Drive external content connector supports the ability to run delta content crawls in between full content crawls. Unlike full content crawls, delta content crawls only examine, retrieve, and index newly added, changed, or deleted items from your shared drives. By ignoring unchanged items, delta content crawling can significantly reduce the time taken to crawl content from the source system. This means you can refresh your searchable content more often by running delta content crawls between your scheduled full or partial content crawls.

To learn more about delta content crawls, see Delta content crawls for external content connectors. For details on the activation procedure for delta content crawls, see Activate delta content crawling for an external content connector.

Note: Delta content crawls don't replace full content crawls. They're supplemental crawls that enable you to refresh searchable content more frequently in between full content crawls.

Delta content crawls for the Google Drive external content connector have the following limitations.

- Delta content crawls can't detect membership changes for Google Drive shared drives. As a result, user access permissions to files and attachments from your shared drives may be out of sync until the connector completes its next full content crawl.
- If members with the Manager role are removed from shared drives, future delta content crawls may not retrieve changed items from those drives. As a result, searchable content may be out of sync with the source system until the connector completes its next full content crawl.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure Google Drive for external content indexing

Enable the Google Drive and Admin SDK APIs and create a Google Cloud service account to allow the Google Drive external content connector to crawl eligible shared drives and security principals in your Google Drive source system.

Before you begin

You need super administrator credentials for your organization's Google Cloud and Google Admin consoles. To learn about super administrator accounts, see the Prebuilt administrator roles and Super administrator account best practices Google resources.

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Role required: none

About this task

The Google Drive external content connector retrieves content from your Google Drive source system using APIs and a service account configured in the Google Cloud console. The connector also relies on domain-wide delegation for the service account, which is configured in the Google Admin console.

Your connector administrator can use settings copied from the Google Cloud console to configure the Google Drive external content connector for proper connection to your Google Drive source system.

Procedure

1. Enable the Google Drive and Admin SDK APIs for your selected project.
   a. Log in to the Google Cloud console at https://console.cloud.google.com/.
   b. If necessary, select the displayed project name to open the **Select a project** dialog box, then select the appropriate project for your organization's Google Drive content.
   The console displays the selected project's name.
   c. Locate and select the **APIs & Services** menu item.
   If this menu item is not visible on the Google Cloud page, enter `APIs & Services` in the search field and select the **APIs & Services** search result.
   d. On the APIs & Services page, select **Enable APIs and Services**.
   e. Locate and select the **Google Drive API** tile, then select **Enable**.
   The API appears in the Enabled APIs & services listing for your project.
   f. Repeat steps 1.c through 1.e, but this time locate, select, and enable the **Admin SDK API**.
2. Create a new Google Cloud service account for your selected project.
   a. In the Google Cloud console, locate and select the **IAM & Admin** > **Service Accounts** menu item.
   If this menu item is not visible on the Google Cloud page, enter `Service Accounts` in the search field and select the **Service Accounts** search result.
   b. On the Service accounts page, select **Create Service Account**.
   c. Enter a display name, an account ID, and a description for the service account, then select **Create and Continue**.
   d. Select **Done**.
   The service account appears in the Service Accounts listing for your project.
3. Add a private key to your new Google Cloud service account.

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a. In the Google Cloud console, on the Service Accounts page, select the email address for the service account.

b. In the service account editor, select the **Keys** section header.

c. Select **Add key**, then select **Create new key**.

d. In the Create private key dialog box, select the JSON key type, then select **Create**.

e. When prompted, download the JSON-format private key file to a secure location.

> **Important:** Your connector administrator needs the JSON-format private key file to configure a Google Drive external content connector.

f. Select **Close**.

4. Activate domain-wide delegation in Google Admin for your new Google Cloud service account.

a. In the Google Cloud console, on the Service Accounts page, copy and record the OAuth 2 Client ID value for your new service account.

b. Log in to the Google Admin console at https://admin.google.com/.

c. Navigate to **Security** > **Access and data control** > **API controls**.

d. Select **Manage domain wide delegation**.

e. In the API clients list, select **Add new**.

f. In the **Client ID** field, enter the service account's OAuth 2 Client ID that you copied in step 4.a.

g. In the **OAuth scopes** field, enter `https://www.googleapis.com/auth/drive.readonly, https://www.googleapis.com/auth/admin.directory.user.readonly, https://www.googleapis.com/auth/admin.directory.group.readonly`.
This field's value is a single comma-separated string, not multiple strings.

h. Select **Authorize**.

What to do next

Provide the following items to your connector administrator:

- Your Google Workspace domain name, in the format `example.com`. You can find your domain name by navigating to the https://admin.google.com/ac/domains/manage Google administration page.
- The email address for a user account that has permission to access your Google Workspace domain's user directory. The Google Drive external content connector uses this account to enumerate users and groups of the domain.

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Note: This should be an email address from your organization's domain, not a service account email address from the `iam.gserviceaccount.com` domain.

- The JSON private key file for the Google Cloud service account that you downloaded in step 3.e.

Your connector administrator needs these items to configure a Google Drive external content connector to retrieve searchable content and security principals from your Google Drive instance.

For details on creating and configuring a Google Drive external content connector, see Create a Google Drive external content connector.

Create a Google Drive external content connector

Create an external content connector to retrieve searchable content and security principals from your Google Drive source system.

Before you begin

A source system administrator must have already configured your Google Drive source system to allow access by the Google Drive external content connector. For the required source system configuration steps, see Configure Google Drive for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Google Drive* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Google Drive external content connector.
Workspace domain	Google Workspace domain for your source system, in this format: `https://workspace.example.com`. The Google Drive external content connector crawls eligible shared drives found in this domain. **Note:** The Google Drive external content connector only crawls eligible shared drives from your source system. It doesn't crawl user drives from your source system.
Service account email	Email address for a user account that has permission to access your Google Workspace domain's user directory. The Google Drive external content connector uses this account to enumerate users and groups of the domain. As an example, you might enter `google.service.account@example.com`.

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Connection setting	Description
	If you don't know the email address to use, ask your Google administrator for it.
Service account JSON file	JSON-format private key file for the service account configured in Google Cloud for the Google Drive external content connector. If you don't have this JSON file, ask your Google administrator for it.

6. Save your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection setting entries fails, the system shows an error message. Verify your connection settings to ensure they're correct.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Google Drive external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

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- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Google Drive external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Google Drive external content connector

Specify the shared drives you want your Google Drive external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Google Drive external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Google Drive external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Google Drive external content connector crawls all eligible shared drives from its specified source system and sends documents with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the eligible shared drives to crawl when running content crawls

> **Note:** To be eligible for crawling, a shared drive must be accessible by at least one member who is a user in the Directory and who has the Manager role (or is a member of a group with the Manager role). To learn more about the Directory, see https://support.google.com/a/answer/1628009. For details on the Manager role, see https://support.google.com/a/users/answer/12380484.

- Inclusion or exclusion filters for the attachment file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Google Drive external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Content filtering** options:
   - To crawl all eligible shared drives from the source system, select **Crawl all content**.
   - To crawl only a specified set of eligible shared drives from the source system, select **Include only these drives**, then use the **Add URL** field and **Add** button to enter URLs for shared drives that you want to include in the crawl.

     For example, you might enter `https://drive.google.com/drive/folders/1YKEQjtCzxiS7Uf9PVA` to include only searchable content from the specified shared drive.
   - To crawl all except a specified set of eligible shared drives from the source system, select **Exclude only these drives**, then use the **Add URL** field and **Add** button to enter URLs for shared drives that you want to exclude from the crawl.

     For example, you might enter `https://drive.google.com/drive/folders/X5pOsb29NYITGMZMGEq` to exclude searchable content from the specified shared drive.
5. Select one of the following **Attachment filtering** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

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As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.

- To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

  As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.

6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save**.

Result

The Google Drive external content connector is updated with your crawl scope and file extension filter settings.

What to do next

To retrieve content from your Google Drive source system using your modified crawl settings, create and run a one-time content crawl for your Google Drive external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Filter content by label for a Google Drive external content connector

Configure a label filter for your Google Drive external content connector. The connector only retrieves content that has one or more of your specified label values applied.

Before you begin

Role required: admin

About this task

The Google Drive external content connector supports the use of labels to filter retrieved content. You can specify a list of label value IDs for your Google Drive connectors to check for during content crawls. The connectors only retrieve content items that have one or more of your specified label values applied.

Note: This task is optional. If you don't specify a list of label value IDs, your Google Drive connectors ignore labels when retrieving content items.

To learn more about labels and their IDs and values in Google Drive, see the Labels overview Google developer guide.

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Procedure

1. Navigate to the External Content Connector Configuration Tables [sn_ext_conn_base_connector_configuration] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sn_ext_conn_base_connector_configuration.list`.
   c. Press Enter.
2. If the Advanced Configuration field doesn't appear in the list view, add it to the list view.
   a. Select the Personalize List icon.
   b. In the Personalize List Columns dialog box, find the Advanced Configuration field in the Available list and use the Add icon to move it to the Selected list.
   c. Select **OK**.
3. Use the list editor to add the *`google_drive_label_include_filter`* property to the Advanced Configuration field value.
   To learn more about the list editor, see Use the list editor.
   a. Double-click or long-press (or use the keyboard shortcut) to open the Advanced Configuration field value.
   The list editor pane opens and displays the current field value.
   b. In the Advanced Configuration JSON object literal, add this new JSON property.

```
"google_drive_label_include_filter" : [ "label_id_1" ]
```

   c. Inside the brackets for the new JSON property's array value, replace the placeholder `"label_id_1"` string with a comma-separated list of label value IDs that you want Google Drive external connectors to use as filters when retrieving content.
   As an example, you might replace `"label_id_1"` as follows to filter on three label values with the specified IDs:

```
"google_drive_label_include_filter" : [
    "0Nlvb5ey59iFqWKEF8r8JjE2TykSaYY87y8RNNEbbFcb",
    "EmOll66ZEgwlbZH2iDvPTbAQ4lGEETKf363RNNEbbFcb",
    "LXpSpR3Tedghc59mo8hE3MiWsG4Xxqi2bzeSNNEbbFcb"
]
```

   With this JSON property specified, your Google Drive connectors only retrieve content items that have at least one of the three specified label values applied.

   Note: To find the ID for a Google Drive label value, edit the label value in Google Drive. The label value's ID appears in the **Label details** section of the **Preview** pane on the editor page. For details on editing labels in Google Drive, see the Edit and monitor classification labels for your organization Google Workspace Help resource.

   d. Select the Save icon or press Enter.
   The list editor pane closes and the field value is updated with your changes.

Result

When you run content crawls for your Google Drive external content connectors, the connectors only retrieve content items that have one or more of your specified label values applied.

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HubSpot external content connector

The HubSpot external content connector retrieves tickets and notes from your HubSpot source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Note: The HubSpot API provides only limited information about document permissions. As a result, the external content connector may reindex a significant number of crawled documents when you add or remove HubSpot users or members of HubSpot groups. In extreme cases, adding a single user or updating membership for a single group can trigger an update of all crawled HubSpot documents in the AI Search index.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure HubSpot for external content indexing

Create and authorize a legacy public app in HubSpot to allow the HubSpot external content connector to access your HubSpot source system.

Before you begin

You need a HubSpot developer account. For details on developer accounts, see https://developers.hubspot.com/docs/getting-started/account-types.

Role required: none

About this task

The HubSpot external content connector retrieves tickets and notes from your HubSpot source system using the HubSpot API.

To allow the connector to access your HubSpot source system via the HubSpot API, you must configure and authorize a legacy public app in HubSpot. Your connector administrator can use settings copied from the public app to configure the HubSpot external connector for proper connection to your source system.

Procedure

1. In HubSpot, begin creating a new legacy public app for the HubSpot external content connector.

   a. Navigate to https://app-na2.hubspot.com/ (or your HubSpot URL, if different) and log in with your credentials.

   b. In the menu, select **Development**.

   c. In the Development menu, select **Legacy Apps**.

   d. On the Legacy Apps screen, select **Create**.

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e. In the Create Legacy App dialog box, select **Public**.
You're taken to the Basic Info screen for your new draft legacy public app.

2. Configure required settings for your new legacy public app.

a. In the Public app name field, enter a name for your new legacy public app.
As an example, you might enter `HubSpot external content connector`.

b. Navigate to the **Auth** tab.

c. In the Redirect URLs section, enter `https://<instance-name>.service-now.com/oauth_redirect.do`, replacing `<instance-name>` with the name of your ServiceNow AI Platform® instance.

d. In the Scopes section, select **Add new scope**.

e. On the Add new scope form, select each of the following scopes as Required, then select **Update**.

- crm.objects.companies.read
- crm.objects.users.read
- files
- tickets

Note: The oauth scope is automatically selected as Required.

f. Select **Create app**.

The new legacy public app is created and you're taken to its Basic Info screen.

3. Copy the client ID and client secret for your new legacy public app.

a. Navigate to the **Auth** tab.

b. Copy the client ID for your new legacy public app and store it in a secure location.

Important: Your external content connector administrator needs this client ID when configuring the HubSpot external content connector.

c. Reveal the client secret by selecting **Show**.

d. Copy the client secret for your new legacy public app and store it in a secure location.

Important: Your external content connector administrator needs this client secret when configuring the HubSpot external content connector.

What to do next

Provide the following items to your connector administrator:

- The client ID that you copied in step 3.b.
- The client secret that you copied in step 3.d.

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Your connector administrator needs these items to configure a HubSpot external content connector to retrieve tickets, notes, and security principals from your HubSpot source system.

For details on creating and configuring a HubSpot external content connector, see Create a HubSpot external content connector.

Create a HubSpot external content connector

Create an external content connector to retrieve searchable content and security principals from your HubSpot source system.

Before you begin

A source system administrator must have already configured your HubSpot source system to allow access by the HubSpot external content connector. For the required source system configuration steps, see Configure HubSpot for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *HubSpot* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this HubSpot external content connector.
Client ID	Client ID for the legacy public app configured in your HubSpot source system that grants the connector access to your content. If you don't have the client ID, ask your HubSpot administrator for it.
Client Secret	Client secret for the legacy public app configured in your HubSpot source system that grants the connector access to your content. If you don't have the client secret, ask your HubSpot administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

> **Note:** If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.

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If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a HubSpot external content connector.

9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a HubSpot external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

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You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a HubSpot external content connector

Specify the tickets you want your HubSpot external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the HubSpot external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a HubSpot external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the HubSpot external content connector crawls all tickets from its specified source system and sends all content, and binary attachment files with all supported file extensions, to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the tickets to crawl when running content crawls
- Inclusion or exclusion filters for the binary attachment file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

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Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the HubSpot external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Tickets** options:
   - To crawl all tickets from the source system, select **Crawl all tickets**.
   - To crawl only tickets that have been modified in the last three months, select **Modified last 3 months**.
   - To crawl only tickets that have been modified in the last six months, select **Modified last 6 months**.
   - To crawl only tickets that have been modified in the last year, select **Modified last year**.
5. Select one of the following **Attachments** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

   For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save and validate**.

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Result
The HubSpot external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your HubSpot source system using your modified crawl settings, create and run a one-time content crawl for your HubSpot external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Lucidchart external content connector

The Lucidchart external content connector retrieves documents from folders in your Lucidchart source system and makes their text content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

- Create a content crawl for an external content connector
- Create a user permission crawl for an external content connector

Configure Lucidchart for external content indexing

Create and authorize an OAuth 2.0 application in the Lucid developer tools and enable the SCIM API in the Lucid admin tools to allow the Lucidchart external content connector to access your Lucidchart content.

Before you begin
You must have an Enterprise subscription for Lucidchart, with the System for Cross-domain Identity Management (SCIM) feature enabled for your account. To learn more about enabling SCIM for your account, see the Lucid SCIM API reference at https://lucid.readme.io/reference/overview-scim.

You need admin privileges for the Lucid developer tools (https://lucid.app/developer) and the Lucid admin tools (https://admin.lucid.app/).

The connector administrator who will create your Lucidchart external content connectors needs an account in your organization's Lucidchart instance so that they can be assigned application collaborator roles for applications you create. Their account needs to have access to all of your Lucidchart content that you want the connector to be able to crawl or retrieve.

Role required: none

About this task
The Lucidchart external content connector retrieves searchable content from documents in your Lucidchart source system using the Lucid SCIM API.

To allow the connector to access your Lucidchart source system via the SCIM API, you must configure and authorize an OAuth 2.0 application in the Lucid developer tools and generate a SCIM bearer token in the Lucid admin tools. Your connector administrator needs the OAuth 2.0 application's client settings and the SCIM bearer token to configure the Lucidchart external connector for proper connection to your source system.

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Procedure

1. Use the Lucid developer tools to create a new application for the Lucidchart external content connector.

   a. Navigate to https://lucid.app/developer and log in with admin credentials.

   b. Select **Create Application**.

   c. Enter a name for your new application.
   As an example, you might enter `Lucidchart external content connector`.

   d. Select **Create**.

   The General settings tab for your new application appears.

2. Invite your connector administrator to be a collaborator on your new application.

   Note: You can skip this step if you're the connector administrator who will create your Lucidchart external content connectors on your ServiceNow AI Platform instance. As the creator of the application, you're automatically added to it as an application collaborator with the **Owner** role.

   a. In the Collaborators section, select **Invite**.

   b. In the Invite application collaborator modal window, enter the email address for the connector administrator who will create your Lucidchart external content connectors.

   c. Select the **Tester** role for the invited application collaborator.

   d. Select **Invite**.

   e. Repeat these steps for each additional connector administrator you need to invite to be an application collaborator.

3. Create an OAuth 2.0 client in your new application.

   a. Navigate to **OAuth 2.0**.

   b. In the Create custom OAuth 2.0 client field, enter a name for your new OAuth 2.0 client.
   As an example, you might enter `Lucidchart external content connector OAuth 2.0 client`

   c. Select **Create OAuth 2.0 client**.
   The details for your new OAuth 2.0 client appear.

   d. Select the Copy icon to copy the **Client ID** value for your new OAuth 2.0 client, then record the value in a secure location.

   Important: Your external content connector administrator needs this client ID value when configuring the Lucidchart external content connector.

   e. Select the Copy icon to copy the **Client Secret** value for your new OAuth 2.0 client, then record the value in a secure location.

   Important: Your external content connector administrator needs this client secret value when configuring the Lucidchart external content connector.

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f. In the Authorized Redirect URIs section, select **Add Redirect URI**.

g. Enter `https://<instance-name>.service-now.com/oauth_redirect.do` as the callback URI, replacing `<instance-name>` with your ServiceNow AI Platform® instance name, then select **Add**.

4. Generate a SCIM bearer token that you can use to authenticate requests to the Lucid SCIM API.

a. Navigate to https://admin.lucid.app/ and log in with admin credentials.

b. Navigate to **App integration** > **General**.

c. In the Enabled integrations section, find the SCIM integration and select its **Settings** link.

Note: If the SCIM integration doesn't appear in the Enabled integrations section, ask Lucid support to enable SCIM for your account.

The SCIM integration settings screen appears.

d. In the SCIM setup subsection's IdP configuration section, select **Generate token**.

Note: If the link shows **Regenerate token** instead of **Generate token**, your account already has a SCIM bearer token generated. Skip to the next step.

e. Select the Copy icon to copy the **Bearer Token** value, then record the copied value in a secure location.

Important: Your external content connector administrator needs this SCIM bearer token value when configuring the Lucidchart external content connector.

What to do next

Provide the following items to your connector administrator:

- The OAuth 2.0 client ID that you copied in step 3.d.
- The OAuth 2.0 client secret that you copied in step 3.e.
- The SCIM bearer token that you copied in step 4.e.

Your connector administrator needs these items to configure a Lucidchart external content connector to retrieve documents, folders, and security principals from your Lucidchart source system.

Important: If you invited any connector administrators to be application collaborators in step 2, make sure they've accepted their invitations. Without the application collaborator role, they won't be able to create a Lucidchart external content connector.

For details on creating and configuring a Lucidchart external content connector, see Create a Lucidchart external content connector.

Create a Lucidchart external content connector

Create an external content connector to retrieve searchable content and security principals from your Lucidchart source system.

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Before you begin

A source system administrator must have already configured your Lucidchart source system to allow access by the Lucidchart external content connector. For the required source system configuration steps, see Configure Lucidchart for external content indexing.

You must be an application collaborator with the Owner or Tester role on the new OAuth 2.0 application that grants the connector access to your Lucidchart content. If you're not sure whether you have this application collaborator role for the application, check with your Lucid administrator.

Important: The Lucidchart external content connector can only access searchable content and metadata from documents and folders that your Lucid account has access to when you create the connector. Work with your Lucid administrator to make sure your Lucid account has access to all documents and folders that you want the connector to be able to crawl and retrieve.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Lucidchart* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Lucidchart external content connector.
Admin Key/ SCIM Token	System for Cross-domain Identity Management (SCIM) bearer token generated for your Lucid account. If you don't have this SCIM bearer token, ask your Lucid administrator for it.
Client ID	Client ID for the OAuth 2.0 client application that grants the connector access to your Lucidchart source system. If you don't have this client ID, ask your Lucid administrator for it.
Client Secret	Client secret for the OAuth 2.0 client application that grants the connector access to your Lucidchart source system. If you don't have this client secret, ask your Lucid administrator for it.

6. Save and validate your connection settings.
   a. Select **Validate Connection**.
   You're redirected to Lucid to approve a request for access to your Lucid user account by the new OAuth 2.0 application that grants the connector access to your organization's Lucidchart content.

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b. On the connection request page, select **Grant Access**.
You're redirected back to the connector creation page.

Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Lucidchart external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Lucidchart external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

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To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Lucidchart external content connector

Specify the folders you want your Lucidchart external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Lucidchart external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Lucidchart external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Lucidchart external content connector crawls all folders from its specified source system and sends documents with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the folders to crawl when running content crawls
- Inclusion or exclusion filters for the file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Lucidchart external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Date** options:
   - To retrieve content from documents that were published in the last year, select **Published last year**.
   - To retrieve content from documents that were published in the last quarter, select **Published last quarter**.
   - To retrieve content from documents that were published in the last month, select **Published last month**.
   - To retrieve content from documents that were published in the last week, select **Published last week**.
5. Select one of the following **Folders** options:
   - To crawl all folders encountered on the source system, select **Crawl all folders**.
   - To crawl only a specified set of folders encountered on the source system, select **Include only these folders**, then use the **Add folder name or ID to include** field and **Add** button to enter names or IDs for folders you want the connector to include when crawling.

     As an example, you might enter `MarketingFolder` to only retrieve searchable content from documents in folders with the specified name or ID.

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- To crawl all but a specified set of folders encountered on the source system, select **Exclude only these folders**, then use the **Add folder name or ID to exclude** field and **Add** button to enter names or IDs for folders you want the connector to exclude when crawling.

  As an example, you might enter `DraftFolder` to exclude searchable content from documents in folders with the specified name or ID.

6. Select one of the following **Documents** options:
   - To crawl all documents from the source system, select **Crawl all documents**.
   - To crawl only a specified set of documents from the source system, select **Include only these documents**, then use the **Add document name or ID to include** field and **Add** button to enter names or IDs for documents you want the connector to include in retrieval.

     As an example, you might enter `release_document` to only retrieve searchable content from documents with the specified name or ID.

   - To crawl all but a specified set of documents from the source system, select **Exclude only these documents**, then use the **Add document name or ID to exclude** field and **Add** button to enter names or IDs for documents you want the connector to exclude from retrieval.

     As an example, you might enter `DraftFolder2` to exclude searchable content from documents with the specified name or ID.

7. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
8. Select **Save and validate**.

Result
The Lucidchart external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your Lucidchart source system using your modified crawl settings, create and run a one-time content crawl for your Lucidchart external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

ManageEngine external content connector

The ManageEngine external content connector retrieves public-domain knowledge articles from knowledge bases in your ManageEngine source system and makes their content and metadata searchable in AI Search applications.

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Connector administrators can run or schedule content crawls to update searchable content and metadata from your source system. Content crawls feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure ManageEngine for external content indexing

Create a server-based OAuth 2.0 client application in the Zoho API console to allow the ManageEngine external content connector to access your ManageEngine source system.

Before you begin

You need the following permissions in your ManageEngine instance:

- Administrator or privileged access
- API access
- Read-only access to knowledge base articles and their attachments

Role required: none

About this task

The ManageEngine external content connector retrieves public-domain knowledge articles from knowledge bases in your ManageEngine source system using the ManageEngine REST API.

To allow the connector to access your ManageEngine content via the REST API, you must create a server-based OAuth 2.0 client application in the Zoho API console. Your connector administrator can use the ID and secret from this client application to configure the ManageEngine external connector for proper connection to your source system.

Procedure

1. Navigate to the Zoho API console at https://api-console.zoho.com/ and log in with Administrator or privileged credentials when prompted.
2. Create a new server-based OAuth 2.0 client application.

   a. Select **Get Started** or **Add Client**.
   The **Get Started** link appears if you haven't added any client applications. If you've previously added one or more client applications, the **Add Client** link appears instead.

   b. On the Choose a Client Type page, select **Server-based Applications**.

   c. On the Create New Client page, fill in the fields.

Field	Value
Client Name	Enter a unique name for your OAuth 2.0 client application.
Homepage URL	Enter `https://<instance-name>.service-now.com/`, where

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Field	Value
	`<instance-name>` is the hostname of your ServiceNow AI Platform® instance.
Authorized Redirect URIs	Enter `https://<instance-name>.service-now.com/oauth_redirect.do`, where `<instance-name>` is the hostname of your ServiceNow AI Platform® instance.

d. Select **Create**.

The API console displays your new server-based OAuth 2.0 client application.

3. Record the client ID and client secret for your new server-based OAuth 2.0 client application.

a. Select your new server-based OAuth 2.0 client application from the client list.

b. Navigate to the application's **Client Secret** page.

c. Copy the application's **Client ID** and store it in a secure location.

> **Important:** Your external content connector administrator needs this client ID when configuring the ManageEngine external content connector.

d. Copy the application's **Client Secret** and store it in a secure location.

> **Important:** Your external content connector administrator needs this client secret when configuring the ManageEngine external content connector.

What to do next

Provide the following items to your connector administrator:

- The URL for your ManageEngine instance.
- The client ID that you copied in step 3.c.
- The client secret that you copied in step 3.d.

Your connector administrator needs these items to configure a ManageEngine external content connector to retrieve public-domain knowledge articles from your ManageEngine source system.

For details on creating and configuring a ManageEngine external content connector, see Create a ManageEngine external content connector.

Create a ManageEngine external content connector

Create an external content connector to retrieve searchable content from your ManageEngine source system.

Before you begin

A source system administrator must have already configured your ManageEngine source system to allow access by the ManageEngine external content connector. For the required source system configuration steps, see Configure ManageEngine for external content indexing.

Role required: sn_ext_conn.xcc_admin

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Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *ManageEngine* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this ManageEngine external content connector.
Portal URL	URL for your ManageEngine instance. This is typically `https://<organization>.manageengine.com`, where `<organization>` is the name of your organization. If you don't have the portal URL, ask your ManageEngine administrator for it.
Client ID	Client ID for the server-based OAuth 2.0 client application that grants the connector access to your ManageEngine instance. If you don't have the client ID for this application, ask your ManageEngine administrator for it.
Client Secret	Client secret for the server-based OAuth 2.0 client application that grants the connector access to your ManageEngine instance. If you don't have the client secret for this application, ask your ManageEngine administrator for it.

6. Save and validate your connection settings.
   a. Select **Validate Connection**.
   A Zoho Accounts window reports that the server-based OAuth 2.0 client application is requesting access to information from your ManageEngine instance.
   b. In the Zoho Accounts window, select the option to allow the OAuth 2.0 client application to access your Zoho account information, then select **Accept**.
   You're redirected to the connector creation page for connection setting validation.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.

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If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a ManageEngine external content connector.

9. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
10. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content with your new connector, you must configure and run content crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a ManageEngine external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a ManageEngine external content connector

Delimit the set of knowledge articles you want your ManageEngine external content connector to retrieve. Define inclusion or exclusion filters to specify which articles the crawl retrieves and feeds to AI Search for indexing.

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Before you begin

A connector administrator must have already created the ManageEngine external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a ManageEngine external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the ManageEngine external content connector crawls all knowledge bases from its specified source system and sends all public-domain knowledge articles and attachment binary files with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Filter knowledge articles by ID, author, modification date, or category when running content crawls
- Filter attachment binary files by extension when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the ManageEngine external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. In the **Articles** section, select one of the following article options:
   - To retrieve all knowledge articles found while crawling, select **Crawl all articles**.
   - To retrieve only a specified set of knowledge articles, select **Include only these articles**, then use the **Add article URL or ID to include** field and **Add** button to enter URLs or IDs for knowledge articles that you want the connector to include when crawling.

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As an example, you might enter `IT FAQ 2026` and `Troubleshooting` to retrieve only knowledge articles with the specified IDs.

- To retrieve all but a specified set of knowledge articles, select **Exclude only these articles**, then use the **Add article URL or ID to exclude** field and **Add** button to enter URLs or IDs for knowledge articles that you want the connector to exclude when crawling.

  As an example, you might enter `hfuzf762gh173` to exclude the knowledge article with the specified ID.

Note: Article URLs and IDs can be specified as prefixes, with the wildcard character `*` at the end of the URL or ID matching any string. As an example, specifying article ID `Troubleshoot*` includes or excludes articles with IDs `Troubleshooting` and `Troubleshooting guide`.

5. In the **Articles** section, select one of the following author options:
   - To retrieve knowledge articles from all authors, select **Crawl all authors**.
   - To retrieve only knowledge articles from a specified set of authors, select **Include only these authors**, then use the **Add author name to include** field and **Add** button to enter names for authors whose knowledge articles you want the connector to include when crawling.

     As an example, you might enter `Abel Tuter` and `Beth Anglin` to retrieve only knowledge articles by the specified authors.
   - To retrieve knowledge articles from all but a specified set of authors, select **Exclude only these authors**, then use the **Add author name to exclude** field and **Add** button to enter names for authors whose knowledge articles you want the connector to exclude when crawling.

     As an example, you might enter `Test user` to exclude knowledge articles from the specified author.
6. In the **Articles** section, select one of the following modification date options:
   - To retrieve knowledge articles modified within the last year, select **Modified last year**.
   - To retrieve knowledge articles modified within the last quarter, select **Modified last quarter**.
   - To retrieve knowledge articles modified within the last month, select **Modified last month**.
   - To retrieve knowledge articles modified within the last week, select **Modified last week**.
7. In the **Articles** section, select one of the following category options:
   - To retrieve knowledge articles from all categories, select **Crawl all categories**.
   - To retrieve only knowledge articles from a specified set of categories, select **Include only these categories**, then use the **Add category name to include** field and **Add** button to enter names for categories you want the connector to include when crawling.

     As an example, you might enter `Guide` and `Wiki` to only retrieve knowledge articles in the specified categories.

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- To retrieve knowledge articles from all but a specified set of categories, select **Exclude only these categories**, then use the **Add category name to exclude** field and **Add** button to enter names for categories you want the connector to exclude when crawling.

  As an example, you might enter `Confidential` to exclude knowledge articles from this category.

8. Select one of the following **Attachments** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

   For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
9. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
10. Select **Save and validate**.

Result

The ManageEngine external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your ManageEngine source system using your modified crawl settings, create and run a one-time content crawl for your ManageEngine external content connector.
To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

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Microsoft OneDrive external content connector

The Microsoft OneDrive external content connector retrieves files from individual drives in your Microsoft OneDrive source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

- Create a content crawl for an external content connector
- Create a user permission crawl for an external content connector

Create a public/private key pair for the Microsoft OneDrive external content connector

Generate a public/private key pair for the Microsoft OneDrive external content connector. Extract the public key as a DER-encoded binary X.509 format certificate for use in configuring API access for the connector in the Microsoft Entra admin center.

Before you begin

You must have access to the Java keytool utility. For details on the keytool utility, see https://docs.oracle.com/en/java/javase/21/docs/specs/man/keytool.html.

Role required: none

About this task

The Microsoft OneDrive external content connector uses a public/private key pair to authenticate with an OAuth 2.0 app configured in the Microsoft Entra admin center. Key pair authentication allows the connector to access your Microsoft OneDrive data via the Microsoft Graph API.

To configure public/private key pair authentication for the connector, you need to create the following items:

1. A public/private key pair in Java KeyStore (JKS) format.
   - Your connector administrator needs this JKS keystore file and its password when configuring settings for the Microsoft OneDrive external content connector.
   - When the Microsoft OneDrive external content connector runs a crawl, it uses the private key from this JKS keystore file to sign the authentication request it sends to the OAuth 2.0 app defined in the Microsoft Entra admin center.
2. A copy of the public key in DER-encoded binary X.509 certificate format.
   - Your administrator needs to upload this certificate file to the OAuth 2.0 app defined in the Microsoft Entra admin center that grants API access to the Microsoft OneDrive external content connector.
   - When the Microsoft OneDrive external content connector submits its authentication request to the OAuth 2.0 app defined in the Microsoft Entra admin center, the app uses the public key from this uploaded certificate to confirm that the authentication request was signed with the private key.

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Note: If your organization has its own guidelines for generating public/private key pairs, follow those to generate a key pair and a public key certificate in the required formats.

Procedure

1. Generate a public/private key pair in JKS keystore format:

   a. Run this keytool command, replacing `<alias>`, `<jks-file>`, and `<password>` with values of your choice:

   ```
   keytool -genkey -alias <alias> -keyalg RSA -keysize 2048
    -keystore <jks-file>.jks -storepass "<password>" -storetype
    JKS -validity 360
   ```

   As an example, you might specify `ms-onedrive-connector-cert` as the key alias and the JKS repository filename, and enter a password:

   ```
   keytool -genkey -alias ms-onedrive-connector-cert -keyalg
    RSA -keysize 2048 -keystore ms-onedrive-connector-cert.jks
    -storepass "lwmoWTbbT+j+qvdQ" -storetype JKS -validity 360
   ```

   b. When prompted for your first and last name, enter the Common Name (CN) you want for the key pair, then press Enter.
   As an example, you might specify `Microsoft OneDrive external content connector` as the Common Name for the key pair.

   c. At each of the remaining distinguished name prompts, enter the requested information and press Enter.

   d. When prompted to confirm that the distinguished name is correct, enter `yes` and press Enter.

   e. When prompted for a key password, press Enter to use the same password you specified for the keystore file.

   Important: The key must use the same password as the keystore. Record this password in a secure location. Your connector administrator needs this password when configuring the Microsoft OneDrive external content connector.

   The keytool utility generates a new Java KeyStore (.jks) file containing your public/private key pair.

   Important: Ignore the keytool warning message about migrating your keystore to the PKCS12 format. The external content connector only supports the Java KeyStore format.

2. Export your public key in DER-encoded binary X.509 certificate format by running the following keytool command, replacing `<cer-file>` with a filename of your choice and replacing `<alias>`, `<jks-file>`, and `<password>` with the same values you used in step 1:

   ```
   keytool -export -alias <alias> -file <cer-file>.cer -keystore
    <jks-file>.jks -storepass "<password>" -storetype JKS
   ```

   As an example, you might specify `ms-onedrive-connector-cert` as the filename for the DER-encoded binary X.509 format certificate:

   ```
   keytool -export -alias ms-onedrive-connector-cert
    -file ms-onedrive-connector-cert.cer -keystore
   ```

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```
ms-onedrive-connector-cert.jks -storepass "1wmoWTbbT+j+qvdQ"
-storetype JKS
```

The keytool utility exports a copy of your public key as a DER-encoded binary X.509 format certificate file with your chosen filename.

Important: Ignore the keytool warning message about migrating your keystore to the PKCS12 format. The external content connector only supports the Java KeyStore format.

What to do next

Provide both of the files you generated to the admins who configure your Microsoft OneDrive instance and AI Search on your ServiceNow AI Platform® instance, as follows:

File	Description
DER-encoded binary X.509 format public key certificate file	Provide this certificate file to your Microsoft OneDrive administrator. They will need to upload the certificate to the Microsoft Entra admin center when configuring an OAuth 2.0 application for the Microsoft OneDrive external content connector. For more information on configuring an OAuth 2.0 application in the Microsoft Entra admin center for the Microsoft OneDrive external content connector, see Configure Microsoft OneDrive for external content indexing.
JKS keystore file and password	Provide this Java KeyStore file and its password to your ServiceNow AI Platform admins. They will need the file and password when configuring the Microsoft OneDrive external content connector. For details on creating and configuring the Microsoft OneDrive external content connector, see Create a Microsoft OneDrive external content connector.

Configure Microsoft OneDrive for external content indexing

Register an OAuth 2.0 application in the Microsoft Entra admin center to allow the Microsoft OneDrive external content connector to access your Microsoft OneDrive source system.

Before you begin

You need the following credentials and permissions for your organization in the Microsoft Entra admin center:

- Login credentials
- Permission to register an application
- Permission to add API permissions to an application
- Permission to grant admin consent for an application's API permissions
- Permission to upload certificates for an application

You must have created a public/private key pair for the Microsoft OneDrive external content connector and extracted the public key certificate in DER-encoded binary X.509 format. For details on creating the public/private key pair and extracting the public key certificate, see Create a public/private key pair for the Microsoft OneDrive external content connector.

Role required: none

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About this task

The Microsoft OneDrive external content connector retrieves content from your Microsoft OneDrive source system using the Microsoft Graph API.

To enable the connector to access your Microsoft OneDrive source system via this API, you must configure an OAuth 2.0 application in the Microsoft Entra admin center. Your connector administrator can use settings copied from this Microsoft Entra application to configure the Microsoft OneDrive external content connector for proper connection to your Microsoft OneDrive source system.

Procedure

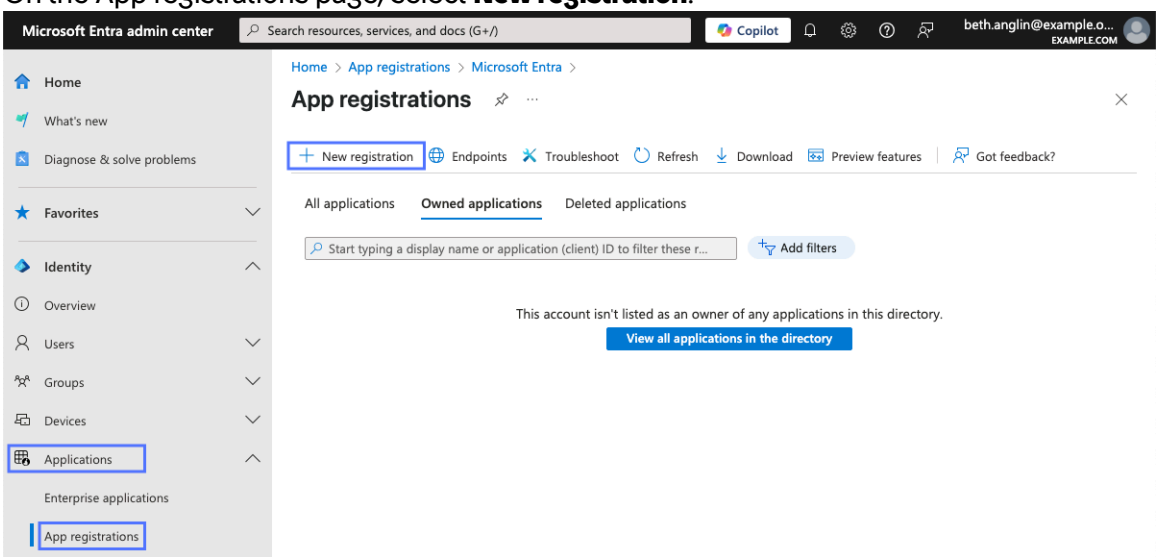
1. Register a new application in the Microsoft Entra admin center.

   a. Log in to the Microsoft Entra admin center at https://entra.microsoft.com/.

   > **Note:** If your Microsoft OneDrive tenant is in the Microsoft 365 GCC or GCC High cloud or the Microsoft 365 DoD cloud, log in at https://entra.microsoft.us/ instead.

   b. Select **Applications** > **App registrations**.

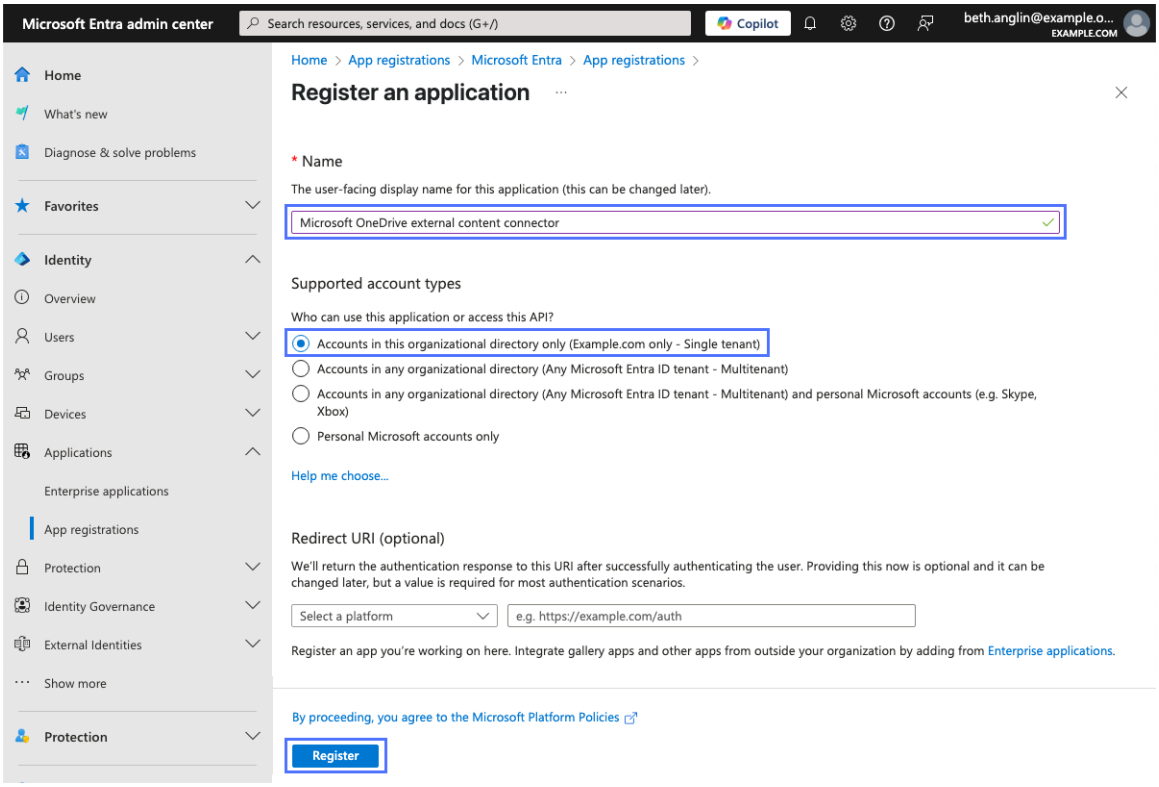
   c. On the App registrations page, select **New registration**.



   d. On the Register an application form, fill in the following fields:

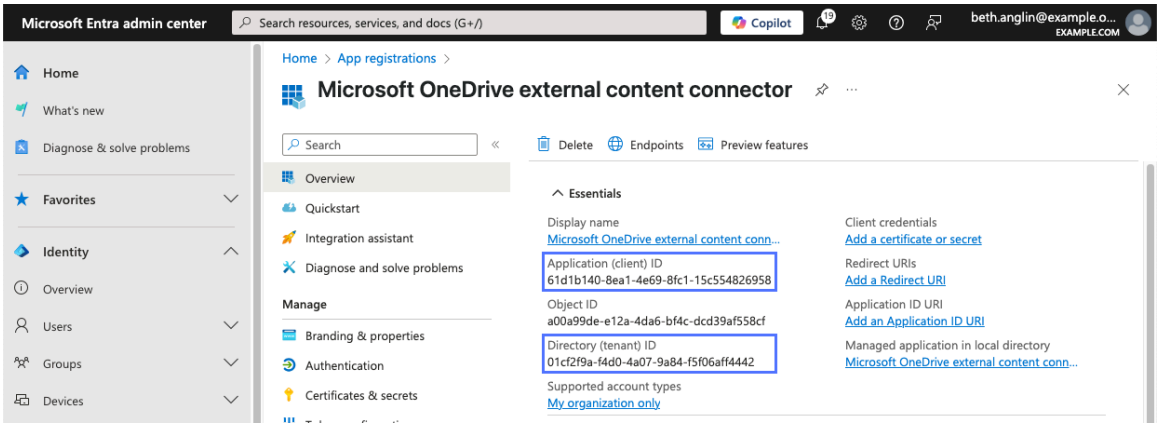
Field	Instructions
Name	Enter a unique name for your OAuth 2.0 application. For example, you might enter `Microsoft OneDrive external content connector`.
Supported account types	Select **Accounts in this organizational directory only (<instance-name> only - Single tenant)**, where `<instance-name>` is the name of your Microsoft Entra instance.
Redirect URI (optional)	Leave this field empty.

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e. Select **Register**.
The new application's Overview page appears.

2. Record the values of the **Application (client) ID** and **Directory (tenant) ID** properties in a secure location.

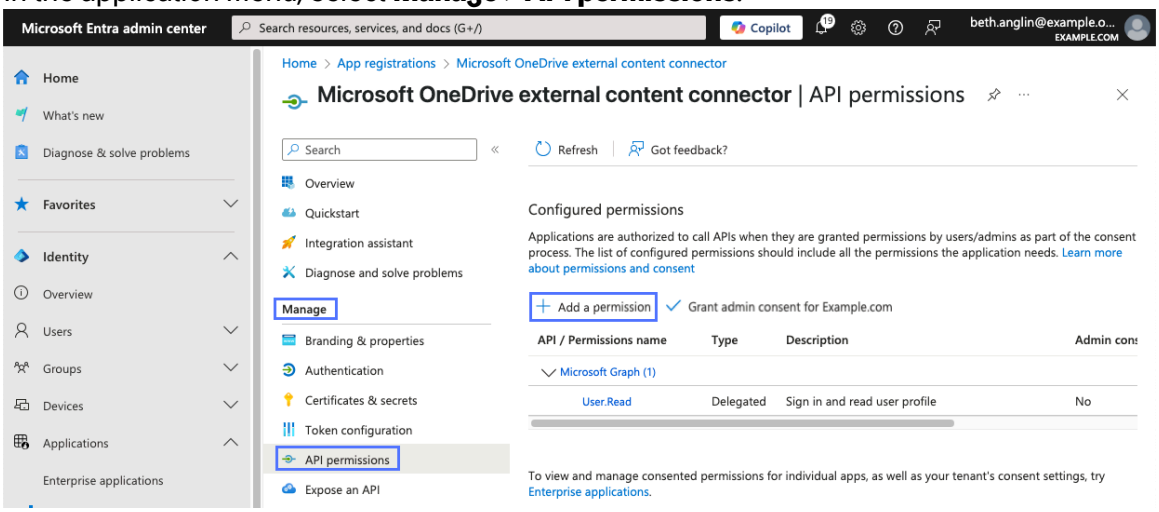


Important: Your connector administrator needs the application's tenant and client IDs to configure a Microsoft OneDrive external content connector.

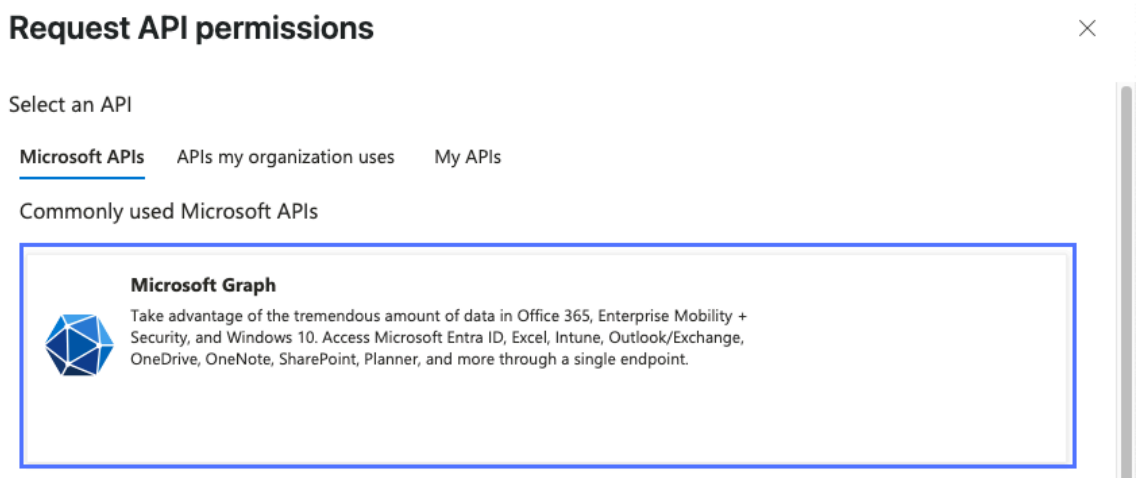
3. Add the API permissions required by the Microsoft OneDrive external content connector.

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a. In the application menu, select **Manage** > **API permissions**.



b. Select **Add a permission**, then select *Microsoft Graph*, then select **Application permissions**.



c. For each of the following permissions, enter the permission name into the **Select permissions** search field, then locate and select the option for the permission.

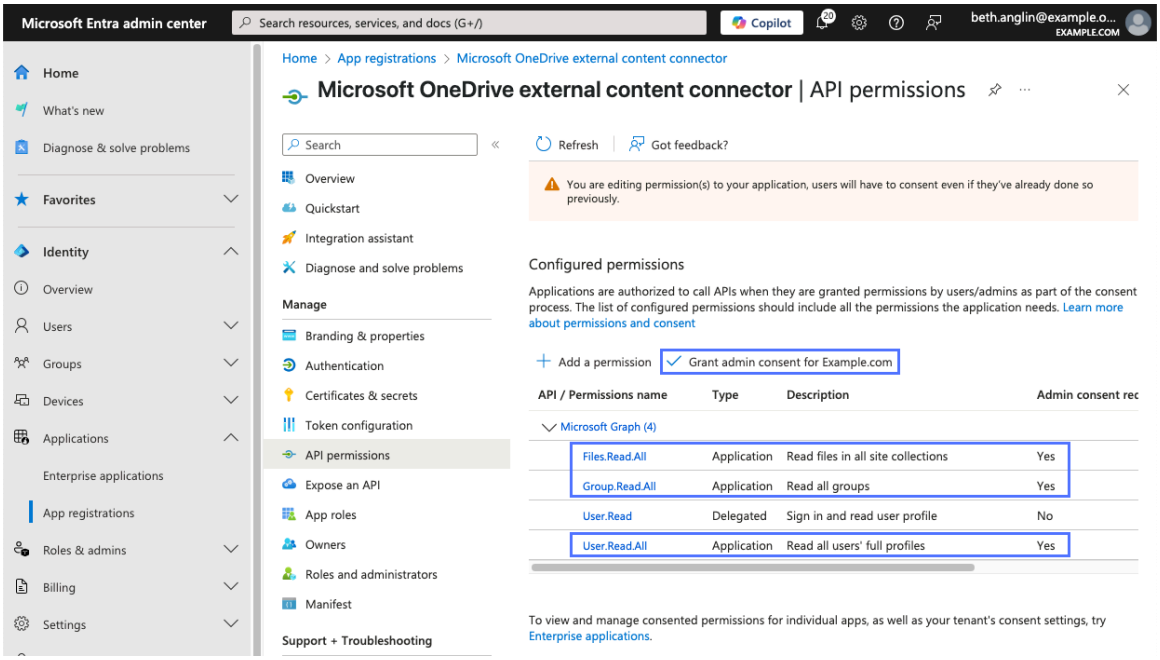
- Files.Read.All
- Group.Read.All or GroupMember.Read.All

  Note: Selecting the Group.Read.All permission improves the connector's crawl speed, but it also gives the connector read access to group chats in your Microsoft OneDrive source system. If you don't want the connector to have read access to your group chats, select the GroupMember.Read.All permission instead.

- User.Read.All

d. Select **Add permissions**.
The new Microsoft Graph permissions appear in the application's Configured permissions list.

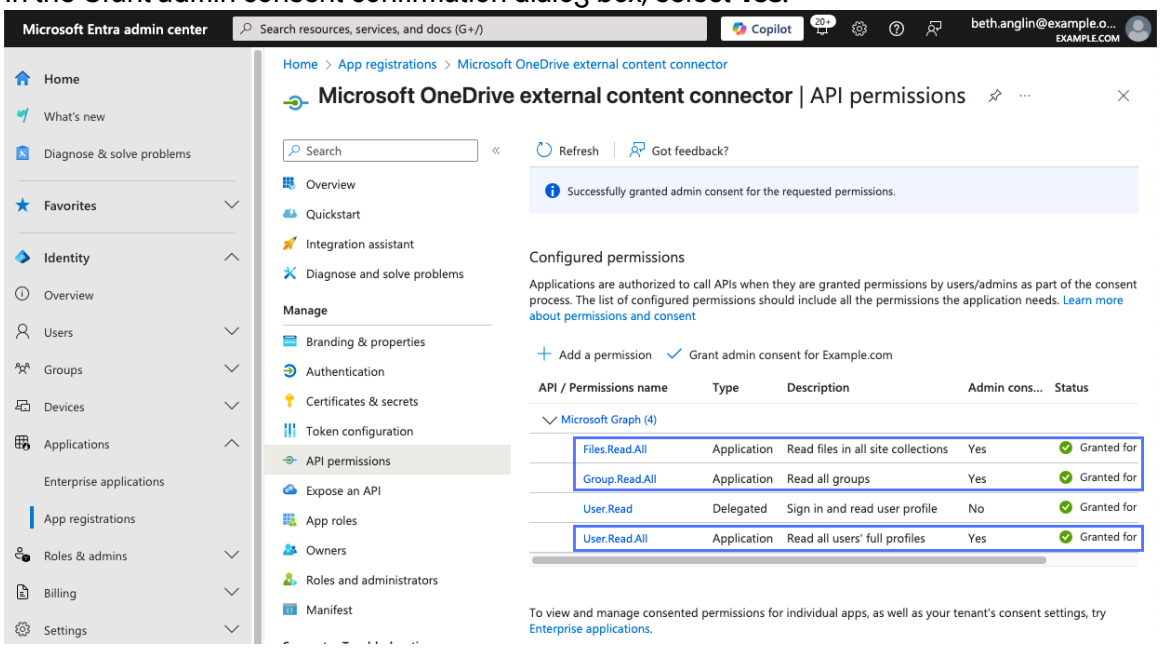
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4. Grant admin consent for the added API permissions.

   a. Select **Grant admin consent for <instance-name>**, where `<instance-name>` is the name of your Microsoft Entra instance.

   b. In the Grant admin consent confirmation dialog box, select **Yes**.



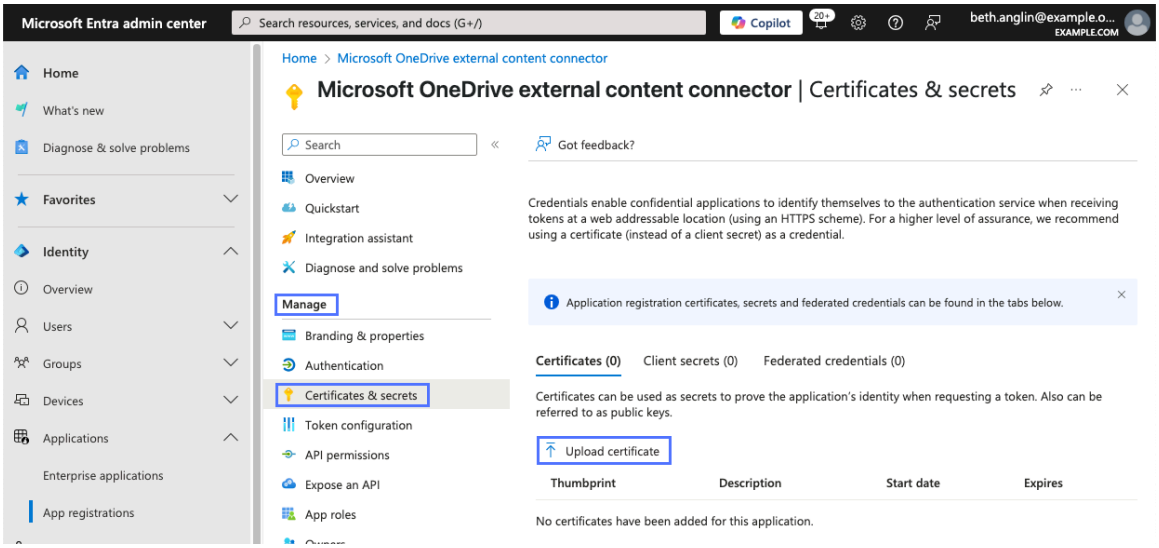
   The status for the added API permissions changes to `Granted for <instance-name>`, where `<instance-name>` is the name of your Microsoft Entra instance.

5. Upload your DER-encoded binary X.509 format public key certificate for the Microsoft OneDrive external content connector.

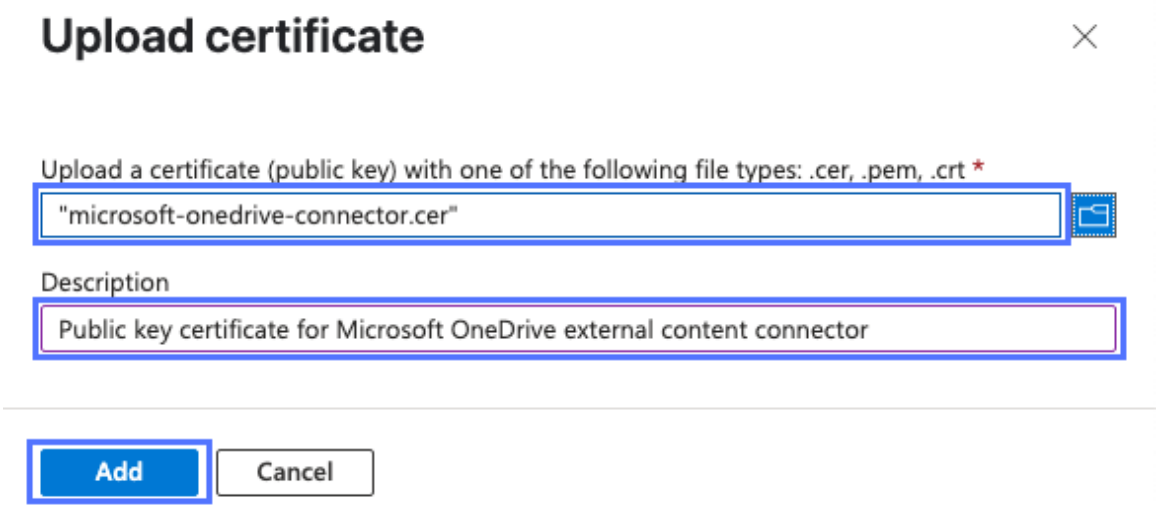
   a. In the Microsoft Entra application menu, select **Manage** > **Certificates & secrets**.

   b. Select **Certificates**, then select **Upload certificate**.

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c. Select **Select a file** and locate your DER-encoded binary X.509 format public key certificate file, then enter a description for it.

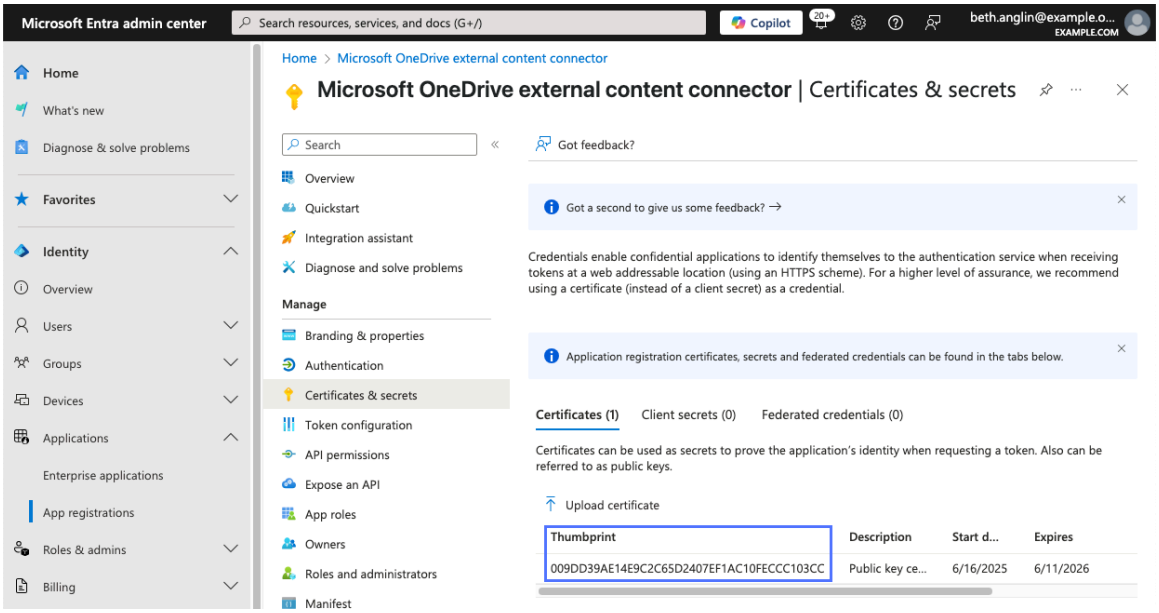


d. Select **Add**.
The DER-encoded binary X.509 format public key certificate appears in the Certificates list.

Note: You can drag the column separators in the Certificates list to view the entire thumbprint SHA1 hash value.

e. Copy the certificate's **Thumbprint** SHA1 hash, shown in hexadecimal format, and record it in a secure location.

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Important: Your connector administrator needs the DER-encoded binary X.509 format public key certificate's SHA1 thumbprint hash to configure the Microsoft OneDrive external content connector.

f. Retain copies of the generated public/private key files and the key password in a secure location.

Note: You can't download the public key certificate or its password from the Microsoft Entra admin center.

What to do next

Provide the following items to your connector administrator:

- The OAuth 2.0 application's tenant ID and client ID that you recorded in step 2.
- The DER-encoded binary X.509 format public key certificate's SHA1 thumbprint hash in hexadecimal format that you recorded in step 5.e.

Your connector administrator needs these items to configure a Microsoft OneDrive external content connector to retrieve searchable content and security principals from your Microsoft OneDrive instance.

For details on creating and configuring a Microsoft OneDrive external content connector, see Create a Microsoft OneDrive external content connector.

Create a Microsoft OneDrive external content connector

Create an external content connector to retrieve searchable content and security principals from your Microsoft OneDrive source system.

Before you begin

A source system administrator must have already configured your Microsoft OneDrive source system to allow access by the Microsoft OneDrive external content connector. For the required source system configuration steps, see Create a public/private key pair for the Microsoft OneDrive external content connector and Configure Microsoft OneDrive for external content indexing.

Role required: sn_ext_conn.xcc_admin

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Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **OneDrive** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Microsoft OneDrive external content connector.
Application (client) ID	Application (client) ID for the OAuth 2.0 application defined in the Microsoft Entra admin center that grants access to your Microsoft OneDrive instance. If you have access to the OAuth 2.0 application's registration record in the Microsoft Entra admin center, you can navigate to **Overview** and copy this ID from the **Application (client) ID** field in the Essentials section. If you can't access the OAuth 2.0 application's registration record in the Microsoft Entra admin center, ask your Microsoft Entra administrator for the application's **Application (client) ID** value.
Directory (tenant) ID	Directory (tenant) ID for the OAuth 2.0 application defined in the Microsoft Entra admin center that grants access to your Microsoft OneDrive instance. If you have access to the OAuth 2.0 application's registration record in the Microsoft Entra admin center, you can navigate to **Overview** and copy this ID from the **Directory (tenant) ID** field in the Essentials section. If you can't access the OAuth 2.0 application's registration record in the Microsoft Entra admin center, ask your Microsoft Entra administrator for the application's **Directory (tenant) ID** value.
JKS Certificate	Java KeyStore (JKS) file containing a public/private key pair generated with the Java keytool utility. These keys must match the public key from the DER-encoded binary X.509 format certificate uploaded to the OAuth 2.0 application defined in the Microsoft Entra admin center that allows the Microsoft OneDrive external content connector to access your source system data. If you don't have a copy of the JKS file, ask your security administrator for it. You can't download the JKS file from the OAuth 2.0 application's registration record in the Microsoft Entra admin center.
JKS certificate password	Password for the Java KeyStore (JKS) file specified in *`JKS Certificate`*. If you don't have the password for the JKS file, ask your security administrator for it. You can't retrieve the JKS certificate password from the registration record for the OAuth 2.0 application defined in the Microsoft Entra admin center that allows the Microsoft OneDrive external content connector to access your source system data.

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Connection setting	Description
JKS certificate thumbprint	Base64-encoded or hexadecimal SHA1 hash for the DER-encoded binary X.509 format public key certificate uploaded to the OAuth 2.0 application defined in the Microsoft Entra admin center that allows the Microsoft OneDrive external content connector to access your source system data. If you don't have this hash, ask your Microsoft Entra administrator for the SHA1 thumbprint hash for the application's DER-encoded binary X.509 format public key certificate, in either base64-encoded or hexadecimal format.
Settings for regulated markets	
Configure settings for regulated markets	Option to display *Authority endpoint* and *Graph API endpoint* settings fields.
Authority endpoint	URL for the Microsoft authorization server that you use to log in to your source system (Microsoft tenant). This field appears only when *Configure settings for regulated markets* is selected. Default value: `https://login.microsoftonline.com/` Cloud service endpoint URLs include: ○ `https://login.microsoftonline.com/`: Endpoint URL for the Microsoft 365 cloud ○ `https://login.microsoftonline.us/`: Endpoint URL for the Microsoft 365 GCC and GCC High cloud and the Microsoft 365 DoD cloud If you don't know the authority endpoint URL to use, ask your Microsoft administrator for it. **Important:** The authority endpoint URL must end with a trailing slash.
Graph API endpoint	Microsoft Graph API endpoint for your source system (Microsoft tenant). This field appears only when *Configure settings for regulated markets* is selected. Default value: `https://graph.microsoftonline.com/` Microsoft Graph API endpoint URLs include: ○ `https://graph.microsoftonline.com/`: Endpoint URL for the Microsoft Graph global service cloud ○ `https://graph.microsoftonline.us/`: Endpoint URL for the Microsoft Graph for US Government L4 cloud ○ `https://dod-graph.microsoftonline.us/`: Endpoint URL for Microsoft Graph for US Government L5 (DOD) cloud If you don't know the Microsoft Graph API endpoint URL to use, ask your Microsoft administrator for it. **Important:** The Microsoft Graph API endpoint URL must end with a trailing slash.

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Connection setting	Description
Validate connection settings with test crawl	Option to run a short test crawl to verify whether your connection settings and source system permissions are correctly set. For more details on validating connection settings and source system permissions with a test crawl, see Verify your connection settings and source system permissions for an external content connector. **Important:** For connectors that support user permission crawls, all searchable content and metadata indexed by the validation test crawl is public until the connector completes its first user permission crawl. This means the test crawl's content will be visible to all users of portals and search applications that the connector is linked to.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Microsoft OneDrive external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

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Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Microsoft OneDrive external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Microsoft OneDrive external content connector

Specify the individual drives you want your Microsoft OneDrive external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin
A connector administrator must have already created the Microsoft OneDrive external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Microsoft OneDrive external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the Microsoft OneDrive external content connector crawls all individual drives from its specified source system and sends files with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the individual drives to crawl when running content crawls
- Inclusion or exclusion filters for the file extensions to retrieve when running content crawls

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Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Microsoft OneDrive external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Content filtering** options:
   - To crawl all individual drives from the source system, select **Crawl all content**.
   - To crawl only a specified set of individual drives from the source system, select **Include only these individual drives**, then use the **Add OneDrive owner emails to include** field and **Add** button to enter email addresses for the owners of individual drives that you want to include in the crawl.

     For example, you might enter `vanessa@example.com` to include only searchable content from the specified user's individual drive.
   - To crawl all except a specified set of individual drives from the source system, select **Exclude only these individual drives**, then use the **Add OneDrive owner emails to exclude** field and **Add** button to enter email addresses for the owners of individual drives that you want to exclude from the crawl.

     For example, you might enter `alex@example.com` to exclude searchable content from the specified user's individual drive.
5. Select one of the following **Filetype filtering** options:

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- To retrieve all supported file types from the source system, select **Crawl all files**.
- To retrieve only files with specified extensions from the source system, select **Include only these file extensions**, then use the **Add file extensions to include** field to enter file extensions you want the connector to include when crawling.

  As an example, you might enter `.pdf` to only include searchable content from Portable Document Format (PDF) files found in the source system.
- To retrieve all files except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **Add file extensions to exclude** field to enter file extensions you want the connector to exclude when crawling.

  As an example, you might enter `.txt` to exclude searchable content from Plain Text files found in the source system.

For details on the supported file extensions, see Binary file extensions supported in External Content Connectors.

6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save and validate**.

Result

The Microsoft OneDrive external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your Microsoft OneDrive source system using your modified crawl settings, create and run a one-time content crawl for your Microsoft OneDrive external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Microsoft SharePoint Online external content connector

The Microsoft SharePoint Online external content connector retrieves pages from sites in your Microsoft SharePoint Online source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

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Microsoft SharePoint Online static and dynamic page content

Microsoft SharePoint Online pages built primarily with static text content authored in the Microsoft SharePoint Online editor produce searchable content that more closely matches what users see in a web browser. By contrast, pages that rely on dynamic web parts may not contain all of the content that users see in a web browser.

Microsoft SharePoint Online pages are stored as `.aspx` files in a site's Site Pages library. These files can include static content in their CanvasContent1 and WikiFields metadata fields. They can also include scripts that call a server-side engine to dynamically render viewable content at request time. The exact content rendered depends on user context, permissions, and web parts loaded as part of the page request.

Rendering a page's full viewable content requires an authenticated user session. The Microsoft SharePoint Online connector can't impersonate a user to trigger this rendering process. As a result, the connector cannot capture the final HTML output that a web browser would display.

For each page retrieved, the Microsoft SharePoint Online connector queries the SharePoint REST API's `_api/web/lists('<list-id>')/items(<item-id>)` endpoint to access the page's underlying list item. Via this API endpoint, the connector retrieves content primarily from the page's CanvasContent1 and WikiFields metadata fields. It also captures the page's other metadata fields such as title, author, and modification date where available. Page content stored exclusively in dynamic web parts may be retrieved only partially or not at all, since that content doesn't exist in the list item metadata.

To learn how to view the portion of a page's content that can be retrieved using the Microsoft SharePoint Online connector, see View retrievable page content using the Microsoft SharePoint Online REST API.

Microsoft SharePoint Online flags

Microsoft SharePoint Online uses several flags to define how sites, lists, and documents behave.

The Microsoft SharePoint Online external content connector automatically ignores any sites, lists, or documents that have any of the following flags set to true:

- *IsCatalog* (denotes a list used for storing assets or configuration)
- *IsPrivate* (denotes a list intended for restricted or internal use)
- *Hidden* (denotes a list that supports system features and isn't meant for user browsing)
- *NoCrawl* (denotes content that shouldn't be indexed for search)

These flags denote content that isn't relevant or user-facing and should be excluded from search results.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Estimate document volume for Microsoft SharePoint Online

Estimate the total number of documents included in your Microsoft SharePoint Online source system and the document counts for individual sites. Use this information to determine crawl scope settings needed for your Microsoft SharePoint Online external content connector.

Before you begin

You need the following credentials and permissions for your organization's Microsoft 365 admin center instance:

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- Login credentials
- Permission to configure and export the Microsoft SharePoint Online active site listing

For detailed information about access to reports in the Microsoft 365 admin center, see the Microsoft 365 reports in the admin center article on the Microsoft Learn site.

Role required: none

About this task

Before configuring a Microsoft SharePoint Online external content connector, you may find it helpful to estimate the number of documents available in your Microsoft SharePoint Online source system and in its individual sites.

By estimating the count of available documents, you can determine whether you need to restrict the crawl scope for your Microsoft SharePoint Online external content connector to avoid exceeding the indexed-document limit.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Log in to the Microsoft 365 admin center at https://admin.microsoft.com/.
2. Navigate to **Admin centers** > **All admin centers**, then select **SharePoint** in the list of admin centers.
3. Navigate to **Sites** > **Active sites**.
4. In the Active sites list, select the **Customize columns** header, ensure that the following columns are selected for display, then select **Apply**.
   - Site name
   - URL
   - Storage used (GB)
   - Files
5. Export and analyze the document counts for active sites.

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a. Select **Export**.

b. When prompted, save the active sites CSV list to a convenient location.

c. Open the exported active sites CSV list in a tool of your choice.

d. For each site entry in the active sites list, find the number of available documents in the Files field.
Use the Site name and URL field values to identify your sites.

e. Find the total number of available documents in your Microsoft SharePoint Online source system by adding up the Files field values for all the sites in the active sites CSV list.

What to do next

If your Microsoft SharePoint Online source system's total available document count exceeds the connector limit of one million (1,000,000) documents, you will need to limit the crawl scope for the Microsoft SharePoint Online external content connector. Choose a set of sites whose total document count is less than the connector limit, and inform your AI Search administrator so they can configure the external content connector's crawl settings to include only those sites.

For details on configuring the Microsoft SharePoint Online connector's crawl settings, see Configure crawl settings for a Microsoft SharePoint Online external content connector.

Create a public/private key pair for the Microsoft SharePoint Online external content connector

Generate a public/private key pair for the Microsoft SharePoint Online external content connector. Extract the public key as a DER-encoded binary X.509 format certificate for use in configuring API access for the connector in the Microsoft Entra admin center.

Before you begin

You must have access to the Java keytool utility. For details on the keytool utility, see https://docs.oracle.com/en/java/javase/21/docs/specs/man/keytool.html.

Role required: none

About this task

The Microsoft SharePoint Online external content connector uses a public/private key pair to authenticate with an OAuth 2.0 app configured in the Microsoft Entra admin center. Key pair authentication allows the connector to access your Microsoft SharePoint Online data via the Microsoft Graph API.

To configure public/private key pair authentication for the connector, you need to create the following items:

1. A public/private key pair in Java KeyStore (JKS) format.
   - Your connector administrator needs this JKS keystore file and its password when configuring settings for the Microsoft SharePoint Online external content connector.
   - When the Microsoft SharePoint Online external content connector runs a crawl, it uses the private key from this JKS keystore file to sign the authentication request it sends to the OAuth 2.0 app defined in the Microsoft Entra admin center.
2. A copy of the public key in DER-encoded binary X.509 certificate format.

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- Your administrator needs to upload this certificate file to the OAuth 2.0 app defined in the Microsoft Entra admin center that grants API access to the Microsoft SharePoint Online external content connector.
- When the Microsoft SharePoint Online external content connector submits its authentication request to the OAuth 2.0 app defined in the Microsoft Entra admin center, the app uses the public key from this uploaded certificate to confirm that the authentication request was signed with the private key.

Note: If your organization has its own guidelines for generating public/private key pairs, follow those to generate a key pair and a public key certificate in the required formats.

Procedure

1. Generate a public/private key pair in JKS keystore format:

   a. Run this keytool command, replacing `<alias>`, `<jks-file>`, and `<password>` with values of your choice:

   ```
   keytool -genkey -alias <alias> -keyalg RSA -keysize 2048
    -keystore <jks-file>.jks -storepass "<password>" -storetype
    JKS -validity 360
   ```

   As an example, you might specify `ms-spo-connector-cert` as the key alias and the JKS repository filename, and enter a password:

   ```
   keytool -genkey -alias ms-spo-connector-cert -keyalg RSA
    -keysize 2048 -keystore ms-spo-connector-cert.jks -storepass
    "C?yuR4hrt2GU7g}3" -storetype JKS -validity 360
   ```

   b. When prompted for your first and last name, enter the Common Name (CN) you want for the key pair, then press Enter.
   As an example, you might specify `Microsoft SharePoint Online external content connector` as the Common Name for the key pair.

   c. At each of the remaining distinguished name prompts, enter the requested information and press Enter.

   d. When prompted to confirm that the distinguished name is correct, enter `yes` and press Enter.

   e. When prompted for a key password, press Enter to use the same password you specified for the keystore file.

   Important: The key must use the same password as the keystore. Record this password in a secure location. Your connector administrator needs this password when configuring the Microsoft SharePoint Online external content connector.

   The keytool utility generates a new Java KeyStore (.jks) file containing your public/private key pair.

   Important: Ignore the keytool warning message about migrating your keystore to the PKCS12 format. The external content connector only supports the Java KeyStore format.

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2. Export your public key in DER-encoded binary X.509 certificate format by running the following keytool command, replacing `<cer-file>` with a filename of your choice and replacing `<alias>`, `<jks-file>`, and `<password>` with the same values you used in step 1:

```
keytool -export -alias <alias> -file <cer-file>.cer -keystore
 <jks-file>.jks -storepass "<password>" -storetype JKS
```

As an example, you might specify `ms-spo-connector-cert` as the filename for the DER-encoded binary X.509 format certificate:

```
keytool -export -alias ms-spo-connector-cert -file
 ms-spo-connector-cert.cer -keystore ms-spo-connector-cert.jks
 -storepass "C?yuR4hrt2GU7g}3" -storetype JKS
```

The keytool utility exports a copy of your public key as a DER-encoded binary X.509 format certificate file with your chosen filename.

Important: Ignore the keytool warning message about migrating your keystore to the PKCS12 format. The external content connector only supports the Java KeyStore format.

What to do next

Provide both of the files you generated to the admins who configure your Microsoft SharePoint Online instance and AI Search on your ServiceNow AI Platform® instance, as follows:

File	Description
DER-encoded binary X.509 format public key certificate file	Provide this certificate file to your Microsoft SharePoint Online administrator. They will need to upload the certificate to the Microsoft Entra admin center when configuring an OAuth 2.0 application for the Microsoft SharePoint Online external content connector. For more information on configuring an OAuth 2.0 application in the Microsoft Entra admin center for the Microsoft SharePoint Online external content connector, see Configure Microsoft SharePoint Online for external content indexing.
JKS keystore file and password	Provide this Java KeyStore file and its password to your ServiceNow AI Platform admins. They will need the file and password when configuring the Microsoft SharePoint Online external content connector. For details on creating and configuring the Microsoft SharePoint Online external content connector, see Create a Microsoft SharePoint Online external content connector.

Configure Microsoft SharePoint Online for external content indexing

Register an OAuth 2.0 application in the Microsoft Entra admin center to grant the Microsoft SharePoint Online external content connector access to your Microsoft SharePoint Online source system.

Before you begin

You need the following credentials and permissions for your organization in the Microsoft Entra admin center:

- Login credentials
- Permission to register an application
- Permission to add API permissions to an application

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- Permission to grant admin consent for an application's API permissions
- Permission to upload certificates for an application

You must have created a public/private key pair for the Microsoft SharePoint Online external content connector and extracted the public key certificate in DER-encoded binary X.509 format. For details on creating the public/private key pair and extracting the public key certificate, see Create a public/private key pair for the Microsoft SharePoint Online external content connector.

Role required: none

About this task

The Microsoft SharePoint Online external content connector retrieves content from your Microsoft SharePoint Online source system using Microsoft Graph and the Microsoft SharePoint REST APIs.

To enable the connector to access your Microsoft SharePoint Online source system via these APIs, you must configure an OAuth 2.0 application in the Microsoft Entra admin center. Your connector administrator can use settings copied from this Microsoft Entra application to configure the Microsoft SharePoint Online external content connector for proper connection to your Microsoft SharePoint Online source system.

Procedure

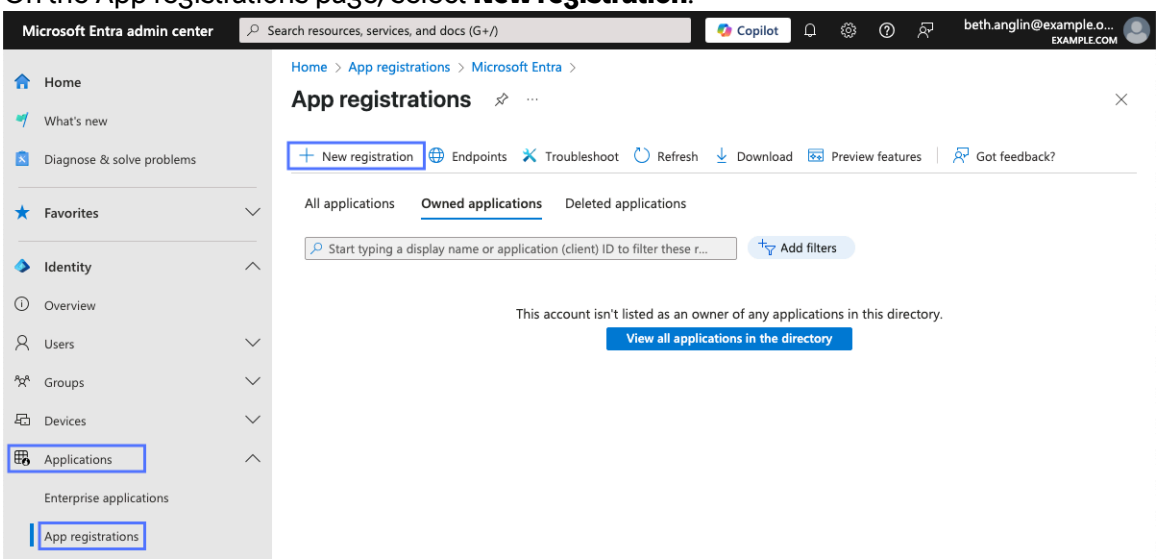
1. Register a new application in the Microsoft Entra admin center.

a. Log in to the Microsoft Entra admin center at https://entra.microsoft.com/.

> **Note:** If your Microsoft SharePoint Online tenant is in the Microsoft 365 GCC or GCC High cloud or the Microsoft 365 DoD cloud, log in at https://entra.microsoft.us/ instead.

b. Select **Applications** > **App registrations**.

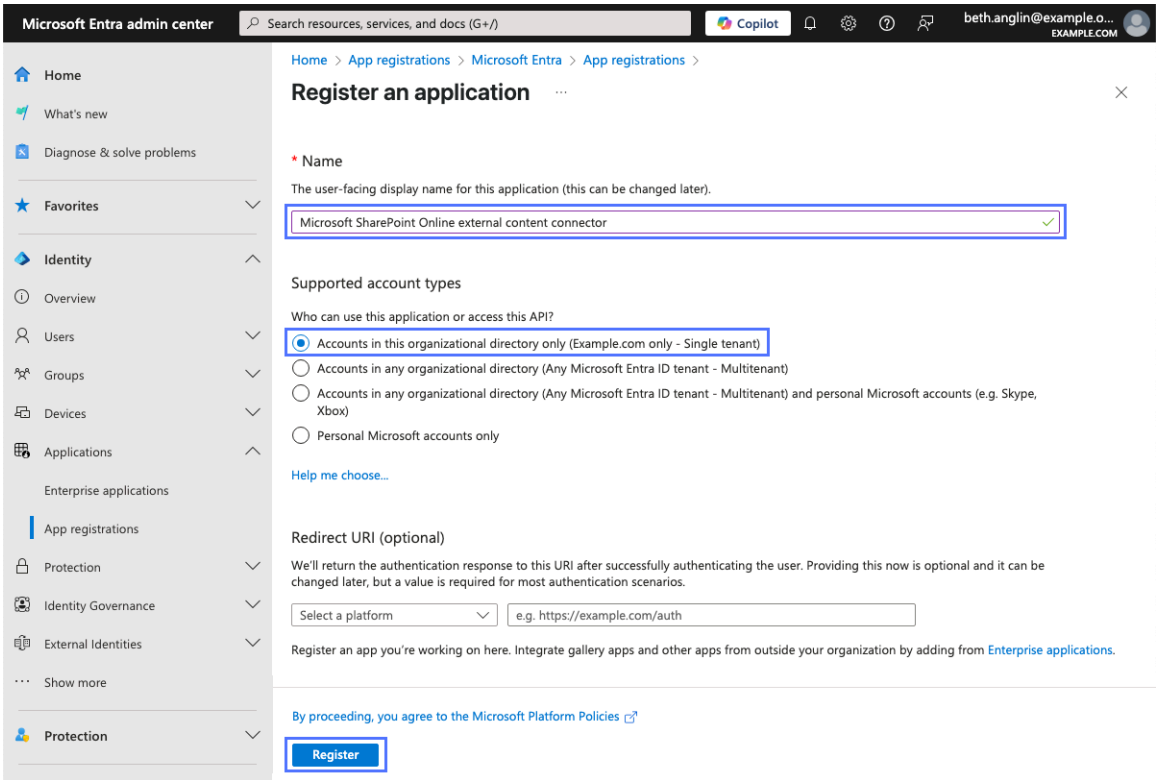
c. On the App registrations page, select **New registration**.



d. On the Register an application form, fill in the following fields:

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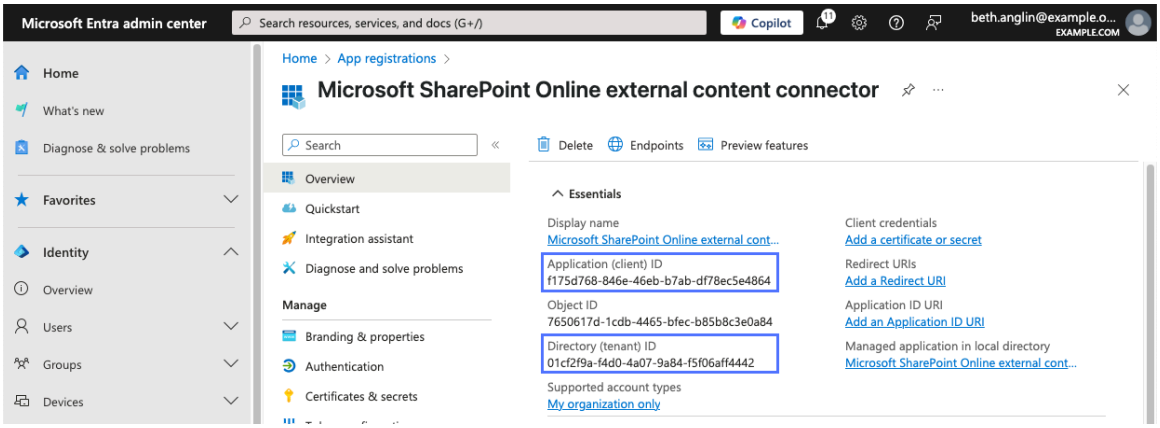
Field	Instructions
Name	Enter a unique name for your OAuth 2.0 application. For example, you might enter `Microsoft SharePoint Online external content connector`.
Supported account types	Select **Accounts in this organizational directory only (<instance-name> only - Single tenant)**, where `<instance-name>` is the name of your Microsoft Entra instance.
Redirect URI (optional)	Leave this field empty.



e. Select **Register**.
The new application's Overview page appears.

2. Record the values of the **Application (client) ID** and **Directory (tenant) ID** properties in a secure location.

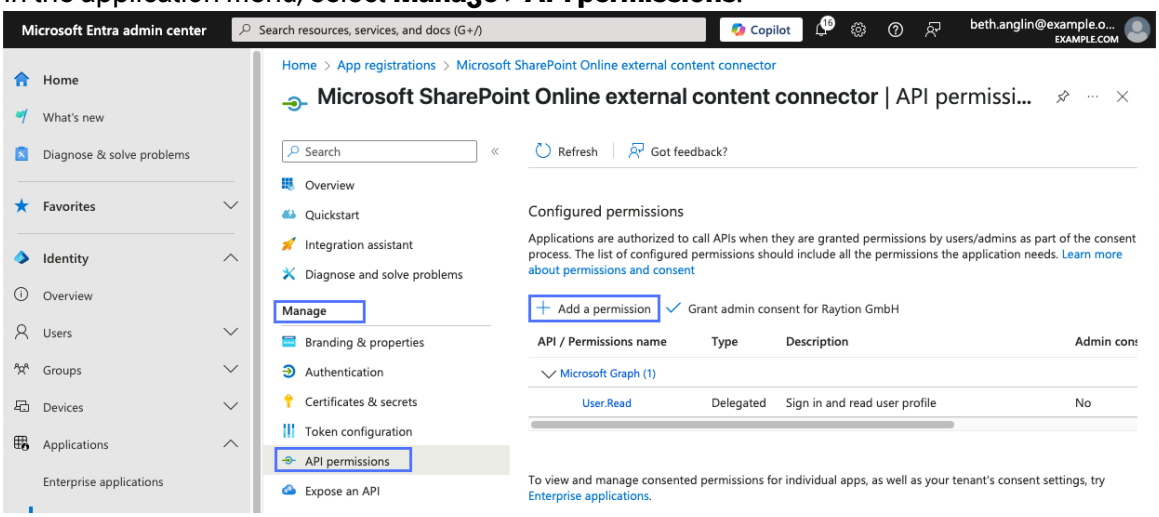
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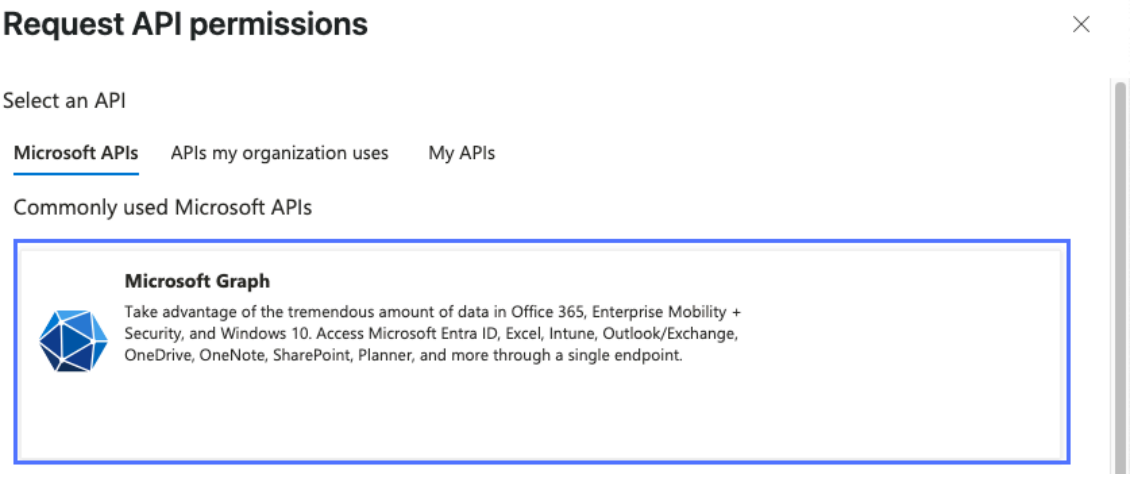
Important: Your connector administrator needs the application's tenant and client IDs to configure a Microsoft SharePoint Online external content connector.

3. Add the API permissions required by the Microsoft SharePoint Online external content connector.

   a. In the application menu, select **Manage** > **API permissions**.



   b. Select **Add a permission**, then select *Microsoft Graph*, then select **Application permissions**.



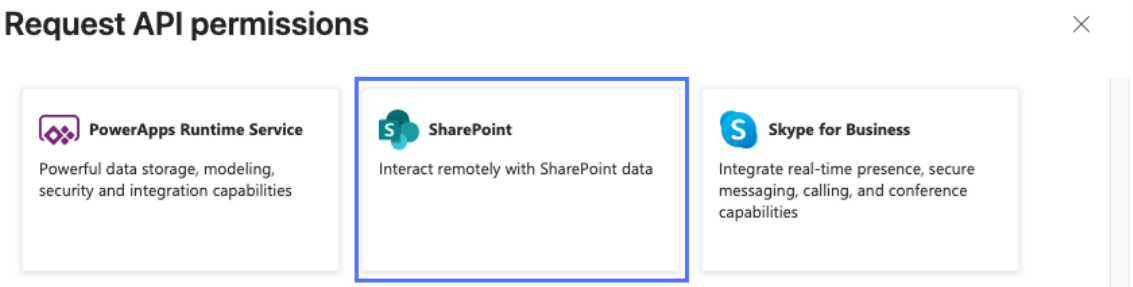
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c. For each of the following permissions, enter the permission name into the **Select permissions** search field, then locate and select the option for the permission.

Permission	Description
GroupMember.Read.All	This permission allows the connector to read group memberships from Microsoft Entra ID.
Sites.Read.All	This permission enables the connector to perform automatic site discovery for crawl configuration and one-time crawls. **Note:** If you plan to specify the sites to crawl manually, don't select this permission. For more information on specifying sites for the connector to crawl, see Configure crawl settings for a Microsoft SharePoint Online external content connector. To learn more about one-time crawls, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.
User.Read.All	This permission allows the connector to read users from Microsoft Entra ID. User information includes user type and account enablement status.

d. Select **Add permissions**.
The new Microsoft Graph permissions appear in the application's Configured permissions list.

e. Select **Add a permission**, then select **SharePoint**, then select **Application permissions**.



f. In the **Select permissions** search field, enter either `Sites.FullControl.All` or `Sites.Selected`, then locate and select the option for the specified permission.

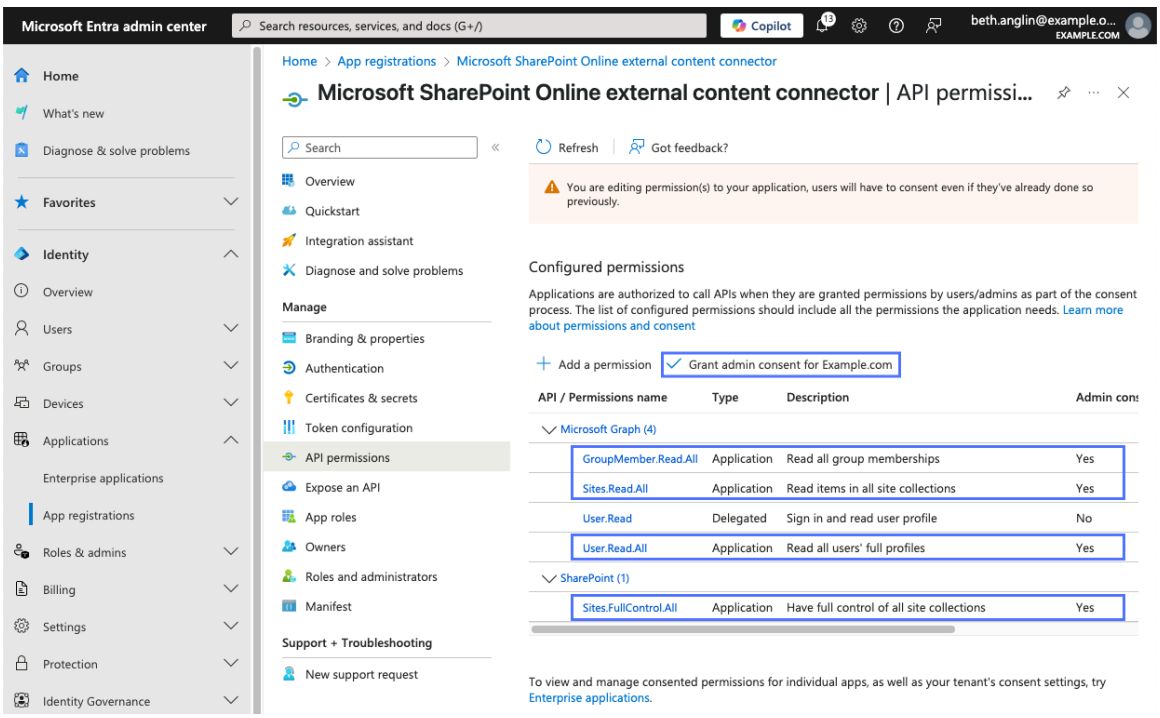
Note: The connector only requires one of these two permissions. Don't select both permissions.

Permission	Description
Sites.FullControl.All	This permission allows the connector to access content and user permissions from all sites and site collections in your Microsoft SharePoint Online tenant. Select this permission if your organization allows it. When you select this permission, no additional configuration is needed.

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Permission	Description
Sites.Selected	This permission allows the connector to access content and user permissions from individual sites and site collections in your Microsoft SharePoint Online tenant. An administrator must grant FullControl permissions to your registered Microsoft Entra OAuth 2.0 app for each site or site collection that you want the connector to access content from. Select this permission if your organization doesn't permit you to grant Sites.FullControl.All permission to a registered application. To learn how to grant FullControl permissions for individual sites and site collections to your registered Microsoft Entra OAuth 2.0 app, see Configure site and site collection access for the Microsoft SharePoint Online external content connector.

g. Select **Add permissions**.
The new SharePoint permission appears in the application's Configured permissions list.



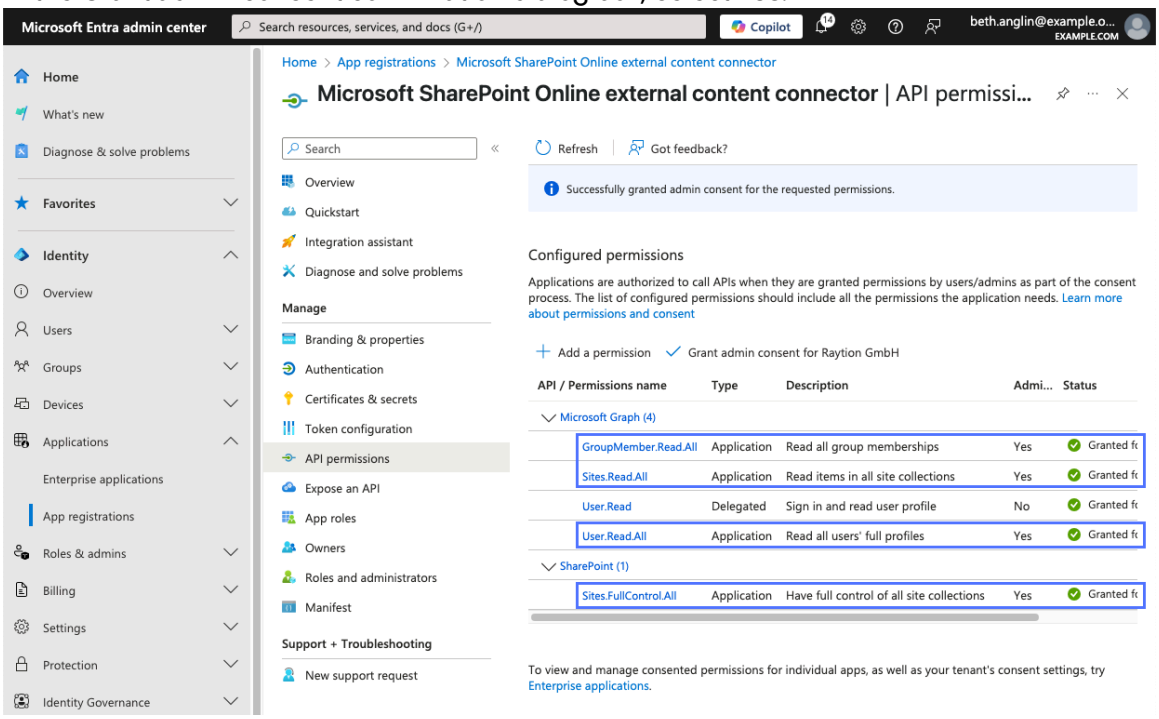
Tip: The SharePoint section of your application's API permissions list shows the entry for the SharePoint API permission that you selected in step 3.f. The images in this procedure show the Sites.FullControl.All permission, but your application may show the Sites.Selected permission instead.

4. Grant admin consent for the added API permissions.

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a. Select **Grant admin consent for <instance-name>**, where `<instance-name>` is the name of your Microsoft Entra instance.

b. In the Grant admin consent confirmation dialog box, select **Yes**.

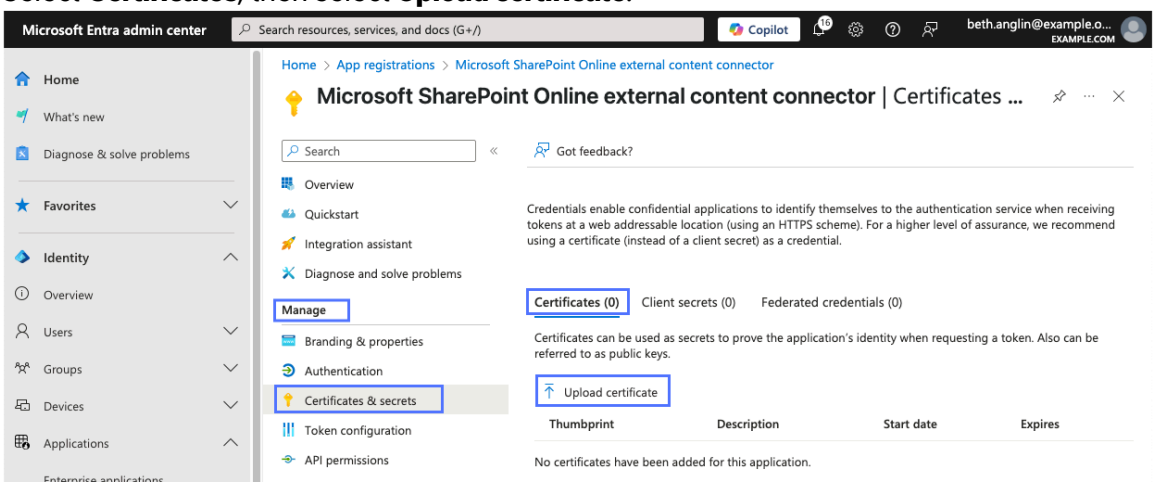


The status for the added API permissions changes to `Granted for <instance-name>`, where `<instance-name>` is the name of your Microsoft Entra instance.

5. Upload your DER-encoded binary X.509 format public key certificate for the Microsoft SharePoint Online external content connector.

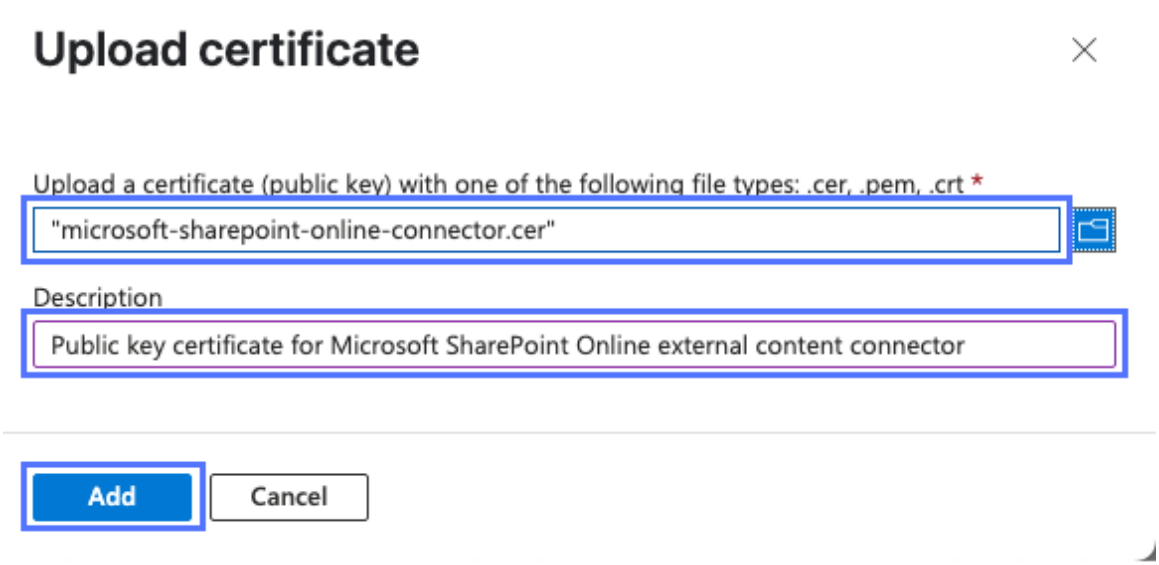
a. In the Microsoft Entra application menu, select **Manage** > **Certificates & secrets**.

b. Select **Certificates**, then select **Upload certificate**.



c. Select **Select a file** and locate your DER-encoded binary X.509 format public key certificate file, then enter a description for it.

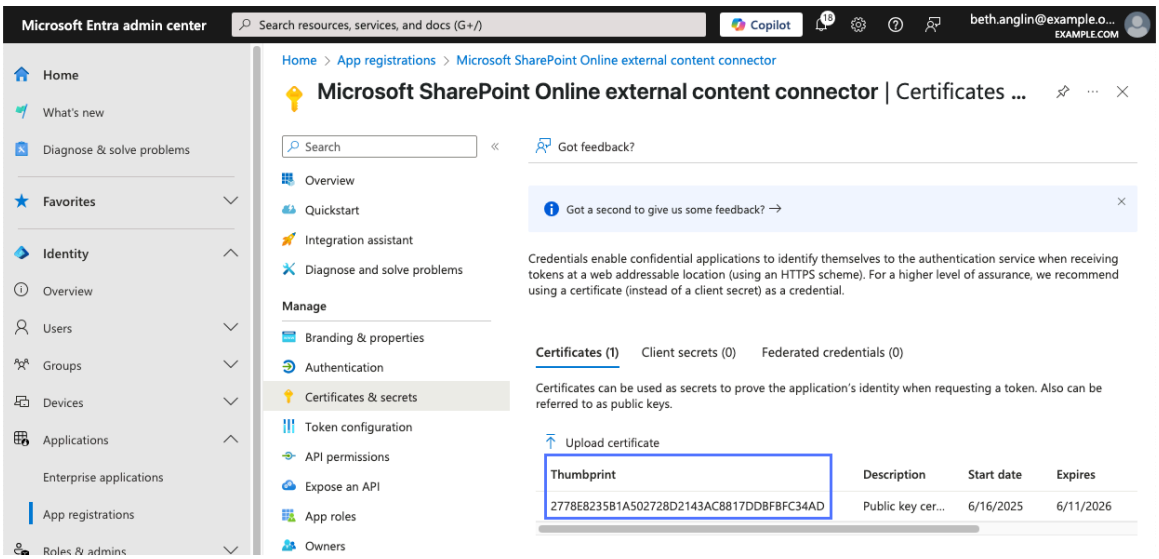
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d. Select **Add**.
The DER-encoded binary X.509 format public key certificate appears in the Certificates list.

Note: You can drag the column separators in the Certificates list to view the entire thumbprint SHA1 hash value.

e. Copy the certificate's **Thumbprint** SHA1 hash, shown in hexadecimal format, and record it in a secure location.



Important: Your connector administrator needs the DER-encoded binary X.509 format public key certificate's SHA1 thumbprint hash to configure the Microsoft SharePoint Online external content connector.

f. Retain copies of the generated public/private key files and the key password in a secure location.

Note: You can't download the public key certificate or its password from the Microsoft Entra admin center.

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What to do next

If you granted Sites.Selected permission instead of Sites.FullControl.All permission in step 3.f, configure SharePoint API permissions for the site collections you want the Microsoft SharePoint Online connector to be able to crawl. For details on this procedure, see Configure site and site collection access for the Microsoft SharePoint Online external content connector.

Provide the following items to your connector administrator:

- The OAuth 2.0 application's tenant ID and client ID that you recorded in step 2.
- The DER-encoded binary X.509 format public key certificate's SHA1 thumbprint hash in hexadecimal format that you recorded in step 5.e.

Your connector administrator needs these items to configure a Microsoft SharePoint Online external content connector to retrieve searchable content and security principals from your Microsoft SharePoint Online instance.

For details on creating and configuring a Microsoft SharePoint Online external content connector, see Create a Microsoft SharePoint Online external content connector.

Configure site and site collection access for the Microsoft SharePoint Online external content connector

Allow the Microsoft SharePoint Online connector to crawl your sites and site collections by granting site-specific SharePoint API FullControl permissions to the OAuth 2.0 app registered in Microsoft Entra for the connector.

Before you begin

You must have PowerShell 7.0 or a later compatible version installed.

You need appropriate privileges or permissions to alter permissions for the target app, which is the Microsoft Entra OAuth 2.0 app that allows the Microsoft SharePoint Online external content connector to authenticate and access your source system content. These privileges and permissions depend on which authentication model you want to use when configuring site access for the target app:

- To use interactive browser-based login, your Microsoft Entra account needs administration privileges.
- To use service principal authentication, you need a service principal for a Microsoft Entra app that has the Sites.FullControl.All Microsoft Graph API application permission granted by a Microsoft Entra admin. This service principal app is distinct from the target app. You also need one of the following items:

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- For certificate-based service principal authentication, you need the certificate and private key for your service principal app in PFX format.

  Note:

  If you only have your service principal app's certificate and private key in a Java KeyStore (JKS) file, you can convert that file to PFX format using this Java keytool command:

  ```
  keytool -importkeystore -srckeystore <your-keystore>.jks
   -destkeystore certificate.pfx -deststoretype PKCS12
  -srcalias <your-alias> -deststorepass <your-pfx-password>
   -destkeypass <your-pfx-password>
  ```

  In this command, replace `<your-keystore>` and `<your-alias>` with the name and alias of the existing JKS file. Replace `your-pfx-password` with the password you want to specify for the PFX output file.

  For details on the Java keytool utility, see https://docs.oracle.com/en/java/javase/21/docs/specs/man/keytool.html.

- For client secret-based service principal authentication, you need the client secret for your service principal app. If you don't have the client secret, ask your Microsoft Entra administrator for it.

Role required: none

About this task

This task is only required if you specify the Sites.Selected SharePoint API permission instead of the Sites.FullControl.All permission when configuring the registered Microsoft Entra OAuth 2.0 app for the Microsoft SharePoint Online connector.

Note: For details on how these permissions are specified in the OAuth 2.0 app configuration process, see step 3.f in Configure Microsoft SharePoint Online for external content indexing.

By default, source system administrators grant the Sites.FullControl.All SharePoint API permission to the registered Microsoft Entra OAuth 2.0 app for the Microsoft SharePoint Online connector. This permission allows the connector to read content, metadata, and security information for all types of content in all source system sites and site collections.

If your organization's security practices don't allow granting of Sites.FullControl.All permission, you can instead grant the Sites.Selected SharePoint API permission to the OAuth 2.0 application. With this permission granted, the Microsoft SharePoint Online connector can only read content, metadata, and security information for sites and site collections that the OAuth 2.0 app has FullControl permission for.

A source system administrator must grant FullControl permission for each site or site collection that you want the Microsoft SharePoint Online connector to be able to crawl. If you want to prevent the connector from crawling a site or site collection, you can revoke a previously granted FullControl permission for that site or site collection.

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Procedure

1. Import the SelectedSiteAppPermissionManager PowerShell module on your local system.

   a. Download the SelectedSiteAppPermissionManager PowerShell module archive from the Assign FullControl permission to sites for indexing via PowerShell (Microsoft SharePoint Online external content connector) [KB2741707] article in the Now Support Knowledge Base.

   b. Extract the downloaded archive's contents to a directory.

   c. Start a PowerShell session and navigate to the directory where you extracted the archive's contents.

   d. Verify that you have the latest version of the Microsoft Graph PowerShell SDK installed by running these PowerShell commands:

   ```
   Install-Module -Name Microsoft.Graph -Scope CurrentUser
   ```

   ```
   Update-Module -Name Microsoft.Graph -Force -Scope CurrentUser
   ```

   e. View your PowerShell module paths by running this PowerShell command:

   ```
   $env:PSModulePath -split [System.IO.Path]::PathSeparator
   ```

   f. Copy the SelectedSiteAppPermissionManager module folder from the downloaded archive into one of your PowerShell module paths by running this PowerShell command, replacing `<PowerShell-module-path>` with one of the paths reported in step 1.e.

   ```
   Copy-Item -Path "SelectedSiteAppPermissionManager"
    -Destination "<PowerShell-module-path>" -Recurse
   ```

   As an example, to copy the module folder into your personal modules folder, you might run this command:

   ```
   Copy-Item -Path "SelectedSiteAppPermissionManager"
    -Destination "$HOME\Documents\PowerShell\Modules" -Recurse
   ```

   g. Import the SelectedSiteAppPermissionManager module by running this PowerShell command:

   ```
   Import-Module SelectedSiteAppPermissionManager
   ```

   h. Verify that the SelectedSiteAppPermissionManager module is correctly imported by running this PowerShell command:

   ```
   Get-Module SelectedSiteAppPermissionManager
   ```

   The command should display information about the SelectedSiteAppPermissionManager module, including its version and supported commands.

2. Copy one of the JSON-format example configuration files found in the `SelectedSiteAppPermissionManager\Config` directory to a new `my-config.json` file, depending on which authentication method you want to use when configuring site access:

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- To use interactive authentication in the browser, copy `app-config-interactive.example.json` to `my-config.json`.
- To use service principal authentication with a client secret, copy `app-config.client-secret.example.json` to `my-config.json`.
- To use service principal authentication with a PFX-format certificate, copy `app-config.certificate.example.json` to `my-config.json`.

3. In a text editor, modify the JSON object literal key-value pairs in your `my-config.json` file to match your Microsoft Entra app configuration.

JSON object literal key	Value
ServicePrincipal.Authentication.Certificate.Password	Password for the PFX-format certificate used for service principal authentication. You only need this key-value pair if you're using service principal authentication with a certificate that has a password. If your certificate has no password, omit this key-value pair. Type: String
ServicePrincipal.Authentication.Certificate.Path	Relative path to a PFX-format certificate file that contains the certificate and private key for your service principal app in Microsoft Entra. You only need this key-value pair if you're using service principal authentication with a certificate. Type: String
ServicePrincipal.Authentication.Secret	Client secret for your service principal app in Microsoft Entra. You only need this key-value pair if you're using service principal authentication with a client secret. Type: String
ServicePrincipal.Authentication.Type	Type of authentication to use for your service principal. You only need this key-value pair if you're using service principal authentication with a certificate or a client secret. Type: Choice Supported values:

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JSON object literal key	Value
	○ *`Certificate`*: Authenticate using a PFX-format certificate. ○ *`Secret`*: Authenticate using a client secret.
ServicePrincipal.ClientId	Application (client) ID for your service principal app in Microsoft Entra. You only need this key-value pair if you're using service principal authentication with a certificate or a client secret. Type: String
ServicePrincipal.TenantId	Directory (tenant) ID for your service principal app in Microsoft Entra. You only need this key-value pair if you're using service principal authentication with a certificate or a client secret. Type: String
TargetApp.DisplayName	Display name for the OAuth 2.0 app that's registered in Microsoft Entra for the Microsoft SharePoint Online connector. For details on this app, see Configure Microsoft SharePoint Online for external content indexing. Type: String
TargetApp.Id	Application (client) ID for the OAuth 2.0 app that's registered in Microsoft Entra for the Microsoft SharePoint Online connector. For details on this app, see Configure Microsoft SharePoint Online for external content indexing. Type: String

Example configuration for interactive authentication:

```
{
    "TargetApp": {
        "Id": "your-application-id",
        "DisplayName": "Your Application Name"
    }
}
```

Example configuration for service principal authentication with PFX-format certificate:

```
{
    "TargetApp": {
        "Id": "your-application-id",
```

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```
        "DisplayName": "Your Application Name"
    },
    "ServicePrincipal": {
        "ClientId": "your-service-principal-id",
        "TenantId": "your-tenant-id",
        "Authentication": {
            "Type": "Certificate",
            "Certificate": {
                "Path": "path/to/certificate.pfx",
                "Password": "pfx-password"  // Optional if certificate has no password
            }
        }
    }
}
```

Example configuration for service principal authentication with client secret:

```
{
    "TargetApp": {
        "Id": "your-application-id",
        "DisplayName": "Your Application Name"
    },
    "ServicePrincipal": {
        "ClientId": "your-service-principal-id",
        "TenantId": "your-tenant-id",
        "Authentication": {
            "Type": "Secret",
            "Secret": "your-client-secret"
        }
    }
}
```

4. **Optional:** Create a site list file with all the Microsoft SharePoint Online site and site collection URLs you want to operate on for bulk operations.

   a. In a text editor, create a new file called `sitelist.txt`.

   b. Populate the new `sitelist.txt` file with the URLs for all the Microsoft SharePoint Online sites and site collections you want to view or modify permissions for, one per line.
   As an example, if you wanted to view or modify permissions for two sites at once, your file might look like this:

   ```
   https://example.sharepoint.com/sites/site1
   https://example.sharepoint.com/sites/site2
   ```

5. To view existing app permissions for specified Microsoft SharePoint Online sites and site collections, run this PowerShell command:

   ```
   Get-SharePointAppPermission
    -SiteUrls "https://example.sharepoint.com/sites/site1","https://example.sharepoint.com/sites/site2" -ConfigFile "./my-config.json"
   ```

   If you have a site list file, you can specify it with the `-SiteListFile` argument (replacing the `-SiteURLs` argument):

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```
Get-SharePointAppPermission -SiteListFile "./sitelist.txt"
 -ConfigFile "./my-config.json"
```

Important: If you're using service principal authentication, add the `-UseServicePrincipal` argument to your command line.

6. To add FullControl permissions to specified Microsoft SharePoint Online sites and site collections, run this PowerShell command:

```
Add-SharePointAppPermission
 -SiteUrls "https://example.sharepoint.com/sites/site1","https://example.sharepoint.
com/sites/site2" -ConfigFile "./my-config.json"
```

If you have a site list file, you can specify it with the `-SiteListFile` argument (replacing the `-SiteURLs` argument):

```
Add-SharePointAppPermission -SiteListFile "./sitelist.txt"
 -ConfigFile "./my-config.json"
```

Important: If you're using service principal authentication, add the `-UseServicePrincipal` argument to your command line.

7. To remove FullControl permissions from specified Microsoft SharePoint Online sites and site collections, run this PowerShell command:

```
Remove-SharePointAppPermission
 -SiteUrls "https://example.sharepoint.com/sites/site1","https://example.sharepoint.
com/sites/site2" -ConfigFile "./my-config.json"
```

If you have a site list file, you can specify it with the `-SiteListFile` argument (replacing the `-SiteURLs` argument):

```
Remove-SharePointAppPermission -SiteListFile "./sitelist.txt"
 -ConfigFile "./my-config.json"
```

Important: If you're using service principal authentication, add the `-UseServicePrincipal` argument to your command line.

What to do next

If you remove FullControl permissions from sites or site collections that are still crawled by the Microsoft SharePoint Online external content connector, the connector will log permissions alerts when it tries to crawl content from those sites or site collections. To eliminate these alerts, ask your connector administrator to remove or exclude the affected sites and site collections from the set of sites crawled by the connector.

Create a Microsoft SharePoint Online external content connector

Create an external content connector to retrieve searchable content and security principals from your Microsoft SharePoint Online source system.

Before you begin

A source system administrator must have already configured your Microsoft SharePoint Online source system to allow access by the Microsoft SharePoint Online external content connector.

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For the required source system configuration steps, see Create a public/private key pair for the Microsoft SharePoint Online external content connector and Configure Microsoft SharePoint Online for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **SharePoint Online** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Microsoft SharePoint Online external content connector.
Application (client) ID	Application (client) ID for the OAuth 2.0 application defined in the Microsoft Entra admin center that grants access to your Microsoft SharePoint Online source system. If you have access to the OAuth 2.0 application's registration record in the Microsoft Entra admin center, you can navigate to **Overview** and copy this ID from the **Application (client) ID** field in the Essentials section. If you can't access the OAuth 2.0 application's registration record in the Microsoft Entra admin center, ask your Microsoft Entra administrator for the application's **Application (client) ID** value.
Directory (tenant) ID	Directory (tenant) ID for the OAuth 2.0 application defined in the Microsoft Entra admin center that grants access to your Microsoft SharePoint Online source system. If you have access to the OAuth 2.0 application's registration record in the Microsoft Entra admin center, you can navigate to **Overview** and copy this ID from the **Directory (tenant) ID** field in the Essentials section. If you can't access the OAuth 2.0 application's registration record in the Microsoft Entra admin center, ask your Microsoft Entra administrator for the application's **Directory (tenant) ID** value.
JKS Certificate	Java KeyStore (JKS) file containing a public/private key pair generated with the Java keytool utility. These keys must match the public key from the DER-encoded binary X.509 format certificate uploaded to the OAuth 2.0 application defined in the Microsoft Entra admin center that allows the Microsoft SharePoint Online external content connector to access your source system data. If you don't have a copy of the JKS file, ask your security administrator for it. You can't download the JKS file from the OAuth 2.0 application's registration record in the Microsoft Entra portal.

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Connection setting	Description
JKS certificate password	Password for the Java KeyStore (JKS) file specified in *JKS Certificate*. If you don't have the password for the JKS file, ask your security administrator for it. You can't retrieve the JKS certificate password from the registration record for the OAuth 2.0 application defined in the Microsoft Entra admin center that allows the Microsoft SharePoint Online external content connector to access your source system data.
JKS certificate thumbprint	Base64-encoded or hexadecimal SHA1 hash for the DER-encoded binary X.509 format public key certificate uploaded to the OAuth 2.0 application defined in the Microsoft Entra admin center that allows the Microsoft SharePoint Online external content connector to access your source system data. If you don't have this hash, ask your Microsoft Entra administrator for the SHA1 thumbprint hash for the application's DER-encoded binary X.509 format public key certificate, in either base64-encoded or hexadecimal format.
Settings for regulated markets	
Configure settings for regulated markets	Option to display *Authority endpoint* and *Graph API endpoint* settings fields.
Authority endpoint	URL for the Microsoft authorization server that you use to log in to your source system (Microsoft tenant). This field appears only when *Configure settings for regulated markets* is selected. Default value: `https://login.microsoftonline.com/` Cloud service endpoint URLs include: ○ `https://login.microsoftonline.com/`: Endpoint URL for the Microsoft 365 cloud ○ `https://login.microsoftonline.us/`: Endpoint URL for the Microsoft 365 GCC and GCC High cloud and the Microsoft 365 DoD cloud If you don't know the authority endpoint URL to use, ask your Microsoft administrator for it. **Important:** The authority endpoint URL must end with a trailing slash.
Graph API endpoint	Microsoft Graph API endpoint for your source system (Microsoft tenant). This field appears only when *Configure settings for regulated markets* is selected. Default value: `https://graph.microsoftonline.com/` Microsoft Graph API endpoint URLs include:

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Connection setting	Description
	○ `https://graph.microsoftonline.com/`: Endpoint URL for the Microsoft Graph global service cloud ○ `https://graph.microsoftonline.us/`: Endpoint URL for the Microsoft Graph for US Government L4 cloud ○ `https://dod-graph.microsoftonline.us/`: Endpoint URL for Microsoft Graph for US Government L5 (DOD) cloud If you don't know the Microsoft Graph API endpoint URL to use, ask your Microsoft administrator for it. **Important:** The Microsoft Graph API endpoint URL must end with a trailing slash.
Validate connection settings with test crawl	Option to run a short test crawl to verify whether your connection settings and source system permissions are correctly set. For more details on validating connection settings and source system permissions with a test crawl, see Verify your connection settings and source system permissions for an external content connector. **Important:** For connectors that support user permission crawls, all searchable content and metadata indexed by the validation test crawl is public until the connector completes its first user permission crawl. This means the test crawl's content will be visible to all users of portals and search applications that the connector is linked to.

Note: The **Settings for regulated markets** connection settings aren't shown for Microsoft SharePoint Online connectors that you created in versions of External Content Connectors prior to version 4.0. Starting in External Content Connectors version 4.0, these connection settings are shown when you create a new Microsoft SharePoint Online external content connector.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Microsoft SharePoint Online external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details

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on this procedure and user permission settings, see Configure user permission settings for an external content connector.

10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.
12. Select **Save**.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Microsoft SharePoint Online external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

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Configure crawl settings for a Microsoft SharePoint Online external content connector

Specify the sites you want your Microsoft SharePoint Online external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Microsoft SharePoint Online external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Microsoft SharePoint Online external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Microsoft SharePoint Online external content connector crawls all sites from its specified source system. It sends all supported content types, including files and attachments with all supported file extensions, to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the sites to crawl when running content crawls
- Inclusion or exclusion filters for individual content types (sites, lists, list items, attachments, and files)
- Inclusion or exclusion filters for the attachment file extensions to retrieve when running content crawls
- Exclusion of guest users from Entra ID when retrieving users for user mappings.

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, the Microsoft SharePoint Online external content connector can index up to ten million (10,000,000) content items from its source system. When the connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When the connector's indexed content item count exceeds eight million (8,000,000) content items, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

The Microsoft SharePoint Online external content connector can handle permissions for up to five hundred thousand (500,000) users and their groups. If the connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If your Microsoft SharePoint Online connector reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

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Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Microsoft SharePoint Online external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Content filtering** options:
   - To crawl all sites from the source system, select **Crawl all content**.
   - To crawl only a specified set of sites from the source system, select **Include only these sites**, then use the **Add URL** field and **Add** button to enter URLs for sites that you want to include in the crawl.

     For example, you might enter `https://example.sharepoint.com/sites/ProductionSite` to include only searchable content from the specified site.
   - To crawl all except a specified set of sites from the source system, select **Exclude only these sites**, then use the **Add URL** field and **Add** button to enter URLs for sites that you want to exclude from the crawl.

     For example, you might enter `https://example.sharepoint.com/sites/TestSite` to exclude searchable content from the specified site.

   Important: The connector validates access permissions for your specified sites on every crawl. If it encounters a site that it doesn't have FullControl SharePoint API permission for, it records an alert for that site. The type of event depends on whether the site in question was automatically discovered or whether it was specified in your site inclusion list.
   - If the connector automatically discovers a site that it doesn't have FullControl permission for, it records an informational alert indicating that it can't index that site.
   - If the connector doesn't have FullControl SharePoint API permission for a site in your inclusion list, it records a warning alert indicating that it can't traverse (crawl) that site.

   For details on configuring SharePoint API permissions for your Microsoft SharePoint Online sites, see Configure Microsoft SharePoint Online for external content indexing and Configure site and site collection access for the Microsoft SharePoint Online external content connector.
5. In the Content types section, deselect the options for any content types you want the connector to exclude when crawling.
   Supported content types include sites, lists, list items, attachments, and files.

   As an example, to exclude lists and list items from the connector's content crawls, deselect the **Lists** and **List items** options. You must include at least one content type.
6. Select one of the following **Attachment filtering** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

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As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.

- To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

  As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.

7. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
8. In the Users section, to exclude guest users when retrieving users from Entra ID, deselect the **Fetch guest users from Entra ID** option.

   Note: When the **Fetch guest users from Entra ID** option is selected, the connector retrieves guest users and tenant members from Entra ID. This can significantly increase the user corpus size for user mappings and can affect performance. With the option deselected, the connector only retrieves tenant members from Entra ID. Deselect this option unless mapping guest users from Entra ID to ServiceNow AI Platform users is a requirement for the external content connector.

9. Select **Save**.

Result

The Microsoft SharePoint Online external content connector is updated with your crawl scope and file extension filter settings.

What to do next

To retrieve content from your Microsoft SharePoint Online source system using your modified crawl settings, create and run a one-time content crawl for your Microsoft SharePoint Online external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

View retrievable page content using the Microsoft SharePoint Online REST API

Review the elements of a Microsoft SharePoint Online page's content that can be retrieved by the Microsoft SharePoint Online external content connector.

Before you begin

You need the following details about each Microsoft SharePoint Online page that you want to view retrievable content for:

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- Your site URL. This is typically in the format `https://<tenant-name>.sharepoint.com/sites/<site-name>`, where `<tenant-name>` is the hostname for your tenant and `<site-name>` is the name of the site in which the page resides. As an example, your site URL might be `https://example.sharepoint.com/sites/my-site`.
- The `.aspx` page's filename, without the extension. As an example, if the URL for your page is `https://example.sharepoint.com/sites/my-site/SitePages/sample-page.aspx`, the page's filename is `sample-page`.

> **Note:** Microsoft SharePoint Online page filenames are case-sensitive, so copy the filename exactly as it appears in the URL field of your web browser.

Role required: none

About this task

Perform this procedure to review the contents of a Microsoft SharePoint Online page's CanvasContent1 and WikiFields metadata fields. These fields contain the static content that the connector retrieves and makes searchable in your AI Search applications.

Microsoft SharePoint Online pages are stored as `.aspx` files in a site's Site Pages library. These files include static content in their CanvasContent1 and WikiFields metadata fields, but they also include scripts that call a server-side engine to dynamically render viewable content at request time. The exact content rendered depends on user context, permissions, and web parts loaded as part of the page request.

Rendering a page's full viewable content requires an authenticated user session. The Microsoft SharePoint Online connector can't impersonate a user to trigger this rendering process. As a result, the connector cannot capture the final HTML output that a web browser would display.

For each page retrieved, the Microsoft SharePoint Online connector queries the SharePoint REST API to access the page's underlying list item. The API endpoint used is `_api/web/lists('<list-id>')/items(<item-id>)`, where `<list-id>` and `<item-id>` are dynamically substituted values. The connector retrieves content primarily from the page's CanvasContent1 and WikiFields metadata fields, and also captures the page's other metadata fields such as title, author, and modification date where available. Page content stored exclusively in dynamic web parts may be retrieved only partially or not at all, since that content doesn't exist in the list item metadata.

The upshot of this limitation is that pages built primarily with static text content authored in the Microsoft SharePoint Online editor produce searchable content that more closely matches what users see in a web browser. By contrast, pages that rely on dynamic web parts may not contain all of the content that users see in a web browser.

Procedure

1. Retrieve the ID for your site's Site Pages list.

   a. In a web browser, navigate to your Microsoft SharePoint Online tenant and log in.

   b. In the browser, navigate to `<site-url>/_api/web/lists?$select=ID,Title&$filter=Title%20eq%20%27Site%20Pages%27`, replacing `<site-url>` with your Microsoft SharePoint Online site URL.
   If this request doesn't return an XML response describing the Site Pages list, navigate to `<site-url>/_api/web/lists?$select=ID,Title` instead, then find the entry for the Site Pages list in the unfiltered response.

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c. In the XML response, locate the `<d:Id>` element and copy the list GUID given as its value. As an example, the list GUID might be `4acc128d-166d-441d-a7a6-d96ae2e8b46f`.

2. View static content for your selected page.

a. In your web browser, navigate to `<site-url>/_api/web/lists('<list-id>')/items?$filter=FileLeafRef%20eq%20%27<filename>.aspx%27`, replacing `<site-url>` with your site URL, `<list-id>` with the GUID that you copied in step 1.c, and `<filename>` with the filename of the page you want to view searchable content for.

b. In the XML response, locate the CanvasContent1 and WikiField metadata fields and examine their values.
These fields contain the static content that the Microsoft SharePoint Online connector makes searchable when the page is retrieved.

Note: If the CanvasContent1 and WikiField metadata fields are missing or empty, the page is likely rendered entirely via dynamic web parts and doesn't contain static content that can be retrieved by the Microsoft SharePoint Online external content connector.

Microsoft Teams external content connector

The Microsoft Teams external content connector retrieves conversations and attachments from teams in your Microsoft Teams source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Create a public/private key pair for the Microsoft Teams external content connector

Generate a public/private key pair for the Microsoft Teams external content connector. Extract the public key as a DER-encoded binary X.509 format certificate for use in configuring API access for the connector in the Microsoft Entra admin center.

Before you begin

You must have access to the Java keytool utility. For details on the keytool utility, see https://docs.oracle.com/en/java/javase/21/docs/specs/man/keytool.html.

Role required: none

About this task

The Microsoft Teams external content connector uses a public/private key pair to authenticate with an OAuth 2.0 app configured in the Microsoft Entra admin center. Key pair authentication allows the connector to access your Microsoft Teams data via the Microsoft Graph API.

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To configure public/private key pair authentication for the connector, you need to create the following items:

1. A public/private key pair in Java KeyStore (JKS) format.
   - Your connector administrator needs this JKS keystore file and its password when configuring settings for the Microsoft Teams external content connector.
   - When the Microsoft Teams external content connector runs a crawl, it uses the private key from this JKS keystore file to sign the authentication request it sends to the OAuth 2.0 app defined in the Microsoft Entra admin center.
2. A copy of the public key in DER-encoded binary X.509 certificate format.
   - Your administrator needs to upload this certificate file to the OAuth 2.0 app defined in the Microsoft Entra admin center that grants API access to the Microsoft Teams external content connector.
   - When the Microsoft Teams external content connector submits its authentication request to the OAuth 2.0 app defined in the Microsoft Entra admin center, the app uses the public key from this uploaded certificate to confirm that the authentication request was signed with the private key.

Note: If your organization has its own guidelines for generating public/private key pairs, follow those to generate a key pair and a public key certificate in the required formats.

Procedure

1. Generate a public/private key pair in JKS keystore format:

   a. Run this keytool command, replacing `<alias>`, `<jks-file>`, and `<password>` with values of your choice:

   ```
   keytool -genkey -alias <alias> -keyalg RSA -keysize 2048
    -keystore <jks-file>.jks -storepass "<password>" -storetype
    JKS -validity 360
   ```

   As an example, you might specify `ms-teams-connector-cert` as the key alias and the JKS repository filename, and enter a password:

   ```
   keytool -genkey -alias ms-teams-connector-cert -keyalg
    RSA -keysize 2048 -keystore ms-teams-connector-cert.jks
    -storepass "gC+M{wKyqSu*}7HY" -storetype JKS -validity 360
   ```

   b. When prompted for your first and last name, enter the Common Name (CN) you want for the key pair, then press Enter.
   As an example, you might specify `Microsoft Teams external content connector` as the Common Name for the key pair.

   c. At each of the remaining distinguished name prompts, enter the requested information and press Enter.

   d. When prompted to confirm that the distinguished name is correct, enter `yes` and press Enter.

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e. When prompted for a key password, press Enter to use the same password you specified for the keystore file.

> **Important:** The key must use the same password as the keystore. Record this password in a secure location. Your connector administrator needs this password when configuring the Microsoft Teams external content connector.

The keytool utility generates a new Java KeyStore (.jks) file containing your public/private key pair.

> **Important:** Ignore the keytool warning message about migrating your keystore to the PKCS12 format. The external content connector only supports the Java KeyStore format.

2. Export your public key in DER-encoded binary X.509 certificate format by running the following keytool command, replacing `<cer-file>` with a filename of your choice and replacing `<alias>`, `<jks-file>`, and `<password>` with the same values you used in step 1:

```
keytool -export -alias <alias> -file <cer-file>.cer -keystore
 <jks-file>.jks -storepass "<password>" -storetype JKS
```

As an example, you might specify `ms-teams-connector-cert` as the filename for the DER-encoded binary X.509 format certificate:

```
keytool -export -alias ms-teams-connector-cert
 -file ms-teams-connector-cert.cer -keystore
 ms-teams-connector-cert.jks -storepass "gC+M{wKyqSu*}7HY"
 -storetype JKS
```

The keytool utility exports a copy of your public key as a DER-encoded binary X.509 format certificate file with your chosen filename.

> **Important:** Ignore the keytool warning message about migrating your keystore to the PKCS12 format. The external content connector only supports the Java KeyStore format.

What to do next

Provide both of the files you generated to the admins who configure your Microsoft Teams instance and AI Search on your ServiceNow AI Platform® instance, as follows:

File	Description
DER-encoded binary X.509 format public key certificate file	Provide this certificate file to your Microsoft Teams administrator. They will need to upload the certificate to the Microsoft Entra admin center when configuring an OAuth 2.0 application for the Microsoft Teams external content connector. For more information on configuring an OAuth 2.0 application in the Microsoft Entra admin center for the Microsoft Teams external content connector, see Configure Microsoft Teams for external content indexing.
JKS keystore file and password	Provide this Java KeyStore file and its password to your ServiceNow AI Platform admins. They will need the file and password when configuring the Microsoft Teams external content connector. For details on creating and configuring the Microsoft Teams external content connector, see Create a Microsoft Teams external content connector.

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Configure Microsoft Teams for external content indexing

Register an OAuth 2.0 application in the Microsoft Entra admin center to allow the Microsoft Teams external content connector to access your Microsoft Teams source system.

Before you begin

You need the following credentials and permissions for your organization in the Microsoft Entra admin center:

- Login credentials
- Permission to register an application
- Permission to add API permissions to an application
- Permission to grant admin consent for an application's API permissions
- Permission to upload certificates for an application

You must have created a public/private key pair for the Microsoft Teams external content connector and extracted the public key certificate in DER-encoded binary X.509 format. For details on creating the public/private key pair and extracting the public key certificate, see Create a public/private key pair for the Microsoft Teams external content connector.

Role required: none

About this task

The Microsoft Teams external content connector retrieves content from your Microsoft Teams source system using Microsoft Graph and the Microsoft SharePoint REST APIs.

To enable the connector to access your Microsoft Teams source system via these APIs, you must configure an OAuth 2.0 application in the Microsoft Entra admin center. Your connector administrator can use settings copied from this Microsoft Entra application to configure the Microsoft Teams external content connector for proper connection to your Microsoft Teams source system.

Procedure

1. Register a new application in the Microsoft Entra admin center.

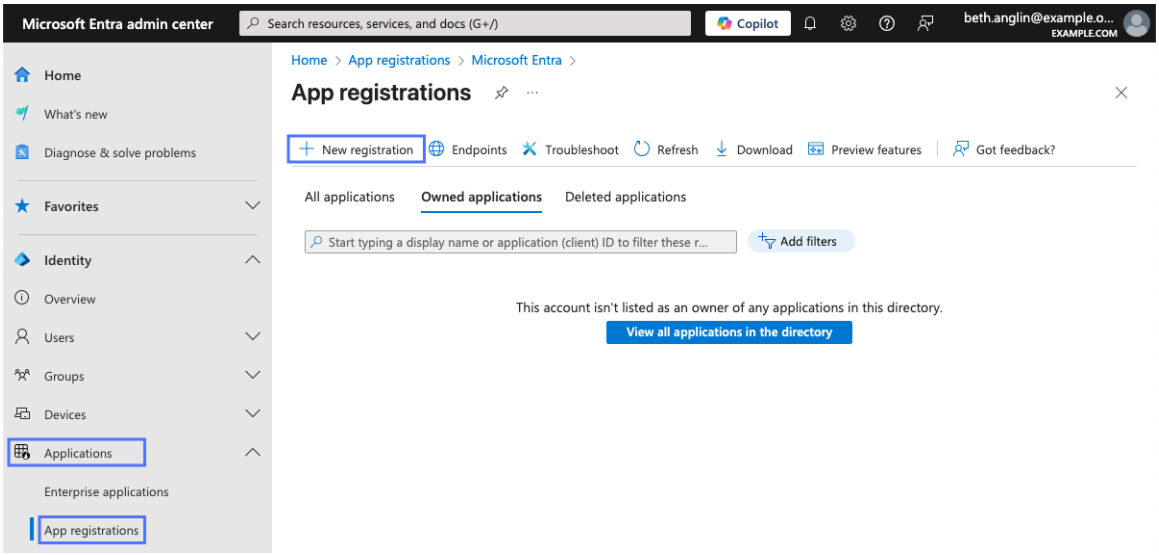
   a. Log in to the Microsoft Entra admin center at https://entra.microsoft.com/.

      Note: If your Microsoft Teams tenant is in the Microsoft 365 GCC or GCC High cloud or the Microsoft 365 DoD cloud, log in at https://entra.microsoft.us/ instead.

   b. Select **Applications** > **App registrations**.

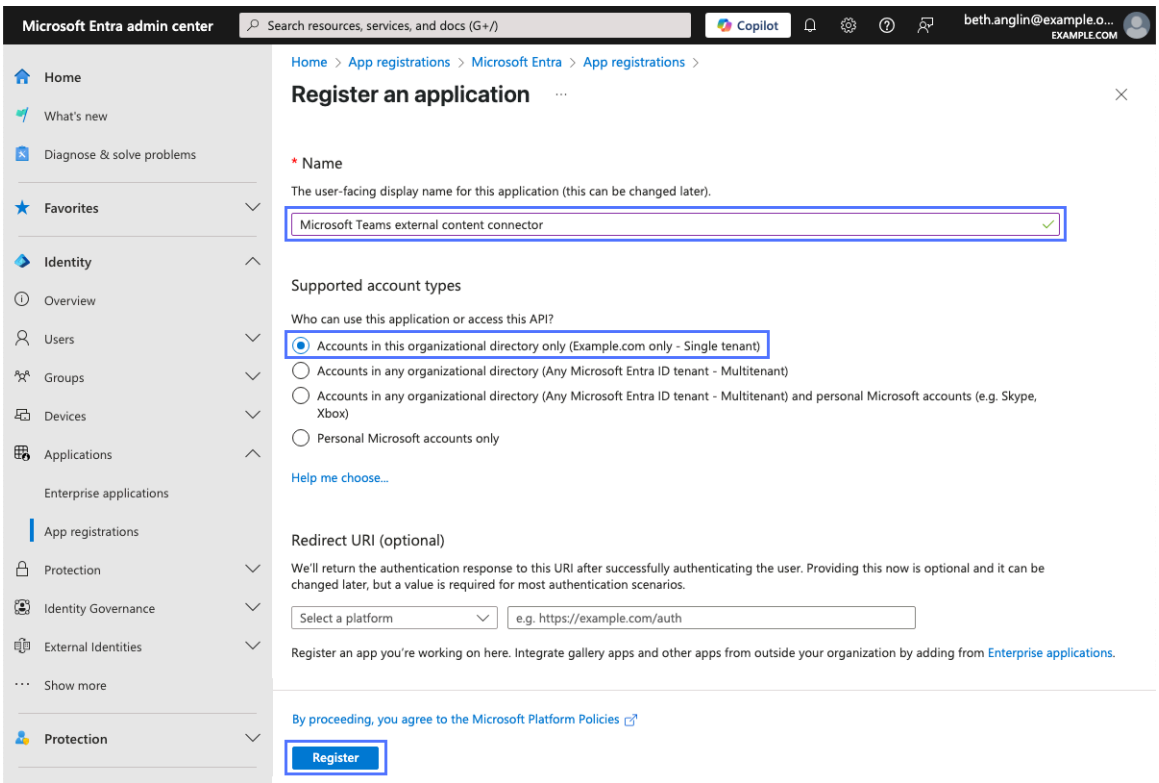
   c. On the App registrations page, select **New registration**.

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d. On the Register an application form, fill in the following fields:

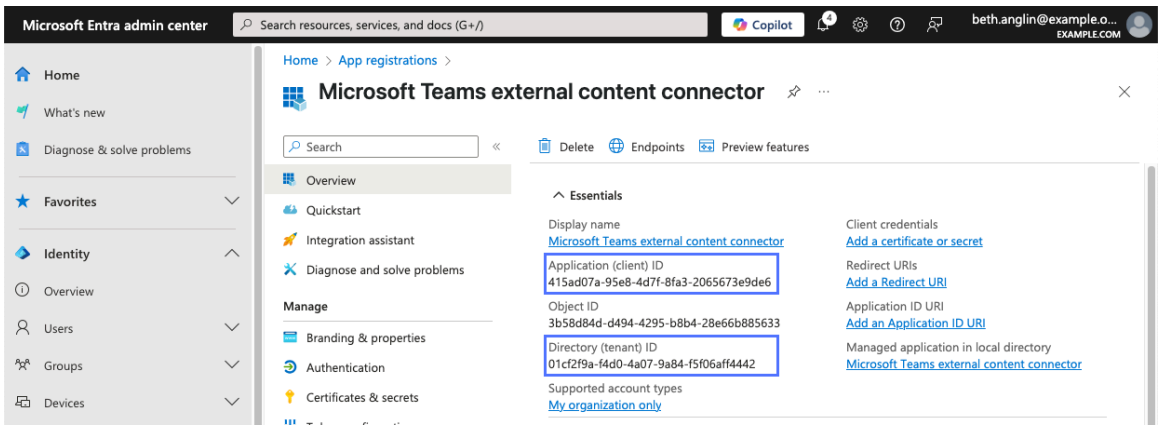
Field	Instructions
Name	Enter a unique name for your OAuth 2.0 application. For example, you might enter `Microsoft Teams external content connector`.
Supported account types	Select **Accounts in this organizational directory only (<instance-name> only - Single tenant)**, where `<instance-name>` is the name of your Microsoft Entra instance.
Redirect URI (optional)	Leave this field empty.



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e. Select **Register**.
The new application's Overview page appears.

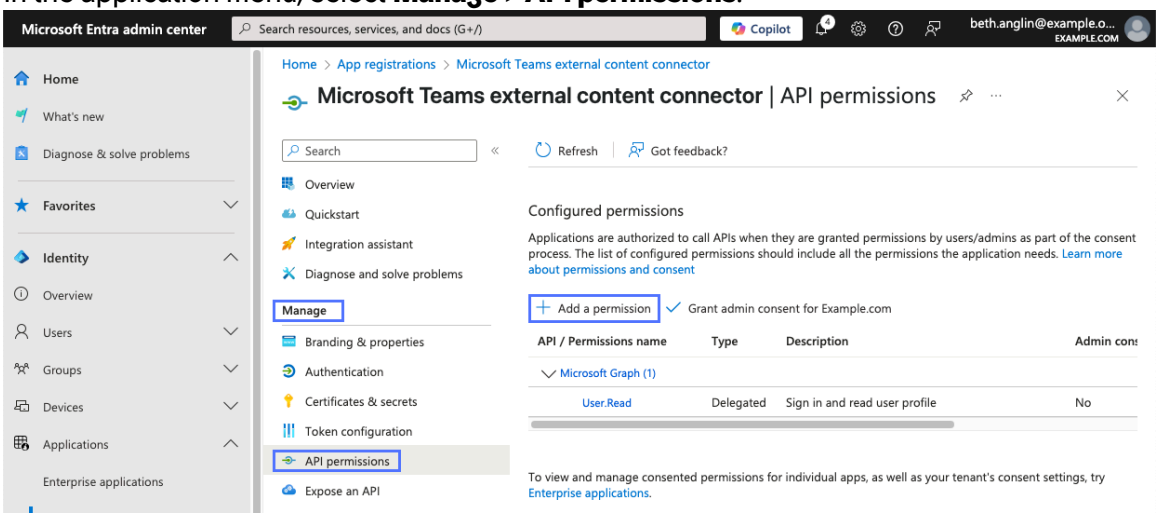
2. Record the values of the **Application (client) ID** and **Directory (tenant) ID** properties in a secure location.



Important: Your connector administrator needs the application's tenant and client IDs to configure a Microsoft Teams external content connector.

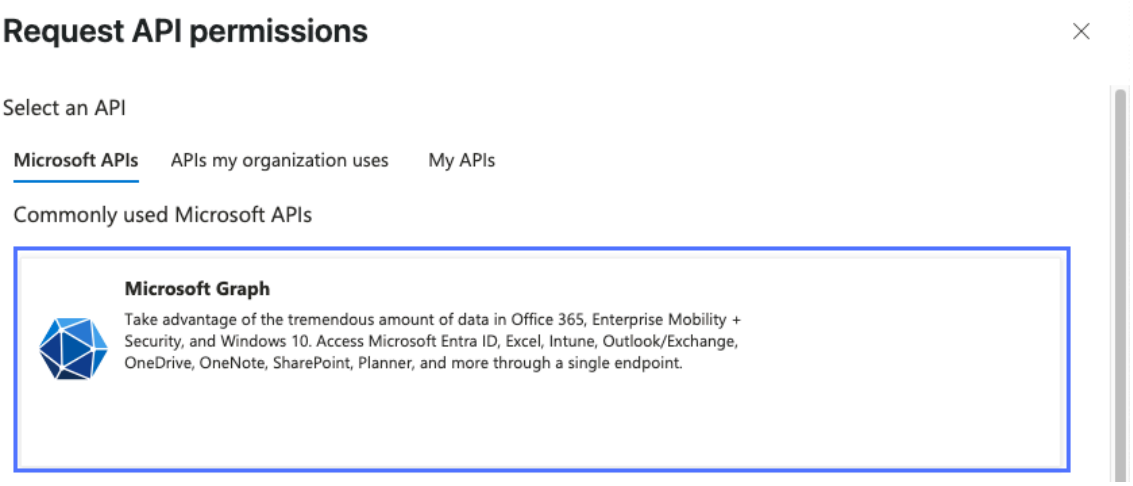
3. Add the API permissions required by the Microsoft Teams external content connector.

a. In the application menu, select **Manage** > **API permissions**.



b. Select **Add a permission**, then select *Microsoft Graph*, then select **Application permissions**.

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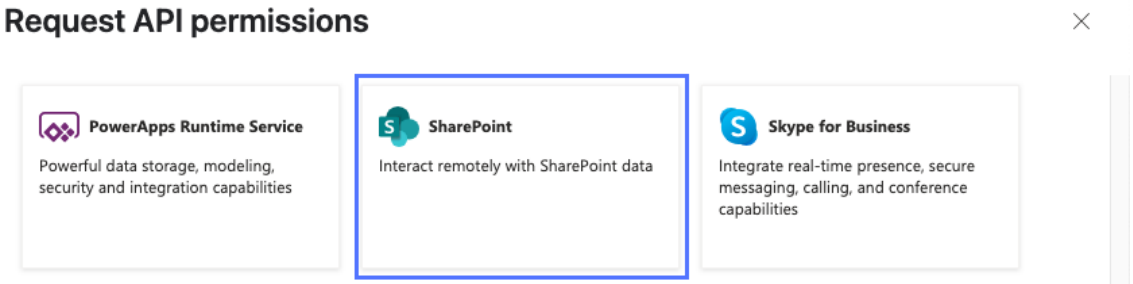


c. For each of the following permissions, enter the permission name into the **Select permissions** search field, then locate and select the option for the permission.

- Channel.ReadBasic.All
- ChannelMember.Read.All
- GroupMember.Read.All
- Sites.Read.All
- Team.ReadBasic.All
- TeamMember.Read.All
- User.Read.All

d. Select **Add permissions**.
The new Microsoft Graph permissions appear in the application's Configured permissions list.

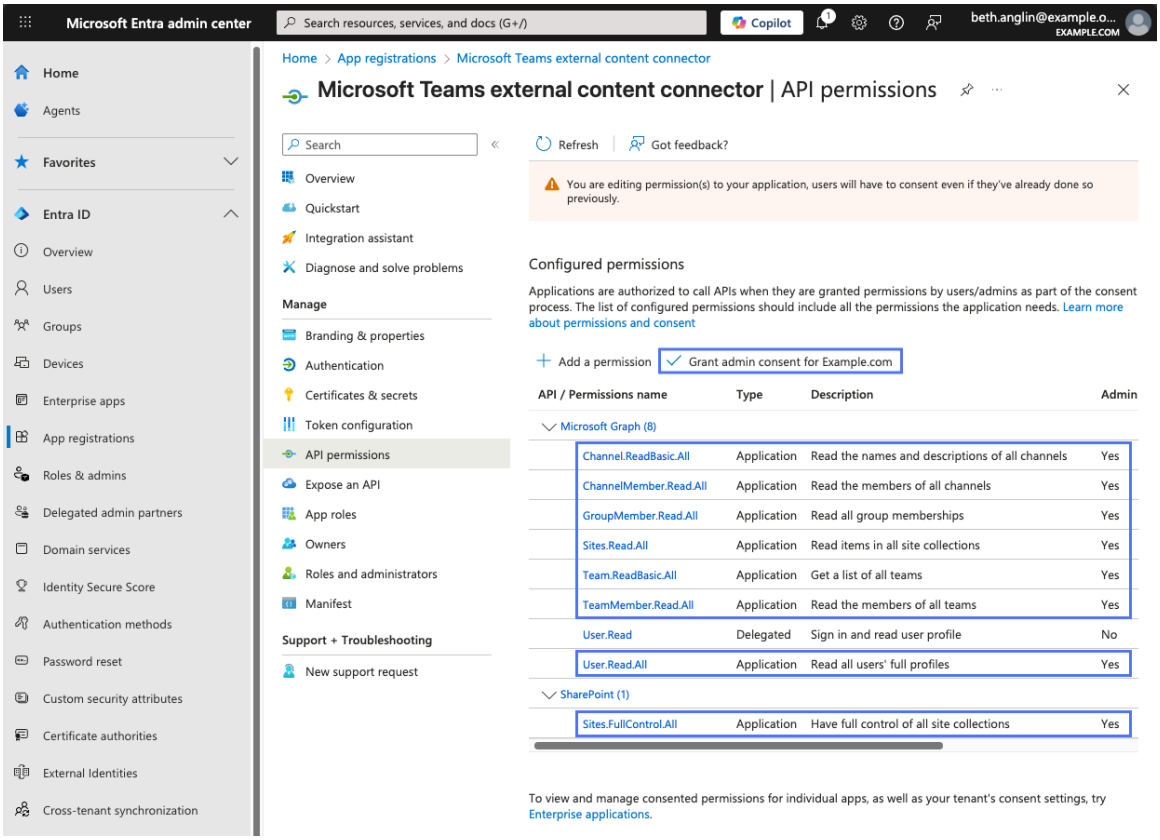
e. Select **Add a permission**, then select **SharePoint**, then select **Application permissions**.



f. In the **Select permissions** search field, enter `Sites.FullControl.All`, then locate and select the option for the permission.

g. Select **Add permissions**.
The new SharePoint permission appears in the application's Configured permissions list.

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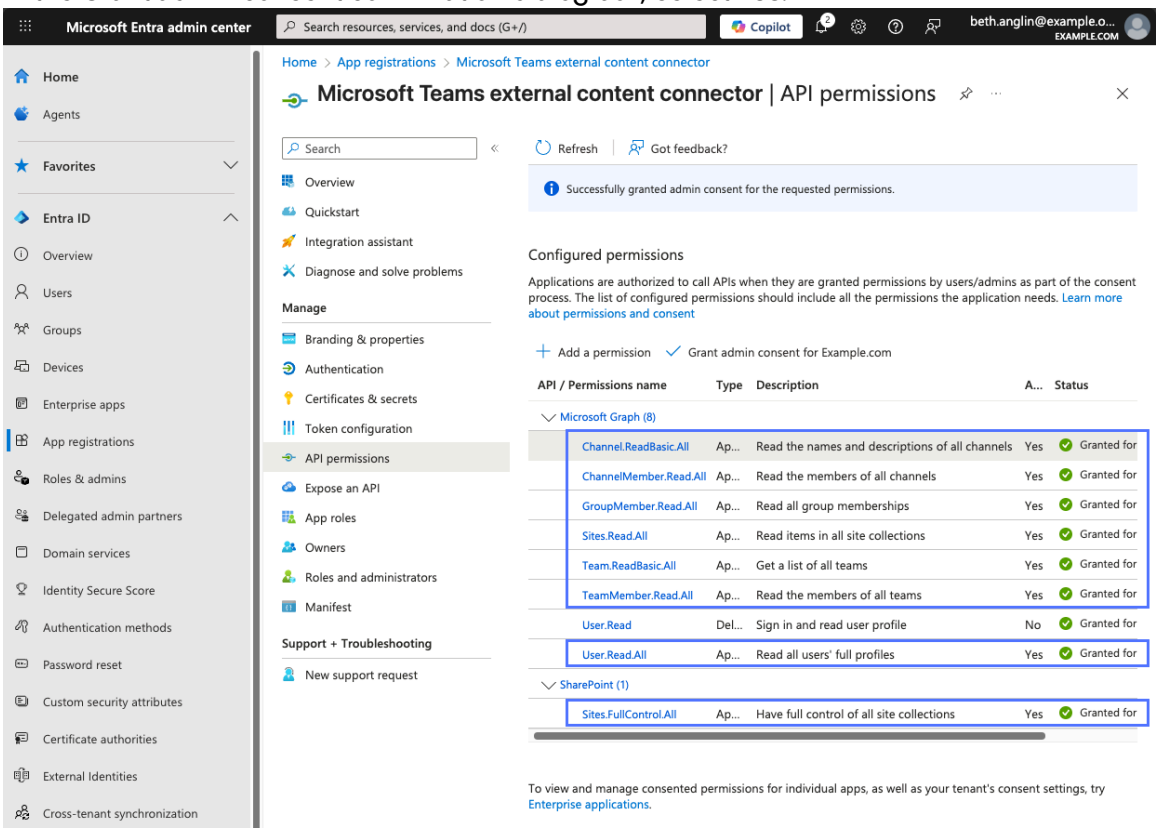


4. Grant admin consent for the added API permissions.

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a. Select **Grant admin consent for <instance-name>**, where `<instance-name>` is the name of your Microsoft Entra instance.

b. In the Grant admin consent confirmation dialog box, select **Yes**.

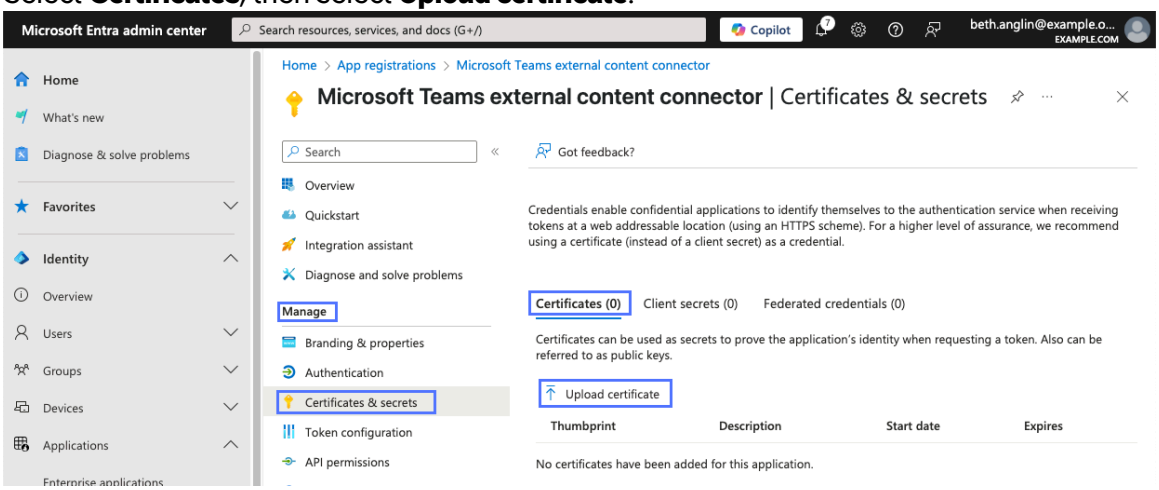


The status for the added API permissions changes to `Granted for <instance-name>`, where `<instance-name>` is the name of your Microsoft Entra instance.

5. Upload your DER-encoded binary X.509 format public key certificate for the Microsoft Teams external content connector.

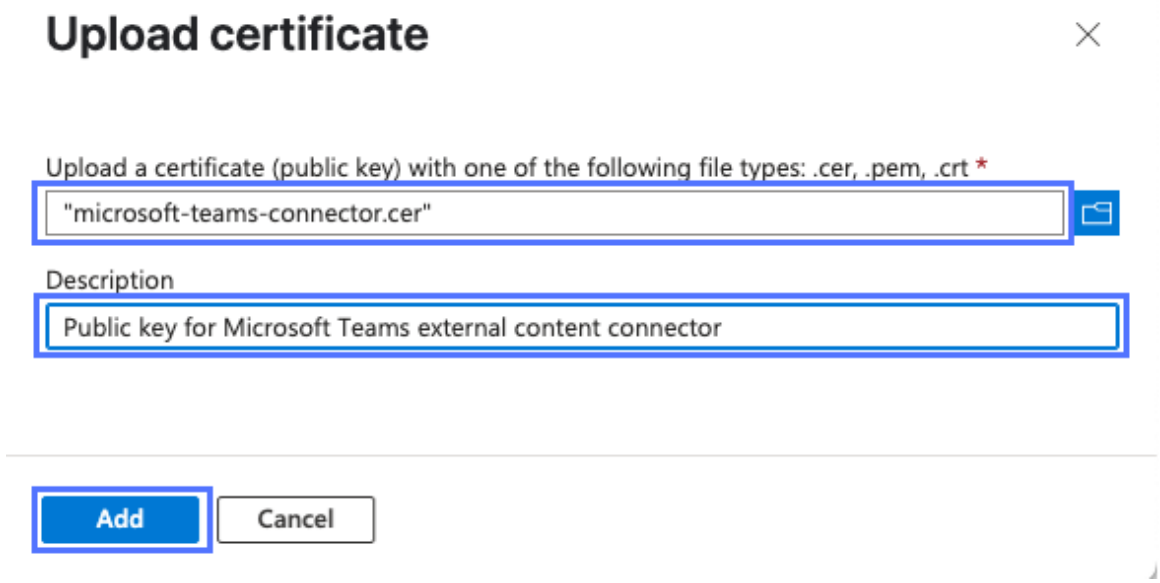
a. In the Microsoft Entra application menu, select **Manage** > **Certificates & secrets**.

b. Select **Certificates**, then select **Upload certificate**.



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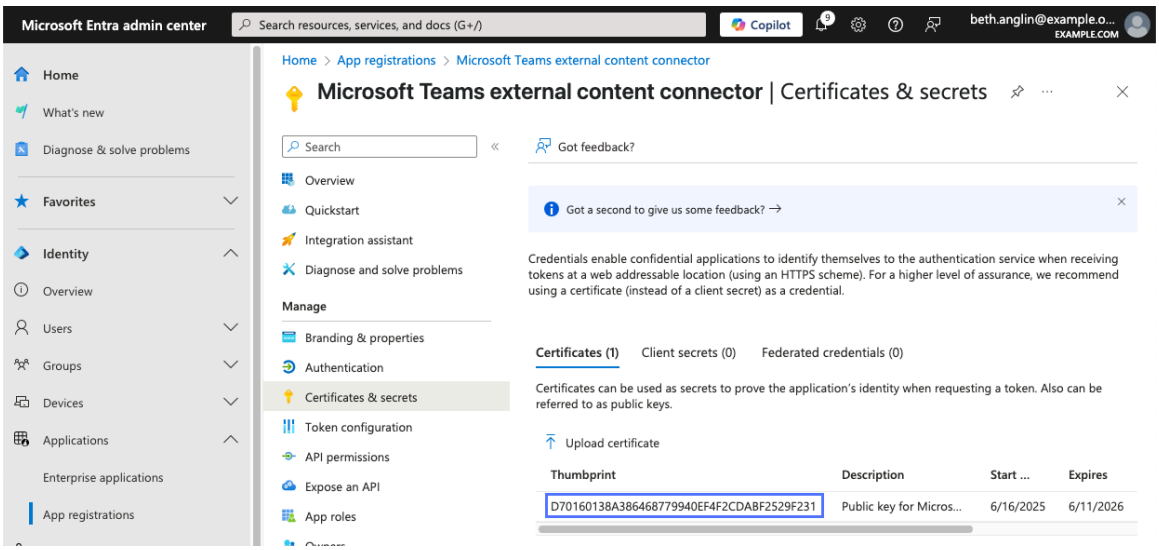
c. Select **Select a file** and locate your DER-encoded binary X.509 format public key certificate file, then enter a description for it.



d. Select **Add**.
The DER-encoded binary X.509 format public key certificate appears in the Certificates list.

Note: You can drag the column separators in the Certificates list to view the entire thumbprint SHA1 hash value.

e. Copy the certificate's **Thumbprint** SHA1 hash, shown in hexadecimal format, and record it in a secure location.



Important: Your connector administrator needs the DER-encoded binary X.509 format public key certificate's SHA1 thumbprint hash in base64-encoded format to configure the Microsoft Teams external content connector.

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f. Retain copies of the generated public/private key files and the key password in a secure location.

Note: You can't download the public key certificate or its password from the Microsoft Entra admin center.

What to do next

Provide the following items to your connector administrator:

- The OAuth 2.0 application's tenant ID and client ID that you recorded in step 2.
- The DER-encoded binary X.509 format public key certificate's SHA1 thumbprint hash in hexadecimal format that you recorded in step 5.e.

Your connector administrator needs these items to configure a Microsoft Teams external content connector to retrieve searchable content and security principals from your Microsoft Teams instance.

For details on creating and configuring a Microsoft Teams external content connector, see Create a Microsoft Teams external content connector.

Create a Microsoft Teams external content connector

Create an external content connector to retrieve searchable content and security principals from your Microsoft Teams source system.

Before you begin

A source system administrator must have already configured your Microsoft Teams source system to allow access by the Microsoft Teams external content connector. For the required source system configuration steps, see Create a public/private key pair for the Microsoft Teams external content connector and Configure Microsoft Teams for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Microsoft Teams** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Microsoft Teams external content connector.
Application (client) ID	Application (client) ID for the OAuth 2.0 application defined in the Microsoft Entra admin center that grants access to your Microsoft Teams source system. If you have access to the OAuth 2.0 application's registration record in the Microsoft Entra admin center, you can navigate to **Overview** and copy this ID from the **Application (client) ID** field in the Essentials section.

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Connection setting	Description
	If you can't access the OAuth 2.0 application's registration record in the Microsoft Entra admin center, ask your Microsoft Entra administrator for the application's **Application (client) ID** value.
Directory (tenant) ID	Directory (tenant) ID for the OAuth 2.0 application defined in the Microsoft Entra admin center that grants access to your Microsoft Teams source system. If you have access to the OAuth 2.0 application's registration record in the Microsoft Entra admin center, you can navigate to **Overview** and copy this ID from the **Directory (tenant) ID** field in the Essentials section. If you can't access the OAuth 2.0 application's registration record in the Microsoft Entra admin center, ask your Microsoft Entra administrator for the application's **Directory (tenant) ID** value.
JKS Certificate	Java KeyStore (JKS) file containing a public/private key pair generated with the Java keytool utility. These keys must match the public key from the DER-encoded binary X.509 format certificate uploaded to the OAuth 2.0 application defined in the Microsoft Entra admin center that allows the Microsoft Teams external content connector to access your source system data. If you don't have a copy of the JKS file, ask your security administrator for it. You can't download the JKS file from the OAuth 2.0 application's registration record in the Microsoft Entra admin center.
JKS certificate password	Password for the Java KeyStore (JKS) file specified in *`JKS Certificate`*. If you don't have the password for the JKS file, ask your security administrator for it. You can't retrieve the JKS certificate password from the registration record for the OAuth 2.0 application defined in the Microsoft Entra admin center that allows the Microsoft Teams external content connector to access your source system data.
JKS certificate thumbprint	Base64-encoded or hexadecimal SHA1 hash for the DER-encoded binary X.509 format public key certificate uploaded to the OAuth 2.0 application defined in the Microsoft Entra admin center that allows the Microsoft Teams external content connector to access your source system data. If you don't have this hash, ask your Microsoft Entra administrator for the SHA1 thumbprint hash for the application's DER-encoded binary X.509 format public key certificate, in either base64-encoded or hexadecimal format.
Settings for regulated markets	
Configure settings for regulated markets	Option to display *`Authority endpoint`* and *`Graph API endpoint`* settings fields.
Authority endpoint	URL for the Microsoft authorization server that you use to log in to your source system (Microsoft tenant). This field appears only when *`Configure settings for regulated markets`* is selected. Default value: `https://login.microsoftonline.com/`

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Connection setting	Description
	Cloud service endpoint URLs include: ○ `https://login.microsoftonline.com/`: Endpoint URL for the Microsoft 365 cloud ○ `https://login.microsoftonline.us/`: Endpoint URL for the Microsoft 365 GCC and GCC High cloud and the Microsoft 365 DoD cloud If you don't know the authority endpoint URL to use, ask your Microsoft administrator for it. **Important:** The authority endpoint URL must end with a trailing slash.
Graph API endpoint	Microsoft Graph API endpoint for your source system (Microsoft tenant). This field appears only when *`Configure settings for regulated markets`* is selected. Default value: `https://graph.microsoftonline.com/` Microsoft Graph API endpoint URLs include: ○ `https://graph.microsoftonline.com/`: Endpoint URL for the Microsoft Graph global service cloud ○ `https://graph.microsoftonline.us/`: Endpoint URL for the Microsoft Graph for US Government L4 cloud ○ `https://dod-graph.microsoftonline.us/`: Endpoint URL for Microsoft Graph for US Government L5 (DOD) cloud If you don't know the Microsoft Graph API endpoint URL to use, ask your Microsoft administrator for it. **Important:** The Microsoft Graph API endpoint URL must end with a trailing slash.
Validate connection settings with test crawl	Option to run a short test crawl to verify whether your connection settings and source system permissions are correctly set. For more details on validating connection settings and source system permissions with a test crawl, see Verify your connection settings and source system permissions for an external content connector. **Important:** For connectors that support user permission crawls, all searchable content and metadata indexed by the validation test crawl is public until the connector completes its first user permission crawl. This means the test crawl's content will be visible to all users of portals and search applications that the connector is linked to.

Note: The **Settings for regulated markets** connection settings aren't shown for Microsoft Teams connectors that you created in versions of External Content Connectors prior to version 4.0. Starting in External Content Connectors version 4.0, these connection settings are shown when you create a new Microsoft Teams external content connector.

6. Save and validate your connection settings by selecting **Validate Connection**.

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Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Microsoft Teams external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Microsoft Teams external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search

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application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Microsoft Teams external content connector

Specify the teams you want your Microsoft Teams external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Microsoft Teams external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Microsoft Teams external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Microsoft Teams external content connector crawls all teams from its specified source system and sends documents with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the teams to crawl when running content crawls
- Inclusion or exclusion filters for the attachment file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Microsoft Teams external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Content filtering** options:
   - To crawl all teams from the source system, select **Crawl all content**.
   - To crawl only a specified set of teams from the source system, select **Include only these teams**, then use the **Add URL** field and **Add** button to enter URLs for teams that you want to include in the crawl.

     For example, you might enter `https://teams.microsoft.com/l/team/NJ1UM7Km8nxdInbXeBw4` to include only searchable content from the specified team.
   - To crawl all except a specified set of teams from the source system, select **Exclude only these teams**, then use the **Add URL** field and **Add** button to enter URLs for teams that you want to exclude from the crawl.

     For example, you might enter `https://teams.microsoft.com/l/team/ipSKKdSu0IeCrO3kWXmD` to exclude searchable content from the specified team.
5. Select one of the following **Attachment filtering** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

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As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.

- To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

  As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.

6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save**.

Result

The Microsoft Teams external content connector is updated with your crawl scope and file extension filter settings.

What to do next

To retrieve content from your Microsoft Teams source system using your modified crawl settings, create and run a one-time content crawl for your Microsoft Teams external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Microsoft Viva Engage external content connector

The Microsoft Viva Engage external content connector retrieves messages and attachments from conversations in your Microsoft Viva Engage source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Limitations for the Microsoft Viva Engage external content connector

The Microsoft Viva Engage external content connector only retrieves searchable content from attachments that are stored in Microsoft SharePoint Online. To learn about file attachment storage in Microsoft Viva Engage, see the Microsoft Viva Engage file storage overview resource.

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Only members of a private community can see searchable content from attachments found in that community. Non-members cannot see searchable content from attachments in the private community, even if those attachments are shared with them in Microsoft Viva Engage.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure Microsoft Viva Engage for external content indexing

Register an OAuth 2.0 application in the Microsoft Entra admin center to allow the Microsoft Viva Engage external content connector to access your Microsoft Viva Engage source system.

Before you begin

You need the following credentials and permissions for your organization in the Microsoft Entra admin center:

- Login credentials
- Permission to register an application
- Permission to add API permissions to an application
- Permission to create client secrets for an application

Role required: none

About this task

The Microsoft Viva Engage external content connector retrieves content from your Microsoft Viva Engage source system using the Yammer API.

To enable the connector to access your Microsoft Viva Engage source system via these APIs, you must configure an OAuth 2.0 application in the Microsoft Entra admin center. Your connector administrator can use settings copied from this Microsoft Entra application to configure the Microsoft Viva Engage external content connector for proper connection to your Microsoft Viva Engage source system.

Procedure

1. Register a new application in the Microsoft Entra admin center.

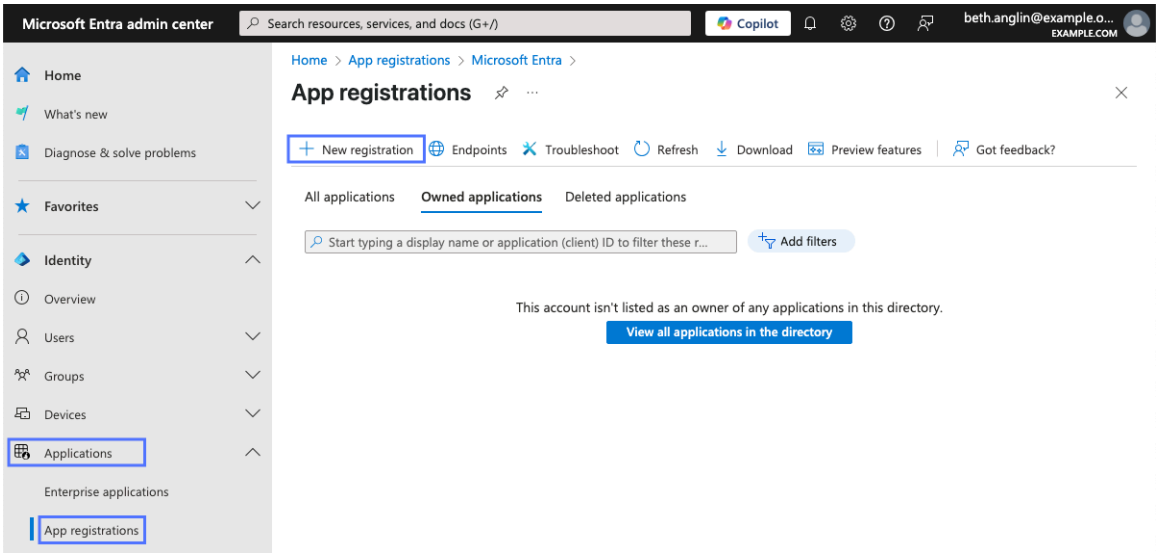
   a. Log in to the Microsoft Entra admin center at https://entra.microsoft.com/.

   Note: If your Microsoft Viva Engage tenant is in the Microsoft 365 GCC or GCC High cloud or the Microsoft 365 DoD cloud, log in at https://entra.microsoft.us/ instead.

   b. Select **Applications** > **App registrations**.

   c. On the App registrations page, select **New registration**.

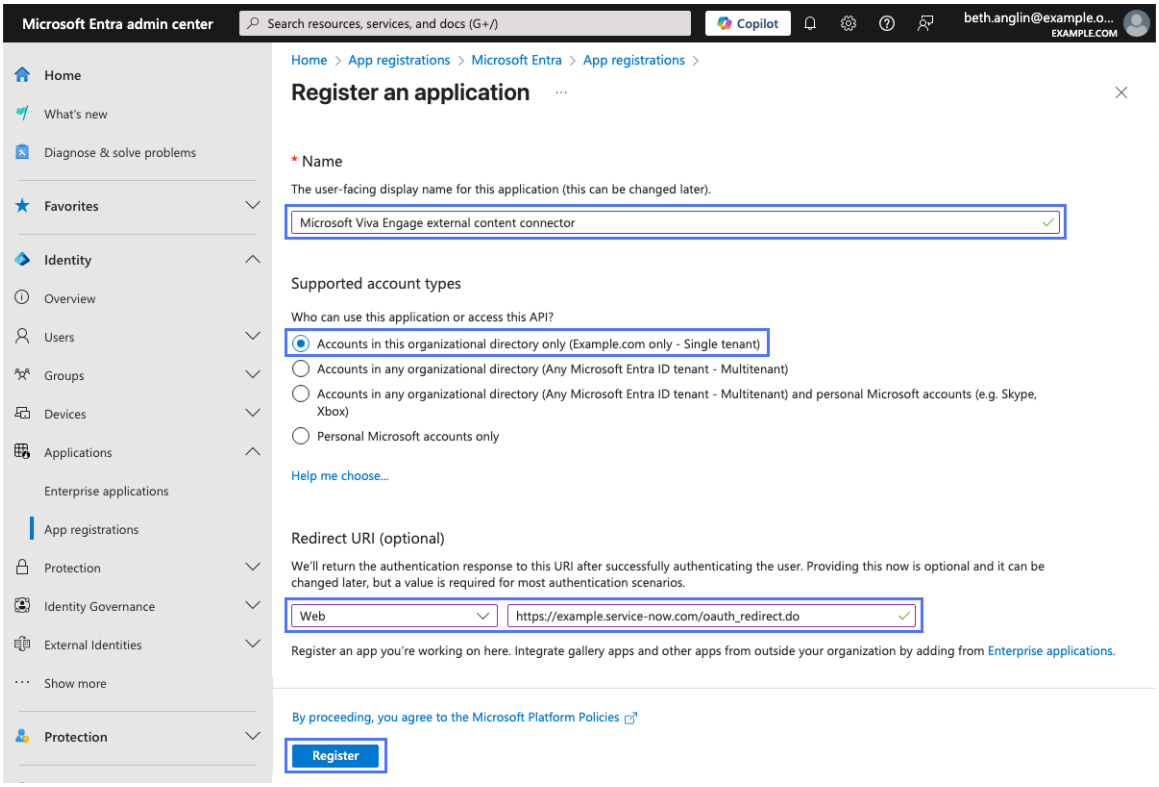
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d. On the Register an application form, fill in the following fields:

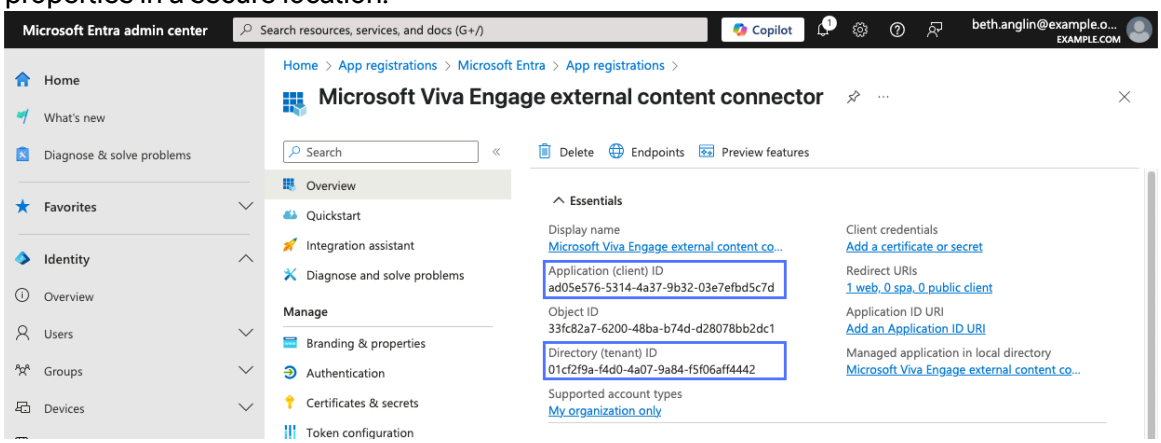
Field	Instructions
Name	Enter a unique name for your OAuth 2.0 application. For example, you might enter `Microsoft Viva Engage external content connector`.
Supported account types	Select **Accounts in this organizational directory only (<instance-name> only - Single tenant)**, where `<instance-name>` is the name of your Microsoft Entra instance.
Redirect URI (optional)	Select **Web** as the redirect URI type, then enter `https://<instance-name>.service-now.com/oauth_redirect.do` as the URI, replacing `<instance-name>` with the hostname for the ServiceNow AI Platform® instance where the Microsoft Viva Engage external content connector will be created.

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e. Select **Register**.
The new application's Overview page appears.

2. Record the values of the new application's **Application (client) ID** and **Directory (tenant) ID** properties in a secure location.



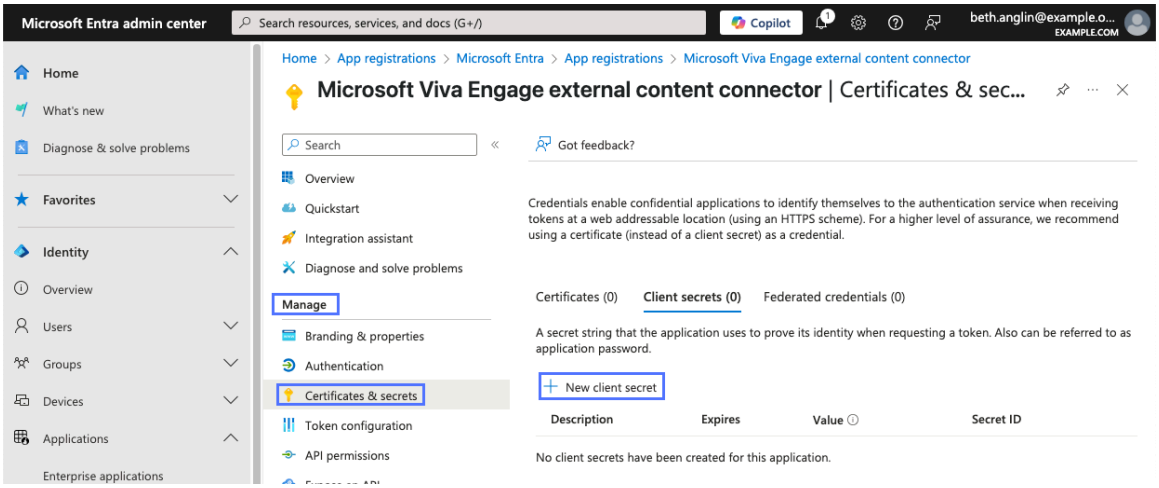
Important: Your connector administrator needs the application's tenant and client IDs to configure a Microsoft Viva Engage external content connector.

3. Create a client secret for the new application.

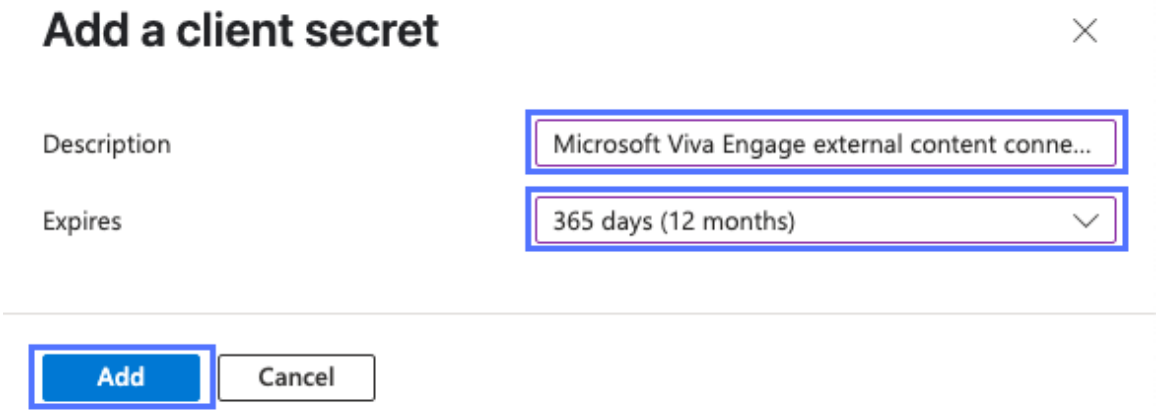
a. In the application menu, select **Manage** > **Certificates & secrets**.

b. Select **Client secrets**, then select **New client secret**.

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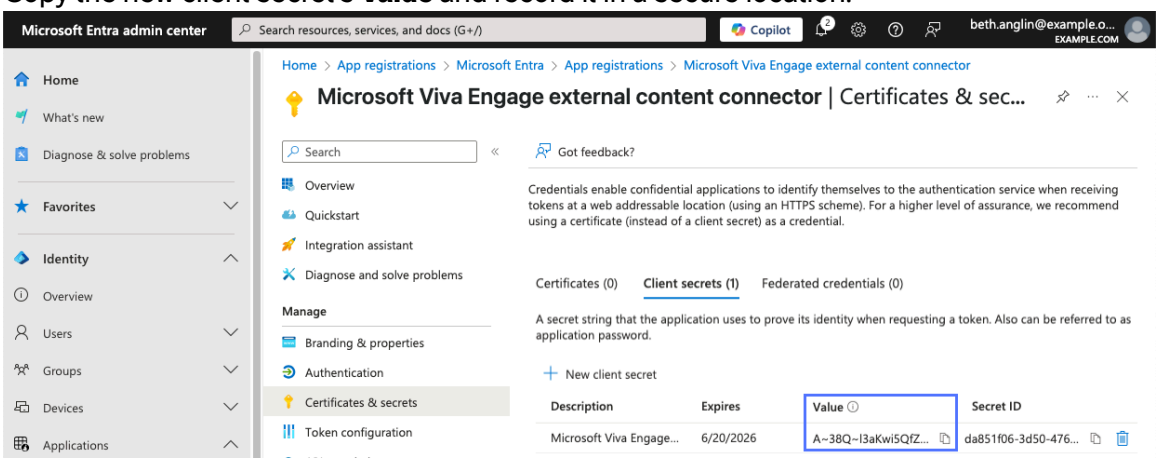


c. In the Add a client secret pane, enter a description for the secret and select its expiration period, then select **Add**.



The new client secret appears in the Client secrets list.

d. Copy the new client secret's **Value** and record it in a secure location.

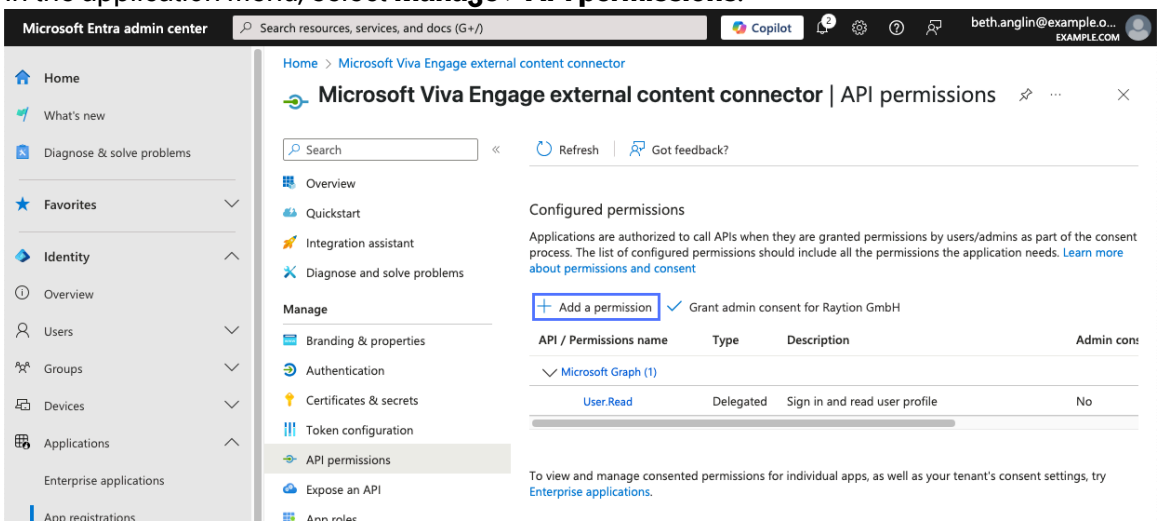


Important: Your connector administrator needs the value of this client secret to configure a Microsoft Viva Engage external content connector.

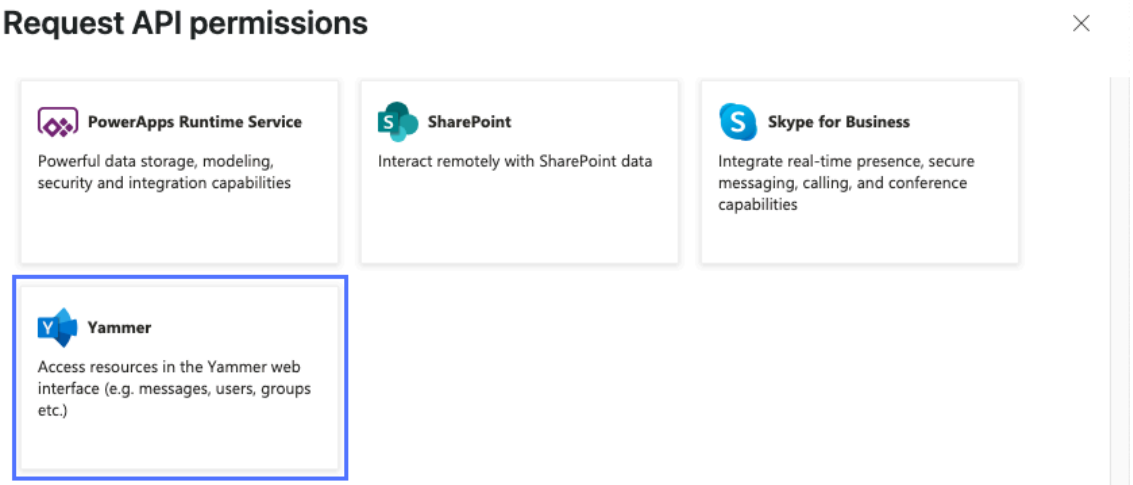
4. Add the Yammer API permission required by the Microsoft Viva Engage external content connector.

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a. In the application menu, select **Manage** > **API permissions**.

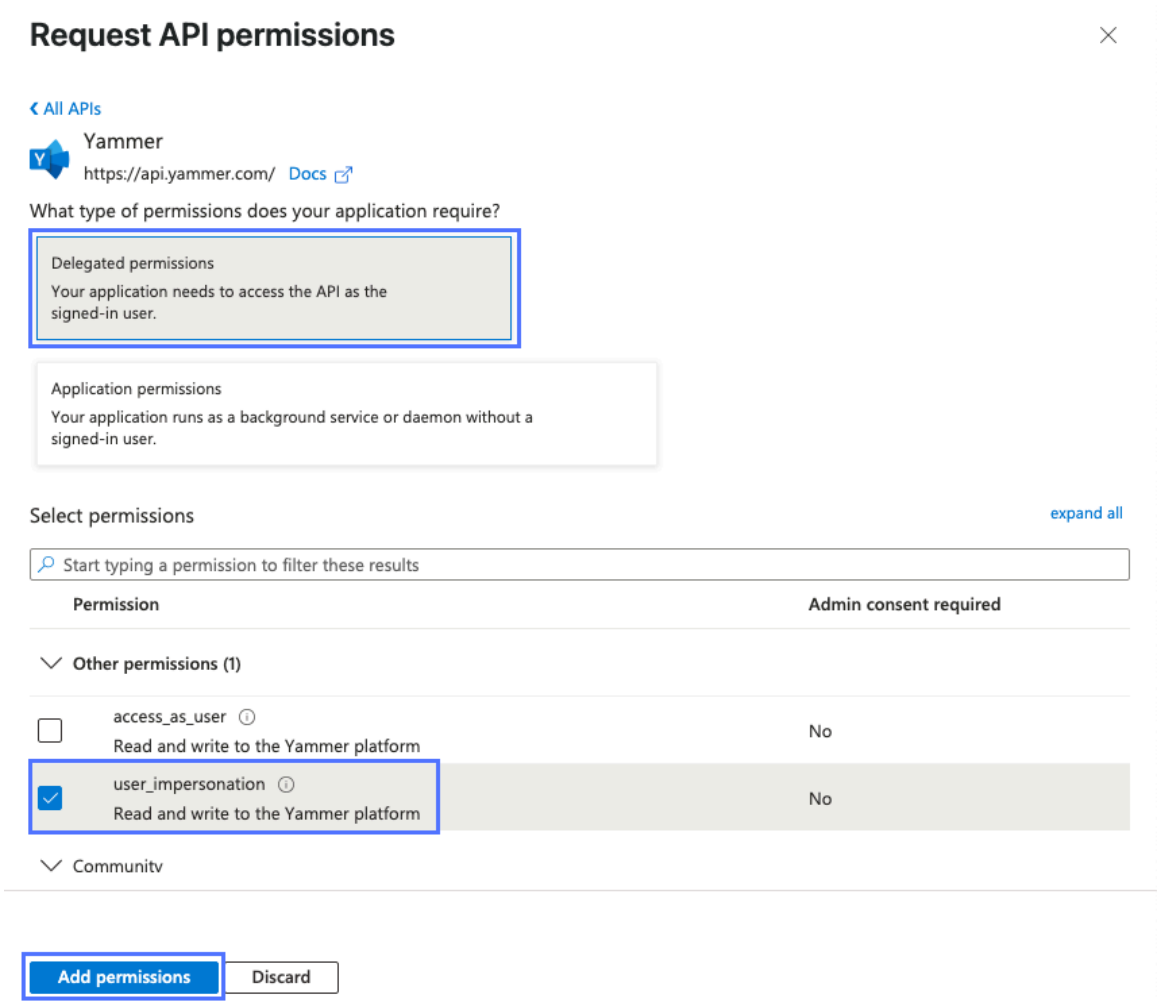


b. Select **Add a permission**, then select **Yammer**.

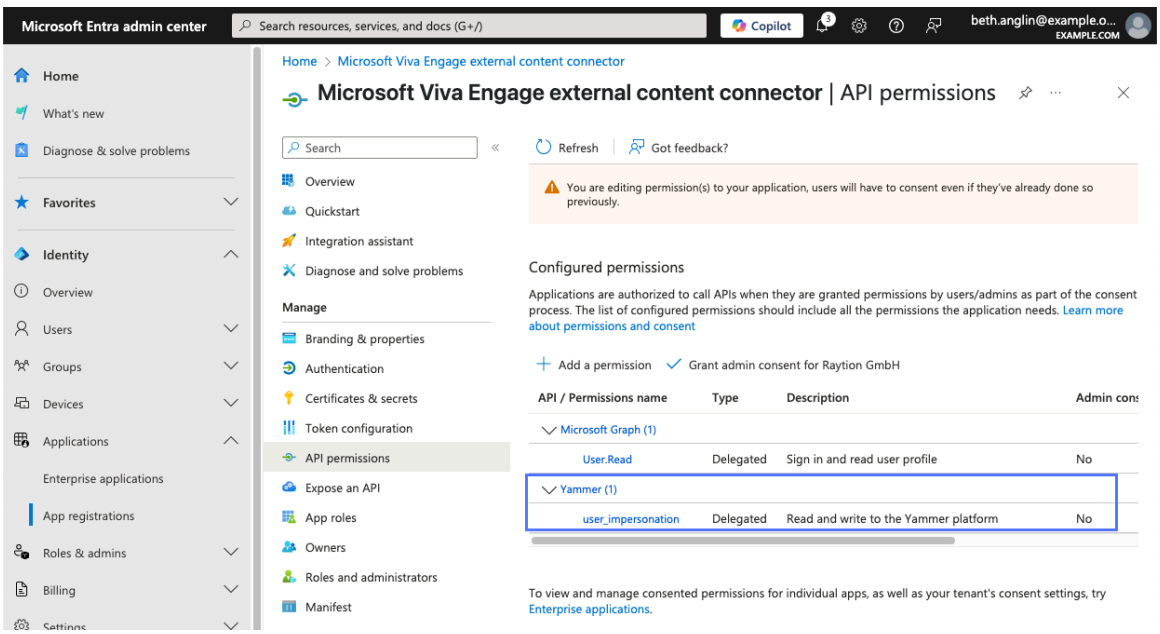


c. Select **Delegated permissions**, then select the option for the **user_impersonation** permission and select **Add permissions**.

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The new Yammer API permission appears in the application's Configured permissions list.



What to do next

Provide the following items to your connector administrator:

- The OAuth 2.0 application's tenant ID and client ID that you recorded in step 2.
- The client secret value that you recorded in step 3.d.

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Your connector administrator needs these items to configure a Microsoft Viva Engage external content connector to retrieve searchable content and security principals from your Microsoft Viva Engage instance.

For details on creating and configuring a Microsoft Viva Engage external content connector, see Create a Microsoft Viva Engage external content connector.

Create a Microsoft Viva Engage external content connector

Create an external content connector to retrieve searchable content and security principals from your Microsoft Viva Engage source system.

Before you begin

A source system administrator must have already configured your Microsoft Viva Engage source system to allow access by the Microsoft Viva Engage external content connector. For the required source system configuration steps, see Configure Microsoft Viva Engage for external content indexing.

You need login credentials for a Microsoft Entra service user account that can grant the Microsoft Viva Engage connector access to your Microsoft Viva Engage tenant.

Note: In order for the connector to retrieve searchable content and metadata from a private community in your Microsoft Viva Engage source system, one of these conditions must be true:

- The service user account is a member of the private community
- The service user account has the Global Administrator Microsoft Entra role
- The service user account has the Groups Administrator Microsoft Entra role

To learn more about administrator roles in Microsoft Viva Engage, see the https://learn.microsoft.com/en-us/entra/identity/role-based-access-control/permissions-reference resource.

Verify that you're logged out of all your Microsoft accounts.

Important: If you're logged in to a Microsoft account when creating the connector, the connector runs using that account instead of prompting you for your Microsoft Entra service user account credentials. Using a non-service user account may prevent Microsoft Viva Engage content from being searchable in AI Search applications.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Viva Engage** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

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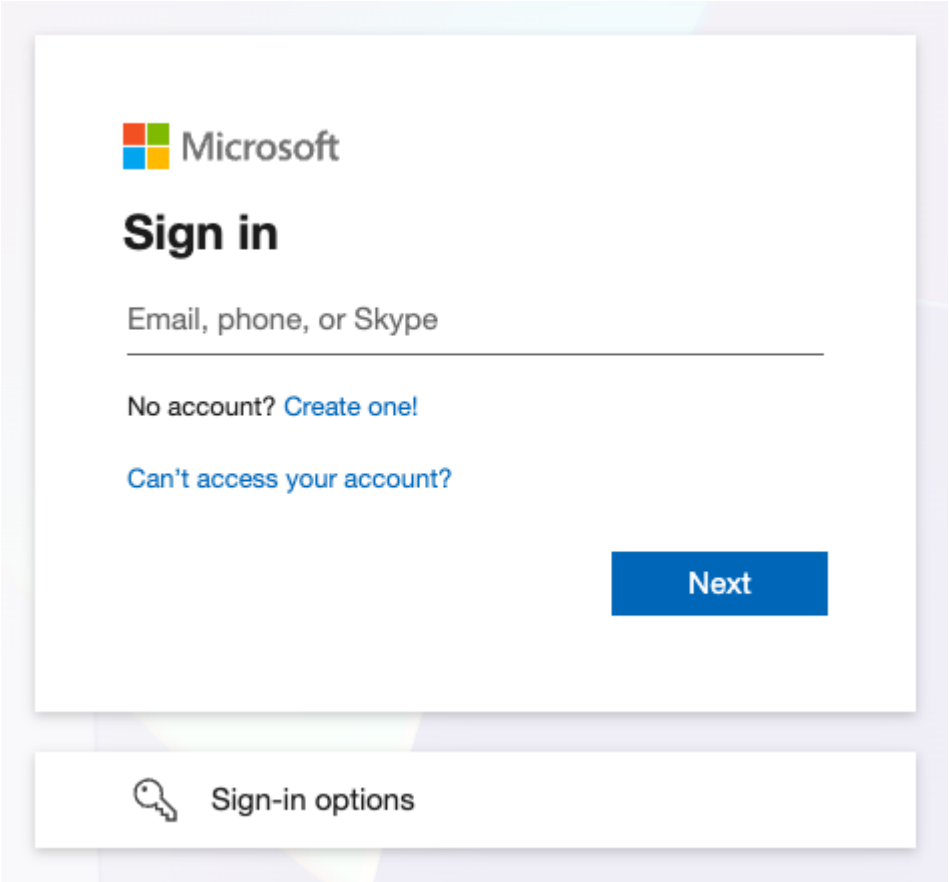
Connection settings

Connection setting	Description
Connector name	Unique name for this Microsoft Viva Engage external content connector.
Authority URL	Authority URL used to log in to your Microsoft Viva Engage source system. The authority URL typically consists of your Microsoft cloud service endpoint URL, possibly followed by organization-specific parameters. Cloud service endpoint URLs include: ○ `https://login.microsoftonline.com/` (for the Microsoft 365 cloud) ○ `https://login.microsoftonline.us/` (for the Microsoft 365 GCC or GCC High cloud or the Microsoft 365 DoD cloud) If you don't know the authority URL to use, ask your Microsoft Viva Engage administrator for it.
Tenant ID	Directory (tenant) ID for the OAuth 2.0 application defined in the Microsoft Entra admin center that grants access to your Microsoft Viva Engage instance. If you have access to the OAuth 2.0 application's registration record in the Microsoft Entra admin center, you can navigate to **Overview** and copy this ID from the **Directory (tenant) ID** field in the Essentials section. If you can't access the OAuth 2.0 application's registration record in the Microsoft Entra admin center, ask your Microsoft Entra administrator for the application's **Directory (tenant) ID** value.
Client ID	Application (client) ID for the OAuth 2.0 application defined in the Microsoft Entra admin center that grants access to your Microsoft Viva Engage instance. If you have access to the OAuth 2.0 application's registration record in the Microsoft Entra admin center, you can navigate to **Overview** and copy this ID from the **Application (client) ID** field in the Essentials section. If you can't access the OAuth 2.0 application's registration record in the Microsoft Entra admin center, ask your Microsoft Entra administrator for the application's **Application (client) ID** value.
Client Secret	Value of the client secret for the OAuth 2.0 application defined in the Microsoft Entra admin center that grants access to your Microsoft Viva Engage instance. If you have access to the OAuth 2.0 application's registration record in the Microsoft Entra admin center, you can navigate to **Manage** > **Certificates & secrets** and copy this value from the appropriate client secret's **Value** field in the Client secrets section. If you can't access the OAuth 2.0 application's client secret value in the Microsoft Entra admin center, ask your Microsoft Entra administrator for it.

6. Save and validate your connection settings.

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a. Select **Validate Connection**.



A pop-up window prompts you to sign in with a Microsoft account.

Important: If you don't see the pop-up window, make sure you're signed out of all your Microsoft accounts, then repeat the connector creation procedure.

b. Sign in using your Microsoft Entra service user account credentials.
The connector runs its crawls using permissions from this service user account.

Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Microsoft Viva Engage external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details

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on this procedure and user permission settings, see Configure user permission settings for an external content connector.

10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Microsoft Viva Engage external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Microsoft Viva Engage external content connector

Specify the communities you want your Microsoft Viva Engage external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

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Before you begin

A connector administrator must have already created the Microsoft Viva Engage external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Microsoft Viva Engage external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Microsoft Viva Engage external content connector retrieves searchable content from all communities in your Microsoft Viva Engage source system, and from all supported attachment file types. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the communities to crawl when running content crawls
- Inclusion or exclusion filters for the attachment file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Microsoft Viva Engage external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Content filtering** options:
   - To crawl all communities from the source system, select **Crawl all communities**.
   - To crawl only a specified set of communities from the source system, select **Include only these communities**, then use the **Add URL to include** field and **Add** button to enter URLs for the communities that you want to include in the crawl.

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For example, you might enter `https://engage.cloud.microsoft/main/org/example.com/groups/Lj3YgLhPGsZQLZHoSnS0YB3w6` to include only searchable content from the specified community.

- To crawl all except a specified set of communities from the source system, select **Exclude only these communities**, then use the **Add URL to exclude** field and **Add** button to enter URLs for the communities that you want to exclude from the crawl.

  For example, you might enter `https://engage.cloud.microsoft/main/org/example.com/groups/kBrGU2W3fKneiSPBU4e7Yc4PZ` to exclude searchable content from the specified community.

5. Select one of the following **Attachment filtering** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

   For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save and validate**.

Result

The Microsoft Viva Engage external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your Microsoft Viva Engage source system using your modified crawl settings, create and run a one-time content crawl for your Microsoft Viva Engage external content

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connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Miro external content connector

The Miro external content connector crawls boards from Spaces in your Miro source system and makes their text content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

- Create a content crawl for an external content connector
- Create a user permission crawl for an external content connector

Configure Miro for external content indexing

Create and authorize an application in the Miro Developer Hub to allow the Miro external content connector to access your Miro source system.

Before you begin

You must be on the Miro Enterprise plan. For details on the Enterprise plan, see https://help.miro.com/hc/en-us/articles/360017730433-Enterprise-Plan.

You need the Company Admin role for your organization in Miro. To learn about admin roles in Miro, see https://help.miro.com/hc/en-us/articles/14766440626834-Understand-admin-roles-and-their-privileges.

You must have a Developer team set up for your organization in Miro. To learn about creating a Developer team for your organization, see https://help.miro.com/hc/en-us/articles/4766759572114-Enterprise-Developer-teams.

Role required: none

About this task

The Miro external content connector retrieves searchable text content and metadata from boards in your Miro source system using the Miro REST API.

To allow the connector to access your Miro source system via the Miro REST API, you must configure and authorize an OAuth 2.0 application in the Miro Developer Hub. Your connector administrator can use settings copied from the OAuth 2.0 application to configure the Miro external connector for proper connection to your source system.

Procedure

1. In the Miro Developer Hub, create a new application for the Miro external content connector.
   a. Navigate to https://developers.miro.com/ and log in with your Company Admin credentials.
   b. Navigate to **Your apps**, then select **Create a new app**.
      If you haven't created an app before, the app creation link may show **Create your first app** instead of **Create a new app**.

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The Profile settings screen appears and displays a Create new app modal window.

c. In the Create new app modal window, enter a name for your new app.
As an example, you might enter `Miro external content connector`.

d. Select the Developer team for your new app.

e. Select the **Expire user authentication token** option.

f. Select **Create app**.

The Profile settings page displays settings for your new app.

2. Record the client settings for your new app.

a. In the App Credentials section of the app's settings screen, copy the client ID for your new app and record it in a secure location.

> **Important:** Your external content connector administrator needs this client ID when configuring the Miro external content connector.

b. Copy the client secret for your new app and record it in a secure location.

> **Important:** Your external content connector administrator needs this client secret when configuring the Miro external content connector.

3. Configure the OAuth 2.0 redirect URI for your new application.

a. In the Redirect URI for OAuth 2.0 section of the app's settings screen, enter `https://<instance-name>.service-now.com/oauth_redirect.do`, replacing `<instance-name>` with your ServiceNow AI Platform® instance hostname.

b. Select **Add**.
The new redirect URI appears in the application's settings.

4. Configure permissions for your new application.

a. In the Permissions section of the app's settings screen, select the options for the following permissions in the All plans listing:

- boards:read
- identity:read
- team:read

b. Select the options for the following permissions in the Enterprise plan only listing:

- organizations:read
- organizations:teams:read
- projects:read

Your permissions changes are automatically saved as you make them.

What to do next

Provide the following items to your connector administrator:

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- The OAuth 2.0 application client ID that you copied in step 2.a
- The OAuth 2.0 application client secret that you copied in step 2.b

Your connector administrator needs these items to configure a Miro external content connector to retrieve searchable text content and metadata and security principals from your Miro source system.

For details on creating and configuring a Miro external content connector, see Create a Miro external content connector.

Create a Miro external content connector

Create an external content connector to retrieve searchable text content and metadata and security principals from your Miro source system.

Before you begin

A source system administrator must have already configured your Miro source system to allow access by the Miro external content connector. For the required source system configuration steps, see Configure Miro for external content indexing.

You need a Miro account with the Company Admin role for your organization. To learn about admin roles in Miro, see https://help.miro.com/hc/en-us/articles/14766440626834-Understand-admin-roles-and-their-privileges.

Role required: sn_ext_conn.xcc_admin or admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Miro** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Miro external content connector.
Client ID	Client ID for the OAuth 2.0 application that grants the connector access to your Miro source system. If you don't have this client ID, ask your Miro administrator for it.
Client Secret	Client secret for the OAuth 2.0 application that grants the connector access to your Miro source system. If you don't have this client secret, ask your Miro administrator for it.

6. Save and validate your connection settings.

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a. Select **Validate Connection**.
You're prompted to add the OAuth 2.0 application to a Miro team.

b. In the Select a team field, select the Miro team that owns all Spaces you want the external content connector to crawl.

c. Select **Add**.

Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Miro external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

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- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Miro external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Miro external content connector

Specify the Spaces and boards you want your Miro external content connector to crawl. Define inclusion or exclusion filters to restrict the content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Miro external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Miro external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Miro external content connector crawls all accessible Spaces from its specified source system and sends searchable text content and metadata from all boards it finds to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the Spaces to crawl when running content crawls
- Inclusion or exclusion filters for the boards to retrieve searchable text content and metadata from when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Miro external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Dates** options:
   - To only retrieve searchable text content and metadata from boards that were published in the last year, select **Published last year**.
   - To only retrieve searchable text content and metadata from boards that were published in the last quarter, select **Published last quarter**.
   - To only retrieve searchable text content and metadata from boards that were published in the last month, select **Published last month**.
   - To only retrieve searchable text content and metadata from boards that were published in the last week, select **Published last week**.
5. Select one of the following **Spaces** options:
   - To crawl boards from all Spaces found on the source system, select **Crawl all spaces**.
   - To crawl only boards from a specified set of Spaces, select **Include only these spaces**, then use the **Add space ID to include** field and **Add** button to enter IDs for Spaces with boards that you want the connector to include when crawling.

     As an example, you might enter `3458764623126768011` to only retrieve searchable text content and metadata from boards in the Space with the specified ID.

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- To crawl boards from all but a specified set of Spaces, select **Exclude only these spaces**, then use the **Add space ID to exclude** field and **Add** button to enter IDs for Spaces with boards you want the connector to exclude when crawling.

  As an example, you might enter `3074457347343237232` to exclude searchable text content and metadata from boards in the Space with the specified ID.

6. Select one of the following **Boards** options:
   - To retrieve searchable text content and metadata from all boards found in the source system, select **Crawl all boards**.
   - To retrieve searchable text content and metadata from only a specified set of boards found in the source system, select **Include only these boards**, then use the **Add board ID to include** field and **Add** button to enter IDs for boards you want the connector to include when crawling.

     As an example, you might enter `uXjVJYMjOOM=` and `o9J_1eLUTqM=` to only retrieve searchable text content and metadata from boards with the specified IDs.
   - To retrieve searchable text content and metadata from all but a specified set of boards found in the source system, select **Exclude only these boards**, then use the **Add board ID to exclude** field and **Add** button to enter IDs for boards you want the connector to exclude when crawling.

     As an example, you might enter `uXjVK7XkyFY=` to exclude searchable text content and metadata from the board with the specified ID.
7. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
8. Select **Save and validate**.

Result

The Miro external content connector is updated with your modified crawl settings.

What to do next

To retrieve searchable text content and metadata from your Miro source system using your modified crawl settings, create and run a one-time content crawl for your Miro external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

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monday.com external content connector

The monday.com external content connector crawls workspaces, boards, board items, and workdocs from your monday.com source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

- Create a content crawl for an external content connector
- Create a user permission crawl for an external content connector

Configure monday.com for external content indexing

Obtain an API token for a monday.com user account with admin privileges to allow the monday.com external content connector to access searchable content and metadata from your monday.com source system.

Before you begin

Your monday.com account must have administrator privileges or API access for your monday.com organization.

Your monday.com account must also have permissions to access all the workspaces, boards, board items, and workdocs that you want the monday.com external content connector to retrieve searchable content and metadata from.

Role required: none

About this task

The monday.com external content connector retrieves searchable content from workspaces, boards, board items, and workdocs found in your monday.com source system using the monday.com API.

To allow the connector to access your monday.com source system via the monday.com API, you need an API token for a monday.com user account with administrator privileges or API access. Your connector administrator can use this API token and the monday.com API endpoint URL to configure the monday.com external connector for proper connection to your source system.

Procedure

1. Log in to monday.com with your credentials.
2. If your account has administrator privileges, perform these steps.
   a. Open the context menu by selecting your profile picture.
   b. Navigate to **Administration** > **Connections** > **Personal API token**.

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c. Copy the value of your personal API token and store it in a secure location.

> **Important:** Your external content connector administrator needs this API token when configuring the monday.com external content connector.

3. If your account doesn't have administrator privileges but has API access, perform these steps.

a. Open the context menu by selecting your profile picture.

b. Select **Developers**.
The monday.com Developer Center opens.

c. In the Developer Center, navigate to **API token**.

d. On the API token page, display your personal API token by selecting **Show**.

e. Copy the value of your personal API token and store it in a secure location.

> **Important:** Your external content connector administrator needs this API token when configuring the monday.com external content connector.

What to do next

Provide the following items to your connector administrator:

- The URL for the monday.com API endpoint. This is typically `https://api.monday.com/v2`. To find the current API endpoint URL, see https://developer.monday.com/api-reference/docs/introduction-to-graphql.
- The API token that you copied in step 2.c or step 3.e.

Your connector administrator needs these items to configure a monday.com external content connector to retrieve searchable content and metadata from workspaces, boards, board items, workdocs, and security principals found in your monday.com source system.

For details on creating and configuring a monday.com external content connector, see Create a monday.com external content connector.

Create a monday.com external content connector

Create an external content connector to retrieve searchable content and security principals from your monday.com source system.

Before you begin

A source system administrator must have already configured your monday.com source system to allow access by the monday.com external content connector. For the required source system configuration steps, see Configure monday.com for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.

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4. On the Choose source page, select the *monday.com* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this monday.com external content connector.
URL	URL for the monday.com API. This URL typically has the value `https://api.monday.com/v2`. If you don't have the monday.com API URL, ask your monday.com administrator for it.
Auth Token	Personal API token for a monday.com user account with either administrator privileges or API access. The monday.com external content connector uses this token to authenticate as the admin user when running crawls. If you don't have the authentication token, ask your monday.com administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

> **Note:** If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a monday.com external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.

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If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a monday.com external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a monday.com external content connector

Specify the workspaces you want your monday.com external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin
A connector administrator must have already created the monday.com external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a monday.com external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the monday.com external content connector crawls all workspaces, boards, items, and workdocs found in its specified source system and sends them

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all to AI Search for indexing. Only perform this task if you want the connector to apply inclusion or exclusion filters for the workspaces to crawl when running content crawls.

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the monday.com external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Workspaces** options:
   - To crawl all workspaces from the source system, select **Crawl all workspaces**.
   - To crawl only a specified set of workspaces from the source system, select **Include only these workspaces**, then use the **Add workspaces to include** field and **Add** button to enter URLs for workspaces you want the connector to include when crawling.

     As an example, you might enter `https://example.monday.com/workspaces/2871949` to only retrieve searchable content from the specified workspace.
   - To crawl all but a specified set of workspaces from the source system, select **Exclude only these workspaces**, then use the **Add workspaces to exclude** field and **Add** button to enter URLs for workspaces you want the connector to exclude when crawling.

     As an example, you might enter `https://example.monday.com/workspaces/6743223` to exclude searchable content from the specified workspace.
5. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.

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When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

This option is only available when the Platform Multimodal Service plugin is activated on your instance.

- For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
- To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.

6. Select **Save and validate**.

Result
The monday.com external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your monday.com source system using your modified crawl settings, create and run a one-time content crawl for your monday.com external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Notion external content connector

The Notion external content connector retrieves pages and files from your Notion source system and makes their content and metadata searchable in AI Search applications.

Search administrators can run or schedule content crawls to retrieve updated content from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Important: The Notion external content connector doesn't retrieve per-user permissions when running content crawls. All content indexed by the connector is searchable by all mapped users who have access to your configured AI Search experience.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure Notion for external content indexing

Create and authorize an internal integration in the Notion integrations dashboard to allow the Notion external content connector to access your Notion source system.

Before you begin
You need a Notion account with the Workspace owner role for your organization's workspace. To learn about workspace member roles, see the Manage members & guests Notion help resource.

Role required: none

About this task
The Notion external content connector retrieves pages and files from your Notion source system using the Notion REST API.

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To allow the connector to access your Notion source system via the Notion REST API, you must configure and authorize an internal integration in the Notion integrations dashboard. Your connector administrator can use settings copied from the internal integration to configure the Notion external connector for proper connection to your source system.

Important: The Notion external content connector doesn't retrieve per-user permissions when running content crawls. All content indexed by the connector is searchable by all mapped users who have access to your configured AI Search experience.

Procedure

1. In the Notion integrations dashboard, create a new internal integration for the Notion external content connector.
   a. Navigate to https://www.notion.so/profile/integrations and log in with your Notion credentials.
   b. Select **New integration**.
   c. Enter a name for your new integration.
   As an example, you might enter `Notion external content connector`.
   d. Select your organization's workspace as the workspace to associate with your new integration.
   e. Set your new integration's type to **Internal**.
   f. Select **Save**.

   A message indicates that your new internal integration was successfully created and shows a **Configure integration settings** button.
2. Get the secret for your new internal integration.
   a. Select **Configure integration settings**.
   The Configuration page for your new internal integration appears.
   b. Locate the internal integration secret and display its value by selecting **Show**.
   c. Copy the internal integration secret and record it in a secure location.

   Important: Your external content connector administrator needs this internal integration secret when configuring the Notion external content connector.
3. Configure the capabilities for your new internal integration.
   a. In the Capabilities section, under Content Capabilities, select the **Read content** option if it's not already selected.
   b. In the Capabilities section, under User Capabilities, select the **Read user information including email address** option if it's not already selected.
4. Perform the following steps to enable your new internal integration for each page in your workspace that you want the Notion external content connector to be able to retrieve searchable content and metadata from.

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Note: Enabling your internal integration for a page automatically enables it for all of that page's subpages.

a. Navigate to the selected Notion page.

b. In the menu at the upper right of the page, navigate to **...** > **Connections** > **Add connection**.

c. Select your new internal integration from the list of available connections.

d. Select **Confirm**.
The selected Notion page and all of its subpages are added to your internal integration, allowing the Notion external content connector to retrieve their searchable content and metadata.

What to do next

Provide the internal integration secret that you copied in step 2.c to your connector administrator.

Your connector administrator needs this item to configure a Notion external content connector to retrieve pages, files, and security principals from your Notion source system.

For details on creating and configuring a Notion external content connector, see Create a Notion external content connector.

Create a Notion external content connector

Create an external content connector to retrieve searchable content and security principals from your Notion source system.

Before you begin

A source system administrator must have already configured your Notion source system to allow access by the Notion external content connector. For the required source system configuration steps, see Configure Notion for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Notion* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Notion external content connector.
Authentication token	Secret for the internal integration created to allow the connector to access your Notion workspace. If you don't have the internal integration secret, ask your Notion administrator for it.

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6. Save your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection setting entries fails, the system shows an error message. Verify your connection settings to ensure they're correct.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Notion external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Notion external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

Important: The Notion external content connector doesn't retrieve per-user permissions when running content crawls. All content indexed by the connector is searchable by all mapped users who have access to your configured AI Search experience.

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To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Notion external content connector

Specify the pages you want your Notion external content connector to crawl and feed to AI Search for indexing.

Before you begin

A connector administrator must have already created the Notion external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Notion external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

The Notion external content connector crawls pages in your Notion workspace. To make a page eligible for crawling, you must add a connection from that page to the internal integration registered for the Notion external content connector.

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Notion external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select **Go to Notion to share content**, then perform the following steps in your Notion workspace for each page you want the connector to be able to retrieve searchable content, metadata, and files from:
   a. Navigate to the selected Notion page.
   b. In the menu at the upper right of the page, navigate to **. . .** > **Connections** > **Add connection**.
   c. Select the internal integration registered for the Notion external content connector from the list of available connections.
   d. Select **Confirm**.
   A **Configured** status indicator appears once you've added the internal integration as a connection for one or more pages in your Notion workspace.
5. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
6. Select **Save and validate**.

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Result
The Notion external content connector is updated with your modified crawl settings.

> **Important:** The Notion external content connector doesn't retrieve per-user permissions when running content crawls. All content indexed by the connector is searchable by all mapped users who have access to your configured AI Search experience.

What to do next
To retrieve content from your Notion source system using your modified crawl settings, create and run a one-time content crawl for your Notion external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

SAP DMS external content connector

The SAP DMS external content connector retrieves documents from repositories in your SAP Document Management System instance and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

- Create a content crawl for an external content connector
- Create a user permission crawl for an external content connector

Create a subaccount in the SAP Business Technology Platform (BTP)

Create a subaccount with required entitlements in your SAP global account using the SAP BT cockpit. You need this subaccount in order to configure SAP access for the SAP DMS external content connector.

Before you begin
You must be a global account administrator on the SAP Business Technology Platform (BTP). Your global account must be authorized to access the SAP Document Management Service.

Role required: none

About this task
This task is optional. To configure the SAP DMS external content connector, you need a subaccount in your SAP BTP global account, with these entitlements:

- Document Management Service, Application Option
- Document Management Service, Integration Option
- Document Management Service, Repository Option
- Cloud Foundry Environment
- Authorization and Trust Management Service

If your SAP BTP global account already includes a subaccount with these entitlements, you can skip this task and go on to configure your SAP BTP global account to allow access by the connector. For details on this procedure, see Configure SAP DMS for external content indexing.

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Procedure

1. Create a new subaccount in your global account.
   a. Log in to the SAP Business Technology Platform (BTP) at https://cockpit.btp.cloud.sap/ using your global account credentials.
   b. Select **Create** > **Subaccount**.
   c. Enter a display name for your new subaccount.
   As an example, you might enter `SAP DMS external content connector subaccount`.
   d. **Optional:** Enter a description for your new subaccount.
   e. Enter a subdomain for your new subaccount.
   f. Select the desired region for your new subaccount.
   g. Select a parent for your new subaccount.
   The parent can be your global account or a directory.
   h. Select **Create**.

   SAP BTP creates your new subaccount.
2. Create a Cloud Foundry organization in your new subaccount.
   a. Select your new subaccount and navigate to its Overview page.
   b. Select **Enable Cloud Foundry**.
   c. On the Enable Cloud Foundry form, in the Plan field, select the plan for the Cloud Foundry runtime.
   d. In the Org Name field, enter a name for your new Cloud Foundry organization.
   As an example, you might enter `sap-dms-integrate`.
   e. Select **Create**.

   SAP BTP creates the new Cloud Foundry organization for your new subaccount.
3. Create a new Cloud Foundry space named **DMS** in the Cloud Foundry organization for your new subaccount.
   a. Navigate to the **Cloud Foundry** > **Spaces** page for your new subaccount.
   b. Select **Create Space**.
   c. On the Create Space form, enter `DMS` as the name for your new space.
   d. Select the options for the **Space Developer** and **Space Manager** roles.
   e. Select **Save**.
   SAP BTP creates the new Cloud Foundry space in the Cloud Foundry organization for your new subaccount.
4. Add a service plan for the SAP Document Management Service to your new subaccount.

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a. Navigate to your global account.

b. In the menu, navigate to **Entitlements** > **Entity Assignments**.

c. In the Subaccounts/Directories field, search for and select your new subaccount.

d. In the My Subaccount pane, select **Edit**.

e. Select **Add Service Plans**.

f. In the Services section, search for and select the **Document Management Service, Integration Option** entry.

g. In the Service Details pane, in the Available Plans field, select the **standard** plan.

h. Select **Add 1 Service Plan**.

i. Select **Save**.

SAP BTP adds the service plan to your new subaccount.

What to do next

Now that you've created a subaccount with the required entitlements, go on to configure service instances and service keys in your SAP BTP global account. For details on this procedure, see Configure SAP DMS for external content indexing.

Create a SAP user and role collection

Create a user and a role collection in the SAP Business Technology Platform (BTP) cockpit. The SAP DMS external content connector needs this user account to access your SAP DMS content.

Before you begin

You must be a global account administrator on the SAP BTP.

A SAP global account administrator must have created a subaccount in your SAP BTP global account, with these entitlements:

- Document Management Service, Application Option
- Document Management Service, Integration Option
- Document Management Service, Repository Option
- Cloud Foundry Environment
- Authorization and Trust Management Service

If you don't already have a subaccount with these entitlements in your SAP BTP global account, perform the Create a subaccount in the SAP Business Technology Platform (BTP) preliminary task before performing this task.

Role required: none

About this task

The SAP DMS external content connector requires a user account with specific roles. Create a role collection with these roles and assign it to a user account to allow the connector to access your SAP DMS folders and files.

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Procedure

1. Create a new user account for use with the SAP DMS external content connector.

   a. Log in to the SAP Business Technology Platform (BTP) at https://cockpit.btp.cloud.sap/ using your global account credentials.

   b. In the Subaccounts tab, select your subaccount with the aforementioned entitlements.

   c. Navigate to **Security** > **Users**.

   d. Select **Create**.

   e. On the Create User form, fill in the fields.

Field	Description
User Name	Enter a name for this user account.
Identity Provider	Select **Default identity provider**.
E-Mail	Enter the email address for this user account.

   f. Select **Create**.

   The SAP BTP creates your new user account.

2. Create a new role collection.

   a. From your subaccount, navigate to **Security** > **Roles Collections**.

   b. Select **Create**.

   c. On the Create Role Collection form, enter a name for your role collection.

   d. Select **Create**.
   The SAP BTP creates your new role collection.

3. Assign the required roles to your new role collection.

   a. In your subaccount, search for and then select the name of your new role collection.

   b. On the form for your new role collection, select **Edit**.

   c. Select the name of your new role collection.

   d. Select each of the following roles.

   - SDMWeb_Admin
   - SDMWeb_Migration
   - SDMWeb_User
   - SDM_MobileAdmin
   - SDM_Admin

   e. Select **Add**.

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4. Assign your new role collection to your new user account.
   a. From the Users list, search for and select the name of your new user account.
   b. Select **Assign Role Collection**.
   c. Select the name of your new role collection.
   d. Select **Assign Role Collection**.

Configure SAP DMS for external content indexing

Create service instances and service keys in your SAP Business Technology Platform (BTP) global account to allow the SAP DMS external content connector to access your SAP DMS documents and repositories.

Before you begin

You must be a global account administrator on the SAP BTP. Your global account must be authorized to access the SAP Document Management Service.

A SAP global account administrator must have created a subaccount in your SAP BTP global account, with these entitlements:

- Document Management Service, Application Option
- Document Management Service, Integration Option
- Document Management Service, Repository Option
- Cloud Foundry Environment
- Authorization and Trust Management Service

If you don't already have a subaccount with these entitlements in your SAP BTP global account, perform the Create a subaccount in the SAP Business Technology Platform (BTP) preliminary task before performing this task.

Role required: none

About this task

The SAP DMS external content connector retrieves documents from repositories in your SAP DMS source system using the Document Management Service, Integration Option REST API.

To allow the connector to access your SAP DMS source system via this API, you must configure service instances and service keys in the SAP DMS Business Technology Platform (BTP). Your connector administrator can use settings copied from your new service keys to configure the SAP DMS external connector for proper connection to your source system.

Procedure

1. Create a service instance for the Document Management Service, Application Option in your subaccount.
   a. Log in to the SAP Business Technology Platform (BTP) at https://cockpit.btp.cloud.sap/ using your global account credentials.
   b. In the Subaccounts tab, select your subaccount.
   c. Navigate to **Service Marketplace**.
   d. Search for and select the **Document Management Service, Application Option** entry.

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e. Select **Create**.

f. On the New Instance or Subscription form, fill in the fields.

Field	Description
Plan	Select **standard**, then select the disclaimer option.
Runtime Environment	Select **Cloud Foundry**.
Space	Enter the name of the Cloud Foundry space you created for your subaccount. If you followed the subaccount creation steps from Create a subaccount in the SAP Business Technology Platform (BTP), this name is `DMS`.
Instance Name	Enter a name of your choice. As an example, you might enter `DMS - AO`.

g. Select **Create**.
SAP BTP creates the Document Management Service, Application Option service instance in your subaccount.

2. Create a service key for your new Document Management Service, Application Option service instance.

a. From your subaccount, navigate to **Instances and Subscriptions**.

b. In the Subscriptions tab, in the row for your new Document Management Service, Application Option service instance, select **...** > **Create Service Key**.

c. On the New Service Key form, enter a name for your new service key.
As an example, you might enter `DMS - AO`.

d. Select **Create**.
SAP BTP creates the Document Management Service, Application Option service key in your subaccount.

3. Create a service instance for the Document Management Service, Integration Option in your subaccount.

a. Log in to the SAP Business Technology Platform (BTP) at https://cockpit.btp.cloud.sap/ using your global account credentials.

b. In the Subaccounts tab, select your subaccount.

c. Navigate to **Service Marketplace**.

d. Search for and select the **Document Management Service, Integration Option** entry.

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e. Select **Create**.

f. On the New Instance or Subscription form, fill in the fields.

Field	Description
Plan	Select **standard**, then select the disclaimer option.
Runtime Environment	Select **Cloud Foundry**.
Space	Enter the name of the Cloud Foundry space you created for your subaccount. If you followed the subaccount creation steps from Create a subaccount in the SAP Business Technology Platform (BTP), this name is `DMS`.
Instance Name	Enter a name of your choice. As an example, you might enter `DMS-IO`.

g. Select **Create**.
SAP BTP creates the Document Management Service, Integration Option service instance in your subaccount.

4. Create a service key for your new Document Management Service, Integration Option service instance and copy its client settings and API URL.

a. From your subaccount, navigate to **Instances and Subscriptions**.

b. In the Subscriptions tab, in the row for your new Document Management Service, Integration Option service instance, select **...** > **Create Service Key**.

c. On the New Service Key form, enter a name for your new service key.
As an example, you might enter `DMS-IO`.

d. Select **Create**.
SAP BTP creates the Document Management Service, Integration Option service key in your subaccount.

e. In the Service Keys section, view your new service key by selecting **...** > **View** in its entry.

f. On the Credentials form, copy the **clientid**, **clientsecret**, and **url** values from the **uaa** section and store them in a secure location.

> **Important:** Your external content connector administrator needs these client setting values when configuring the SAP DMS external content connector.

g. On the Credentials form, copy the **url** field value from the endpoints section's ecmservice entry and store it in a secure location.

> **Important:** Your external content connector administrator needs this endpoint URL when configuring the SAP DMS external content connector.

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h. On the Credentials form, copy the **apiurl** field value and store it in a secure location.

> **Important:** Your external content connector administrator needs this role collections endpoint URL when configuring the SAP DMS external content connector.

i. On the Credentials form, copy the portion of the **xsappname** field value that appears after the pipe | symbol and store it in a secure location.
As an example, if the **xsappname** field value is `673dc63a-f785-4225-b974-de10815701fc!b23581|sdm-di-DocumentManagement-sdm_integration!b62497`, the portion of the value to copy is `sdm-di-DocumentManagement-sdm_integration!b62497`.

5. Create a service instance for the Document Management Service, Repository Option in your subaccount.

a. Log in to the SAP Business Technology Platform (BTP) at https://cockpit.btp.cloud.sap/ using your global account credentials.

b. In the Subaccounts tab, select your subaccount.

c. Navigate to **Service Marketplace**.

d. Search for and select the **Document Management Service, Repository Option** entry.

e. Select **Create**.

f. On the New Instance or Subscription form, fill in the fields.

Field	Description
Plan	Select **standard**, then select the disclaimer option.
Runtime Environment	Select **Cloud Foundry**.
Space	Enter the name of the Cloud Foundry space you created for your subaccount. If you followed the subaccount creation steps from Create a subaccount in the SAP Business Technology Platform (BTP), this name is DMS.
Instance Name	Enter a name of your choice. As an example, you might enter DMS-R0.

g. Select **Create**.
SAP BTP creates the Document Management Service, Repository Option service instance in your subaccount.

6. Create a service key for your new Document Management Service, Repository Option service instance.

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a. From your subaccount, navigate to **Instances and Subscriptions**.

b. In the Subscriptions tab, in the row for your new Document Management Service, Repository Option service instance, select **...** > **Create Service Key**.

c. On the New Service Key form, enter a name for your new service key.
As an example, you might enter `DMS-RO`.

d. Select **Create**.
SAP BTP creates the Document Management Service, Repository Option service key in your subaccount.

7. Create a service instance for the Authorization and Trust Management Service in your subaccount.

a. From your subaccount, navigate to **Services** > **Service Marketplace**.

b. Search for and select the **Authorization and Trust Management Service** entry.

c. Select **Create**.

d. On the New Instance or Subscription form, fill in the fields.

Field	Description
Plan	Select **apiaccess**.
Runtime Environment	Select **Cloud Foundry**.
Space	Enter the name of the Cloud Foundry space you created for your subaccount. If you followed the subaccount creation steps from Create a subaccount in the SAP Business Technology Platform (BTP), this name is `DMS`.
Instance Name	Enter a name of your choice. As an example, you might enter `ATMS`.

e. Select **Next**.

f. On the New Instance or Subscription form, paste the following JSON code into the Configure instance parameters text entry field, replacing `<instance-name>` with the name of your ServiceNow AI Platform instance.

```
{
  "xsappname": "dms-servicenow-client",
  "tenant-mode": "dedicated",
  "description": "XSUAA config for DMS API access via IAS",
  "oauth2-configuration": {
    "redirect-uris": [
      "https://<instance-name>.service-now.com/oauth_redirect.do"
    ],
    "grant-types": [
```

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```
            "authorization_code",
            "client_credentials",
            "password",
            "refresh_token"
        ]
    },
    "scopes": [
        {
            "name": "$XSAPPNAME.DMSViewer",
            "description": "Read-only access to DMS repositories"
        },
        {
            "name": "$XSAPPNAME.DMSContributor",
            "description": "Create and modify documents in DMS"
        },
        {
            "name": "$XSAPPNAME.DMSAdministrator",
            "description": "Full administrative access to DMS"
        }
    ],
    "role-templates": [
        {
            "name": "DMSViewerRole",
            "description": "Role for viewing DMS documents",
            "scope-references": [
                "$XSAPPNAME.DMSViewer"
            ]
        },
        {
            "name": "DMSContributorRole",
            "description": "Role for contributing documents",
            "scope-references": [
                "$XSAPPNAME.DMSContributor"
            ]
        },
        {
            "name": "DMSAdministratorRole",
            "description": "Role for administering DMS",
            "scope-references": [
                "$XSAPPNAME.DMSAdministrator"
            ]
        }
    ],
    "authorities": [
        "$XSAPPNAME.DMSViewer",
        "$XSAPPNAME.DMSContributor",
        "$XSAPPNAME.DMSAdministrator"
    ]
}
```

g. Select **Create**.
SAP BTP creates the service instance for the Authorization and Trust Management Service in your subaccount.

8. Create a service key for your new Authorization and Trust Management Service instance.

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a. From your subaccount, navigate to **Instances and Subscriptions**.

b. In the Subscriptions tab, in the row for your new Authorization and Trust Management Service instance, select **...** > **Create Service Key**.

c. On the New Service Key form, enter a name for your new service key.
As an example, you might enter `ATMS`.

d. Select **Create**.
SAP BTP creates the service key for the Authorization and Trust Management Service in your subaccount.

e. In the Service Keys section, view your new service key by selecting **...** > **View** in its entry.

f. On the Credentials form, copy the **clientid**, **clientsecret**, and **url** values from the service key section and store them in a secure location.

> **Important:** Your external content connector administrator needs these client setting values when configuring the SAP DMS external content connector.

9. Create a new instance for the Authorization and Trust Management Service with the application plan in your SAP BTP subaccount.

a. From your subaccount, navigate to **Services** > **Instances and Subscriptions**.

b. Select **Create**.

c. On the New Instance or Subscription form's Basic Info page, fill in the fields.

Field	Description
Service	Select **Authorization and Trust Management Service**.
Plan	Select **application**.
Runtime Environment	Select **Cloud Foundry**.
Space	Select **DMS**. **Note:** This is the name of the Cloud Foundry space you created for your SAP BTP subaccount. For details on this procedure, see Create a subaccount in the SAP Business Technology Platform (BTP).
Instance Name	Enter a unique name for this service instance.

d. Select **Next**.

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e. On the New Instance or Subscription form's Parameters page, paste the following JSON code into the Configure instance parameters text entry field, replacing `<service-name>` with the name you entered for the new Authorization and Trust Management Service instance with the application plan in step 9.c, `<instance-name>` with the name of your ServiceNow AI Platform instance, and `<xsappname>` with the **xsappname** substring that you copied in step 4.i.

```
{
  "xsappname": "<service-name>",
  "tenant-mode": "dedicated",
  "description": "XSUAA config for DMS API access via IAS",
  "oauth2-configuration": {
    "redirect-uris": [
      "https://<instance-name>.service-now.com/oauth_redirect.do"
    ],
    "grant-types": [
      "authorization_code",
      "client_credentials",
      "password",
      "refresh_token"
    ]
  },
  "scopes": [
    {
      "name": "$XSAPPNAME.DMSViewer",
      "description": "Read-only access to DMS repositories"
    },
    {
      "name": "$XSAPPNAME.DMSContributor",
      "description": "Create and modify documents in DMS"
    },
    {
      "name": "$XSAPPNAME.DMSAdministrator",
      "description": "Full administrative access to DMS"
    }
  ],
  "role-templates": [
    {
      "name": "DMSViewerRole",
      "description": "Role for viewing DMS documents",
      "scope-references": [
        "$XSAPPNAME.DMSViewer"
      ]
    },
    {
      "name": "DMSContributorRole",
      "description": "Role for contributing documents",
      "scope-references": [
        "$XSAPPNAME.DMSContributor"
      ]
    },
    {
      "name": "DMSAdministratorRole",
      "description": "Role for administering DMS",
      "scope-references": [
        "$XSAPPNAME.DMSAdministrator"
```

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```
        ]
      }
    ],
    "authorities": [
      "$ACCEPT_GRANTED_AUTHORITIES",
      "<xsappname>.sdmadmin",
      "<xsappname>.sdmbusinessadmin"
    ],
    "foreign-scope-references": [
      "<xsappname>.sdmuser",
      "<xsappname>.sdmadmin",
      "<xsappname>.sdmbusinessadmin"
    ]
}
```

f. Select **Create**.
SAP BTP creates the service instance for the Authorization and Trust Management Service with the application plan in your subaccount.

10. Create a service key for your new Authorization and Trust Management Service instance with the application plan.

a. From your subaccount, navigate to **Instances and Subscriptions**.

b. In the Subscriptions tab, in the row for your new Authorization and Trust Management Service instance with the application plan, select **...** > **Create Service Key**.

c. On the New Service Key form, enter a name for your new service key.
As an example, you might enter `ATMS-app-plan`.

d. Select **Create**.
SAP BTP creates the service key for the Authorization and Trust Management Service instance with the application plan in your subaccount.

e. In the Service Keys section, view your new service key by selecting **...** > **View** in its entry.

f. On the Credentials form, copy the **clientid** and **clientsecret** values from the service key section and store them in a secure location.

> **Important:** Your external content connector administrator needs these client setting values when configuring the SAP DMS external content connector.

11. Copy the base web URL for documents in your SAP DMS tenant.

a. Log in to your SAP DMS tenant using your global account credentials.

b. Navigate to a repository of your choice.

c. In the repository, navigate to a folder of your choice that contains one or more documents.

d. Select **...** in any document entry, then select **Show properties** from the context menu.

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e. Copy the **Web Link** for the document, then extract the base web URL and store it in a secure location.

The base web URL is the portion of the **Web Link** URL that ends with `/open`. As an example, if the **Web Link** URL is `https://example.sap.com/cp.portal/site#user-display?sap-ui-app-id-hint=com.sap.ecm.sdm.user&/documents/v1/open/rep=ABCDE&obj=12345&vs=1`, the base web URL is `https://example.sap.com/cp.portal/site#user-display?sap-ui-app-id-hint=com.sap.ecm.sdm.user&/documents/v1/open`.

Important: Your external content connector administrator needs this base web URL when configuring the SAP DMS external content connector.

What to do next

Provide the following items to your connector administrator:

- The client ID, client secret, and access token URL that you copied from the service key for the Document Management Service, Integration Option service instance in step 4.f.
- The ecmservice endpoint URL that you copied from the service key for the Document Management Service, Integration Option service instance in step 4.g.
- The role collections endpoint URL that you copied from the service key for the Document Management Service, Integration Option service instance in step 4.h.
- The client ID, client secret, and access token URL that you copied from the service key for the Authorization and Trust Management Service instance in step 8.f.
- The client ID and client secret that you copied from the service key for the Authorization and Trust Management Service instance with the application plan in step 10.f.
- The base web URL that you copied in step 11.e.

Your connector administrator needs these items to configure a SAP DMS external content connector to retrieve documents and security principals from your SAP DMS source system.

For details on creating and configuring a SAP DMS external content connector, see Create a SAP DMS external content connector.

Create a SAP DMS external content connector

Create an external content connector to retrieve searchable content and security principals from your SAP DMS source system.

Before you begin

A source system administrator must have already configured your SAP DMS source system to allow access by the SAP DMS external content connector. For the required source system configuration steps, see Configure SAP DMS for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *SAP* **Document Management System** tile, then select **Next**.

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5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this SAP DMS external content connector.
Client ID	Client ID from the service key for the Document Management Service, Integration Option service instance that's defined in a subaccount in your organization's SAP BTP global account. If you don't have the client ID from this service key, ask your SAP DMS administrator for it.
Client secret	Client secret from the service key for the Document Management Service, Integration Option service instance that's defined in a subaccount in your organization's SAP BTP global account. If you don't have the client secret from this service key, ask your SAP DMS administrator for it.
Connection URL	URL from the service key for the Document Management Service, Integration Option service instance that's defined in a subaccount in your organization's SAP BTP global account. If you don't have the URL from this service key, ask your SAP DMS administrator for it.
Base Web URL	Base web URL for documents in your SAP DMS tenant. If you don't have the base web URL, ask your SAP DMS administrator for it.
Endpoint URL	Endpoint URL for the ecmservice from the service key for the Document Management Service, Integration Option service instance that's defined in a subaccount in your organization's SAP BTP global account. If you don't have the endpoint URL from this service key, ask your SAP DMS administrator for it.
Role Collections Endpoint	Role collections endpoint URL from the service key for the Document Management Service, Integration Option service instance that's defined in a subaccount in your organization's SAP BTP global account. If you don't have the role collections endpoint URL from this service key, ask your SAP DMS administrator for it.
Client ID for token exchange	Client ID from the service key for the Authorization and Trust Management Service instance with the application plan that's defined in a subaccount in your organization's SAP BTP global account. If you don't have the client ID from this service key, ask your SAP DMS administrator for it.
Client secret	Client secret from the service key for the Authorization and Trust Management Service instance with the application plan that's defined in a subaccount in your organization's SAP BTP global account.

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Connection setting	Description
for token exchange	If you don't have the client secret from this service key, ask your SAP DMS administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. On the Client credentials screen, fill in the client credential settings.

   Connection settings

Client credential setting	Description
Client ID	Client ID from the service key for the Authorization and Trust Management Service instance that's defined in a subaccount in your organization's SAP BTP global account. If you don't have the client ID from this service key, ask your SAP DMS administrator for it.
Client secret	Client secret from the service key for the Authorization and Trust Management Service instance that's defined in a subaccount in your organization's SAP BTP global account. If you don't have the client secret from this service key, ask your SAP DMS administrator for it.
Connection URL	URL from the service key for the Authorization and Trust Management Service instance that's defined in a subaccount in your organization's SAP BTP global account. If you don't have the connection URL from this service key, ask your SAP DMS administrator for it.

8. Save and validate your client credential settings by selecting **Validate connection**.

   Note: If validation of your client credential settings fails, the system shows an error message. Verify your client credential settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that need to be corrected. Provide the information from this message to your source system administrator.

9. After your connection settings are validated, select **Next**.
10. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.

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If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a SAP DMS external content connector.

11. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
12. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
13. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a SAP DMS external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

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You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a SAP DMS external content connector

Specify the folders you want your SAP DMS external content connector to crawl. Define inclusion or exclusion filters to specify which content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the SAP DMS external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a SAP DMS external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the SAP DMS external content connector crawls all folders and repositories from its specified source system and sends all documents and their attachments with supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for documents to retrieve based on their last modification date
- Inclusion or exclusion filters for the folders to crawl when running content crawls
- Inclusion or exclusion filters for the repositories to crawl when running content crawls
- Inclusion or exclusion filters for the attachment file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

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Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the SAP DMS external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Last modified date** options:
   - To retrieve content from all documents regardless of their last modification date, select **All**.
   - To only retrieve content from documents that were last modified in the preceding 365 days, select **Last 365 days**.
   - To only retrieve content from documents that were last modified in the preceding 180 days, select **Last 180 days**.
   - To only retrieve content from documents that were last modified in the preceding 90 days, select **Last 90 days**.
   - To only retrieve content from documents that were last modified in the preceding 30 days, select **Last 30 days**.
   - To only retrieve content from documents that were last modified in the preceding 7 days, select **Last 7 days**.
5. Select one of the following **Folders** options:
   - To crawl all folders from the source system, select **Crawl all folders**.
   - To crawl only a specified set of folders from the source system, select **Include only these folders**, then use the **Add folder ID to include** field and **Add** button to enter IDs for folders you want the connector to include when crawling.

     As an example, you might enter `9173ggdzt1671gfeja` to only retrieve searchable content from the folder with the specified ID.
   - To crawl all but a specified set of folders from the source system, select **Exclude only these folders**, then use the **Add folder ID to exclude** field and **Add** button to enter IDs for folders you want the connector to exclude when crawling.

     As an example, you might enter `48dhgdgf16712gvsa` to exclude searchable content from the folder with the specified ID.
6. Select one of the following **Repositories** options:
   - To crawl documents from all repositories on the source system, select **Crawl all repositories**.
   - To crawl only documents from a specified set of repositories on the source system, select **Include only these repositories**, then use the **Add repositories name or ID to include** field and **Add** button to enter names or IDs for repositories you want the connector to include when crawling.

     As an example, you might enter `5b01d7f6-6263-4aeb-9b75-2186db9b201e` and `production-repo` to only retrieve documents from the specified repositories.
   - To crawl documents from all but a specified set of repositories on the source system, select **Exclude only these repositories**, then use the **Add repositories name or ID to exclude** field

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and **Add** button to enter names or IDs for repositories you want the connector to exclude when crawling.

As an example, you might enter `d11d7f07-c4ad-4742-b17d-c078869e54a5` and `test-repo` to exclude documents from the specified repositories.

7. Select one of the following **Attachments** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file types**, then use the **File types to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file types**, then use the **File types to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

   For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
8. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
9. Select **Save and validate**.

Result

The SAP DMS external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your SAP DMS source system using your modified crawl settings, create and run a one-time content crawl for your SAP DMS external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

SAP SuccessFactors external content connector

The SAP SuccessFactors external content connector parses trainings exported from your SAP SuccessFactors Learning environment and makes their content and metadata searchable in AI Search applications.

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The SAP SuccessFactors connector runs content and user permission crawls. Unlike most connector crawls, these crawls don't retrieve content or security principals directly from your SAP SuccessFactors Learning source system. Instead, content retrieval involves these steps:

1. As a one-time step, a SAP SuccessFactors Learning admin creates three custom reports that retrieve the user, library and assignment, and training item data needed by the connector. These custom reports can be imported into SAP SuccessFactors Learning environments as needed.
2. On a schedule of your choosing, a SAP SuccessFactors Learning admin runs the custom reports in your SAP SuccessFactors Learning environment. This process exports three comma-separated value (CSV) data files containing trainings content and security principals from the selected environment.
3. After each data export, a connector administrator updates the SAP SuccessFactors connector configuration, attaching the latest exported CSV data files.
4. On a schedule of your choosing, the connector runs content and user permission crawls. During a crawl, the connector parses the attached CSV data files to discover trainings content or security principals. It sends the discovered data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Export SAP SuccessFactors Learning data for external content indexing

Export user, library and assignment, and training item data from your SAP SuccessFactors Learning environment. The SAP SuccessFactors external content connector needs this exported data to index your content and user permissions for search.

Before you begin

You need a non-production SAP SuccessFactors Learning environment configured to include the Learning Report Designer tool. To learn how to request Learning Report Designer configuration in a non-production environment, see the 2171592 - Process to enable the use of Plateau Report Designer (PRD) on Learning SAP support resource.

Note: Many SAP resources still refer to the Learning Report Designer using its legacy name, Plateau Report Designer.

In both the non-production SAP SuccessFactors Learning environment and the environment that you want the connector to retrieve data from, you need administrator accounts with the following report permissions:

- Edit Report
- Import/Export Reports
- Publish/Unpublish Reports
- Run [report title] Report
- Run Unpublished Reports
- Search Reports
- View Report Query

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For details on these report permissions in SAP SuccessFactors Learning, see the Report Permissions SAP Help Portal resource.

In the non-production SAP SuccessFactors Learning environment that has Learning Report Designer enabled, your administrator account needs the REPORT_DEVELOPER role. For details on adding this role to an administrator account, see the Setting up a Plateau Report Designer Account SAP Help Portal resource.

The Learning Report Designer tool must be downloaded and installed on a Windows workstation with a 32-bit Java Runtime Environment (JRE). You must have configured Learning Report Designer to connect to your non-production SAP SuccessFactors Learning environment. To learn about these procedures, see the Downloading Learning Report Designer SAP Help Portal resource.

Role required: none

About this task

Unlike most other external content connectors, the SAP SuccessFactors connector doesn't retrieve content and metadata directly from your source system.

Instead, the SAP SuccessFactors external content connector retrieves user, library and assignment, and training item data from three comma-separated value (CSV) files. These CSV data files are generated using custom reports that you run in your SAP SuccessFactors Learning environment. Your connector administrator needs these generated CSV data files to configure the SAP SuccessFactors external content connector.

Perform these steps to import the custom reports into your SAP SuccessFactors Learning environment and generate the three CSV data files required by the SAP SuccessFactors connector.

Procedure

1. On your Windows workstation that has Learning Report Designer installed, download the three custom report ZIP archive files attached to the External Content Connector (XCC) for SAP SuccessFactors - Attach report SQL [KB3047950] article in the Now Support Knowledge Base.
2. Start Learning Report Designer and use it to edit the SQL query for one of the three downloaded custom reports.

   a. Navigate to **File** > **Open File...**, then open the `Users_custom_report` report from the `Users_custom_report.zip` custom report ZIP archive file.
   To learn about opening a report in Learning Report Designer, see "Updating a System Report in Report Designer" steps 2–8 in the Using Plateau Report Designer SAP Help Portal resource.

   b. In the Data Explorer panel, expand the **Data Sets** section and double-click (or use the keyboard shortcut) to open the data set associated with the custom report query.

   c. In the query editor, find this clause in the custom report's SQL query:

```
(SELECT User_value
FROM PA_STUD_USER c
WHERE a.STUD_ID = c.STUD_ID (+)
AND c.col_num = 10) as "Custom Column 10"
```

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3. In the Learning Report Designer query editor, edit the SQL query clause from the preceding step to reference the user mapping column for your SAP SuccessFactors Learning environment.
   Your user mapping column is the column with values that uniquely identify each user in your SAP SuccessFactors Learning environment. Values in this column might contain user IDs, email addresses, or some other uniquely identifying information.

   The SAP SuccessFactors connector uses values from your user mapping column to map users from your source system to users in your ServiceNow AI Platform® instance. This mapping is needed to preserve user access permissions for content indexed from your SAP SuccessFactors Learning environment.

   Your user mapping column may be a predefined column from the PA_STUDENT table, such as EMAIL_ADDR, or a custom column from the PA_STUD_USER table.

   - If your user mapping column is a predefined column from the PA_STUDENT table, replace the entire clause shown in the preceding step with this clause:

     ```
     a.EMAIL_ADDR AS "Email Address"
     ```

     Change the column name and alias in this clause to match your user mapping column. As an example, if your user mapping column is PA_STUDENT.STUD_ID, change the clause to refer to that column:

     ```
     a.STUD_ID AS "Student ID"
     ```

   - If your user mapping column is a custom column from the PA_STUD_USER table, change the column number in the `c.col_num = 10` condition and the `"Custom Column 10"` alias to match the column number of your custom column. As an example, if your user mapping column is a custom column with column number 20, change the last line of the clause to `AND c.col_num = 20) as "Custom Column 20"`.

4. Use Learning Report Designer to save the modified custom report.
   a. Select **Save**.
   b. In the Outline panel, select the modified report name, then select the **Zip** icon.
   c. Save the modified report to the Workspace as a ZIP archive.
5. Replace the downloaded `Users_custom_report.zip` custom report ZIP archive file with the modified copy that you saved in the preceding step.
6. Use your administrator credentials to log in to the SAP SuccessFactors Learning environment that you want the connector to retrieve trainings data for.
7. Import the custom reports from the downloaded and updated ZIP archives.
   For details on importing reports into your SAP SuccessFactors Learning environment, see the Importing Reports SAP Help Portal resource.

   Importing a report automatically grants you the Run [report title] Report permission for that report.

8. **Optional:** Make the imported custom reports accessible to other users in your SAP SuccessFactors Learning environment.

   Note: This step is only required if you want the reports to be run by users other than the user who imported them. If you will run the custom reports from your administrator account, skip to the next step.

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a. Publish the imported custom reports.
Publishing a report makes it available to users who can access the report and who have the Run [report title] Report permission. Unpublished reports are only available to users who satisfy these conditions and who have the Run Unpublished Reports permission.

(Optional) To learn how to publish a SAP SuccessFactors Learning report, see the Publishing a Report SAP Help Portal resource.

b. For each of the imported custom reports, grant the Run [report title] Report permission to all users who will run the report.

(Optional) For details on the Run [report title] Report permission in SAP SuccessFactors Learning, see the Report Permissions SAP Help Portal resource.

9. In SAP SuccessFactors Learning, run each of the imported custom reports, specifying CSV as the report format.
To learn how to run a SAP SuccessFactors Learning report, see the Running Reports in Learning SAP Help Portal resource.

Result
The custom reports generate CSV files that include current user data, library data, assignment data, and training item data from your selected SAP SuccessFactors Learning environment.

Note: The SAP SuccessFactors external content connector can't accept CSV data files that exceed the maximum attachment size specified by the value of the `com.glide.attachment.max_size` system property. By default, this property limits the size of attachments to 1 Gb or less. For details on configuring this system property, see Maximum allowed attachment size.

What to do next
Provide the three CSV data files that you generated in step 9 to your connector administrator.

Your connector administrator needs these three files to configure a SAP SuccessFactors external content connector to retrieve trainings from your SAP SuccessFactors Learning source system.

For details on creating and configuring a SAP SuccessFactors external content connector, see Create a SAP SuccessFactors external content connector.

Note: To update the user, library and assignment, and training item data available to the SAP SuccessFactors external content connector, repeat step 9 and provide the three updated CSV data files to your connector administrator. To learn how to update the connector configuration to read these files, see Update CSV data files for a SAP SuccessFactors external content connector.

Create a SAP SuccessFactors external content connector

Create an external content connector to retrieve searchable content and security principals from your SAP SuccessFactors source system.

Before you begin
A source system administrator must have already exported user, library and assignment, and training item data from your SAP SuccessFactors Learning source system in three comma-separated value (CSV) files. For details on exporting the appropriate data from your source system in CSV format, see Export SAP SuccessFactors Learning data for external content indexing.

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Note: The SAP SuccessFactors external content connector can't accept CSV data files that exceed the maximum attachment size specified by the value of the *com.glide.attachment.max_size* system property. By default, this property limits the size of attachments to 1 Gb or less. For details on configuring this system property, see Maximum allowed attachment size.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *SAP SuccessFactors* tile, then select **Next**.
5. On the Manage data page, attach the three exported CSV data files to entries in the Data tables section as follows.

   a. In the Users data table, use the **Add file** link to attach the CSV data file from the Users custom report.
   This CSV file includes the contains the User Mapping ID and Assignment Profile ID columns. Data from this file populates the user mapping table for the connector. The connector crawls this table during user permission crawls. AI Search uses the retrieved data to find the original document access restrictions to apply for each search user.

   b. In the Library and assignment profiles data table, use the **Add file** link to attach the CSV data file from the Libraries and assignment profiles custom report.
   This CSV file includes the Library ID and Assignment Profile ID columns. Data from this file links assignment profiles to libraries. The connector crawls this table during user permission crawls. AI Search uses the retrieved links to enforce the original document access restrictions for each search user.

   c. In the Trainings data table, use the **Add file** link to attach the CSV data file from the Training items custom report.
   This CSV file includes the Type ID, Item ID, Revision Date, Item Classification ID, Item Title, Item Description, Aggregated Library ID, and Locale_ID columns. Data from this file provides content and metadata for training items. The connector crawls this table during content crawls. AI Search uses the retrieved information to make training item content and metadata searchable for users with the correct access controls.

   d. In the Trainings data table, enter the URL for one of your SAP SuccessFactors source system's training items.
   AI Search analyzes this sample training item URL to determine the correct URL format for training item search results from your source system.

6. Select the **I agree to the following disclaimer** option, then select **Next**.
7. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.

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8. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
9. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

   When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you need to configure and run content and user mapping crawls for it. You can create content crawls for the connector from the External Content Admin Home page even if you skipped this step during connector creation.

For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Update CSV data files for a SAP SuccessFactors external content connector

Upload newly generated comma-separated value (CSV) data files to your SAP SuccessFactors external content connector. The connector reads these files to retrieve updated content and metadata from your SAP SuccessFactors Learning source system.

Before you begin
A source system administrator must have already exported updated user, library and assignment, and training item data from your SAP SuccessFactors Learning source system as three files in comma-separated value (CSV) format. To learn how to export the appropriate data

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from your source system, see Export SAP SuccessFactors Learning data for external content indexing.

Note: The SAP SuccessFactors external content connector can't accept CSV data files that exceed the maximum attachment size specified by the value of the *com.glide.attachment.max_size* system property. By default, this property limits the size of attachments to 1 Gb or less. For details on configuring this system property, see Maximum allowed attachment size.

A connector administrator must have already created the SAP SuccessFactors external content connector that parses the three CSV data files. For details on creating the connector, see Create a SAP SuccessFactors external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

Unlike most external content connectors, the SAP SuccessFactors connector doesn't automatically retrieve updated content and metadata from its source system every time it crawls. To make updated content and metadata available for retrieval in crawls, you must update the connector configuration, attaching the latest CSV-format data files exported from the source system.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors list, select the SAP SuccessFactors connector you want to update the CSV data files for, then navigate to **Settings** > **Connection settings**.
4. On the Connection settings page, attach the three exported CSV data files to entries in the Data tables section as follows.

   a. In the Users data table, use the **Add file** link to attach the CSV data file from the Users custom report.
   This CSV file includes the contains the User Mapping ID and Assignment Profile ID columns. Data from this file populates the user mapping table for the connector. The connector crawls this table during user permission crawls. AI Search uses the retrieved data to find the original document access restrictions to apply for each search user.

   b. In the Library and assignment profiles data table, use the **Add file** link to attach the CSV data file from the Libraries and assignment profiles custom report.
   This CSV file includes the Library ID and Assignment Profile ID columns. Data from this file links assignment profiles to libraries. The connector crawls this table during user permission crawls. AI Search uses the retrieved links to enforce the original document access restrictions for each search user.

   c. In the Trainings data table, use the **Add file** link to attach the CSV data file from the Training items custom report.
   This CSV file includes the Type ID, Item ID, Revision Date, Item Classification ID, Item Title, Item Description, Aggregated Library ID, and Locale_ID columns. Data from this file provides content and metadata for training items. The connector crawls this table during content crawls. AI Search uses the retrieved information to make training item content and metadata searchable for users with the correct access controls.

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d. In the Trainings data table, enter the URL for one of your SAP SuccessFactors source system's training items.
AI Search analyzes this sample training item URL to determine the correct URL format for training item search results from your source system.

5. Select the **I agree to the following disclaimer** option, then select **Save**.

ServiceNow® instance external content connector

The ServiceNow instance external content connector retrieves KB article records (and their attachments) from your ServiceNow AI Platform source instance and makes their content and metadata searchable in AI Search applications in your ServiceNow AI Platform destination instance.

The ServiceNow AI Platform instance that you want the external content connector to retrieve searchable content and metadata from is your source instance. The instance where the connector runs and populates search applications with the retrieved data is your destination instance.

Search administrators can run or schedule content crawls to retrieve updated content from your source instance, or user permission crawls to retrieve updated security principals from your source instance. Both types of crawl feed their data to AI Search for indexing on your destination instance.

In your destination instance, the indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Important: Your source and destination instances must be distinct from one another. Don't use the ServiceNow® instance external content connector to feed an instance's content back into itself.

User permissions

To view search results from the source instance, a user on the destination instance must satisfy the following conditions:

- There must be a matching user account defined for them on the source instance, with the same email address.
- Their user account on the source instance must have access to the content represented by the search results.

If these conditions aren't satisfied, the destination instance user won't be able to see search results crawled from the source instance.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure your ServiceNow AI Platform® instance for external content indexing

Create and configure a non-interactive service user account on your ServiceNow AI Platform® source instance to allow access by the ServiceNow instance external content connector.

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Before you begin

Role required: admin and security_admin

Note: The security_admin role is an elevated privilege role. To learn more about elevated privilege roles, see Elevated privilege roles. For details on the security_admin elevated privilege role, see Security_admin role.

About this task

The ServiceNow instance external content connector retrieves KB articles and security principals from a ServiceNow AI Platform instance. To allow the external content connector to access this content, you need to configure a non-interactive service user account that the connector will use when running document and user mapping crawls.

Perform all of these steps on the ServiceNow AI Platform instance that you want the external content connector to retrieve searchable content and metadata from. This is your source instance. The instance where the connector runs and populates search applications with the retrieved data is your destination instance.

Procedure

1. On your source instance, create a new non-interactive user and save its user ID.

   a. Create a new user by following the steps from Create a user.

      Note: Make sure to select the **Web service access only** option on the new user record. This option designates your new user as a non-interactive user. To learn more about how non-interactive users differ from interactive users, see Non-interactive sessions.

   b. Copy the **User ID** for your new source instance user account and store it in a secure location.

      Important: Your connector administrator needs this user account's user ID when configuring the ServiceNow instance external content connector on your destination instance.

2. On your source instance, generate and copy a strong password for your new user.

   a. Generate a strong password for your new user by following the steps from Configure password for a user.

   b. Store the copied password in a secure location.

      Important: Your connector administrator needs this user account's password when configuring the ServiceNow instance external content connector on your destination instance.

3. On your source instance, add your new user to the **MFA Exempted User Group** by following the steps from Add a user to a group.

   Note: Inclusion in this group exempts your new user from the default requirement to use multi-factor authentication (MFA) when logging in to your source instance. This configuration is needed for proper operation of the ServiceNow instance external content connector.

4. On your source instance, create a new custom role in the Global application scope.

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a. Select the Global application scope, following the steps from Application picker.

b. Navigate to **All** > **User Administration** > **Roles**.

c. Select **New**.

d. On the Role form, enter a name for your new custom role.
As an example, you might enter `ext_cont_connectors_custom_role`.

e. Select **Submit**.

5. On your source instance, create and edit ACLs (access control lists) to grant users with your new custom role access to the Security Attribute [sys_security_attribute] table.

a. Navigate to **All** > **System Security** > **Access Control (ACL)**.

b. Select **New**.

c. On the Access Control form, fill in the fields.

Field	Value
Type	Select **record**.
Operation	Select **read**.
Active	Select this option.
Name	In the **Tables** list, select the Security Attribute [sys_security_attribute] table. Leave the **Fields** list set to its default value.
Conditions	
Requires role	Insert a new row with the name of your new custom role.

d. Select **Submit**, then select **Continue**.
The new ACL record appears in the Access Control list view.

e. In the Access Control [sys_security_acl] table list view, create and apply a filter with the following condition.

Field	Operation	Value
Sys ID	is	ee3ebfdc9f4112108647e8c40b0a1cb0

For details on creating and applying filters to limit records shown in a table's list view, see Create a filter in List.

This filter should display a single Access Control record with Decision Type **Deny Unless**.

f. Open the filtered Access Control record.

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g. On the Access Control form, in the Conditions section, find the **Requires role** condition list and insert a new row with the name of your new custom role.

h. Select **Update**.

6. On your source instance, assign roles to your new user.

a. Assign your new custom role to your new user by following the steps from Assign a role to a user.

b. Assign each of the following roles to your new user by following the steps from Assign a role to a user.

Role	Description
access_analyzer_admin	Grants the user access to tables relating to access control in your source instance, including the Access Control [sys_security_acl], Role [sys_user_role], and Table [sys_db_object] tables. To learn more about access control, see Access Control Lists (ACLs).
catalog_manager	Grants the user access to Service Catalog items in your source instance. For more details on this base system role, see Base system roles.
itil	Grants the user access to incidents and user criteria in your source instance. For more details on this base system role, see Base system roles.
knowledge_admin	Grants the user access to KB articles in your source instance. For more details on this base system role, see Base system roles.
snc_platform_rest_api_access	Grants the user access to Platform Rest APIs in your source instance. The ServiceNow instance external content connector uses the Attachment API and Table API to access your source instance during crawls. For more details on this base system role, see Base system roles.
snc_read_only	Restricts the user to read-only access on all tables that it has access to. For more details on this base system role, see Read-only role.

What to do next

Provide the following items to the connector administrator who will create the ServiceNow instance connector on your destination instance:

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- The URL for your ServiceNow AI Platform source instance. As an example, you might provide `https://example.service-now.com/` as the instance URL.
- The user ID for the non-interactive service user you created on your source instance, as copied in step 1.b. As an example, you might provide `sn.instance.connector` as the user ID.
- The password for the non-interactive service user you created on your source instance, as copied in step 2.b.

Your connector administrator needs these items to configure a ServiceNow instance external content connector on your destination instance to retrieve content and security principals from your ServiceNow AI Platform source instance.

For details on creating and configuring a ServiceNow instance external content connector, see Create a ServiceNow instance external content connector.

Create a ServiceNow® instance external content connector

Create an external content connector to retrieve searchable content and security principals from a ServiceNow AI Platform instance.

Before you begin

A user with the admin role must have already configured your ServiceNow AI Platform source instance to allow access by the ServiceNow instance external content connector. For the required source instance configuration steps, see Configure your ServiceNow AI Platform instance for external content indexing.

Role required: sn_ext_conn.xcc_admin

About this task

Create a ServiceNow® instance external content connector to retrieve content and metadata from a remote source instance and make it searchable on the destination instance where the connector runs.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **ServiceNow Instance** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this ServiceNow instance external content connector. You may find it useful to name the connector to match your source instance's hostname. As an example, if your source instance is `https://example-prod.service-now.com/`, you might enter `Example-Prod` as the connector name.

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Connection setting	Description
Instance URL	URL for the ServiceNow AI Platform source instance that you want to crawl searchable content from. As an example, you might enter `https://example-prod.service-now.com/`.
User Name	User ID for the service user defined in your ServiceNow AI Platform source instance. If you don't know the service user's ID, ask the admin who configured the ServiceNow AI Platform source instance for external content indexing for it.
Password	Password for the service user defined in your ServiceNow AI Platform source instance. If you don't know the service user's password, ask the admin who configured the ServiceNow AI Platform source instance for external content indexing for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a ServiceNow instance external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

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Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a ServiceNow instance external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a ServiceNow® instance external content connector

Specify the content types that you want your ServiceNow instance external content connector to retrieve when running content crawls.

Before you begin
A connector administrator must have already created the ServiceNow® instance external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a ServiceNow instance external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the ServiceNow instance external content connector retrieves all KB articles from your ServiceNow AI Platform instance. Only perform this task if you want the connector to use inclusion or exclusion filters for the KB articles to retrieve when running content crawls.

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the ServiceNow instance external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Short description filtering** options in the KB articles section.
   - To crawl all KB articles from the source instance, select **Crawl all short descriptions**.
   - To crawl only a specified set of KB articles from the source instance, select **Include only these short descriptions**, then use the **Add short description patterns to include** field and **Add** button to enter Java regular expression patterns that match the short descriptions for the KB articles that you want to include in the crawl.

     As an example, you might enter `Beginner's [Gg]uide` to include all KB articles with short descriptions that contain the terms `Beginner's Guide` or `Beginner's guide`.
   - To crawl all except a specified set of KB articles from the source instance, select **Exclude only these short descriptions**, then use the **Add short description patterns to exclude** field and **Add** button to enter Java regular expression patterns that match the short descriptions for the KB articles that you want to exclude from the crawl.

     As an example, you might enter `(?i)\[Legacy\]` to exclude all KB articles with short descriptions that contain the terms `[Legacy]` or `[legacy]`.

   Note: To learn about Java regular expression pattern syntax, see the Javadoc for the java.regex.util.Pattern class.
5. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved

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attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

This option is only available when the Platform Multimodal Service plugin is activated on your instance.

- For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
- To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.

6. Select **Save and validate**.

Result
The ServiceNow instance external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your ServiceNow AI Platform instance using your modified crawl settings, create and run a one-time content crawl for your ServiceNow instance external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

ServiceNow® product documentation external content connector

The ServiceNow® product documentation external content connector retrieves topics from the ServiceNow product documentation and makes their content and metadata searchable in AI Search applications.

Note: This external content connector is not included in the External Content Connectors Application Suite application. To use this connector, you must install it separately. For details on installation, see Install External Content Connectors.

The system automatically schedules monthly content crawls to retrieve updated content from the product documentation for a family release that you specify. Search administrators can run one-time content crawls to update content ahead of schedule.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a ServiceNow® product documentation external content connector

Create an external content connector to retrieve searchable content from the ServiceNow product documentation site.

Before you begin
Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.

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4. On the Choose source page, select the **ServiceNow Product Documentation** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this ServiceNow product documentation external content connector.
Select source	ServiceNow AI Platform® family release to crawl product documentation for. Supported values: ○ *`Automatically sync to current instance`*: Crawl product documentation for the ServiceNow AI Platform family release used by your instance. As an example, if your instance has Yokohama Patch 3 installed, the connector crawls product documentation for the Yokohama family release. ○ *`Manually select family version`*: Specify a ServiceNow AI Platform family release that you want to crawl product documentation for.
Family version	ServiceNow AI Platform family release that you want to crawl product documentation for. This field appears only when **Manually select family version** is selected from **Family version**.

6. Save and validate your connection settings by selecting **Validate Connection**.

> **Note:** If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a ServiceNow product documentation external content connector.
8. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
9. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

   When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

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Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content with your new connector, you must configure and run content crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a ServiceNow product documentation external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a ServiceNow® product documentation external content connector

Choose the products that you want your ServiceNow product documentation external content connector to crawl documentation for.

Before you begin
A connector administrator must have already created the ServiceNow® product documentation external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a ServiceNow product documentation external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the ServiceNow product documentation external content connector crawls documentation for all ServiceNow products. Only perform this task if you want to exclude the documentation for some products from the connector's crawls.

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the ServiceNow product documentation external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. To restrict the connector's content crawl scope, select the products that you want to crawl the documentation for.
   By default, all products are selected. You can use the option in the list header to select or deselect all products.
5. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
6. Select **Save**.

Result

The ServiceNow product documentation external content connector is updated with your chosen crawl scope.

Slack external content connector

The Slack external content connector retrieves attachments from public channels in your Slack source system and makes their content and metadata searchable in AI Search applications.

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Connector administrators can run or schedule content crawls to update searchable content and metadata from your source system. Content crawls feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Slack connector limitations

The Slack external content connector doesn't retrieve text or metadata content from messages in your Slack source system's public channels. It only retrieves and indexes attachments from those public channels.

User access permissions aren't preserved for indexed attachments, so any user with access to your indexed Slack content can view any indexed attachment.

The connector doesn't retrieve content from your Slack source system's private channels.

Related topics

Create a content crawl for an external content connector

Configure Slack for external content indexing

Create a Slack API application to allow the Slack external content connector to crawl public channels in your Slack source system.

Before you begin

You need permission to create Slack API applications in your organization's Slack workspace.

Role required: none

About this task

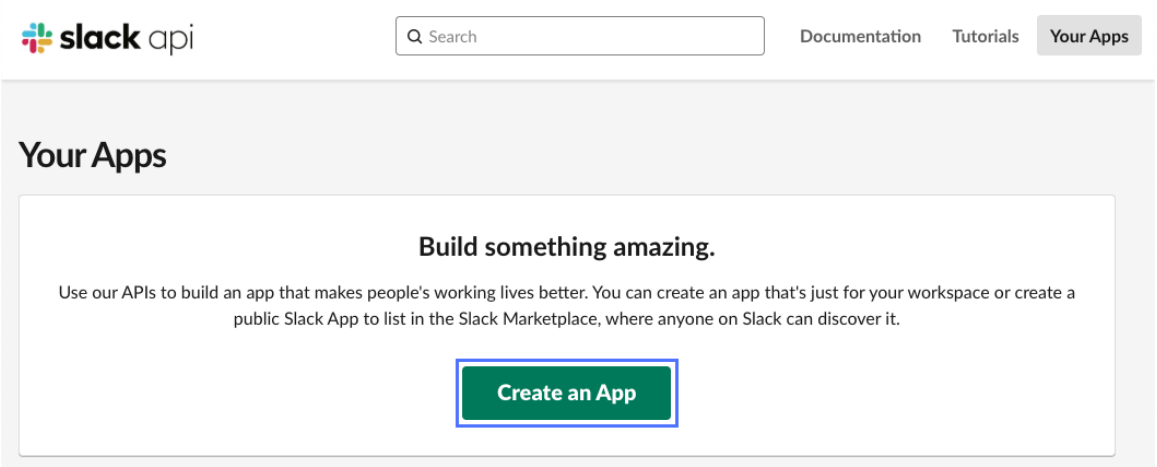
The Slack external content connector retrieves content from public channels in your Slack source system using a Slack API application. You need to create this application and configure its OAuth settings to allow the external content connector access to your Slack workspace.

Your connector administrator needs the Slack API application's client ID and secret to configure the Slack external content connector for proper connection to your Slack source system.

Procedure

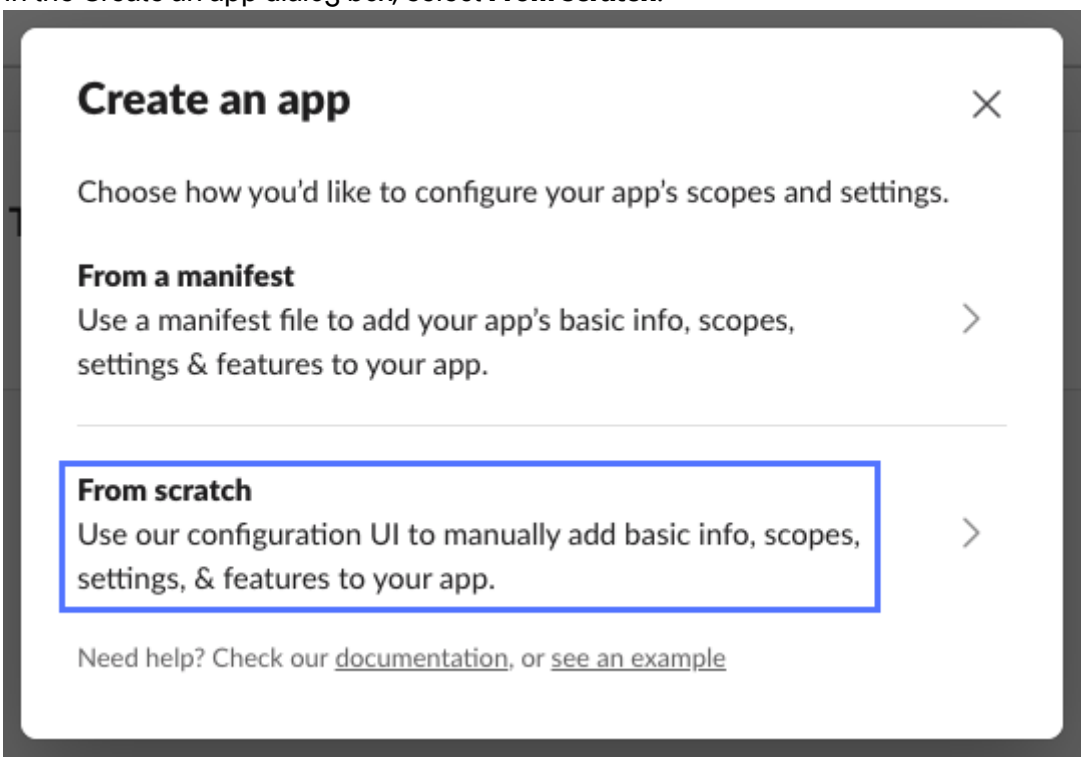
1. Navigate to the Slack API: Applications page at https://api.slack.com/apps.
2. If prompted, sign in to your Slack account and select the workspace that you want the external content connector to crawl.
3. Select **Create an App**.

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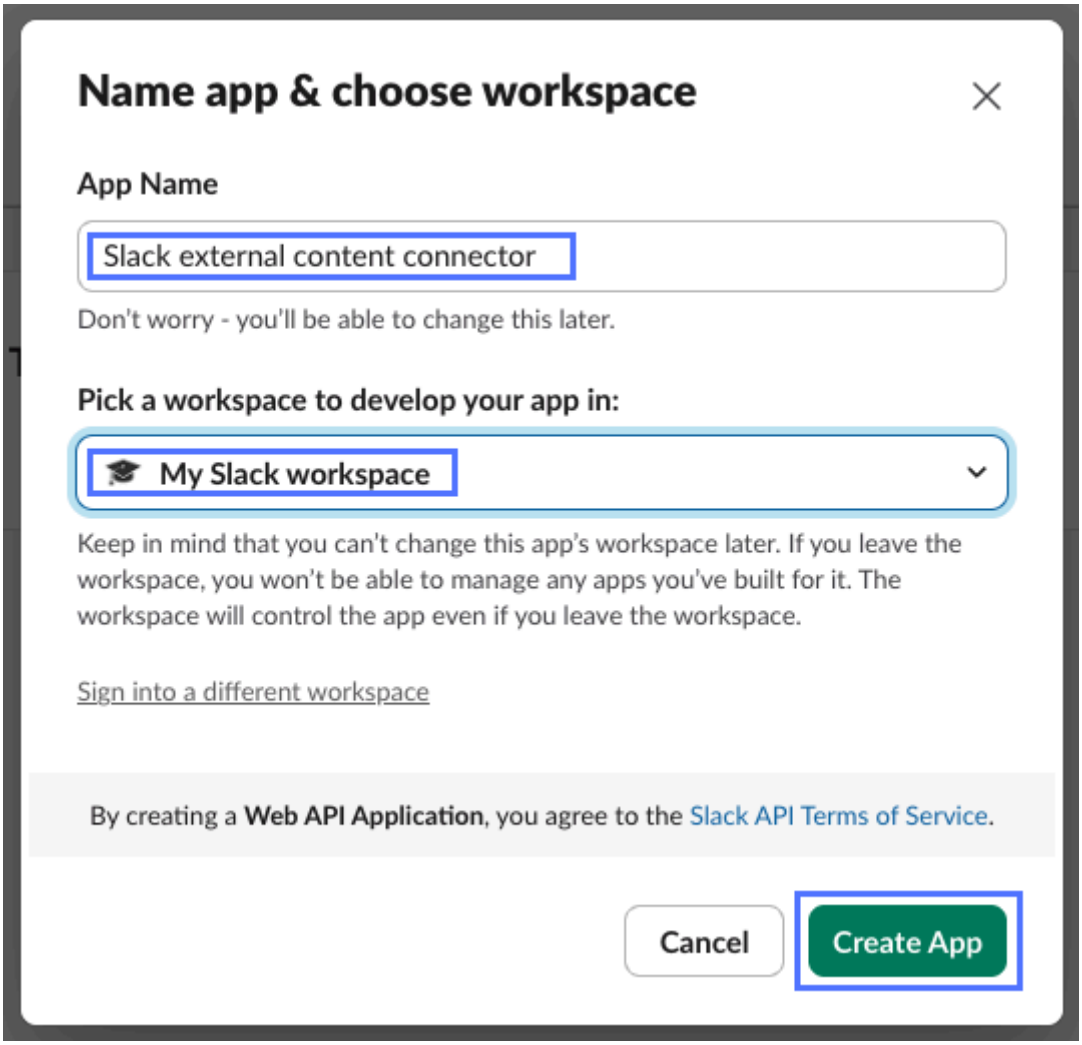
If you already have existing applications on this page, select **Create New App** instead.

4. In the Create an app dialog box, select **From scratch**.



5. In the Name app & choose workspace dialog box, specify a name and workspace for your application.
   a. In the **App Name** field, enter a name for your application.
   b. In the **Pick a workspace to develop your app in** field, select the workspace that you want the external content connector to crawl.
   c. Select **Create App**.

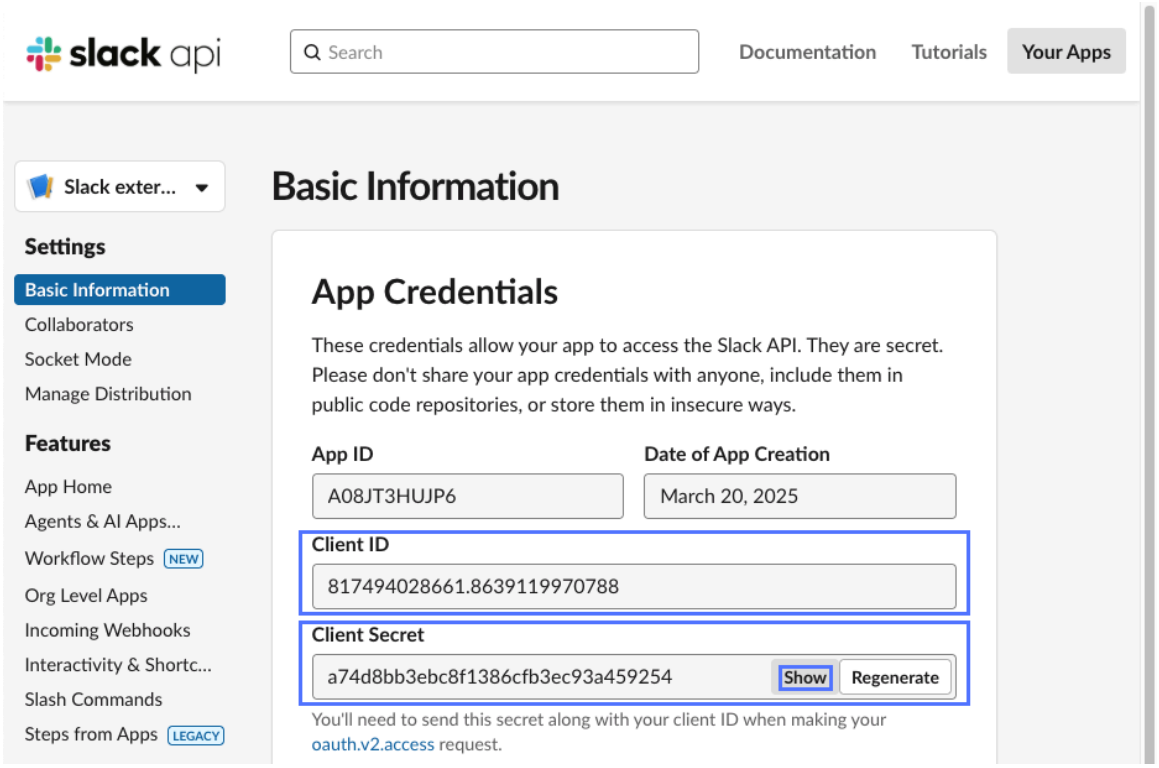
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The application's Settings page appears, open to the Basic Information page.

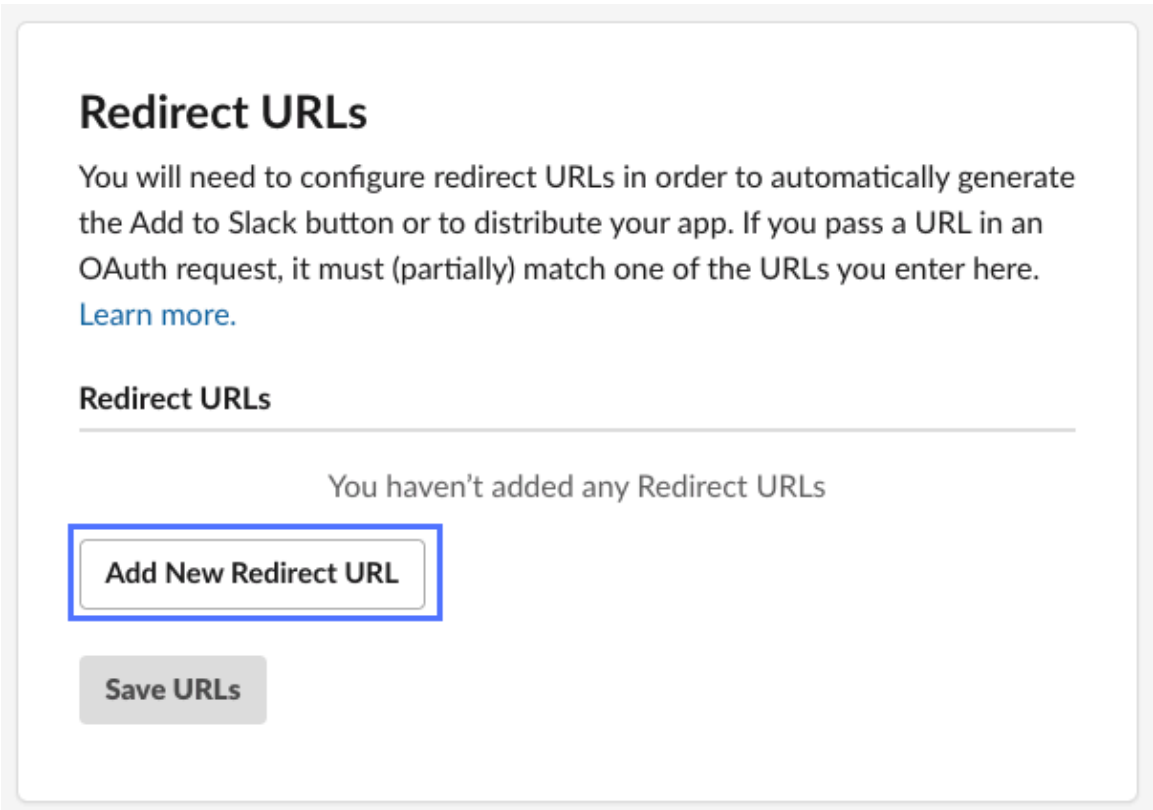
6. In the App Credentials section, select **Show** to display the **Client Secret** field value, then record the application's **Client ID** and **Client Secret** values in a secure location.

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Important: Your connector administrator needs these values to configure the Slack external content connector.

7. Navigate to **Features** > **OAuth & Permissions**.
8. On the OAuth & Permissions page, configure a redirect URL for the application.
   a. In the Redirect URLs section, select **Add New Redirect URL**.

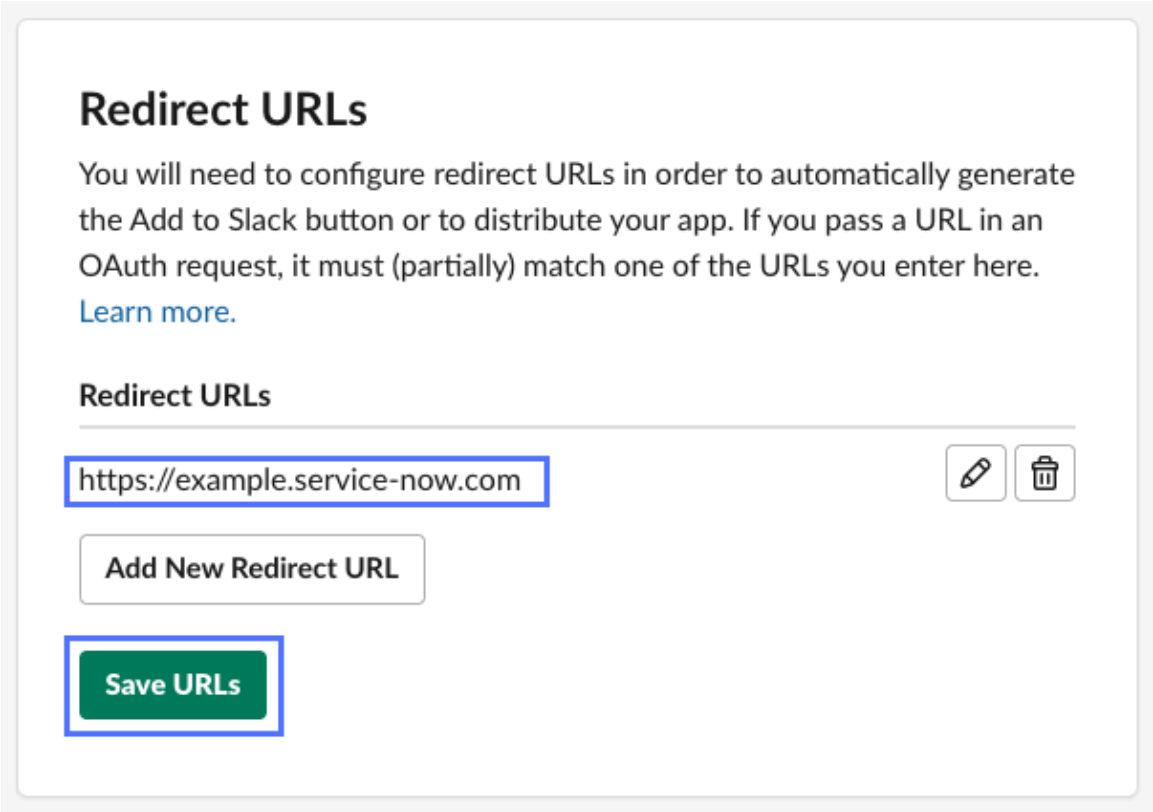


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b. Enter the URL for your ServiceNow AI Platform® instance, `https://<instance-name>.service-now.com`, replacing `<instance-name>` with the name of your instance.

c. Select **Add**.

d. Select **Save URLs**.

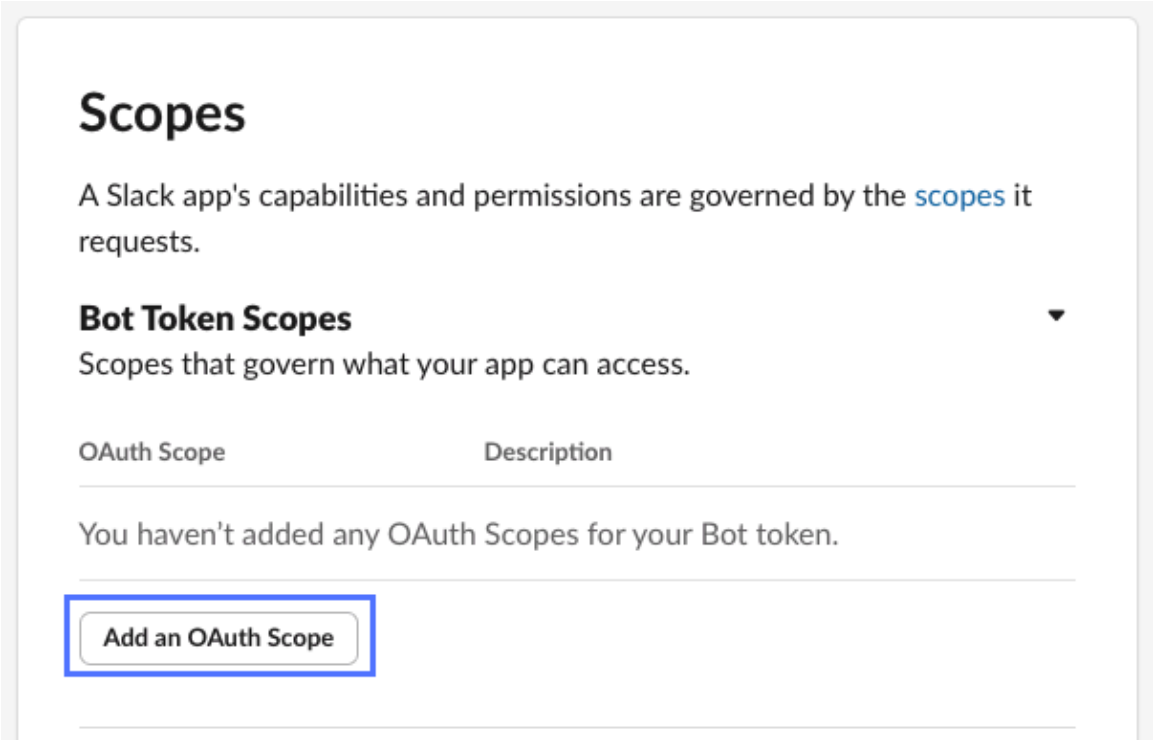


9. On the OAuth & Permissions page, in the Scopes section's Bot Token Scopes subsection, configure each of these bot token scopes for the application.

- channels:history
- channels:join
- channels:read
- files:read
- remote_files:read
- team:read
- users:read

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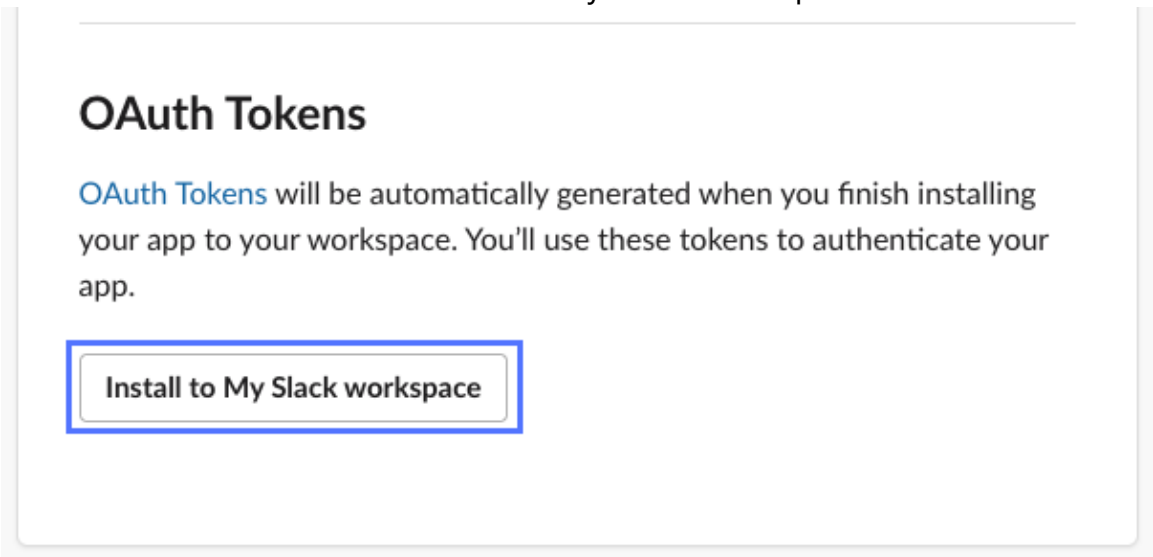
a. Select **Add an OAuth Scope**.



b. Enter the OAuth scope's name to filter the list of scopes, then select the scope's entry.
The selected scope appears in the list of Bot Token Scopes for your application.

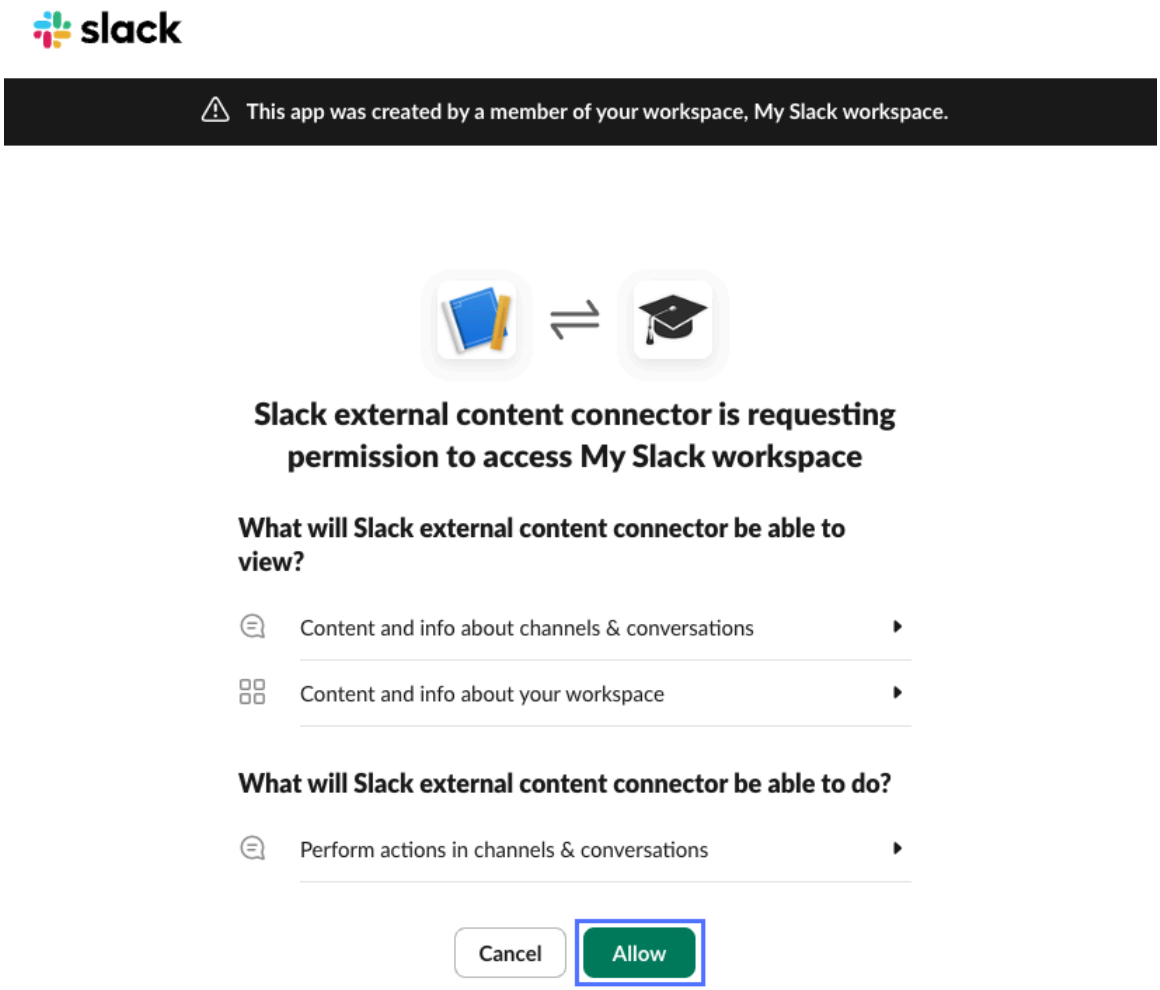
10. On the OAuth & Permissions page, install the application into your Slack workspace.

a. In the OAuth Tokens section, select the link to install the application to your Slack workspace.
The installation link's text includes the name of your Slack workspace.



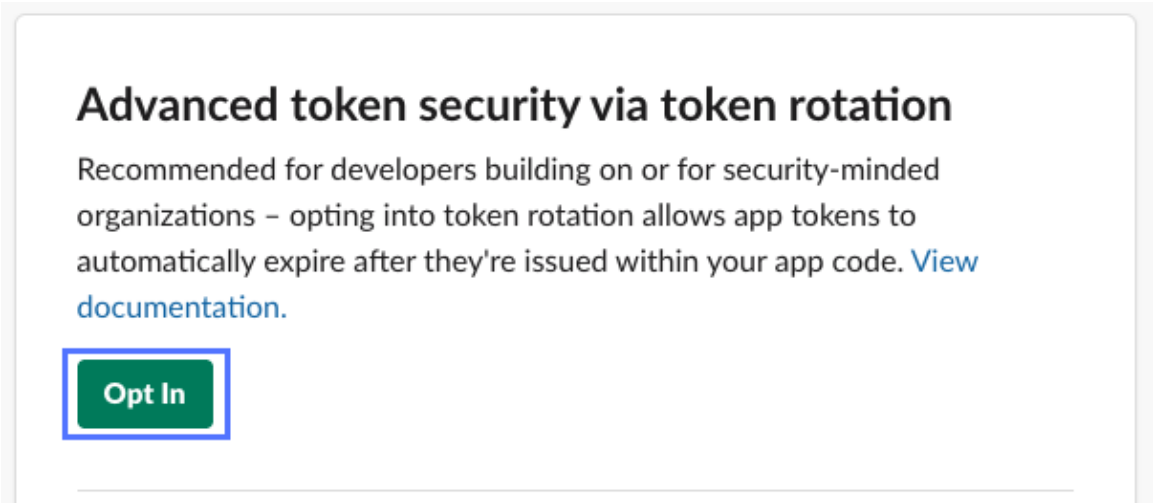
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b. On the confirmation page, select **Allow**.



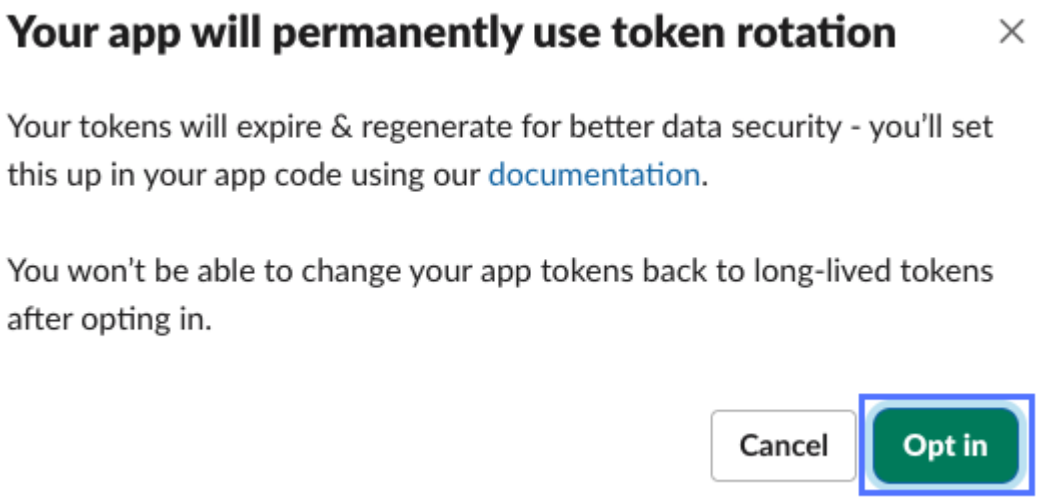
11. On the OAuth & Permissions page, opt into token rotation for the application.

a. In the Advanced token security via token rotation section, select **Opt In**.



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b. On the confirmation page, select **Opt in**.



What to do next

Provide the following items to your connector administrator:

- The Slack API application client ID and client secret that you recorded in step 6.
- The URL where your Slack workspace is accessible. This is usually `https://slack.com`.

Your connector administrator needs these items to configure a Slack external content connector to retrieve attachments from your Slack instance.

For details on creating and configuring a Slack external content connector, see Create a Slack external content connector.

Create a Slack external content connector

Create an external content connector to retrieve searchable content from public channels in your Slack source system.

Before you begin

A source system administrator must have already configured your Slack source system to allow access by the Slack external content connector. For the required source system configuration steps, see Configure Slack for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Slack** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

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Connection settings

Connection setting	Description
Connector name	Unique name for this Slack external content connector.
URL	URL where your Slack workspace is accessible. This is usually `https://slack.com`.
Client ID	Client ID for the Slack API application that allows the external content connector to access your Slack workspace. If you don't know the client ID for the application, ask your Slack administrator for it.
Client secret	Client secret for the Slack API application that allows the external content connector to access your Slack workspace. If you don't know the client secret for the application, ask your Slack administrator for it.
I am aware that this connector crawls documents from public channels only and that those documents are accessible by every user that has access to my configured AI Search experience.	Option confirming your understanding that the Slack external content connector doesn't preserve user access permissions and only retrieves content from attachments in public channels.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for an Atlassian Confluence Cloud external content connector.
8. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
9. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.

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If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content with your new connector, you must configure and run content crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Slack external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Slack external content connector

Specify the public channels you want your Slack external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin
A connector administrator must have already created the Slack external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Slack external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the Slack external content connector crawls all public channels from its specified source system and sends attachments with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

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- Inclusion or exclusion filters for the public channels to crawl when running content crawls
- Inclusion or exclusion filters for the attachment file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Slack external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Content filtering** options:
   - To crawl all channels from the source system, select **Crawl all content**.
   - To crawl only a specified set of channels from the source system, select **Include only these channels**, then use the **Add URL** field and **Add** button to enter URLs for channels that you want to include in the crawl.

     For example, you might enter `https://example.slack.com/archives/D27X71EJRLU` to include only searchable content from the specified channel.
   - To crawl all except a specified set of channels from the source system, select **Exclude only these channels**, then use the **Add URL** field and **Add** button to enter URLs for channels that you want to exclude from the crawl.

     For example, you might enter `https://example.slack.com/archives/K84Z67CKEIB` to exclude searchable content from the specified channel.

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Important:

When specifying URLs for Slack channels, always use the format that includes your Slack workspace's hostname followed by `/archives/` and a channel ID, as in this example: `https://example.slack.com/archives/C69S1L3SS`. You can obtain the URL for a channel by long-pressing (or right-clicking) the channel in Slack and then selecting **Copy** > **Copy link** from the context menu.

Don't use channel URLs that include `app.slack.com` as the hostname, such as `https://app.slack.com/client/TP6U2MGFM/C69S1L3SS`, as these aren't supported by the Slack external content connector.

5. Select one of the following **Attachment filtering** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

   For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save**.

Result

The Slack external content connector is updated with your crawl scope and file extension filter settings.

What to do next

To retrieve content from your Slack source system using your modified crawl settings, create and run a one-time content crawl for your Slack external content connector. To learn about

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creating and running one-time content crawls, see Create a content crawl for an external content connector.

Smartsheet external content connector

The Smartsheet external content connector retrieves sheets from workspaces in your Smartsheet source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure Smartsheet for external content indexing

Generate an API key in Smartsheet to allow the Smartsheet external content connector to access your Smartsheet source system.

Before you begin

You need a Smartsheet account with administrator privileges. The external content connector will run in the context of this account.

Role required: none

About this task

The Smartsheet external content connector retrieves sheets from workspaces in your Smartsheet source system using the Smartsheet API.

To allow the connector to access your Smartsheet source system via the Smartsheet API, you must generate an API key (access token) in Smartsheet. Your connector administrator can use this API key to configure the Smartsheet external connector for proper connection to your source system.

Procedure

1. Record your Smartsheet domain URL.
   The domain URL typically has the format `https://example.smartsheet.com/`.

   Important: Your connector administrator needs this Smartsheet domain URL when configuring the Smartsheet external content connector.

2. In Smartsheet, generate an API key for the Smartsheet external content connector.

   a. Navigate to https://app.smartsheet.com/ and log in with administrator credentials.

   b. Select the **Account Settings** icon, then select **Personal Settings...** in the context menu.

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c. In the Personal Settings dialog box, select **API Access**, then select **Generate new access token**.

d. Enter a name for your API key, then select **OK**.
As an example, you might enter *Smartsheet* external content connector API key as the name for the API key.
The value of your new API key appears in the dialog box.

e. Copy the API key value and store it in a secure location.

> **Important:** Your connector administrator needs this API key value when configuring the Smartsheet external content connector.

f. Close the API key dialog box by selecting **OK**, then close the Personal Settings dialog box by selecting **Close**.

What to do next

Provide the following items to your connector administrator:

- The URL for your Smartsheet domain that you recorded in step 1.
- The API key value that you copied in step 2.e.

Your connector administrator needs these items to configure a Smartsheet external content connector to retrieve sheets and security principals from your Smartsheet source system.

For details on creating and configuring a Smartsheet external content connector, see Create a Smartsheet external content connector.

Create a Smartsheet external content connector

Create an external content connector to retrieve searchable content and security principals from your Smartsheet source system.

Before you begin

A source system administrator must have already configured your Smartsheet source system to allow access by the Smartsheet external content connector. For the required source system configuration steps, see Configure Smartsheet for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Smartsheet** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

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Connection settings

Connection setting	Description
Connector name	Unique name for this Smartsheet external content connector.
Domain	URL for your Smartsheet domain, such as `https://example.smartsheet.com/`. If you don't have the domain URL, ask your Smartsheet administrator for it.
API Key	Value of an API key configured for a Smartsheet user account with administrator privileges. If you don't have the API key value, ask your Smartsheet administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Smartsheet external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

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Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Smartsheet external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Smartsheet external content connector

Specify the items you want your Smartsheet external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin
A connector administrator must have already created the Smartsheet external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Smartsheet external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the Smartsheet external content connector crawls all workspaces from its specified source system and sends all sheets and attachments with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for workspaces to crawl when running content crawls
- Inclusion or exclusion filters for sheets to retrieve when running content crawls

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- Inclusion or exclusion filters for the attachment file extensions to retrieve when running content crawls
- Inclusion or exclusion filters for the content types to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Smartsheet external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. In the Workspaces, Sheets, Attachments, and Crawl content types sections, select the options for the items you want the connector to visit and retrieve when you run content crawls.
5. Select one of the following **Workspaces** options:
   - To crawl all workspaces found in the source system, select **Crawl all workspaces**.
   - To crawl only a specified set of workspaces found in the source system, select **Include only these workspaces**, then use the **Add workspace name to include** field and **Add** button to enter names for workspaces you want the connector to include when crawling.

     As an example, you might enter `Project Horizon` to only retrieve content from this workspace.

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- To crawl all but a specified set of workspaces found in the source system, select **Exclude only these workspaces**, then use the **Add workspace name to exclude** field and **Add** button to enter names for workspaces you want the connector to exclude when crawling.

  As an example, you might enter `Catalyst Programs` to exclude content from this workspace.

6. Select one of the following **Sheets** options:
   - To crawl all sheets found in the source system, select **Crawl all sheets**.
   - To crawl only a specified set of sheets found in the source system, select **Include only these sheets**, then use the **Add sheet name to include** field and **Add** button to enter names for sheets you want the connector to include when crawling.

     As an example, you might enter `Efficiency Enhancements` to only retrieve content from sheets with this name.
   - To crawl all but a specified set of sheets found in the source system, select **Exclude only these sheets**, then use the **Add sheet name to exclude** field and **Add** button to enter names for sheets you want the connector to exclude when crawling.

     As an example, you might enter `Future Plans` to exclude sheets with this name.
7. Select one of the following **Attachments** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

   For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
8. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

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- For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
- To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.

9. Select **Save and validate**.

Result
The Smartsheet external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your Smartsheet source system using your modified crawl settings, create and run a one-time content crawl for your Smartsheet external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Trello external content connector

The Trello external content connector retrieves boards that are accessible to all users in your Trello source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to update searchable content and metadata from your source system. Content crawls feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Note: The Trello external content connector only retrieves searchable content and metadata from boards that can be accessed by all users in your Trello enterprise. It doesn't retrieve content and metadata from secure boards.

Related topics

Create a content crawl for an external content connector

Configure Trello for external content indexing

Create and authorize a Power-Up in the Trello Power-Up Admin Portal to allow the Trello external content connector to access your Trello source system.

Before you begin
Your organization must be on the Trello Enterprise plan. For details on this plan, see https://trello.com/enterprise.

Make sure that you have the Trello Enterprise Name for your organization.

Note: You can find your Enterprise Name in the URL for your organization's Trello Enterprise Admin Dashboard, which has the format `https://trello.com/e/EnterpriseName/admin`. For more information on the Trello Enterprise Admin Dashboard, see https://trello.com/guide/enterprise/admins-dashboard.

You need developer privileges for the Trello Power-Up Admin Portal.

Role required: none

About this task
The Trello external content connector retrieves content from publicly accessible boards in your Trello source system using the Trello REST API.

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To allow the connector to access your Trello source system via the Trello REST API, you must configure and authorize a Power-Up in the Trello Power-Up Admin Portal. Your connector administrator can use settings copied from the Power-Up to configure the Trello external connector for proper connection to your source system.

Procedure

1. In the Trello Power-Up Admin Portal, create a new Power-Up for the Trello external content connector.

   a. Navigate to https://trello.com/power-ups/admin and log in with developer credentials.

   b. Select **New**.

   c. Enter a name for your new Power-Up.
   As an example, you might enter `Trello external content connector`.

   d. Select the Trello workspace that will own your new Power-Up.
   This should be the workspace that includes the content you want the external content connector to retrieve and make searchable.

   e. **Optional:** Enter your email address, a support contact email address or URL, and an author name for your new Power-Up.

   f. Select **Create**.

   You're taken to the Basic Information page for your new Power-Up.

2. Generate an API key and a token for your new Power-Up.

   a. Navigate to the **API Key** page for your new Power-Up.

   b. Select **Generate a new API key**.

   c. In the Generate API key modal window, select **Generate API key**.

   d. Copy your new API key and store it in a secure location.

   > **Important:** Your external content connector administrator needs this API key when configuring the Trello external content connector.

   e. Select **Token**.

   f. On the authorization screen, select **Allow**.

   g. Copy your new token and store it in a secure location.

   > **Important:** Your external content connector administrator needs this API token when configuring the Trello external content connector.

3. Get the ID for your enterprise (organization) from Trello.

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a. Run this curl command, replacing `<enterprise-name>` with your organization's Trello Enterprise Name, `<api-key>` with your copied API key, and `<api-token>` with your copied API token:

```
curl --request GET \
  --url
 'https://api.trello.com/1/enterprises/<enterprise-name>?key=
<api-key>&token=<api-token>' \
  --header 'Accept: application/json'
```

b. Copy the `idEnterprise` value from the curl response and store it in a secure location.

> **Important:** Your external content connector administrator needs this enterprise ID when configuring the Trello external content connector.

What to do next

Provide the following items to your connector administrator:

- The API key that you copied in step 2.d.
- The API token that you copied in step 2.g.
- The enterprise ID that you copied in step 3.b.
- The base URL for the Trello REST API. This is usually `https://api.trello.com`.

Your connector administrator needs these items to configure a Trello external content connector to retrieve boards from your Trello source system.

For details on creating and configuring a Trello external content connector, see Create a Trello external content connector.

Create a Trello external content connector

Create an external content connector to retrieve searchable content from your Trello source system.

Before you begin

A source system administrator must have already configured your Trello source system to allow access by the Trello external content connector. For the required source system configuration steps, see Configure Trello for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Trello** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

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Connection settings

Connection setting	Description
Connector name	Unique name for this Trello external content connector.
API Key	API key for the Power-Up that grants the connector access to your Trello source system. If you don't have the API key, ask your Trello administrator for it.
API Token	API token for the Power-Up that grants the connector access to your Trello source system. If you don't have the API token, ask your Trello administrator for it.
Trello EnterpriseId	Trello ID for your enterprise (organization). If you don't have the enterprise ID, ask your Trello administrator for it.
URL	Base URL for the Trello REST API. If you don't have the base URL, ask your Trello administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Trello external content connector.
9. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
10. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page.

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For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content with your new connector, you must configure and run content crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Trello external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Trello external content connector

Specify the workspaces you want your Trello external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin
A connector administrator must have already created the Trello external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Trello external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the Trello external content connector retrieves boards found in all workspaces in its specified source system, and sends them and all their cards to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

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- Inclusion or exclusion filters for the workspaces to crawl when running content crawls
- Inclusion or exclusion filters for the boards to retrieve when running content crawls
- Inclusion or exclusion filters for the cards to retrieve from boards when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Trello external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. In the Crawl content types section, select one of the following options for workspaces:
   - To crawl boards from all workspaces found in the source system, select **Crawl all workspaces**.
   - To crawl only boards from a specified set of workspaces found in the source system, select **Include only these workspaces**, then use the **Add workspaces to include** field and **Add** button to enter URLs for workspaces you want the connector to include when crawling.

     As an example, you might enter `https://trello.com/w/user_team27179485/home` to only retrieve searchable content and metadata from boards in the specified workspace.

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- To crawl boards from all but a specified set of workspaces found in the source system, select **Exclude only these workspaces**, then use the **Add workspaces to exclude** field and **Add** button to enter URLs for workspaces you want the connector to exclude when crawling.

  As an example, you might enter `https://trello.com/w/user_team79211866/home` to exclude searchable content and metadata from boards in the specified workspace.

5. In the Crawl content types section, select one of the following options for boards:
   - To crawl all boards found in the source system, select **Crawl all boards**.
   - To crawl only a specified set of boards found in the source system, select **Include only these boards**, then use the **Add boards to include** field and **Add** button to enter URLs for boards you want the connector to include when crawling.

     As an example, you might enter `https://trello.com/b/PmX4mI8k/production-3` to only retrieve searchable content and metadata from the specified board.
   - To crawl all but a specified set of boards found in the source system, select **Exclude only these boards**, then use the **Add boards to exclude** field and **Add** button to enter URLs for boards you want the connector to exclude when crawling.

     As an example, you might enter `https://trello.com/b/QcW9nC3p/qe-test-1` to exclude searchable content and metadata from the specified board.
6. In the Crawl content types section, select one of the following options for cards:
   - To crawl all cards found in the source system, select **Crawl all cards**.
   - To crawl only a specified set of cards found in the source system, select **Include only these cards**, then use the **Add cards to include** field and **Add** button to enter URLs for cards you want the connector to include when crawling.

     As an example, you might enter `https://trello.com/c/6CExZNvG/2-doing-task-1-updated` to only retrieve searchable content and metadata from the specified card.
   - To crawl all but a specified set of cards found in the source system, select **Exclude only these cards**, then use the **Add cards to exclude** field and **Add** button to enter URLs for cards you want the connector to exclude when crawling.

     As an example, you might enter `https://trello.com/c/9JLeCQpK/task-270-updated` to exclude searchable content and metadata from the specified card.
7. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

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- For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
- To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.

8. Select **Save and validate**.

Result

The Trello external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your Trello source system using your modified crawl settings, create and run a one-time content crawl for your Trello external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Webcrawler external content connector

The Webcrawler external content connector retrieves pages and subdomains from a public website and makes their content and metadata searchable in AI Search applications. This connector can crawl content from predefined public web sources or your own custom web sources.

Note: This external content connector is not included in the External Content Connectors Application Suite application. To use this connector, you must install it separately. For details on installation, see Install External Content Connectors.

Connector administrators can run or schedule content crawls to retrieve updated content from pages and subdomains found on the selected website. Scheduled content crawls can run on a daily, weekly, or monthly basis. Content crawls feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Each Webcrawler connector can retrieve up to 50,000 items (URLs) from its source system when running content crawls.

Note: This is an exception to the general content crawl limit of one million (1,000,000) items.

By default, you can configure up to three Webcrawler connectors for custom web sources. If you need to retrieve items from more than three custom web sources, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the Webcrawler connector.

Related topics

Create a content crawl for an external content connector

Webcrawler external content connector predefined web sources

Predefined public web sources are available for the Webcrawler external content connector. Search administrators can run Webcrawler connector crawls to make content from these web sources searchable.

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Predefined web sources

Predefined web sources and URLs

Web source	URL
Apple Support	https://support.apple.com/
Atlassian Bitbucket	https://support.atlassian.com/bitbucket-server/
Atlassian Confluence Cloud	https://support.atlassian.com/confluence-cloud/
Atlassian Jira Cloud	https://support.atlassian.com/jira-software-cloud/
Atlassian Trello	https://support.atlassian.com/trello/
Box Inc	https://support.box.com/hc/en-us
Cisco AnyConnect VPN	https://www.cisco.com/c/en/us/support/security/anyconnect-secure-mobility-client/series.html#~tab-documents
Citrix Receiver VDI	https://support.citrix.com
Developer ServiceNow®	https://developer.servicenow.com
Dropbox	https://help.dropbox.com/
GitHub	https://docs.github.com/en
GlobalProtect	https://knowledgebase.paloaltonetworks.com/
Gmail	https://support.google.com/mail
Google Calendar	https://support.google.com/calendar
Google Chat	https://support.google.com/chat
Google Chrome	https://www.google.com/chrome/
Google Docs, Sheets, Slides	https://support.google.com/docs
Google Drive	https://support.google.com/drive
Google Meet	https://support.google.com/meet
Horizon ServiceNow	https://horizon.servicenow.com
HubSpot	https://knowledge.hubspot.com/
Microsoft BitLocker	https://learn.microsoft.com/en-us/windows/security/operating-system-security/data-protection/bitlocker/
Microsoft Dynamics 365	https://learn.microsoft.com/en-us/dynamics365/
Microsoft Office	https://learn.microsoft.com/en-us/office/

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Predefined web sources and URLs (continued)

Web source	URL
Microsoft OneDrive	`https://support.microsoft.com/en-us/onedrive`
Microsoft Power BI	`https://learn.microsoft.com/en-us/power-bi/`
Microsoft SharePoint	`https://support.microsoft.com/en-us/sharepoint`
Microsoft Teams	`https://support.microsoft.com/en-us/teams`
Microsoft Windows	`https://learn.microsoft.com/en-us/windows/`
Notion	`https://www.notion.com/help`
Okta	`https://support.okta.com/help`
Postman	`https://learning.postman.com/`
Salesforce	`https://help.salesforce.com/`
ServiceNow	`https://www.servicenow.com`
ServiceNow Community	`https://www.servicenow.com/community`
ServiceNow Community Developer Blog	`https://www.servicenow.com/community/developer-blog`
ServiceNow Support	`https://support.servicenow.com`
Slack	`https://slack.com/help`
Splunk	`https://docs.splunk.com/Documentation`
Tableau	`https://www.tableau.com/support/help`
Webex	`https://help.webex.com/`
Zoom	`https://support.zoom.com/hc`

Note: The Webcrawler external content connector includes a dedicated search source for each predefined web source. Each dedicated search source includes content from the specified predefined web source that's stored in the connector's indexed source. Use these search sources to access searchable content and metadata retrieved from predefined web sources. As an example, searchable content and metadata retrieved from the Google Drive predefined web source is accessible in a search source named *`Google Drive`*.

To create a Webcrawler external content connector, see Create a Webcrawler external content connector. To configure crawl settings for a Webcrawler external content connector, see Configure crawl settings for a Webcrawler external content connector.

Create a Webcrawler external content connector

Create an external content connector to retrieve searchable content from pages and subdomains in a public web source system. Select from a list of predefined web sources or specify your own web source.

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Before you begin
Role required: sn_ext_conn.xcc_admin

About this task
Follow this procedure to create a new Webcrawler connector to retrieve searchable content and metadata from URLs found in a predefined or custom web source.

By default, you can configure up to three Webcrawler connectors for custom web sources. If you need to retrieve items from more than three custom web sources, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the Webcrawler connector.

Procedure
1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Webcrawler** tile, then select **Next**.
5. On the Connection settings page, specify the web source that you want to retrieve searchable content from.
   - To retrieve searchable content from a web source in the list of predefined web sources, select the **Predefined web source** tile, then select your desired web source from the list.
   - To retrieve searchable content from a public web source not included in the list, select the **Custom web source** tile. Enter a name for the connector and the URL for your selected web source, then select the legal disclaimer option.

     Note: If you select this option, content crawls for the Webcrawler external content connector retrieve content and links from URLs found in the source system's sitemaps that include the specified start point URL. The connector reads matching URLs from all sitemaps referenced in the source system's `robots.txt` file and all sitemaps located in common sitemap locations.

     As an example, suppose you select the **Use sitemap** option and then specify `https://example.com/mysite` as the start point URL for a content crawl. When you run the content crawl, the Webcrawler connector retrieves content and links from sitemap URLs that include `https://example.com/mysite`. In this case, the connector retrieves content and links from sitemap URLs `https://example.com/mysite/a` and `https://example.com/mysite/b` but ignores sitemap URLs `https://example.com/othersite/c` and `https://example.com/yoursite/d` because they don't include the start point URL.
6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.
7. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this

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procedure and the available crawl settings, see Configure crawl settings for an Atlassian Confluence Cloud external content connector.

8. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
9. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

   When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content with your new connector, you must configure and run content crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Webcrawler external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you need to link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Search sources for predefined web sources

The Webcrawler external content connector includes a dedicated search source for each predefined web source. Each dedicated search source includes content from the specified predefined web source that's stored in the connector's indexed source. Use these search sources to access searchable content and metadata retrieved from predefined web sources. As an example, searchable content and metadata retrieved from the Google Drive predefined web source is accessible in a search source named *Google Drive*.

Default search source

By default, the system creates a search source that includes all searchable content from your Webcrawler connectors.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

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You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Webcrawler external content connector

Specify the pages and subdomains you want your Webcrawler external content connector to retrieve from your specified web source.

Before you begin

A connector administrator must have already created the Webcrawler external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Webcrawler external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Webcrawler external content connector crawls all pages and subdomains from its specified source system. Only perform this task if you want to specify inclusion or exclusion filters for the subdomains to crawl or pages to retrieve when running content crawls.

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Each Webcrawler connector can retrieve up to 50,000 items (URLs) from its source system when running content crawls.

Note: This is an exception to the general content crawl limit of one million (1,000,000) items.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Webcrawler external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. **Optional:** To load content crawl URLs from the source system's sitemaps, select the **Use sitemap** option.
   If you select this option, content crawls for the Webcrawler external content connector retrieve content and links from URLs found in the source system's sitemaps that include the specified start point URL. The connector reads matching URLs from all sitemaps referenced in the source system's `robots.txt` file and all sitemaps located in common sitemap locations.

   As an example, suppose you select the **Use sitemap** option and then specify `https://example.com/mysite` as the start point URL for a content crawl. When you run the content crawl, the Webcrawler connector retrieves content and links from sitemap URLs that include `https://example.com/mysite`. In this case, the connector retrieves content and links from sitemap URLs `https://example.com/mysite/a` and `https://example.com/mysite/b` but ignores sitemap URLs `https://example.com/othersite/c` and `https://example.com/yoursite/d` because they don't include the start point URL.
5. Select one of the following **Content** options:

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- To crawl all pages and subdomains from the source system, select **Crawl all content**.
- To crawl only a specified set of pages and subdomains from the source system, select **Include only these URLs**, then use the **Add URL** field and **Add** button to enter URLs or wildcard URL expressions for pages and subdomains that you want to include in the crawl.

  For example, you might enter `https://support.apple.com/ipad` to include only searchable content from the specified page or subdomain. Alternately, you might enter `https://support.apple.com/ipad**` to include every page or subdomain with a URL that matches the specified wildcard expression.

- To crawl all except a specified set of pages and subdomains from the source system, select **Exclude only these URLs**, then use the **Add URL** field and **Add** button to enter URLs or wildcard URL expressions for pages and subdomains that you want to exclude from the crawl.

  For example, you might enter `https://knowledgebase.paloaltonetworks.com/KCSArticleDetail` to exclude searchable content from the specified page or subdomain. Alternately, you might enter `https://knowledgebase.paloaltonetworks.com/KCSArticleDetail**` to exclude every page or subdomain with a URL that matches the specified wildcard expression.

Note: Wildcard URL expressions can include a URL prefix followed by the `**` suffix. They match all URLs that begin with the specified prefix.

6. In the **Include only these pages and subdomains** section, use the **Add URL to include** field and **Add** button to enter URLs or URL wildcard expressions for the pages and subdomains that you want to include in content crawls.
   As an example, you might enter `https://www.example.com/products*` and `https://www.example.com/newsroom*` to only retrieve searchable content and metadata from pages and subdomains that match one of the specified URL wildcard expressions.
7. In the **Exclude only these pages and subdomains** section, use the **Add URL to exclude** field and **Add** button to enter URLs or URL wildcard expressions for the pages and subdomains that you want to exclude from content crawls.
   As an example, you might enter `*contact*` to exclude pages and subdomains with URLs that match the specified URL wildcard expression.
8. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
9. Select **Save and validate**.

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Result
The Webcrawler external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from the public web source using your modified crawl settings, create and run a one-time content crawl for your Webcrawler external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

WordPress external content connector

The WordPress external content connector retrieves pages and blog posts and their attachments from websites in your WordPress source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

- Create a content crawl for an external content connector
- Create a user permission crawl for an external content connector

Configure WordPress for external content indexing

Create an admin user and an application password in your WordPress website to allow the WordPress external content connector to access your WordPress content.

Before you begin
You need administrator access privileges for the WordPress website that you want the connector to retrieve content from.

Role required: none

About this task
The WordPress external content connector retrieves pages and blog posts and their attachments from your WordPress source system using the WordPress REST API.

To allow the connector to access your WordPress source system via the WordPress REST API, you must set an application user name and password in the WordPress Admin dashboard. Your connector administrator can use these credentials to configure the WordPress external connector for proper connection to your source system.

Procedure

1. Navigate to the WordPress Admin dashboard at `https://<wordpress-site>/wp-admin/`, replacing `<wordpress-site>` with the fully qualified hostname for your WordPress website.
   For example, if your WordPress website is in the `wordpress.com` domain, you might replace `<wordpress-hostname>` with `example.wordpress.com`. If your WordPress website has its own domain, you might replace `<wordpress-hostname>` with `example-wordpress.com`.
2. When prompted, log in with your WordPress administrator credentials.

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3. Navigate to **Users**.
4. Add a new administrator user account:
   a. Select **Add User**.
   b. Enter a username and email address for your new user account.
   As an example, you might enter `WP_XCC_admin_user` as the username and `wp-admin@example.com` as the email address.
   c. Copy the username you entered and record it in a secure location.

      Important: Your external content connector administrator needs this user name when configuring the WordPress external content connector.

   d. **Optional:** Replace the auto-generated password for the new user account by selecting **Generate password** or entering a password of your own choice.
   e. In the Role field, select **Administrator** as the role for the new user account.
   f. Select **Add User**.

   The new user account appears in the Users list with the administrator role.
5. Generate an application password for your new administrator user account.
   a. In the Users list, edit your new administrator user account.
   b. In the New Application Password Name field, enter a name for the new application password.
   As an example, you might enter `WordPress external content connector app password`.
   c. Select **Add Application Password**.
   The user editor page displays the new application password.
   d. Copy the new application password and record it in a secure location.

      Important: Your external content connector administrator needs this application password when configuring the WordPress external content connector.

   e. Select **Update User**.

What to do next

Provide the following items to your connector administrator:

- The URL for your WordPress website.
- The user name for the administrator user account that you copied in step 4.c.
- The application password for the administrator user account that you copied in step 5.d.

Your connector administrator needs these items to configure a WordPress external content connector to retrieve pages and blog posts and security principals from your WordPress source system.

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For details on creating and configuring a WordPress external content connector, see Create a WordPress external content connector.

Create a WordPress external content connector

Create an external content connector to retrieve searchable content and security principals from your WordPress source system.

Before you begin

A source system administrator must have already configured your WordPress source system to allow access by the WordPress external content connector. For the required source system configuration steps, see Configure WordPress for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *WordPress* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this WordPress external content connector.
Instance URL	URL for your WordPress website. If you don't have the WordPress website URL, ask your WordPress administrator for it.
User name	User name for the administrator user configured for your WordPress source system. If you don't have the user name for the administrator user, ask your WordPress administrator for it.
Password	Application password for the administrator user configured for your WordPress source system. If you don't have the application password for the administrator user, ask your WordPress administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

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7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a WordPress external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a WordPress external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

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You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a WordPress external content connector

Specify the pages and blog posts you want your WordPress external content connector to crawl. Define inclusion or exclusion filters to dictate the types of content the crawl retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the WordPress external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a WordPress external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the WordPress external content connector crawls all pages and blog posts from its specified source system and sends attachments with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the pages and blog posts to crawl when running content crawls
- Inclusion or exclusion filters for the file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

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Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the WordPress external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Pages** options:
   - To crawl all pages from the source system, select **Crawl all pages**.
   - To crawl only a specified set of pages from the source system, select **Include only these pages**, then use the **Add page URL to include** field and **Add** button to enter URLs for pages you want the connector to include when crawling.

     As an example, you might enter `https://example.com/mainSite/mainPage` to only retrieve searchable content from this page.
   - To crawl all but a specified set of pages from the source system, select **Exclude only these pages**, then use the **Add page URL to exclude** field and **Add** button to enter URLs for pages you want the connector to exclude when crawling.

     As an example, you might enter `https://example.com/testSite/testPage` to exclude searchable content from this page.
5. Select one of the following **Blog posts** options:
   - To crawl all blog posts from the source system, select **Crawl all blog posts**.
   - To crawl only a specified set of blog posts from the source system, select **Include only these blog posts**, then use the **Add URL to include** field and **Add** button to enter URLs for blog posts you want the connector to include when crawling.

     As an example, you might enter `https://example.com/blog/latestContent` to only retrieve searchable content from this blog post.
   - To crawl all but a specified set of blog posts from the source system, select **Exclude only these blog posts**, then use the **Add URL to exclude** field and **Add** button to enter URLs for blog posts you want the connector to exclude when crawling.

     As an example, you might enter `https://example.com/blog/testPost` to exclude searchable content from this blog post.
6. Select one of the following **Categories** options:
   - To retrieve blog posts that belong to all categories from the source system, select **Crawl all categories**.
   - To retrieve only blog posts belonging to a specified set of categories from the source system, select **Include only these categories**, then use the **Categories to include** field and **Add** button to enter URLs for categories you want the connector to include when crawling blog posts.

     As an example, you might enter `Company news`, `Tech blog`, and `Press events` to only retrieve searchable content from blog posts that belong to the specified categories.

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- To retrieve blog posts belonging to all but a specified set of categories from the source system, select **Exclude only these categories**, then use the **Categories to exclude** field and **Add** button to enter URLs for categories you want the connector to exclude when crawling blog posts.

  As an example, you might enter `Testing` to exclude searchable content from blog posts that belong to the specified category.

7. Select one of the following **Date** options:
   - To retrieve pages and blog posts from the source system that were modified in the last year, select **Modified last year**.
   - To retrieve pages and blog posts from the source system that were modified in the last quarter, select **Modified last quarter**.
   - To retrieve pages and blog posts from the source system that were modified in the last month, select **Modified last month**.
   - To retrieve pages and blog posts from the source system that were modified in the last week, select **Modified last week**.
8. Select one of the following **State** options:
   - To retrieve pages and blog posts with all states from the source system, select **Crawl all states**.
   - To retrieve only pages and blog posts with a specified set of states from the source system, select **Include only these states**, then use the **States to include** field and **Add** button to enter states you want the connector to include when crawling.

     As an example, you might enter `publish` to only retrieve pages and blog posts that have this state.
   - To retrieve pages and blog posts with all but a specified set of states from the source system, select **Exclude only these states**, then use the **States to exclude** field and **Add** button to enter states you want the connector to exclude when crawling.

     As an example, you might enter `private`, `future`, `pending`, and `draft` to exclude pages and blog posts that have any of the specified states.
9. Select one of the following **Attachments** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.

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- To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

  As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.

10. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

    This option is only available when the Platform Multimodal Service plugin is activated on your instance.

    - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
    - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
11. Select **Save and validate**.

Result
The WordPress external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your WordPress source system using your modified crawl settings, create and run a one-time content crawl for your WordPress external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Workday external content connector

The Workday external content connector retrieves help articles, benefits, learning assignments, Manager Insights Hub data, payroll information, PTO information, and vacation policies from your Workday source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

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Configure Workday security settings

Create an unconstrained integration system security group in Workday. The Workday external content connector uses this security group when accessing your Workday content.

Before you begin

You need administrator privileges in your organization's Workday tenant.

Role required: none

About this task

The Workday external content connector runs as an integration in Workday. To enable the connector to access your Workday content, you need to create an integration system user and an unconstrained integration system security group in your Workday tenant.

Procedure

1. Create an integration system user account in Workday.
   a. Log in to your Workday tenant with your administrator credentials.
   b. In the Workday search bar, search for the **Create Integration System User** task and select it.
   c. On the Create Integration System User page, enter `ISU SNOW ACL` as the name for your new integration system user.
   d. Enter a password for your new user or generate one by selecting **Generate Random Password**.
   e. Clear the **Require New Password at Next Sign In** option.
   f. Select **OK**.
   Workday creates your new integration system user account.
2. Create an unconstrained integration system security group in Workday.
   a. In the Workday search bar, search for the **Create Security Group** task and select it.
   b. On the Create Security Group page, select **Integration System Security Group (Unconstrained)** as the type for your new group.
   c. Enter `ISSG Service Now ACL` as the name for your new integration system security group.
   d. Select **OK**.
   Workday creates your new unconstrained integration system security group.
   e. In the Integration System Users field, enter `ISU SNOW ACL` and press Enter.
   Workday adds your new integration system user account to your new unconstrained integration system security group.
3. Assign domain security policy permissions to your new integration system security group.
   a. In the Workday search bar, search for the **View Security Groups for User** task and select it.
   b. In the Person field, enter `ISU SNOW ACL`, then select **OK**.
   c. On the View Security Groups for User page, select the entry for your `ISSG Service Now` ACL integration system security group.

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d. On the View Integration System Security Group (Unconstrained) page, navigate to **...** > **Security Group** > **Maintain Domain Permissions for Security Group**

e. On the Maintain Domain Permissions for Security Group page, enter each of the following domain security policy names into the **Domain Security Policies permitting View access** field, pressing Enter after each name:

- HCM All Organizations
- Indexed Data Source: Positions
- Manage: Company
- Manage: Cost Center
- Manage: Custom Organization
- Manage: Help Articles
- Manage: Region
- Manage: Supervisory Organization
- Person Data: Learning
- Person Data: Work Email
- Reports: Learning Record
- Reports: Organization
- Security Administration

  Note: This domain security policy permission is inherited by the following domain security policies:

  - Lock Out Workday Accounts
  - Manage: Authorized Applications
  - Process: User-Based Security Group Event
  - Set Up: Security Rules

- Security Configuration
- Set Up: Compensation Guidelines
- Set Up: Organization
- Set Up: Payroll - Pay Group Specific
- Workday Accounts
- Workday Query Language
- Worker Data: Active and Terminated Workers
- Worker Data: Current Job Profile Information
- Worker Data: Current Management Level Information
- Worker Data: Current Staffing Information
- Worker Data: Headcount Reports
- Worker Data: Historical Staffing Information
- Worker Data: Payroll (Payroll Input)
- Worker Data: Public Worker Reports

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- Worker Data: Time Off (Time Off Balances Manager View)
- Worker Data: Time Off (Time Off Balances)
- Worker Data: Time Off (Time Off Manager View)
- Worker Data: Time Off (Time Off)
- Worker Data: Work Shifts
- WQL for Workday Extend

4. Activate the security policy changes for your new integration system security group.

   a. In the Workday search bar, search for the Activate Pending Security Policy Changes task and select it.

   b. On the Activate Pending Security Policy Changes page, enter a comment, then select **OK**. Workday displays the list of changes pending for your new integration system security group.

   c. Select **Confirm**, then select **OK**.
   The pending changes are applied to your new integration system security group.

Configure access to help articles in Workday

Create an article audience rule in Workday and specify it for your help articles to make them accessible by all your employees. The Workday external content connector uses the audience rule and article settings to make content and metadata from your help articles searchable.

Before you begin

You need administrator privileges in your organization's Workday tenant.

Role required: none

About this task

This task is optional. By default, the Workday external content connector retrieves searchable content and metadata from help articles that are accessible by all your organization's employees in Workday. To facilitate this retrieval, you need to create an article audience rule and then apply that rule to each article that you want to make searchable.

If you don't want the connector to retrieve searchable content and metadata from help articles in Workday, you can skip this task.

Procedure

1. Create a new article audience rule in Workday.

   a. Log in to your Workday tenant with your administrator credentials.

   b. In the Workday search bar, search for the **Create Article Audience Rule** task and select it.

   c. On the Create Article Audience Rule page, in the Description field, enter `Public` as the description for your new article audience rule.

   d. In the Rule Conditions table, select **+** to add a new rule condition row, then enter the following field values.

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Field	Value
And/Or	And
Source External Field or Condition Rule	Worker is Employee
Relational Operator	equal to
Comparison Type	Value specified in this filter
Comparison Value	Yes

e. In the Rule Conditions table, select **+** to add a second new rule condition row, then enter the following field values.

Field	Value
And/Or	Or
Source External Field or Condition Rule	Worker is Contingent Employee
Relational Operator	equal to
Comparison Type	Value specified in this filter
Comparison Value	Yes

f. Select **OK**.
Workday creates your new article audience rule.

2. Create an audience record for your new article audience rule.
   a. In the Workday search bar, search for the **Maintain Article Audiences** task and select it.
   b. On the Maintain Article Audiences page, in the Audiences table, select **+** to add a new audience row.
   c. In the Name field, enter `Public` as the name for your new audience row.
   d. In the Who Can View field, select your **Public** article audience rule.
   e. Select **OK**.
   Workday creates your new audience record.
3. Perform these steps for each article that you want to make searchable through the Workday external content connector.
   a. In the Workday search bar, search for the **Edit Article** task and select it.
   b. On the Edit Article page, in the Article field, search for and then select the article that you want to make accessible by all your organization's employees.
   c. On the article page, select **Edit**.
   d. In the Settings pane, in the Who Can View field, select **Public**.
   e. Select **Publish**.
   Workday republishes the article, making it accessible by all your organization's employees.

Configure a payslip report in Workday

Configure a custom report for payroll data in Workday. The Workday external content connector uses this report to make content and metadata from your payroll data searchable.

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Before you begin

A Workday admin must have already an integration system user and an unconstrained integration system security group in your Workday tenant. For details on this preliminary task, see Configure Workday security settings.

You need an account with the following privileges in your organization's Workday tenant:

- **Custom Report Creation** domain access
- Access to the **Payroll Results** report data source
- **Copy Standard Report to Custom Report** task access

Role required: none

About this task

This task is optional. The Workday external content connector can retrieve payslip data from your Workday source system using a custom report that you configure. If you don't want to retrieve payslip data from Workday, you can skip this task.

Procedure

1. Log in to your Workday tenant with your administrator credentials.
2. Create a new custom report from the Payslip to Print - Report Design standard report.

   a. In the Workday search bar, search for the **Copy Standard Report to Custom Report** task and select it.

   b. On the Copy Standard Report to Custom Report page, in the Standard Report field, search for the **Payslip to Print - Report Design** report and select it.

   c. Enter a name for your custom report.
   As an example, you might enter `Workday connector payslip report`.

   d. Select **OK**.

   Workday creates your new custom report and displays its configuration screen.
3. In the Data Source field, search for the **Payroll Results** entry and select it.
   Workday automatically populates the Data Source Filter field.
4. Configure the columns for your new custom report.

   a. On the Columns tab for your new custom report, in the table, select **+** to add a row for a new column.

   b. Select or enter the following field values for the new column.

Business Object	Field	Column Heading Override	Column Heading Override XML Alias
Payroll Result	Sub Period (if different from Pay Period)		Sub_Period_if_different_from_Pay_Pe

   c. For each row in the table that has **Absence Plans** specified as its Business Object, select **–** to remove the row.

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5. Configure the group column headings for your new custom report.
   a. In the Group Column Headings table, select **–** to remove the row that has **Absence Plans** specified as its Business Object.
   b. For each remaining group column header rows, select and delete all text in the Group Column Heading field.
6. Configure the prompts for your new custom report.
   a. On the Prompts tab for your new custom report, in the Prompt Defaults table, select **–** to remove the existing prompt row.
   b. Select the **Populate Undefined Prompt Defaults** option.
   Workday automatically populates the Prompt Defaults table with built-in prompts.
7. On the Advanced tab for your new custom report, select the **Enable As Web Service** option if it's not already selected, then select **OK**.
   Workday saves your configuration changes for your new custom report.
8. Transfer ownership of your new custom report to the integration system user created for the Workday external content connector.
   a. From the View Custom Report page, navigate to **...** > **Custom Report** > **Transfer Ownership**.
   b. On the Transfer Ownership of Custom Reports page, in the New Owner field, enter or select the **ISU SNOW ACL** integration system user account.

      Important: If you don't see this integration system user account in the system, check that a Workday admin has completed the Configure Workday security settings preliminary task.

   c. Select **OK**.
9. Generate a sample report using your new custom report and copy its CSV URL.
   a. On the View Custom Report page for your new custom report, navigate to **...** > **Web Service** > **View URLs**.
   b. On the View URLs Web Service page, configure a sample report by filling in the fields.

Field	Value
Period Date Indicator	Select **Based on Payment Date**.
End Date	Select an arbitrary end date for the report. The end date must occur after your specified start date.
Start Date	Select an arbitrary start date for the report.
Worker	Select any member of your Workday organization.

   c. Select **OK**.
   Workday displays parameters and URLs for your sample report.

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d. Long-press (or right-click) the **CSV** link and copy the CSV URL.

e. Paste the copied URL into a web browser or a text editor.

The CSV URL has the format `https://<hostname>.workday.com/ccx/service/customreport2/<tenant-name>/<report-owner-user-name>/<report-name-alias>`. This URL may optionally be followed by a question mark and one or more URL parameters separated by ampersands. As an example, your CSV URL might be `https://wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_payslip_report?Period_Date_Indicator%21WID=e3e3e13f80904ee185eab1fbf331acef`.

10. Copy the base URL for your Workday tenant, your Workday tenant name, the custom report owner's user name, the custom report name alias, and the period date indicator Workday ID (WID).

a. Copy the base URL for your Workday tenant from the pasted CSV URL and store it in a secure location.
The base URL for your Workday tenant is the `https://<hostname>.workday.com` portion of the CSV URL (everything before the third slash character). As an example, if your CSV URL is `https://wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_payslip_report?Period_Date_Indicator%21WID=e3e3e13f80904ee185eab1fbf331acef`, the base URL for your Workday tenant is `https://wd2-impl-services1.workday.com`.

> **Important:** Your external content connector administrator needs this base URL when configuring the Workday external content connector.

b. Copy the tenant name for your Workday tenant from the pasted CSV URL and store it in a secure location.
The tenant name for your Workday tenant is the `<tenant-name>` portion of the CSV URL (everything between the sixth and seventh slash characters). As an example, if your CSV URL is `https://wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_payslip_report?Period_Date_Indicator%21WID=e3e3e13f80904ee185eab1fbf331acef`, your Workday tenant name is `Example`.

> **Important:** Your external content connector administrator needs this tenant name when configuring the Workday external content connector.

c. Copy the report owner's user name for your custom payslip report from the pasted CSV URL and store it in a secure location.
The report owner's user name for your custom payslip report is the `<report-owner-user-name>` portion of the CSV URL (everything between the seventh and eighth slash characters). As an example, if your CSV URL is `https://wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_payslip_report?Period_Date_Indicator%21WID=e3e3e13f80904ee185eab1fbf331acef`, your custom payslip report owner's user name is `ISU_SNOW_ACL`.

> **Important:** Your external content connector administrator needs this payslip report owner's user name when configuring the Workday external content connector.

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d. Copy the report name alias for your custom payslip report from the pasted CSV URL and store it in a secure location.
The report name alias for your custom payslip report is the `<report-name-alias>` portion of the CSV URL (everything between the eighth slash character and the question mark or the end of the URL). As an example, if your CSV URL is `https://wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_payslip_report?Period_Date_Indicator%21WID=e3e3e13f80904ee185eab1fbf331acef`, your custom payslip report name alias is `Workday_connector_payslip_report`.

> **Important:** Your external content connector administrator needs this payslip report name alias when configuring the Workday external content connector.

e. Copy the period date indicator WID (Workday ID) for your custom payslip report from the pasted CSV URL and store it in a secure location.
The period date indicator WID for your custom payslip report is the value of the `Period_Date_Indicator_WID` URL parameter from the CSV URL. As an example, if your CSV URL is `https://wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_payslip_report?Period_Date_Indicator%21WID=e3e3e13f80904ee185eab1fbf331acef`, your period date indicator WID is `e3e3e13f80904ee185eab1fbf331acef`.

> **Important:** Your external content connector administrator needs this period date indicator WID when configuring the Workday external content connector.

What to do next

Provide the following items to the connector administrator who creates your Workday external content connectors:

- The base URL for your Workday tenant that you copied in step 10.a.
- The Workday tenant name that you copied in step 10.b.
- The custom payslip report owner's user name that you copied in step 10.c.
- The custom payslip report's name alias that you copied in step 10.d.
- The period date indicator WID (Workday ID) that you copied in step 10.e.

Your connector administrator needs these items to configure a Workday external content connector to retrieve searchable content and metadata from payroll information in your Workday source system.

Configure a Learning assignment custom report in Workday

Configure a custom report for Learning assignments in Workday. The Workday external content connector uses this custom report to make content and metadata from your Learning assignment data searchable.

Before you begin

A Workday admin must have already an integration system user and an unconstrained integration system security group in your Workday tenant. For details on this preliminary task, see Configure Workday security settings.

You need an account with the following privileges in your organization's Workday tenant:

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- Administrator privileges
- **Custom Report Creation** domain access
- Access to the **Learning Assignments by Learning Organization** report data source

Role required: none

About this task

This task is optional. The Workday external content connector can retrieve Learning assignment data from your Workday source system using a custom report that you configure. If you don't want to retrieve Learning assignment data from Workday, you can skip this task.

Procedure

1. Log in to your Workday tenant with your administrator credentials.
2. For each of the calculated fields shown in the following Calculated fields table, perform these steps.

   a. In the Workday search bar, search for the **Create Calculated Field** task and select it.

   b. On the Create Calculated Field page, enter the Field Name shown in the entry for the calculated field in the following Calculated fields table.

   c. Select the Business Object and Function values shown in the entry for the calculated field in the following Calculated fields table.

   d. Select **OK**.
   Workday takes you to the Calculation tab for the new calculated field.

   e. On the Calculation tab, enter the calculation setting field values shown in the entry for the calculated field in the following Calculated fields table.

   f. Select **OK**.
   Workday saves your calculation settings for the new calculated field.

   g. Select **Done**.

Calculated fields

Field Name	Business Object	Function	Calculation setting field values
cf_learning content_type	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: Learning Content ○ Related Business Object: Learning Content ○ Return Value: Learning Content Type
CF_enrollment_event_status	Learning Enrollment Event	True/False Condition	○ And/Or: And ○ Field: Status

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Field Name	Business Object	Function	Calculation setting field values
			○ Operator: equal to ○ Comparison Type: Value specified in this filter ○ Comparison Value: Successfully Completed
CF_enrollment	Learning Enrollment	Lookup Related Value	○ Lookup Field: Learning Enrollment Event ○ Related Business Object: Learning Enrollment Event ○ Return Value: CF_enrollment_event_status
CF_learning_enrollment	Learning Assignment	Extract Multi-Instance	○ Source Field: Learning Enrollment ○ Related Business Object: Learning Enrollment ○ Condition: CF_enrollment
cf_course_type_is_blended	Learning Assignments by Learning Organization	True/False Condition	○ And/Or: And ○ Field: CF_Learning_content_type ○ Operator: in the selection list ○ Comparison Type: Value specified in this filter ○ Comparison Value: Blended Course
Cf_learning_content_type_is_digital_course	Learning Assignments by Learning Organization	True/False Condition	○ And/Or: And ○ Field: CF_Learning_content_type ○ Operator: in the selection list ○ Comparison Type: Value specified in this filter ○ Comparison Value: Digital Course

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Field Name	Business Object	Function	Calculation setting field values
Cf_learning_content_type_is_course_offering	Learning Assignments by Learning Organization	True/False Condition	○ And/Or: And ○ Field: CF_Learning_content_type ○ Operator: in the selection list ○ Comparison Type: Value specified in this filter ○ Comparison Value: Course Offering
Cf_learning_content_type_is_program	Learning Assignments by Learning Organization	True/False Condition	○ And/Or: And ○ Field: CF_Learning_content_type ○ Operator: in the selection list ○ Comparison Type: Value specified in this filter ○ Comparison Value: Program
Cf_learning_content_type_is_lesson	Learning Assignments by Learning Organization	True/False Condition	○ And/Or: And ○ Field: CF_Learning_content_type ○ Operator: in the selection list ○ Comparison Type: Value specified in this filter ○ Comparison Value: Lesson
CF_blended course	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: Learning Content ○ Related Business Object: Learning Content ○ Return Value: Blended Course

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Field Name	Business Object	Function	Calculation setting field values
CF_blended course	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: Learning Content ○ Related Business Object: Learning Content ○ Return Value: Blended Course
CF_blended course id	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: CF_blended source ○ Related Business Object: Blended Course ○ Return Value: Reference ID
cf_digital course	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: Learning Content ○ Related Business Object: Learning Content ○ Return Value: Digital Course
cf_digital_course	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: cf_digital course ○ Related Business Object: Enrollable Course Behaviour ○ Return Value: Reference ID
cf_course_offering	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: Learning Content ○ Related Business Object: Learning Content ○ Return Value: Course Offering
cf_course_offering_id	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: cf_course_offering ○ Related Business Object: Course ○ Return Value: Reference ID

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Field Name	Business Object	Function	Calculation setting field values
CF_Program	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: Learning Content ○ Related Business Object: Learning Content ○ Return Value: Learning Program
Cf_program_id	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: CF_Program ○ Related Business Object: Learning Program ○ Return Value: Reference ID
CF_lesson	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: Learning Content ○ Related Business Object: Learning Content ○ Return Value: Learning Lesson
cf_lesson_id	Learning Assignments by Learning Organization	Lookup Related Value	○ Lookup Field: CF_lesson ○ Related Business Object: Learning Lesson ○ Return Value: Reference ID

3. Create a cf_learning_content_id calculated field.

   a. In the Workday search bar, search for the **Create Calculated Field** task and select it.

   b. On the Create Calculated Field page, enter `cf_learning_content_id` as the Field Name for the new calculated field.

   c. Select **Learning Assignments by Learning Organization** as the Business Object for the new calculated field.

   d. Select **Evaluate Expression** as the Function for the new calculated field.

   e. Select **OK**.
   Workday takes you to the Calculation tab for the new calculated field.

   f. On the Calculation tab, enter these calculation field values.

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- Field Type: Text
- Business Object: (empty)
- Default Value: Empty String

g. On the Calculation tab, in the table, add a new row with the specified field values for each entry in the following cf_learning_content_id calculated field conditions table.

cf_learning_content_id calculated field conditions

Condition	Return Value If Condition is True
cf_course_type_is_blended	cf_blended course id
Cf_learning_content_type_is_digital_course	cf_digital_course_id
Cf_learning_content_type_is_course_offering	cf_course_offering_id
Cf_learning_content_type_is_program	Cf_program_id
Cf_learning_content_type_is_lesson	cf_lesson_id

h. Select **OK**.

i. Select **Done**.

4. Create a learning assignment report in Workday.

a. In the Workday search bar, search for the **Create Custom Report** task and select it.

b. On the Create Custom Report page, enter a name for your new custom report. As an example, you might enter `Workday connector LA report`.

c. In the Report Type field, select **Advanced**.

d. Clear the **Optimized for performance** option.

e. In the Data Source field, select **Learning Assignments by Learning Organization**.

f. Select the **Enable As Web Service** option.

g. Select **OK**.

Workday takes you to the Edit Custom Report page for your new custom report.

5. On the Edit Custom Report page, on the Columns tab, perform the following steps for each entry in the following Custom report columns table.

a. Select **+** to add a new column row.

b. In the new row, select or enter the field values shown in the column entry in the table.

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Custom report columns

Business Object	Field	Column Heading Override	Column Heading Override XML Alias
Learning Assignments by Learning Organization	Worker		Worker
Worker	Employee ID		Employee_ID
Learning Assignments by Learning Organization	Assigned By		Assigned_By
Assigned By	Workday ID	Assigned_by_WID	Assigned_by_WID
Learning Assignments by Learning Organization	Assigned Date		Assigned_Date
Learning Assignments by Learning Organization	Assignment Cancellation Date		Assignment_Cancellation_Date
Learning Assignments by Learning Organization	Assignment Mechanism		assignmentMechanism
Learning Assignments by Learning Organization	Assignment Record Completion Moment		Assignment_Record_Completion_Mo
Learning Assignments by Learning Organization	Assignment Status		Assignment_Status
Learning Assignments by Learning Organization	Created Moment		Created_Moment
Learning Assignments by Learning Organization	Due Date		Due_Date
Learning Assignments by Learning Organization	Last Functionally Updated		Last_Functionally_Updated
Learning Assignments	Latest Assigned		Latest_Assigned

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Business Object	Field	Column Heading Override	Column Heading Override XML Alias
by Learning Organization			
Learning Assignments by Learning Organization	Learning Assignment		Learning_Assignment
Learning Assignments by Learning Organization	Learning Content		Learning_Content
Learning Assignments by Learning Organization	cf_learning_content_id	Learning Content ID	Learning_Content_ID
Learning Assignments by Learning Organization	Learning Enrollment		Learning_Enrollment
Learning Assignments by Learning Organization	Learning Record		Learning_Record
Learning Assignments by Learning Organization	Overdue		Overdue
Learning Assignments by Learning Organization	Required		Required
Learning Assignments by Learning Organization	Waived		Waived
Learning Assignments by Learning Organization	Waived by Worker		Waived_by_Worker
Learning Assignments by Learning Organization	Waive Reason		Waive_Reason
Learning Assignments by Learning Organization	Worker's Manager(s)		Worker_s_Manager_s_

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Business Object	Field	Column Heading Override	Column Heading Override XML Alias
Worker's Manager(s)	Employee ID	Manager emp id	Manager_Employee_ID
Worker's Manager(s)	Workday ID	Manager_wid	managerworkdayID

6. On the Columns tab, in the Group Column Headings section for your new custom report, perform the following steps for each entry in the following Custom report group column headings table.

   a. Select **+** to add a new column row.

   b. In the new row, select or enter the field values shown in the group column heading entry in the table.

Custom report group column headings

Business Object	Group Column Heading	Group Column Heading XML Alias
Assigned By		Assigned_By_group
Worker		Worker_group
Worker's Manager(s)		Worker_s_Manager_s__group

7. On the Edit Custom Report page, navigate to the Sort tab, then perform these steps.

   a. In the table, select **+** to add a new result sort order row for your custom report.

   b. In the new row, select or enter the field values shown in the following Sort order table.

Sort order

Field	Sort Direction
Last Functionally Updated	Alphabetical - Ascending

8. On the Edit Custom Report page, navigate to the Filter tab, then perform the following steps for each filter condition entry in the following Filter conditions table.

   a. In the Filter conditions for filtering on instances table, select **+** to add a new sort order row for your custom report.

   b. In the new row, select or enter the field values shown for the filter condition entry in the table.

Filter conditions

And/Or	(	Field	Operator	Comparison Type	Comparison Value	)	Required?
And		Worker	in the selection list	Prompt the user for the value and	Default Prompt		Yes

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And/Or	(	Field	Operator	Comparison Type	Comparison Value	)	Required?
				ignore the filter condition if the value is blank			
And	((	CF_learning_enrollment	is not empty				
And		Assignment Mechanism	is in the selection list	Value specified in this filter	▪ Enroll in Course WS ▪ Learning Facilitated Enroll ▪ Learning Mass Enroll ▪ Manager Enroll ▪ Retraining	)	Yes
Or		Assignment Mechanism	is in the selection list	Value specified in this filter	Campaign	)	Yes
And		Last Functionally Updated	is greater than or equal to	Prompt the user for the value and ignore the filter condition if the value is blank	Starting Prompt		
And		Last Functionally Updated	is less than or equal to	Prompt the user for the value and ignore the filter condition if the value is blank	Ending Prompt		

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And/Or	(	Field	Operator	Comparison Type	Comparison Value	)	Required?
And	((	cf_learning content_type	is one of selection list	Value specified in this filter	▪ Blended Course ▪ Course Offering ▪ Digital Course ▪ External Content ▪ Imported Content ▪ Program		
And		Learning Record	is not empty			)	Yes
Or		cf_learning content_type	is one of selection list	Value specified in this filter	Lesson	)	

9. On the Edit Custom Report page, navigate to the Prompt tab, then select the **Populate Undefined Prompt Defaults** option
10. On the Prompt tab, perform the following steps for each prompt entry in the following Prompts table.

    a. In the Prompt Defaults table, select **+** to add a new prompt row for your custom report.

    b. In the new row, select or enter the field values shown for the prompt entry in the table.

Prompts

Field	Prompt Qualifier	Label for Prompt XML Alias	Default Type	Default Value	Required
Worker	Default Prompt	Worker	No default value		
Learning Organizations for Learning Assignment		Learning_Organizations_for_Learning_Assignment	No default value		Yes
Include Subordinate Organizations		Include_Subordinate_Organizations	Specify default value	Yes	

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Field	Prompt Qualifier	Label for Prompt XML Alias	Default Type	Default Value	Required
Last Functionally Updated	Starting Prompt	Start_Assigned_Date	No default value		
Last Functionally Updated	Ending Prompt	End_Assigned_Date	No default value		

11. On the Advanced tab for your new custom report, select the **Enable As Web Service** option if it's not already selected, then select **OK**.
Workday saves your configuration changes for your new custom report.
12. Transfer ownership of your new custom report to the integration system user created for the Workday external content connector.
    a. From the View Custom Report page, navigate to **...** > **Custom Report** > **Transfer Ownership**.
    b. On the Transfer Ownership of Custom Reports page, in the New Owner field, enter or select the **ISU SNOW ACL** integration system user account.

    > **Important:** If you don't see this integration system user account in the system, check that a Workday admin has completed the Configure Workday security settings preliminary task.

    c. Select **OK**.
13. Generate a sample report using your new custom report and copy its CSV URL.
    a. On the View Custom Report page for your new custom report, navigate to **...** > **Web Service** > **View URLs**.
    b. On the View URLs Web Service page, configure a sample report by filling in the fields.

Field	Value
Worker	Select any member of your Workday organization.
Learning Organizations for Learning Assignment	Select the supervisory organization for the chosen worker.
Starting Last Functionally Updated	Select an arbitrary start date and time for the report.
Ending Last Functionally Updated	Select an arbitrary end date and time for the report. The end date and time must occur after your specified start date and time.

    c. Select **OK**.
    Workday displays parameters and URLs for your sample report.

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d. Long-press (or right-click) the **CSV** link and copy the CSV URL.

e. Paste the copied URL into a web browser or a text editor.

The CSV URL has the format `https://<hostname>.workday.com/ccx/service/customreport2/<tenant-name>/<report-owner-user-name>/<report-name-alias>`. This URL may optionally be followed by a question mark and one or more URL parameters separated by ampersands. As an example, your CSV URL might be `https://wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_LA_report`.

14. Copy the base URL for your Workday tenant, your Workday tenant name, the custom report owner's user name, and the custom report name alias.

a. Copy the base URL for your Workday tenant from the pasted CSV URL and store it in a secure location.
The base URL for your Workday tenant is the `https://<hostname>.workday.com` portion of the CSV URL (everything before the third slash character). As an example, if your CSV URL is `https://wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_LA_report`, the base URL for your Workday tenant is `https://wd2-impl-services1.workday.com`.

> **Important:** Your external content connector administrator needs this base URL when configuring the Workday external content connector.

b. Copy the tenant name for your Workday tenant from the pasted CSV URL and store it in a secure location.
The tenant name for your Workday tenant is the `<tenant-name>` portion of the CSV URL (everything between the sixth and seventh slash characters). As an example, if your CSV URL is `https://wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_LA_report`, your Workday tenant name is `Example`.

> **Important:** Your external content connector administrator needs this tenant name when configuring the Workday external content connector.

c. Copy the report owner's user name for your custom Learning assignment report from the pasted CSV URL and store it in a secure location.
The report owner's user name for your custom Learning assignment report is the `<report-owner-user-name>` portion of the CSV URL (everything between the seventh and eighth slash characters). As an example, if your CSV URL is `https://wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_LA_report`, your custom Learning assignment report owner's user name is `ISU_SNOW_ACL`.

> **Important:** Your external content connector administrator needs this Learning assignment report owner's user name when configuring the Workday external content connector.

d. Copy the Learning assignment report name alias for your custom report from the pasted CSV URL and store it in a secure location.
The report name alias for your custom Learning assignment report is the `<report-name-alias>` portion of the CSV URL (everything between the eighth slash character and the question mark or the end of the URL). As an example, if your CSV URL is `https://`

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`wd2-impl-services1.workday.com/ccx/service/customreport2/Example/ISU_SNOW_ACL/Workday_connector_LA_report`, your custom Learning assignment report name alias is `Workday_connector_LA_report`.

Important: Your external content connector administrator needs this Learning assignment report name alias when configuring the Workday external content connector.

What to do next

Provide the following items to the connector administrator who creates your Workday external content connectors:

- The base URL for your Workday tenant that you copied in step 14.a.
- The Workday tenant name that you copied in step 14.b.
- The custom Learning assignment report owner's user name that you copied in step 14.c.
- The custom Learning assignment report's name alias that you copied in step 14.d.

Your connector administrator needs these items to configure a Workday external content connector to retrieve searchable content and metadata from learning assignments in your Workday source system.

Get Workday task code for Find Learning Assignments

Get the task code for the Find Learning Assignments task from your Workday tenant. The Workday external content connector needs this task code to retrieve Learning assignment data from Workday.

Before you begin

You need the manager role and access to the Find Learning Assignments task in your organization's Workday tenant.

Role required: none

About this task

This task is optional. The Workday external content connector can retrieve Learning assignment data from your Workday source system. If you don't want to retrieve Learning assignment data from Workday, you can skip this task.

Procedure

1. Log in to your Workday tenant with your manager credentials.
2. In the Workday search bar, search for the **Find Learning Assignments** task and select it.
3. Copy the task code from the Workday URL for the Find Learning Assignments page and store it in a secure location.
   The task code is the path element between the final slash and the `.htmld` extension in the URL shown for the Find Learning Assignments page. As an example, if your Find Learning Assignments page URL is `https://impl.workday.com/example/d/task/3005$6923.htmld`, the task code is `3005$6923`.

Important: Your external content connector administrator needs this task code when configuring the Workday external content connector to retrieve Learning assignment data.

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What to do next
Provide the task code you copied in step 3 to your connector administrator. They need this task code to configure a Workday external content connector to retrieve Learning assignment data from your Workday source system.

For details on creating and configuring a Workday external content connector, see Create a Workday external content connector.

Get Workday task code for My Team's Birthday

Get the task code for the My Team's Birthday task from your Workday tenant. The Workday external content connector needs this task code to retrieve team birthday data from the Manager hub.

Before you begin
You need the manager role and access to the My Team's Birthday task in your organization's Workday tenant.

Role required: none

About this task
This task is optional. The Workday external content connector can retrieve Manager hub data from your Workday source system. If you don't want to retrieve Manager hub data from Workday, you can skip this task.

Procedure
1. Log in to your Workday tenant with your manager credentials.
2. In the Workday search bar, search for the **My Team's Birthday** task and select it.
3. Copy the task code from the Workday URL for the My Team's Birthday page and store it in a secure location.
   The task code is the path element between the final slash and the `.htmld` extension in the URL shown for the My Team's Birthday page. As an example, if your My Team's Birthday page URL is `https://impl.workday.com/example/d/task/3005$6924.htmld`, the task code is `3005$6924`.

> **Important:** Your external content connector administrator needs this task code when configuring the Workday external content connector to retrieve Manager hub data.

What to do next
Provide the task code you copied in step 3 to your connector administrator. They need this task code to configure a Workday external content connector to retrieve Manager hub data from your Workday source system.

For details on creating and configuring a Workday external content connector, see Create a Workday external content connector.

Get Workday task code for My Team Anniversaries

Get the task code for the My Team Anniversaries task from your Workday tenant. The Workday external content connector needs this task code to retrieve team anniversary data from the Manager hub.

Before you begin
You need the manager role and access to the My Team Anniversaries task in your organization's Workday tenant.

Role required: none

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About this task

This task is optional. The Workday external content connector can retrieve Manager hub data from your Workday source system. If you don't want to retrieve Manager hub data from Workday, you can skip this task.

Procedure

1. Log in to your Workday tenant with your manager credentials.
2. In the Workday search bar, search for the **My Team Anniversaries** task and select it.
3. Copy the task code from the Workday URL for the My Team Anniversaries page and store it in a secure location.
   The task code is the path element between the final slash and the `.htmld` extension in the URL shown for the My Team Anniversaries page. As an example, if your My Team Anniversaries page URL is `https://impl.workday.com/example/d/task/3005$6925.htmld`, the task code is `3005$6925`.

> **Important:** Your external content connector administrator needs this task code when configuring the Workday external content connector to retrieve Manager hub data.

What to do next

Provide the task code you copied in step 3 to your connector administrator. They need this task code to configure a Workday external content connector to retrieve Manager hub data from your Workday source system.

For details on creating and configuring a Workday external content connector, see Create a Workday external content connector.

Configure Workday for external content indexing

Create and authorize an OAuth 2.0 API client in your Workday tenant to allow the Workday external content connector to access your Workday source system.

Before you begin

You need administrator privileges for your organization's Workday tenant. You need modify access for these domains in the System functional area:

- Set Up: Tenant Setup - Security
- Security Administration

A Workday admin must have already completed the preliminary tasks shown in the following table.

Preliminary task	Description
Configure Workday security settings	Required task.
Configure access to help articles in Workday	Optional task. Only required if you want the connector to retrieve searchable content and metadata from help articles accessible by all users in your Workday organization.
Configure a payslip report in Workday	Optional task. Only required if you want the connector to retrieve searchable content and metadata from payroll data.

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Preliminary task	Description
Configure a Learning assignment custom report in Workday and Get Workday task code for Find Learning Assignments	Optional tasks. Only required if you want the connector to retrieve searchable content and metadata from Learning assignment data.
Get Workday task code for My Team's Birthday and Get Workday task code for My Team Anniversaries	Optional tasks. Only required if you want the connector to retrieve searchable content and metadata from Manager hub data.

Role required: none

About this task

The Workday external content connector retrieves public help articles, benefits, learning assignments, Manager Insights Hub data, payroll information, PTO information, and vacation policies from your Workday source system using the Workday REST API.

To allow the connector to access your Workday source system via the Workday REST API, you must configure and authorize an OAuth 2.0 API client in your Workday tenant. Your connector administrator can use settings copied from this OAuth 2.0 API client and your Workday tenant to configure the Workday external connector for proper connection to your source system.

Procedure

1. Log in to your Workday tenant and record its base connection URL and tenant name.

   a. Navigate to your Workday tenant and log in with developer credentials.

   b. Copy the base connection URL and the tenant name for your Workday tenant and record them in a secure location.
   Your tenant's base connection URL is the HTTPS protocol prefix and the hostname from the Workday URL that you see after logging in. Your tenant's name is the first path element that follows the hostname in the Workday URL. As an example, if logging in takes you to `https://wd-2-impl-services1.workday.com/example/d/home.htmld`, your base connection URL is `https://wd-2-impl-services1.workday.com` and your tenant name is `example`.

   > **Important:** Your external content connector administrator needs the base connection URL and tenant name when configuring the Workday external content connector.

2. Enable OAuth 2.0 clients in your Workday tenant.

   a. In the Workday search bar, search for the **Edit Tenant Setup - Security** task and select it.

   b. On the Edit Tenant Setup - Security form, in the OAuth 2.0 Settings section, select the **OAuth 2.0 Clients Enabled** option, then select **OK**.

   c. Select **Done**.

3. Create a new OAuth 2.0 API client for the Workday external content connector.

   a. In the Workday search bar, search for the **Register API Client** task and select it.

   b. On the Register API Client form, fill in the fields.

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Field	Description
Client Name	Unique name for this API client. As an example, you might enter `Workday external content connector`.
Client Grant Type	Select **Authorization Code Grant**.
Access Token Type	Select **Bearer**.
Redirection URI	Enter `https://<instance-name>.service-now.com/oauth_redirect.do`, replacing `<instance-name>` with your ServiceNow AI Platform® instance name.
Non-Expiring Refresh Tokens	Select this option.
Grant Administrative Consent	Select this option.
Scope (Functional Areas)	In the drop-down list, select **Custom Objects**, then select all of the listed scopes.
Include Workday Owned Scope	Select this option.

c. Select **OK**.

Your new OAuth 2.0 API client is registered.

4. Find the client ID and client secret for your new OAuth 2.0 API client.

a. Copy the client ID for your new OAuth 2.0 API client and store it in a secure location.

> **Important:** Your external content connector administrator needs this client ID when configuring the Workday external content connector.

b. Copy the client secret for your new OAuth 2.0 API client and store it in a secure location.

> **Important:** Your external content connector administrator needs this client secret when configuring the Workday external content connector.

c. Copy the token endpoint URL for your new OAuth 2.0 API client and store it in a secure location.

> **Important:** Your external content connector administrator needs this token endpoint URL when configuring the Workday external content connector.

d. Copy the authorization endpoint URL for your new OAuth 2.0 API client and store it in a secure location.

> **Important:** Your external content connector administrator needs this authorization endpoint URL when configuring the Workday external content connector.

What to do next

Provide the following items to your connector administrator:

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- The base connection URL for your Workday tenant that you copied in step 1.b.
- The tenant name that you copied in step 1.b.
- The client ID that you copied in step 4.a.
- The client secret that you copied in step 4.b.
- The token endpoint URL that you copied in step 4.c.
- The authorization endpoint URL that you copied in step 4.d.

Your connector administrator needs these items to configure a Workday external content connector to retrieve Workday content from your Workday source system.

For details on creating and configuring a Workday external content connector, see Create a Workday external content connector.

Create a Workday external content connector

Create an external content connector to retrieve searchable content from your Workday source system.

Before you begin

A source system administrator must have already configured your Workday source system to allow access by the Workday external content connector. For the required source system configuration steps, see Configure Workday for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Workday** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Workday external content connector.
Connection URL	Base connection URL for your Workday tenant. This URL typically has the format `https://<hostname>.workday.com`. If you don't have this connection URL, ask your Workday administrator for it.
Client ID	Client ID for the OAuth 2.0 API client that grants the connector access to your Workday tenant. If you don't have this client ID, ask your Workday administrator for it.
Client secret	Client secret for the OAuth 2.0 API client that grants the connector access to your Workday tenant.

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Connection setting	Description
	If you don't have this client secret, ask your Workday administrator for it.
Token URL	Token endpoint URL for the OAuth 2.0 API client that grants the connector access to your Workday tenant. This URL typically has the format `https://<hostname>.workday.com/ccx/oauth2/<tenant-name>/token`. If you don't have this token endpoint URL, ask your Workday administrator for it.
Authorization URL	Authorization endpoint URL for the OAuth 2.0 API client that grants the connector access to your Workday tenant. This URL typically has the format `https://<hostname>.workday.com/<tenant-name>/authorize`. If you don't have this authorization endpoint URL, ask your Workday administrator for it.
Tenant name	Name of your Workday tenant. If you don't have this tenant name, ask your Workday administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Workday external content connector.
9. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
10. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

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Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content with your new connector, you must configure and run content crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Workday external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Workday external content connector

Specify the content types you want your Workday external content connector to retrieve.

Before you begin
A connector administrator must have already created the Workday external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Workday external content connector.

A Workday admin must have already completed the preliminary tasks shown in the following table.

Preliminary task	Description
Configure Workday security settings	Required task.
Configure access to help articles in Workday	Optional task. Only required if you want the connector to retrieve searchable content and metadata from help articles accessible by all users in your Workday organization.
Configure a payslip report in Workday	Optional task. Only required if you want the connector to retrieve searchable content and metadata from payroll data.

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Preliminary task	Description
Configure a Learning assignment custom report in Workday and Get Workday task code for Find Learning Assignments	Optional tasks. Only required if you want the connector to retrieve searchable content and metadata from Learning assignment data.
Get Workday task code for My Team's Birthday and Get Workday task code for My Team Anniversaries	Optional tasks. Only required if you want the connector to retrieve searchable content and metadata from Manager hub data.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Workday external content connector crawls the following content types and sends them to AI Search for indexing:

- Help articles accessible by all users in your Workday organization
- Benefits information
- PTO information
- Vacation policy information

Only perform this task if you want to prevent the connector from retrieving one or more of these default content types, or if you want it to retrieve any of the following content types:

- Payroll information
- Learning assignments
- Birthday, anniversary, and PTO request data from Manager Insights Hub

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

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Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Workday external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. In the Crawl content types section, deselect the options for any of these content types that you don't want the connector to retrieve from Workday:
   - **Articles**
   - **Benefits**
   - **PTO information**
   - **Vacation policy**
5. In the Payroll information section, perform one of the following steps.
   - If you don't want the connector to retrieve payroll information from Workday, disable the **Crawl payroll information** option.
   - If you want the connector to retrieve payroll information from Workday, fill in the fields:

Field	Description
Payslip period date indicator	Workday ID (WID) for the period data indicator from the payslip report configured in your Workday tenant. If you don't have this WID, ask your Workday administrator for it.
Payslip report owner user name	User name for the integrated system user account that owns the payslip report configured in your Workday tenant. If you don't have this user name, ask your Workday administrator for it.
Payslip report name XML alias	XML alias for the name of the payslip report configured in your Workday tenant. If you don't have this XML alias, ask your Workday administrator for it.

6. In the Learning assignments section, perform one of the following steps.
   - If you don't want the connector to retrieve Learning assignments from Workday, disable the **Crawl Learning assignments** option.
   - If you want the connector to retrieve Learning assignments from Workday, fill in the fields:

Field	Description
Learning assignment manager view task code	Task code for the Find Learning Assignments task in your Workday tenant. If you don't have this task code, ask a Workday manager who has access to the Find Learning Assignments task for it. For details on how to find this task code, see Get Workday task code for Find Learning Assignments.
Learning assignments	User name for the integrated system user account that owns the Learning assignments report configured in your Workday tenant.

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Field	Description
report owner user name	If you don't have this user name, ask your Workday administrator for it.
Learning assignments report name XML alias	XML alias for the name of the Learning assignments report configured in your Workday tenant. If you don't have this XML alias, ask your Workday administrator for it.

7. In the Manager hub data section, perform one of the following steps.
   - If you don't want the connector to retrieve Manager Insights Hub data from Workday, disable the **Crawl manager Hub data** option.
   - If you want the connector to retrieve Manager Insights Hub data from Workday, fill in the fields:

Field	Description
Birthday task code	Task code for the My Team's Birthday task in your Workday tenant. If you don't have this task code, ask a Workday manager who has access to the My Team's Birthday task for it. For details on how to find this task code, see Get Workday task code for My Team's Birthday.
Anniversary task code	Task code for the My Team Anniversaries task in your Workday tenant. If you don't have this task code, ask a Workday manager who has access to the My Team Anniversaries task for it. For details on how to find this task code, see Get Workday task code for My Team Anniversaries.

8. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
9. Select **Save and validate**.

Result
The Workday external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your Workday source system using your modified crawl settings, create and run a one-time content crawl for your Workday external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

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Workvivo external content connector

The Workvivo external content connector retrieves articles, comments, documents, events, kudos, pages, and updates from your Workvivo source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure Workvivo for external content indexing

Create and authorize a new application in your Workvivo instance to allow the Workvivo external content connector to access your source system and content.

Before you begin

You need the Developer role for your Workvivo instance.

Role required: none

About this task

The Workvivo external content connector retrieves articles, comments, documents, events, kudos, pages, and updates that are present globally, in teams, or in spaces in your Workvivo source system using the Workvivo API.

To allow the connector to access your Workvivo source system via the API, you must configure and configure an app in your Workvivo instance. Your connector administrator can use this app's API key and settings from your instance to configure the Workvivo external connector for proper connection to your source system.

Procedure

1. In your Workvivo instance, create a new app to grant the Workvivo external content connector access to your content.

   a. Navigate to your Workvivo instance URL and log in with credentials for your account with the Developer role.

   b. In the navigation bar, navigate to **Admin** > **Tools**.

   c. Navigate to **Platform** > **API Keys & JWT Settings**.

   d. Copy your organization's Workvivo ID from the banner and store it in a secure location.

   > **Important:** Your external content connector administrator needs this Workvivo ID when configuring the Workvivo external content connector.

   e. Copy your organization's API URL from the banner and store it in a secure location.

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Important: Your external content connector administrator needs this API URL when configuring the Workvivo external content connector.

f. Select **Add New App**.

g. On the Create New App form, enter a name for your new app.

h. Select all of the following permissions for your new app.

- users.*.read
- users.peerendorsement.read
- teams.*.read
- teams.types.read
- spaces.*.read
- spaces.public.read
- spaces.private.read
- spaces.hidden.read
- articles.*.read
- events.*.read
- updates.*.read
- pages.*.read
- likes.*.read
- comments.*.read
- kudos.*.read
- documents.*.read

i. Select **Save**.

Workvivo creates your new app.

2. Create an API key for your new app.

a. In the list item for your new app, select **Manage Keys**.

b. Select **Add new Key**.

c. On the New API Key form, enter a name for your new key, then select **Save**.

d. Copy your the token for your new API key and store it in a secure location.

Important: Your external content connector administrator needs this API key token when configuring the Workvivo external content connector.

What to do next

Provide the following items to your connector administrator:

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- The host URL for your Workvivo instance. This is typically `https://<organization-name>.workvivo.us`, where `<organization-name>` is the name of your organization.
- Your organization's Workvivo ID that you copied in step 1.d.
- The API URL that you copied in step 1.e.
- The API key token that you copied in step 2.d.

Your connector administrator needs these items to configure a Workvivo external content connector to retrieve articles, comments, documents, events, kudos, pages, and updates and security principals from your Workvivo source system.

For details on creating and configuring a Workvivo external content connector, see Create a Workvivo external content connector.

Create a Workvivo external content connector

Create an external content connector to retrieve searchable content and security principals from your Workvivo source system.

Before you begin

A source system administrator must have already configured your Workvivo source system to allow access by the Workvivo external content connector. For the required source system configuration steps, see Configure Workvivo for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Workvivo* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Workvivo external content connector.
API base URL	Base URL for the Workvivo API. If you don't have the API base URL, ask your Workvivo administrator for it.
Instance base URL	URL for your Workvivo instance host. This is typically `https://<organization-name>.workvivo.us`, where `<organization-name>` is the name of your organization. If you don't have the instance base URL, ask your Workvivo administrator for it.
Organization ID	Workvivo ID for your organization. This is typically a numeric value, such as `1755225`.

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Connection setting	Description
	If you don't have the organization ID, ask your Workvivo administrator for it.
Access token	Token for an API key defined in the app that grants the connector access to your Workvivo instance's content. If you don't have the API key token for the app, ask your Workvivo administrator for it.

6. Save your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection setting entries fails, the system shows an error message. Verify your connection settings to ensure they're correct.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Workvivo external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

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- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Workvivo external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Workvivo external content connector

Define inclusion or exclusion filters to control the attachment file types the Workvivo external content connector retrieves and feeds to AI Search for indexing.

Before you begin

A connector administrator must have already created the Workvivo external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Workvivo external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Workvivo external content connector crawls all global items, space scoped items, and team scoped items from its specified source system and sends all articles, comments, documents, events, kudos, pages, updates, and attachment binary files with all supported file extensions to AI Search for indexing. Only perform this task if you want the connector to use inclusion or exclusion filters for the binary attachment file extensions to retrieve when running content crawls.

Note: The Workvivo external content connector retrieves comments from articles, events, kudos, and updates.

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Workvivo external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **Attachments** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

   For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
5. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

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This option is only available when the Platform Multimodal Service plugin is activated on your instance.

- For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
- To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.

6. Select **Save and validate**.

Result
The Workvivo external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your Workvivo source system using your modified crawl settings, create and run a one-time content crawl for your Workvivo external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Zendesk Guide external content connector

The Zendesk Guide external content connector retrieves articles and attachments from knowledge bases in your Zendesk Guide source system and makes their content and metadata searchable in AI Search applications.

Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure Zendesk for external content indexing

Create an API token in Zendesk Admin Center to allow the Zendesk Guide external content connector to access your Zendesk source system.

Before you begin
You need administrator access to your Zendesk instance.

Role required: none

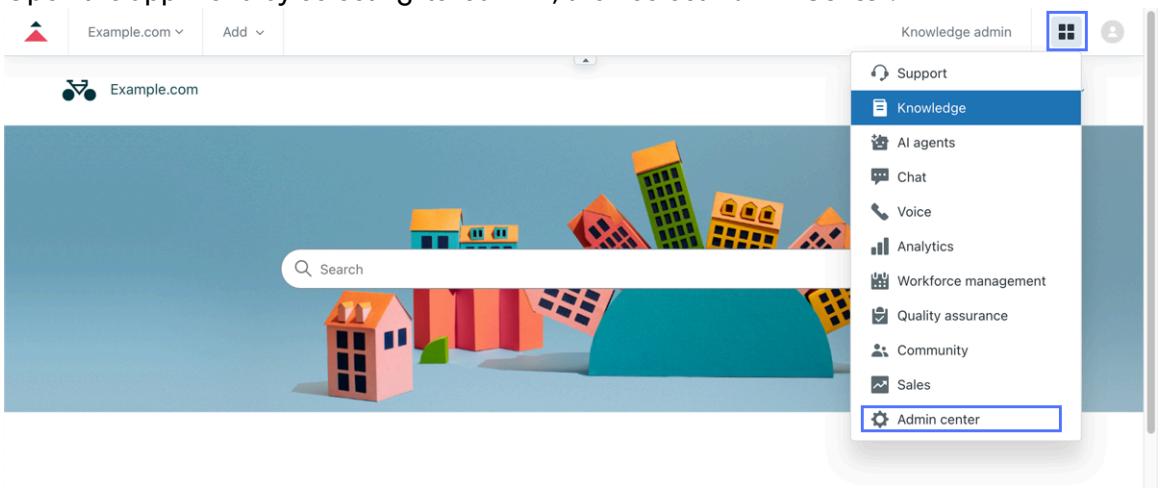
About this task
The Zendesk Guide external content connector retrieves documents and user permissions from your Zendesk source system using the Zendesk API.

To allow the connector to access your Zendesk source system via the Zendesk API, you must create an API token in the Zendesk Admin Center. Your connector administrator can use this API token to configure the Zendesk Guide external connector for proper connection to your source system.

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Procedure

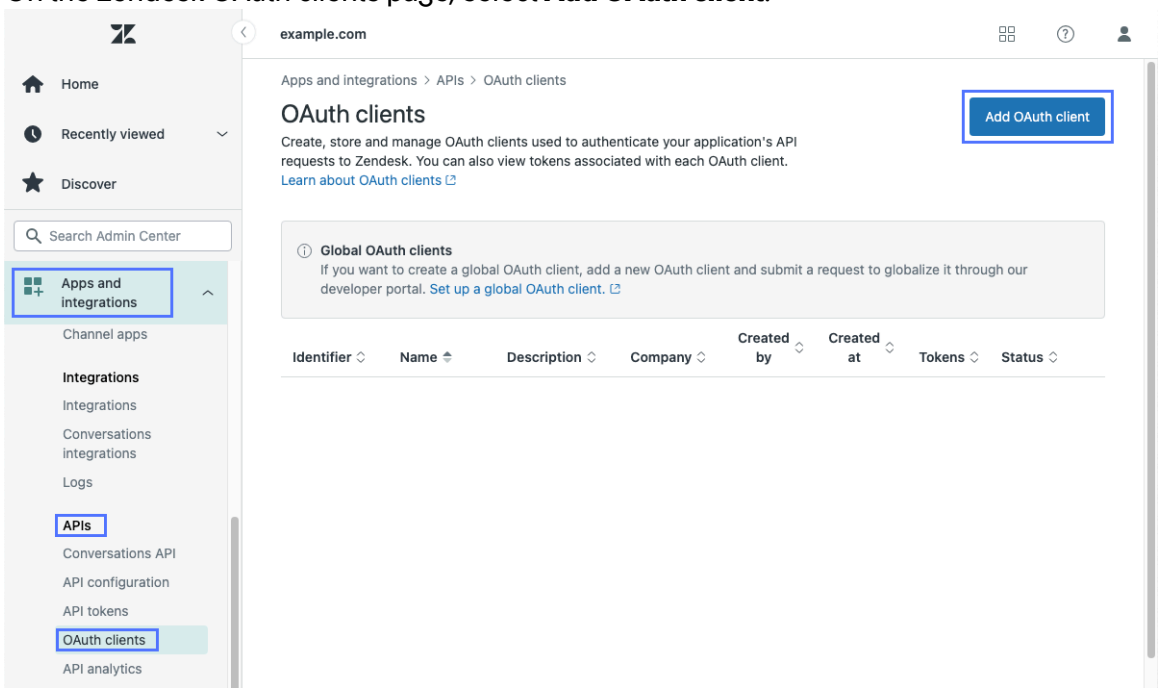
1. Navigate to `https://<subdomain>.zendesk.com`, where `<subdomain>` is the unique identifier for your Zendesk instance.
2. Log in with your Zendesk administrator credentials.
3. Open the app menu by selecting its icon , then select **Admin Center**.



4. In the Admin Center menu, navigate to **Apps and integrations** > **APIs** > **OAuth clients**.

   If the Admin Center menu labels aren't shown, select the **Apps and integrations** icon to expand the menu and navigate.

5. On the Zendesk OAuth clients page, select **Add OAuth client**.



   The Add OAuth client page appears.

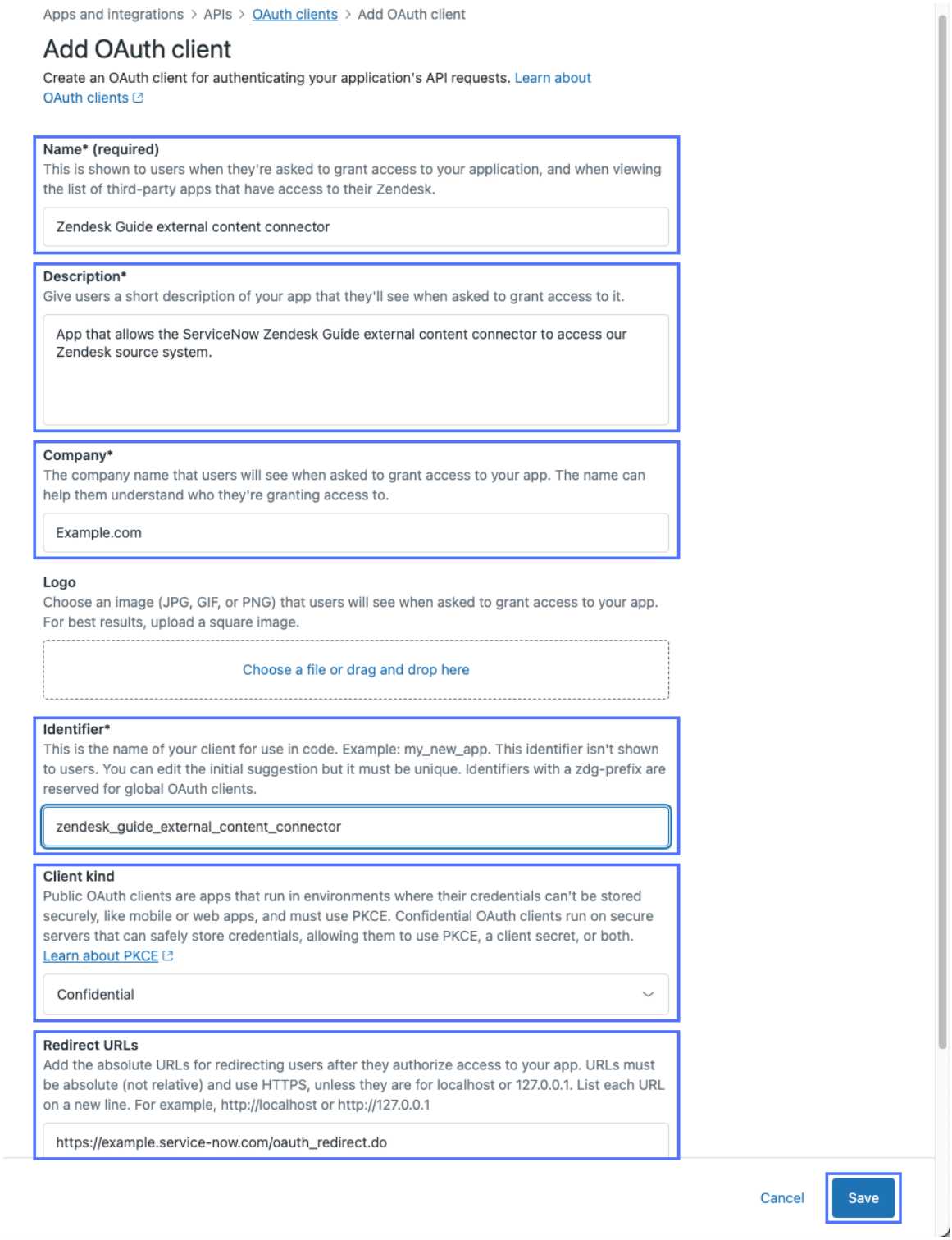
6. On the Add OAuth client page, fill in the fields.

Field	Description
Name* (required)	Enter a name for your new OAuth 2.0 client application. As an example, you might enter

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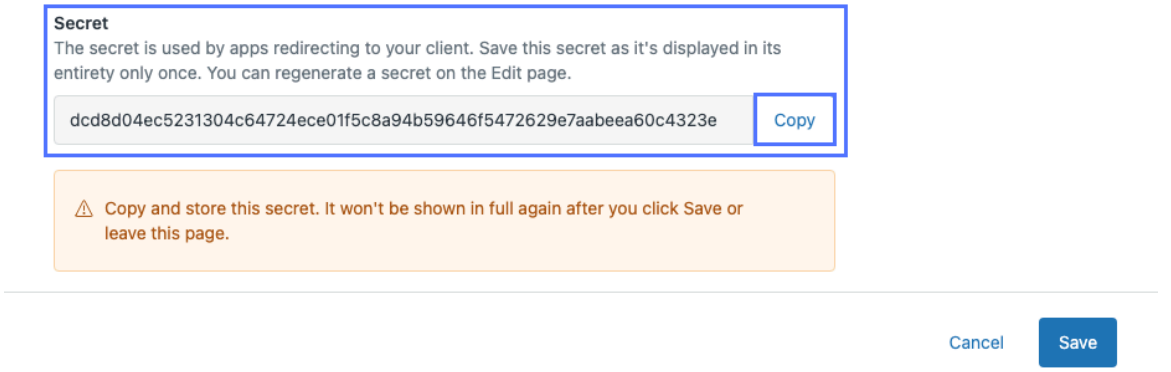
Field	Description
	Zendesk Guide external content connector.
Description*	Enter a short description for your new OAuth 2.0 client application. This description is shown to users when they're asked to grant access to the application. As an example, you might enter App that allows the ServiceNow Zendesk Guide external content connector to access our Zendesk source system..
Company*	Enter the name of your organization. As an example, you might enter Example.com.
Identifier*	Enter the identifier string you want to use when referring to your new OAuth 2.0 client application in code. A default identifier is automatically generated from the application name you enter, but you can override it if you want to use a different value. **Important:** Your connector administrator needs this client identifier when configuring the Zendesk external content connector.
Client kind	Select **Confidential**.
Redirect URLs	Enter https://<instance-name>.service-now.com/oauth_redirect.do, where <instance-name> is the hostname for your ServiceNow AI Platform® instance where you will create and run the external content connector. As an example, you might enter https://example.service-now.com/oauth_redirect.do.

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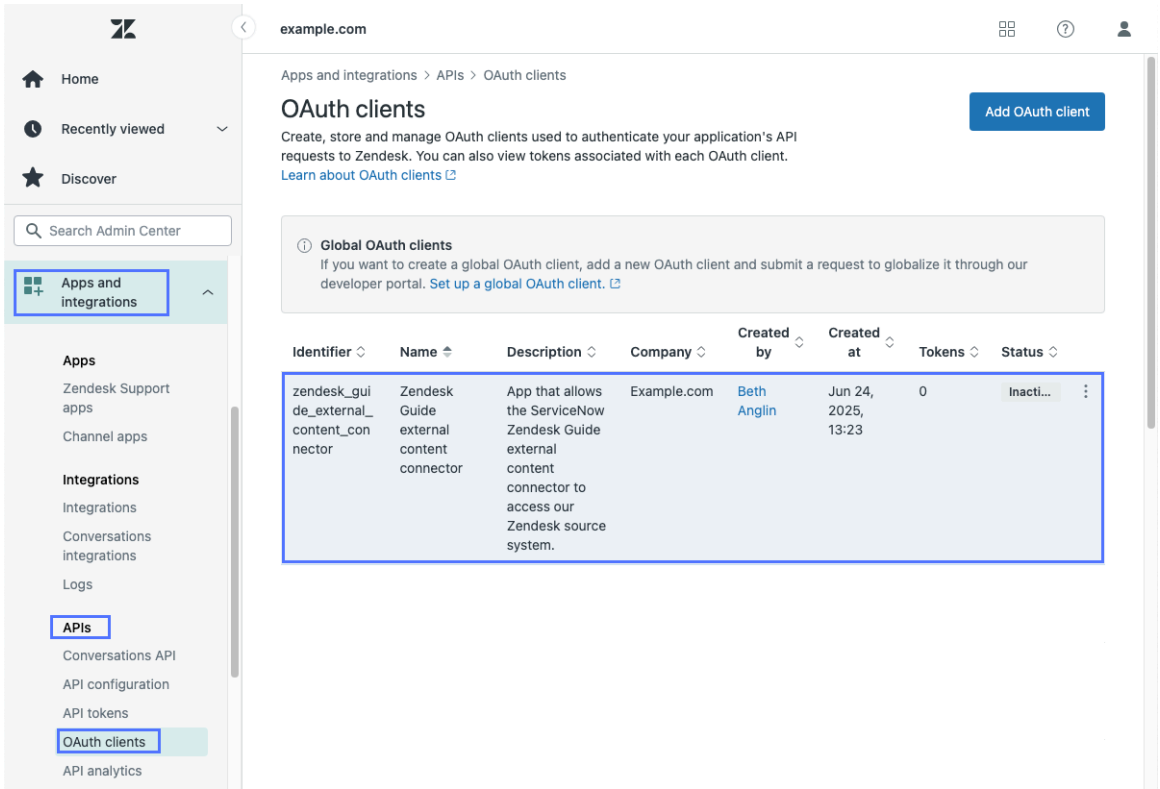
7. Select **Save**.
   Zendesk adds your new OAuth 2.0 client application and displays its generated client secret at the bottom of the Add OAuth client page.
8. Copy your new OAuth 2.0 client application's **Secret** and save it in a secure location.

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Important: Your connector administrator needs this client secret when configuring the Zendesk external content connector.

9. Select **Save**.



Zendesk updates your new OAuth 2.0 client application with the generated secret. Your new application appears on the Zendesk OAuth clients page.

What to do next

Provide the following items to your connector administrator:

- The OAuth 2.0 client identifier that you entered in step 6.
- The client secret that you saved in step 8.

Your connector administrator needs these settings to configure a Zendesk Guide external content connector to retrieve searchable content and security principals from your Zendesk source system.

For details on creating and configuring a Zendesk Guide external content connector, see Create a Zendesk Guide external content connector.

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Create a Zendesk Guide external content connector

Create an external content connector to retrieve searchable content and security principals from your Zendesk source system.

Before you begin

A source system administrator must have already configured your Zendesk source system to allow access by the Zendesk Guide external content connector. For the required source system configuration steps, see Configure Zendesk for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the **Zendesk** tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

Connection settings

Connection setting	Description
Connector name	Unique name for this Zendesk Guide external content connector.
Zendesk instance hostname	URL for your Zendesk instance. As an example, you might enter `https://example.zendesk.com`. If you don't know the instance URL to use, ask your Zendesk administrator for it.
Client ID	Identifier for the OAuth 2.0 client application configured in Zendesk that grants access to your Zendesk source system. As an example, you might enter `zendesk_guide_external_content_connector`. If you don't know the client identifier to use, ask your Zendesk administrator for it.
Client Secret	Secret for the OAuth 2.0 client application configured in Zendesk that grants access to your Zendesk source system. If you don't know the client secret to use, ask your Zendesk administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

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7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Zendesk Guide external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page. For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

    When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result

Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next

To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Zendesk Guide external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

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You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Zendesk Guide external content connector

Specify the article locales and attachment file types you want your Zendesk Guide external content connector to crawl when running content crawls. Define inclusion or exclusion filters for domains to restrict the set of users the crawl retrieves access permissions for when running user permission crawls.

Before you begin

A connector administrator must have already created the Zendesk Guide external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Zendesk Guide external content connector.

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. By default, the Zendesk Guide external content connector crawls all users from the source system during user permission crawls. During content crawls, it defaults to retrieving help center articles from all locales and retrieving all attachments with supported file extensions. Only perform this task if you want the connector to use any of the following non-default settings:

- Inclusion or exclusion filters for the user accounts to access on the source system when running user permission crawls
- Inclusion or exclusion filters for the help center article locales to crawl when running content crawls
- Inclusion or exclusion filters for the attachment file extensions to retrieve when running content crawls

Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

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Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Zendesk Guide external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select one of the following **User *permission* filtering** options:
   - To retrieve user permissions for all users from the source system, select **Map all users**.
   - To only retrieve user permissions for users from specified domains in the source system, select **Map only these users**, then use the **Add domain for user email addresses to include** field and **Add** button to enter domains whose users you want to include in the user permission crawl.

     For example, you might enter `example.com` to include only user permissions for users from the specified domain.
5. Select one of the following **Locale filtering** options:
   - To crawl articles from all locales defined in the source system, select **Crawl all locales**.
   - To crawl only articles from a specified set of locales defined in the source system, select **Include only these locales**, then use the **Locales to include** field to enter identifiers for the locales of articles that you want to include in the crawl.

     For example, you might enter `en-US` and `es-MX` to only crawl searchable content from articles with the US English or Mexican Spanish locales.

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- To crawl all articles except those from a specified set of locales defined in the source system, select **Exclude only these locales**, then use the **Locales to exclude** field to enter identifiers for the locales of articles that you want to exclude from the crawl.

  For example, you might enter `pt-BR` to exclude searchable content from articles with the Brazilian Portuguese locale.

6. Select one of the following **Attachment filtering** options:
   - To retrieve all attachments with supported file extensions from the source system, select **Crawl all attachments**.
   - To retrieve only attachments with specified file extensions from the source system, select **Include only these file extensions**, then use the **File extensions to include** field to enter attachment file extensions you want the connector to include when crawling.

     As an example, you might enter `.docx` to retrieve only attachments with the Microsoft Word file format.
   - To retrieve all attachments except those with specified file extensions from the source system, select **Exclude only these file extensions**, then use the **File extensions to exclude** field to enter attachment file extensions you want the connector to exclude when crawling.

     As an example, you might enter `.csv` to exclude attachments with the Comma-Separated Values (CSV) file format.

   For details on the supported attachment file extensions, see Binary file extensions supported in External Content Connectors.
7. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.
   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
8. Select **Save and validate**.

Result

The Zendesk Guide external content connector is updated with your modified crawl settings.

What to do next

To retrieve content from your Zendesk Guide source system using your modified crawl settings, create and run a one-time content crawl for your Zendesk Guide external content connector.
To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Zoom external content connector

The Zoom external content connector retrieves webinars and meetings from your Zoom source system and makes their content and metadata searchable in AI Search applications.

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Connector administrators can run or schedule content crawls to retrieve updated content and access permissions from your source system, or user permission crawls to retrieve updated security principals from your source system. Both types of crawl feed their data to AI Search for indexing.

The indexed content and metadata are stored as records in a connector-specific indexed source. Search administrators can create search sources from this indexed source and link them to search profiles to make the indexed records searchable in AI Search applications.

Related topics

Create a content crawl for an external content connector

Create a user permission crawl for an external content connector

Configure Zoom for external content indexing

Create and activate a Server-to-Server OAuth app in the Zoom App Marketplace to allow the Zoom external content connector to access your Zoom source system.

Before you begin

You need admin privileges for the Zoom App Marketplace.

Role required: none

About this task

The Zoom external content connector retrieves webinars and meetings from your Zoom source system using the Zoom APIs.

To allow the connector to access your Zoom source system via the Zoom APIs, you must configure and activate a Server-to-Server OAuth app in the Zoom App Marketplace. Your connector administrator can use settings copied from this app to configure the Zoom external connector for proper connection to your source system.

Procedure

1. In the Zoom App Marketplace, create a new Server-to-Server OAuth app for the Zoom external content connector.

   a. Navigate to https://marketplace.zoom.us/ and log in with your admin credentials.

   b. Navigate to **Develop** > **Build app**.

   c. If prompted, agree to the Zoom API license and terms of use by selecting **Agree**.

   d. Select **Server to Server OAuth App** as the kind of app to create, then select **Create**.

   e. Enter a name for your new Server-to-Server OAuth app.
   As an example, you might enter `Zoom external content connector`.

   f. Select **Create**.

   You're taken to the App Credentials page for your new Server-to-Server OAuth app.

2. On the App Credentials page, record the account ID, client ID, and client secret for your new Server-to-Server OAuth app.

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a. Copy the account ID for your new Server-to-Server OAuth app and store it in a secure location.

> **Important:** Your external content connector administrator needs this account ID when configuring the Zoom external content connector.

b. Copy the client ID for your new Server-to-Server OAuth app and store it in a secure location.

> **Important:** Your external content connector administrator needs this client ID when configuring the Zoom external content connector.

c. Copy the client secret for your new Server-to-Server OAuth app and store it in a secure location.

> **Important:** Your external content connector administrator needs this client secret when configuring the Zoom external content connector.

d. Select **Continue**.

You're taken to the Information page for your new Server-to-Server OAuth app.

3. On the Information page, add details about your new Server-to-Server OAuth app. These details are required in order to activate your new app.
   a. In the Company Name field, enter the name of your organization.
   b. **Optional:** In the Short Description field, enter a brief description of your new Server-to-Server OAuth app.
   c. In the Name field, enter your name.
   d. In the Email field, enter your email address.
   e. Select **Continue**.
   You're taken to the Feature page for your new Server-to-Server OAuth app.
4. On the Feature page, select **Continue**.
   You're taken to the Scopes page for your new Server-to-Server OAuth app.
5. On the Scopes page, add the required API scopes to your new Server-to-Server OAuth app.
   a. Select **Add Scopes**.
   b. In the Add Scopes window, search for and then select each of the following scopes.
      - cloud_recording:read:list_user_recordings:admin
      - meeting:read:list_meetings:admin
      - meeting:read:list_past_instances:admin
      - meeting:read:list_past_participants:admin
      - meeting:read:meeting:admin
      - meeting:read:participant:admin
      - meeting:read:past_meeting:admin
      - meeting:read:past_qa:admin
      - meeting:read:summary:admin
      - user:read:list_users:admin

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- user:read:user:admin
- webinar:read:list_panelists:admin
- webinar:read:list_past_instances:admin
- webinar:read:list_past_participants:admin
- webinar:read:list_webinars:admin
- webinar:read:past_qa:admin
- webinar:read:webinar:admin

These scopes grant read access to your new Server-to-Server OAuth app for the specified content elements in your Zoom source system. The app can't modify your source system content with these scopes.

c. Select **Continue**.

You're taken to the Activation page for your new Server-to-Server OAuth app.

6. On the Activation page, activate your new Server-to-Server OAuth app by selecting **Activate your app**.
Your new Server-to-Server OAuth app is activated.

What to do next

Provide the following items to your connector administrator:

- The account ID that you copied in step 2.a.
- The client ID that you copied in step 2.b.
- The client secret that you copied in step 2.c.

Your connector administrator needs these items to configure a Zoom external content connector to retrieve meetings, webinars, and security principals from your Zoom source system.

For details on creating and configuring a Zoom external content connector, see Create a Zoom external content connector.

Create a Zoom external content connector

Create an external content connector to retrieve searchable content and security principals from your Zoom source system.

Before you begin

A source system administrator must have already configured your Zoom source system to allow access by the Zoom external content connector. For the required source system configuration steps, see Configure Zoom for external content indexing.

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors section, select **New**.
4. On the Choose source page, select the *Zoom* tile, then select **Next**.
5. On the Connection settings page, fill in the connection settings.

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Connection settings

Connection setting	Description
Connector name	Unique name for this Zoom external content connector.
Account ID	Account ID for the Server-to-Server OAuth app that grants the connector access to your Zoom content. If you don't have the account ID, ask your Zoom administrator for it.
Client ID	Client ID for the Server-to-Server OAuth app that grants the connector access to your Zoom content. If you don't have the client ID, ask your Zoom administrator for it.
Client secret	Client secret for the Server-to-Server OAuth app that grants the connector access to your Zoom content. If you don't have the client secret, ask your Zoom administrator for it.

6. Save and validate your connection settings by selecting **Validate Connection**.

   Note: If validation of your connection settings fails, the system shows an error message. Verify your connection settings to ensure they're correct. If permissions required by the connector are missing or incorrectly configured in the source system, a warning message appears showing the permissions that must be corrected. Provide the information from this message to your source system administrator.

7. After your connection settings are validated, select **Next**.
8. On the Crawl settings page, modify any default crawl settings that you want to override for this connector, then select **Next**.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the crawl settings for this connector from the External Content Admin Home page. For details on this procedure and the available crawl settings, see Configure crawl settings for a Zoom external content connector.
9. On the User permission settings page, modify any default user permission settings that you want to override for this connector.
   If you want to skip this step for now, select **Skip** instead of **Next**. You can modify the user permission settings for this connector from the External Content Admin Home page. For details on this procedure and user permission settings, see Configure user permission settings for an external content connector.
10. On the Create crawl page, create a content crawl for this connector by selecting a crawl scope (if supported) and any desired options, then select **Next**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can create and run crawls for this connector from the External Content Admin Home page. For details on creating content crawls, see Create a content crawl for an external content connector.
11. On the Connect search profile page, use the **Connect to search profile** field and **Add** button to add any search profiles that you want to connect this external content connector's default search source to, then select **Save**.
    If you want to skip this step for now, select **Skip** instead of **Next**. You can connect search sources for this connector to search profiles from the External Content Admin Home page.

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For details on connecting an external content connector to search profiles, see Connect an external content connector to a search profile.

When you link a connector search source to a search profile in this step, the system automatically publishes the search profile to make the new link take effect.

Result
Your new external content connector appears in the Connectors list on the External Content Admin Home page.

What to do next
To retrieve searchable content and security principals with your new connector, you must configure and run content and user mapping crawls for it. You can modify your new connector's crawl settings and create crawls for it from the External Content Admin Home page even if you skipped these steps during connector creation.

- To learn how to configure your new connector's crawl settings, see Configure crawl settings for a Zoom external content connector.
- For details on creating crawls for your new connector, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

To make content crawled by your new connector searchable in portals and search applications, you must link one of its search sources to the search profile used by each portal or search application. You can use the connector's default search source or create your own custom search sources.

Default search source

By default, the system creates a search source that includes all content from your external content connector's indexed source.

Custom search sources

You can create your own search sources with filters to specify which content from the connector's indexed source is searchable. To view the connector's indexed source, navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**. For information about creating search sources, see Search sources in AI Search.

You can link connector search sources to search profiles from the External Content Admin Home page. For details on this procedure, see Connect an external content connector to a search profile.

Configure crawl settings for a Zoom external content connector

Specify the content types you want your Zoom external content connector to retrieve.

Before you begin
A connector administrator must have already created the Zoom external content connector that you want to configure crawl settings for. To learn about this procedure, see Create a Zoom external content connector.

Role required: sn_ext_conn.xcc_admin

About this task
This task is optional. By default, the Zoom external content connector crawls all webinars and meetings found in its specified source system and sends their searchable content and metadata to AI Search for indexing. Only perform this task if you want the connector to exclude content from webinars or from meetings.

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Content is only retrieved from the source system if it passes all of your configured crawl setting filters. If any crawl setting filter excludes a content item, the external content connector doesn't retrieve it.

Important:

By default, each external content connector can index up to one million (1,000,000) content items from its source system. When a connector exceeds this limit, it continues to crawl the source system, but only sends content item deletions and updates to AI Search for indexing, ignoring new content items. The connector logs an error message for every 10,000 content items it crawls beyond the indexing limit.

When a connector's indexed content item count exceeds 800,000, a warning message appears in the connector's UI to indicate that it's approaching the indexing limit. If the connector reaches the indexing limit, an error message appears in its UI.

External content connectors that support user permissions crawls can handle permissions for up to five hundred thousand (500,000) users and their groups. If a connector retrieves users in excess of this limit, user and group permissions may not be correctly applied to the connector's retrieved content. As a result, the content may not be searchable.

If one of your connectors reaches the content indexing limit, you can update its crawl settings and file inclusion/exclusion filters to reduce the number of content items it retrieves. If you need to index more content items than the limit allows, you can create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase for the connector.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the Zoom external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **Crawl settings**.
4. Select the options for the webinar content types that you want the connector to retrieve searchable content and metadata from.

   Past webinars

   Select this option to index searchable content and metadata from completed webinars.

   Index only transcriptions

   Select this option to only index searchable content from webinar transcripts. This will ignore content and metadata from webinar agendas, summaries, and question and answer sessions. Webinars without transcripts will have no content or metadata indexed.

5. Select the options for the meeting content types that you want the connector to retrieve searchable content and metadata from.

   Past meetings

   Select this option to index searchable content and metadata from completed meetings.

   Index only transcriptions

   Select this option to only index searchable content from meeting transcripts. This will ignore content and metadata from meeting agendas, summaries, and

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question and answer sessions. Meetings without transcripts will have no content or metadata indexed.

Note: If you deselect both **Past webinars** and **Past meetings**, the connector won't retrieve any searchable content or metadata from your Zoom source system.

6. **Optional:** If you want AI Search to automatically generate captions for content in attachments and files retrieved by the connector, select the **Multimodal captions** option.
   When you select this option, the Platform Multimodal Service automatically generates descriptive captions for images, tables, charts, and other visual elements found in retrieved attachments and files. You can discover these retrieved attachments and files by searching for terms from their generated captions.

   This option is only available when the Platform Multimodal Service plugin is activated on your instance.

   - For details on activating the plugin, see Activate the Platform Multimodal Service plugin.
   - To learn how to select the VLM (visual learning model) provider and model used for the Platform Multimodal Service, see Configure multimodal captioning for AI Search.
7. Select **Save and validate**.

Result
The Zoom external content connector is updated with your modified crawl settings.

What to do next
To retrieve content from your Zoom source system using your modified crawl settings, create and run a one-time content crawl for your Zoom external content connector. To learn about creating and running one-time content crawls, see Create a content crawl for an external content connector.

Rename an external content connector

Change the name of an existing external content connector.

Before you begin
Verify that the external content connector you want to rename is not currently running a crawl.

Role required: sn_ext_conn.xcc_admin

Procedure
1. Use the application picker to switch to the External Content Connectors Admin application scope.
2. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
3. In the Connectors pane, find the record for the connector you want to deactivate or delete, and open its context menu in one of the following ways:
   - Select the connector record's Overflow icon .
   - Long-press (or right-click) the connector record.
4. In the context menu, select **Manage**.
   The connector's Configuration tab opens.
5. Select the pencil icon .
   The Rename connector dialog box appears.
6. Enter a new name for the connector, then select **Save**.

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Deactivate, reactivate, or delete an external content connector

Deactivate an external connector to pause its scheduled crawls while retaining all of the content and metadata that it has already crawled. Reactivate a deactivated connector to resume its scheduled crawls. Delete an external content connector to remove the connector's definition along with all content and metadata that it has crawled.

Before you begin

Role required: sn_ext_conn.xcc_admin

About this task

You can deactivate an external content connector to suspend its scheduled crawls. The connector's status changes to `Inactive`. All content, metadata, and permissions indexed from the deactivated connector's previous crawls remain available in search. No new updates are retrieved from the deactivated connector's external data source unless you choose to run a one-time crawl. You can reactivate the connector to resume its scheduled crawls.

You can delete an external content connector to remove its definition. When you delete a connector, AI Search removes all content, metadata, and permissions from that connector's crawls from the index. As a result, users cannot find content from the deleted connector when searching in AI Search applications.

Note: Deleting an external content connector doesn't automatically unlink its search source from your search profiles. You must manually unlink the search source from any search profiles that it's linked to. For details on this procedure, see Unlink a search source from a search profile.

Procedure

1. Use the application picker to switch to the External Content Connectors Admin application scope.
   For details on selecting an application scope using the application picker, see Application picker.
2. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
3. In the Connectors pane, find the record for the connector you want to deactivate or delete, and open its context menu in one of the following ways:
   - Select the connector record's Overflow icon ⋮.
   - Long-press (or right-click) the connector record.
4. In the context menu, select one of the following options:
   - To suspend crawling for an active connector, select **Deactivate**.
   - To reactivate an inactive connector, select **Activate**.
   - To permanently delete a connector, select **Delete**, then select **I understand** and **Delete** in the Delete connector dialog box.

Warning: Deleting an external connector is not reversible. After you delete a connector, you cannot restore its definition or its crawled content, metadata, and permissions.

Result

The result depends on which selection you made:

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- If you deactivated a connector, its status changes to `Inactive`.
- If you reactivated a deactivated connector, its status changes from `Inactive` to some other value.
- If you deleted a connector, it disappears from the Connectors list.

What to do next

If you deactivated an external content connector to disable its scheduled crawls, you can still run one-time crawls to update its content and metadata or its permissions. For details on running one-time crawls, see Create a content crawl for an external content connector and Create a user permission crawl for an external content connector.

If you deleted an external content connector, manually unlink its search source from any search profiles that it's linked to. For details on this procedure, see Unlink a search source from a search profile.

Edit connection or crawl settings for an external content connector

Connector administrators can modify the connection settings and crawl settings for an existing external content connector. If your changes to a connector's settings invalidate its current crawl results, the system prompts you to run a new content crawl.

Before you begin

Role required: sn_ext_conn.xcc_admin

About this task

This task is optional. Perform it only if you need to modify the connection settings or crawl settings specified for one of your existing external content connectors.

Modify a connector's connection settings to reflect changes made in your source system's configuration. As an example, if your source system administrator generates a new client secret for the OAuth 2.0 application that grants the connector access to your content, you can replace the old client secret with the new one in the connector's connection settings.

Modify a connector's crawl settings to alter the set of source system locations it crawls and the set of source system items it retrieves searchable content and metadata from. As an example, if you want to exclude content from items in a newly created Slack channel, you can add that channel to the channel exclusion list in your Slack external content connector's crawl settings.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, choose which settings you want to modify:
   - To modify connection settings for the external content connector, select **Connection settings**.
   - To modify crawl settings for the external content connector, select **Crawl settings**.
4. On the selected settings page, make your desired changes.

   For details on connection settings, see the creation task for the external content connector type, as listed in Creating external content connectors.

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For details on crawl settings, see the crawl-settings configuration task for the external content connector type, as listed in Configuring crawl settings for external content connectors.

5. Select **Save and Validate**.

Result
The external content connector you selected is updated with your modified connection settings or crawl settings.

If your modifications to the connector's connection or crawl settings invalidate its existing content crawl results, the connector status changes to indicate that a recrawl is required.

What to do next
If the external content connector status indicates that a recrawl is required, run a new content crawl for it to update its search results using the modified settings. For details on running content crawls, see Create a content crawl for an external content connector.

Configure user permission settings for an external content connector

Override the default field mappings for an external content connector's user permission crawls. Specify the fields that uniquely identify user security principals in your source system and users in your ServiceNow AI Platform® instance. Optionally execute a custom script to transform security principal IDs before they're compared with the IDs of users in your instance.

Before you begin
Role required: sn_ext_conn.xcc_admin or admin

About this task
User permission crawls for external content connectors retrieve user security principals from your source system and map them to users in your ServiceNow AI Platform instance. A user security principal from the source system should map to no more than one user in your instance.

Each external content connector specifies a predefined source system field that the connector uses as the unique identifier for user security principals in the source system. As an example, a connector might specify a username or email address field as the principal identifier for its source system. All connectors default to using the email field from the Users [sys_user] table as the unique identifier for users in your ServiceNow AI Platform instance.

If you need to specify a different field as the identifier for source system principals or instance users, you can override the default field selections for the external content connector. You can optionally execute a custom script to transform source field values to make them match destination field values for users in your ServiceNow AI Platform instance.

Procedure
1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the external content connector whose settings you want to modify.
3. In the connector editor's Settings tab, select **User** *permission* **settings**.
4. In the Map from section, select a source system field with values that uniquely identify your user security principals.
   As an example, if your source system security principals are uniquely identified by their email addresses, you might select the source system's **email** field.
5. **Optional:** Select the **Custom script** option and enter a custom script function in the code editor.

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You only need to perform this step if you want to transform source system field values before they're compared with destination field values in your ServiceNow AI Platform instance.
As an example, if your source system identifies user security principals with user IDs like `beth.anglin` but your ServiceNow AI Platform instance users have email-based usernames like `beth.anglin@example.com`, you might use the script to append the @ symbol and your domain name to each user security principal ID so that it correctly matches a ServiceNow AI Platform username.

Warning: The system executes your custom script for each user security principal retrieved by the external content connector's user permission crawl. A long-running script can affect performance for the user mapping crawl. Keep your scripts as simple as possible.

The custom script must include a function that transforms the incoming field value for a user from the connector's source system to an output value that will be used to match a user in the ServiceNow AI Platform's User [sys_user] table. Continuing the previous example, you might define this custom script to transform bare usernames into user email addresses in your domain:

```
/**
* Maps the incoming field value of the user from the source system to an output value that
 will be used to match the user in the ServiceNow platform.
* Supported return types are "string" and "number".
*/

var mapSourceUser = function(sourceUserValue) {
   // Append @ symbol and domain name to source user ID
   //  Source field value format = user
   //  Destination field value format = user@example.com

   return sourceUserValue + "@example.com";
}

mapSourceUser(sourceUserValue);
```

The default script includes several code examples that you can use as a basis for your own custom script. To revert the code in the code editor to the default script, select **Reset to default script** and then **Reset**.

Important: Don't change the `mapSourceUser` function declaration at the start of the script or the subsequent call to that function. You should only edit the function body inside the curly braces to implement your desired custom field value transformation.

6. In the Map to section, select the ServiceNow AI Platform field to use as the unique identifier for users in your instance.
   The default identifier field is the email field from the User [sys_user] table.
7. Test your user permission settings by selecting **Test** and then performing the following steps.

   a. When prompted, enter a sample value for the external content connector's source field.
      As an example, if your source system uses email addresses to identify user security principals, you might enter `abel.tuter@example.com`.

   b. Select **Run test** and wait for the test to complete.

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The system uses your user permission settings to look for a ServiceNow AI Platform instance user that matches the specified user security principal from the source system. You can interrupt this process and cancel the test by selecting **Cancel** or closing the modal window.

c. View the test results.

Match

This status indicates that the test successfully matched a single ServiceNow AI Platform instance user.

No match

This status indicates that the test did not match any ServiceNow AI Platform instance user.

Inconclusive

This status indicates that the test matched multiple ServiceNow AI Platform instance users, rather than a single unique user as desired.

d. Perform the appropriate step depending on the test's result.

- To return to the user permission settings editor, select **Close**.
- To return to the sample value entry field so you can repeat the test with different input, select **New test**. You can edit your previous input to see how different values behave.

8. When you're done testing, select **Save**.

Result

The external content connector is updated with your modified user permission settings.

If you configured a custom script, any script errors encountered during user permission crawls are recorded in the Alerts section of the connector's crawl details page. To learn about accessing the crawl details page from an external content connector's crawl history entry, see Review crawl history for an external content connector.

What to do next

To retrieve updated user permissions from your source system using your modified settings, create and run a user permission crawl for the external content connector that you edited. To learn about creating and running user permission crawls, see Create a user permission crawl for an external content connector.

Connect an external content connector to a search profile

Make results from an external content connector searchable in your portals and search applications by connecting its search sources to your existing search profiles.

Before you begin

Role required: sn_ext_conn.xcc_admin or admin

About this task

To make results from an external content connector searchable in a portal or search application, you need to link one of its search sources to the search profile used by that portal or search application. As an example, linking a connector's search source to the **Service Portal** search profile makes filtered content from that connector available in Service Portal searches.

Each external content connector type feeds its crawled results to a unique indexed source. By default, the system creates a search source for each connector type which has no filters and includes all documents from the connector's indexed source. You can define additional search

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sources for the indexed source with filter sets applied to limit which documents are searchable. To learn more about search sources and filters, see Search sources in AI Search.

Linking an external content connector's search source to a search profile makes crawled content that satisfies the search source's filters searchable in all portals and search applications that use the specified search profile. For more details on search profiles, see Search profiles in AI Search.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the external content connector with results that you want to make searchable using one or more search profiles.
3. In the connector editor's Settings tab, select **Manage index**.
4. In the Connected search profiles section, repeat these steps for each search profile you want to link the selected external content connector to.

   a. Use the **Select search source** field to select a search source derived from the connector's indexed source.

   b. Use the **Connect to search profile** field to select the search profile you want to link the selected search source to.

   c. Select **Add**.
   A new connection entry appears showing your search source and search profile selections.

5. Select **Save**.
   The system automatically publishes the search profile to make the new search source link take effect.

Result

For each connection you created, content from the selected external content connector search source becomes searchable in portals and search applications that use the selected search profile.

Add an external content search source to ServiceNow® Otto for Virtual Agent

Include searchable content retrieved by an external content connector in your ServiceNow Otto for Virtual Agent chats.

Before you begin

You must have already created at least one search source for the indexed source associated with the external content connector. For instructions on creating search sources, see Create a search source for AI Search.

Role required: ais_admin

About this task

Linking a search source to the *ServiceNow Otto* **in VA** search profile makes its filtered content available in ServiceNow Otto for Virtual Agent chats. AI Search only uses content from the search profile's linked search sources when generating responses for ServiceNow Otto for Virtual Agent chats.

When linking a search source to the *ServiceNow Otto* **in VA** search profile, you can specify options that control how the search source's content is accessed for ServiceNow Otto for Virtual Agent chats. You can exclude the search source's content from being considered when finding

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standard search results, or prevent it from being considered during Genius Result answer generation.

Procedure

1. Navigate to **All** > *AI Search* > **Search Experience** > **Search Profiles**.
2. Open the *ServiceNow Otto* **in VA** search profile record.
3. In the Search Sources related list, select **Link Existing**.
4. On the Search Profile - Search Source Mapping form, fill in the fields.
   For a description of the field values, see Search Profile - Search Source Mapping form.
5. Select **Submit**.

Result
The new search source appears in the Search Sources related list. ServiceNow Otto for Virtual Agent chats immediately reflect changes to the set of records searchable through the search profile.

What to do next
Derived auto-correction term lists for the *ServiceNow Otto* **in VA** search profile's typo handling dictionary don't automatically update to reflect changes to the set of searchable records. To update these auto-correction term lists, publish the *ServiceNow Otto* **in VA** search profile. For details on publishing a search profile, see Publish an AI Search search profile.

Verify your connection settings and source system permissions for an external content connector

Check that connection settings and source system permissions are correctly specified for your external content connector. Perform this task to verify whether permission changes or revocations affect the connector's ongoing or scheduled crawls.

Before you begin
Role required: sn_ext_conn.xcc_admin

About this task
When you create a new external content connector, the system offers the option to validate your connection settings and verify that source system permissions are properly set to allow access by the connector.

Permission changes and revocations that occur after the connector is created can affect its ability to complete ongoing crawls or to run scheduled crawls. You can verify that the connector still has valid connection settings and source system permissions by running a one-time test crawl that only refreshes a small portion of the source system's searchable content and metadata. Success on this crawl indicates that your connection settings and source system permissions are valid. Failure may indicate that these settings should be double-checked.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the external content connector that you want to verify the connection settings and source system permissions for.
3. In the connector editor's Settings tab, select **Index management**.
4. In the Trigger test crawl section, select **Trigger test crawl**.

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Result
The external content connector runs a one-time test crawl. This crawl checks whether the connector's current connection settings and source system permissions enable it to refresh a small portion of its source system's searchable content and metadata.

The test crawl appears in the connector's crawl history with name **Test crawl** so you can monitor its status. For details on monitoring crawl history, see Review crawl history for an external content connector.

When the test crawl finishes its run, an alert message indicates whether it completed successfully or encountered errors. If it completed successfully, its connection settings and source system permissions are valid.

What to do next
If the test crawl encountered errors, review its crawl history entries to see whether it experienced connection issues or source system permissions issues. If it did, ask your source system administrator to verify your connection settings and to confirm that the permissions required by the connector are properly set.

Resolve health issues for an external content connector

View and resolve connector health issues using the connector health dashboard in the external content connector editor.

Before you begin
Role required: sn_ext_conn.xcc_admin

About this task
External content connectors depend on a variety of configuration settings, permissions, and operations. Incorrect or outdated settings or permissions in the ServiceNow AI Platform® or the source system can prevent a connector from operating properly. Issues encountered during crawls may prevent specific content items from being retrieved and indexed for search.

Specific occurrences that can prevent proper function of an external content connector include:

- Certificate expiration
- Permission mismatches after a source system policy change
- Connector plugin scope changes following an upgrade to External Content Connectors or the ServiceNow AI Platform
- Quota exhaustion on the ServiceNow AI Platform side
- User identity mapping gaps that silently conceal connector search results from users

When an external content connector has one or more of these health issues, its status changes to **Action required**. Perform the following steps to view and resolve health issues for the affected connector.

Procedure
1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors list, select the record for the external content connector that you want to check or resolve health issues for.

> **Note:** Connectors with health issues show **Action required** status.

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4. In the connector editor, select the Overview tab.
5. Review the health category cards in the **Connector health** section.
   Each card includes a health category name, a status indicator, and a context label.

   Health category name

   The health category name describes which aspects of the external content connector's configuration and operations the card refers to.

   - **Source connection**: Connection and authentication settings for the source system.
   - **Internal connection**: ServiceNow AI Platform connectivity needed to run crawls.
   - **Content Permissions**: Permissions needed to access content and metadata in the source system.
   - **Content**: Status of crawled items and any crawl errors that need attention.
   - **User permissions**: Status of user and group access permissions for secure search.
   - **Search profile**: Assignment to at least one search profile.

   Status indicator

   The status indicator indicates the status of the health category for the external content connector. Typical values include **Ready**, **Not configured**, **Warning**, and **Error**.

   Context label

   The context label indicates whether the health category refers to settings in the ServiceNow AI Platform or settings in the external content connector's source system.

6. For each health category card that shows a status other than **Ready**, perform the following steps.

   a. Select the health category card.
   In the **Issues** section, actionable entries show all health issues associated with the selected health category.

   b. Follow the provided action links or guidance to resolve all health issues for the selected health category.

Result
The external content connector no longer shows **Action required** status.

Crawling content with External Content Connectors

Search administrators can use the External Content Connectors application to run one-time document and user permission crawls on demand. They can review connector-specific crawl history and analytics and details of user and group mappings retrieved from external data sources.

To access the External Content Connectors application, navigate to **All** > **External Content Connectors** > **External Content Admin Home**.

On the application's main page, the Connectors list shows your external content connectors with their source, status, count of documents retrieved, last content crawl start date and time, and failed crawl count.

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Note: Starting with External Content Connectors 6.0, crawls that time out due to connectivity issues during their run are automatically resumed when connectivity resumes.

Create a content crawl for an external content connector

Retrieve searchable content and metadata from your source system with a content crawl. Run the crawl as a one-time task or schedule it to run on a recurring basis.

Before you begin

To run crawls for external content connectors, your instance must have inbound mTLS support enabled. For details on verifying that this feature is enabled on your instance, see Verify whether inbound mTLS support is activated for your instance.

Role required: sn_ext_conn.xcc_admin

About this task

Search administrators can retrieve searchable content and metadata from an external content connector's source system by creating a content crawl for the connector. Search administrators can specify the crawl's scope: a full content crawl retrieves searchable content and metadata from all available locations (called start points) in your source system, while a partial content crawl only retrieves content and metadata from a single specified start point and its descendants. A content crawl may take hours or days to complete, depending on the amount of content available in your source system and the scope of the crawl.

Note: Both full and partial content crawls honor the crawl settings defined for your external content connector, including any inclusion/exclusion content filters. Running a full content crawl doesn't bypass these settings.

Some external content connectors include an **Update user** *permissions* content crawl option. When you select this option, running the crawl launches both a content crawl and a user permission crawl for your source system. For more details on user permission crawls, see Create a user permission crawl for an external content connector.

You can run a content crawl as a one-time task or set it to recur on a scheduled basis.

Note: Starting with External Content Connectors 6.0, the External Content Connectors application allows a maximum of five connector crawls to run simultaneously on your ServiceNow AI Platform® instance. Both content crawls and user permission crawls count against this limit. You can schedule and run external content connector crawls throughout the day to avoid overlap, or create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the connector that you want to create a content crawl for.
3. In the connector editor's Create crawls tab, select **Crawl content**.
   The Crawl content dialog box appears.
4. Select the tile for the scope you want for your content crawl.

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- To retrieve searchable content and metadata from all available start points in your source system, select **Full content crawl**.
- To only retrieve searchable content and metadata from a single start point, select **Partial content crawl** and enter or select the start point for the crawl. The partial crawl only retrieves content from this start point and its descendant locations.

  Note: When configuring a partial content crawl, you can select **Refresh start points** to populate the list of available start points. Refreshing this list requires retrieval of data from the source system and may take a minute or two.

Note: If the **Partial content crawl** tile isn't shown, the external content connector only supports full content crawls.

5. **Optional:** To configure your content crawl to launch a user permission crawl (retrieving security principals from your source system) when it runs, select the **Update user mappings** option.

   Note: If the **Update user** *permissions* option isn't shown, the external content connector doesn't support launching user permission crawls from content crawls.

6. **Optional:** To make your content crawl run on a recurrent schedule, select the **Make recurring** option, then specify the schedule options.

   Note: If the **Make recurring** option isn't shown, the external content connector automatically schedules its own content crawls. In this case, you can only run one-time content crawls.

   a. Enter a name for your scheduled crawl.

   b. Select **Daily**, **Weekly**, or **Monthly** as the frequency for your scheduled crawl.

   Note: Not all external content connectors support all of these crawl frequency options. Select a crawl frequency option that's shown for your external content connector.

   c. If you selected **Weekly** as the crawl frequency, select the options for the days of the week that you want your scheduled crawl to run on.

   d. If you selected **Monthly** as the crawl frequency, select a **Day** field value to specify the day of the month that you want your scheduled crawl to run on.

   e. Specify when you want the system to run your scheduled crawl by entering its start time and selecting a time zone.
   The start time should be in *hh:mm a* format, where the format parameters have the following values:

   - *hh*: a one- or two-digit hour between 0 and 12 inclusive, such as `5` or `11`
   - *mm*: a two-digit minute between 00 and 59 inclusive, such as `15` or `37`
   - *a*: any of `A`, `a`, `AM`, or `am` for AM (morning) or any of `P`, `p`, `PM`, or `pm` for PM (afternoon)

7. Create your new content crawl by selecting the appropriate option.

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- If you skipped step 6, select **Create one-time crawl**.
- If you selected the **Make recurring** option in step 6, select **Create crawl schedule**.

Result

If you skipped step 6, your new content crawl is added to the system's crawl queue. The system runs your crawl when it has resources available to do so.

If you selected the **Make recurring** option in step 6, your new crawl appears in the external content connector editor's **Manage crawls** tab. For partial crawls, the list entry includes a link with the ID of the chosen start point. Selecting this link displays the record for the start point, showing its label as well as its ID.

What to do next

You can monitor your content crawl's status or review its results using the crawl history and analytics. For details on these metrics, see Review crawl history for an external content connector.

If you need to cancel your running content crawl, see Cancel a running external content connector crawl.

Activate delta content crawling for an external content connector

Reduce content crawl time for your external content connector by enabling delta content crawls, which ignore unchanged content items from your source system.

Before you begin

You must have completed a full content crawl for the selected external content connector. For details on creating and running content crawls, see Create a content crawl for an external content connector.

Note: If you upgraded from a previous version of the External Content Connectors application, you must have completed a new full content crawl in the new version. Full content crawls completed in a previous version don't retrieve all of the metadata needed for delta content crawling.

Role required: sn_ext_conn.xcc_admin

About this task

The External Content Connectors application supports delta content crawl operations for some external content connectors. When running a delta content crawl, an external content connector only examines, retrieves, and indexes newly added, changed, or deleted items from its source system. By ignoring unchanged items, delta content crawling can significantly reduce the time taken to crawl content from the source system. This means you can refresh your searchable content more often by running delta content crawls between your scheduled full or partial content crawls.

Note: Delta content crawls don't replace full content crawls. They're supplemental crawls that enable you to refresh searchable content more frequently in between full content crawls.

To enable delta content crawling for an external content connector, perform the following steps.

Note: In External Content Connectors 9.0, delta content crawls are only supported for the Google Drive external content connector.

For full details on how delta content crawls behave and operate, see Delta content crawls for external content connectors.

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Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the external content connector that you want to enable delta content crawling for.
3. In the connector editor's **Manage crawls** tab, navigate to the **Default crawl schedules** section and select the **Delta content crawls** option.
4. Select **Save default schedules**.

Result

The system activates delta content crawling for the selected external content connector.

You can deactivate delta content crawling for the connector by deselecting the **Delta content crawls** option, then selecting **Save default schedules**.

Create a user permission crawl for an external content connector

Retrieve security principals from your source system with a user permission crawl. Run the crawl as a one-time task or schedule it to run on a recurring basis.

Before you begin

To run crawls for external content connectors, your instance must have inbound mTLS support enabled. For details on verifying that this feature is enabled on your instance, see Verify whether inbound mTLS support is activated for your instance.

Role required: sn_ext_conn.xcc_admin

About this task

Many external content connectors support preservation of access permissions for searchable content retrieved from their source systems. To use this feature, search administrators must retrieve security principals from the connector's source system by creating a user permission crawl for the connector.

The user permission crawl maps security principals retrieved from the source system to users in your ServiceNow AI Platform® instance. Each user that corresponds to a source system security principal inherits content access permissions specified for that security principal.

A user permission crawl may take hours or days to complete, depending on the number of security principals defined in your source system.

You can run a user permission crawl as a one-time task or set it to recur on a scheduled basis.

Note: Starting with External Content Connectors 6.0, the External Content Connectors application allows a maximum of five connector crawls to run simultaneously on your ServiceNow AI Platform® instance. Both content crawls and user permission crawls count against this limit. You can schedule and run external content connector crawls throughout the day to avoid overlap, or create a Customer Service and Support case at https://support.servicenow.com/now to request a limit increase.

For external content connectors that support user permission crawls, you can also start a user permission crawl by selecting the **Update user** *`permissions`* option when creating or scheduling a content crawl. For more details on this option and defining content crawls, see Create a content crawl for an external content connector.

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Note: The following external content connectors don't retrieve user or group access permissions. You can't run user permission crawls for these connectors.

- Adobe Experience Manager as a Cloud Service external content connector
- Amazon S3 external content connector
- Cornerstone external content connector
- ServiceNow® product documentation external content connector
- Slack external content connector
- Trello external content connector
- Webcrawler external content connector

The Atlassian Confluence Cloud external content connector only retrieves permissions for Confluence Cloud users who have made their email addresses visible to all users. To allow user permission, each Confluence Cloud user must set their own email visibility to **Anyone** as explained in the https://support.atlassian.com/confluence-cloud/docs/configure-user-email-visibility/ Atlassian support resource.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the connector that you want to create a user permission crawl for.
3. In the connector editor's Create crawls tab, select **Crawl user permissions**.
   The Crawl user permissions dialog box appears, with the **User** *permission* **crawl** tile selected.
4. **Optional:** To make your user permission crawl run on a recurrent schedule, select the **Make recurring** option, then specify the schedule options.

   Note: If the **Make recurring** option isn't shown, the external content connector automatically schedules its own user permission crawls. In this case, you can only run one-time user permission crawls.

   a. Enter a name for your scheduled crawl.

   b. Select **Daily** or **Weekly** as the frequency for your scheduled crawl.

   c. If you selected **Weekly** as the crawl frequency, select the options for the days of the week that you want your scheduled crawl to run on.

   d. Specify when you want the system to run your scheduled crawl by entering its start time and selecting a time zone.
   The start time should be in *hh:mm a* format, where the format parameters have the following values:
   - *hh*: a one- or two-digit hour between 0 and 12 inclusive, such as `5` or `11`
   - *mm*: a two-digit minute between 00 and 59 inclusive, such as `15` or `37`
   - *a*: any of `A`, `a`, `AM`, or `am` for AM (morning) or any of `P`, `p`, `PM`, or `pm` for PM (afternoon)

5. Create your new user permission crawl by selecting the appropriate option.

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- If you skipped step 4, select **Crawl user permissions**.
- If you selected the **Make recurring** option in step 4, select **Create user crawl schedule**.

Result
If you skipped step 4, your new user permission crawl is added to the system's crawl queue. The system runs your crawl when it has resources available to do so.

If you selected the **Make recurring** option in step 4, your new crawl appears in the external content connector editor's **Manage crawls** tab.

What to do next
You can monitor your user permission crawl's status or review its results using the crawl history and analytics. For details on these metrics, see Review crawl history for an external content connector and Review user permissions for an external content connector.

If you need to cancel your running user permission crawl, see Cancel a running external content connector crawl.

Cancel a running external content connector crawl

Cancel a running crawl for an external content connector to prevent the connector from retrieving and feeding additional documents or access permissions to AI Search for indexing.

Before you begin
Role required: sn_ext_conn.xcc_admin

About this task
Search administrators can manually cancel external content connector crawls that are in the running state. When you cancel an external content connector's crawl, the connector stops retrieving documents or access permissions and feeding them to AI Search for indexing.

Procedure
1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the external content connector whose crawl you want to cancel.
3. In the connector editor, select the **Crawl history** tab.
4. Select the crawl history record for the currently running crawl.
   The running crawl has state **In progress**.
5. Select **Cancel**, then select **Yes, cancel** in the Cancel crawl dialog box.

> **Note:** Canceling a crawl may take a minute or two. During this time, the connector may continue to retrieve searchable content and security principals and feed them to AI Search.

Result
The selected external content connector halts its crawl.

Refresh content for an external content connector

Refresh searchable content and metadata, including unchanged items, for an external content connector by running a one-time full or partial content crawl.

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Before you begin

To run crawls for external content connectors, your instance must have inbound mTLS support enabled. For details on verifying that this feature is enabled on your instance, see Verify whether inbound mTLS support is activated for your instance.

Role required: sn_ext_conn.xcc_admin

About this task

You can force an external content connector to refresh some or all of its searchable content and metadata by performing a one-time content crawl. This crawl ignores the change history for crawl locations and retrieved items. As a result, unchanged items that would normally be skipped are instead retrieved and reindexed along with changed items.

⚠ **Warning:** Refreshing content for a connector may take hours or days to complete, depending on the scope and scale of the content crawl.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the external content connector that you want to refresh searchable content and metadata for.
3. In the connector editor's Settings tab, select **Index management**.
4. In the Force reindex section, select **Force reindex all content**.
5. Select **Start reindex crawl**.

Result

The external content connector runs a one-time full content crawl to refresh its searchable content and metadata.

This one-time crawl appears in the connector's crawl history with name **Force reindex** so you can monitor its status. For details on monitoring crawl history, see Review crawl history for an external content connector.

Reviewing external content connector crawl results and analytics

Search administrators can review crawl histories and analytics for external content connectors to gain a better understanding of what they're crawling. Administrators with the ais_high_security_admin elevated role can also review user and group permission mappings for external content connectors to verify that source system security principals are correctly associated with ServiceNow AI Platform® users.

To access the External Content Connectors application, navigate to **All** > **External Content Connectors** > **External Content Admin Home**. From this page, you can select an individual connector to review its crawl history, its analytics, or its user permissions.

Review crawl history for an external content connector

View crawl history records for an external content connector. Drill into a crawl history record to see metrics and alerts for the crawl in question.

Before you begin

Role required: sn_ext_conn.xcc_admin

About this task

The crawl history page for an external content connector shows a crawl history record for each crawl run by the connector.

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You can select an individual crawl history record to examine a crawl in more detail, viewing counts of items found, discovered, and updated as well as performance data and a list of any alerts encountered during the crawl.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the external content connector that you want to review crawl history for.
3. In the connector editor, select the **Crawl history** tab.
   The Crawl history section shows a record for each crawl run for the connector in the last 30 days.
4. **Optional:** To view more detailed metrics and alert messages for a specific crawl, select the crawl history record for that crawl.

   (Optional) On the Crawl details page, the About this crawl header section reports the crawl's status, its scope (full or partial), its cadence (whether it was scheduled or a one-time crawl), its start and end times and duration, and the ID of the user who started it. For a partial crawl, this section also shows a link with the label of the chosen start point. Selecting this link displays the record for the start point, showing its ID as well as its label.

   The Statistics tab shows details about items encountered during the crawl.

   - For content crawls, this tab shows document statistics and crawl speed in documents per second. For explanations of these document statistics, see Statistics for external content connector content crawls.
   - For user permission crawls, this tab shows permission statistics and crawl speed in users per second. For explanations of these permission statistics, see Statistics for external content connector user permission crawls.
5. **Optional:** To view entries for any alerts encountered during the crawl, navigate to the Alerts tab.

   (Optional) Alerts include informational, debugging, warning, and error events logged by the connector during its crawl.

   Each alert entry includes a type and a scope. The alert type indicates the importance of the recorded event, as follows.

   Debugging

   A debugging alert provides detailed insights into the connector's behavior during a crawl.

   Informational

   An informational alert indicates the successful operation of connector functionality during a crawl.

   Warning

   A warning alert indicates that the connector encountered an unusual behavior or potentially problematic issue during a crawl.

   Error

   An error alert indicates that the connector encountered a problem that disrupted its functionality during a crawl.

   The alert scope indicates what the recorded event affected.

   Single

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The event affected a single content item retrieved by the connector crawl.

Multiple

The event affected multiple content items retrieved by the connector crawl.

All

The event affected all content items retrieved by the connector crawl.

Crawl

The event affected the crawl job for the connector crawl.

6. To view details for an alert, select the **View Details** link for that alert entry.

Review analytics for an external content connector

Review analytics for an external content connector to gain insight into its crawl behavior.

Before you begin

Role required: sn_ext_conn.xcc_admin

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors list, select the record for the external content connector that you want to review analytics for.
3. In the connector editor, select the Analytics tab.
   For details on the available analytics metrics, see Analytics for external content connectors.

Review indexing status for individual content items

View indexing status, selected fields, errors, and user and group access permissions for individual content items using the Index inspector tool in the external content connector editor.

Before you begin

Roles required: sn_ext_conn.xcc_admin and ais_high_security_admin

Note: The ais_high_security_admin role is an elevated privilege role. To learn more about elevated privilege roles, see Elevated privilege roles. For details on the ais_high_security_admin elevated privilege role, see Assign roles to AI Search administrators and users.

About this task

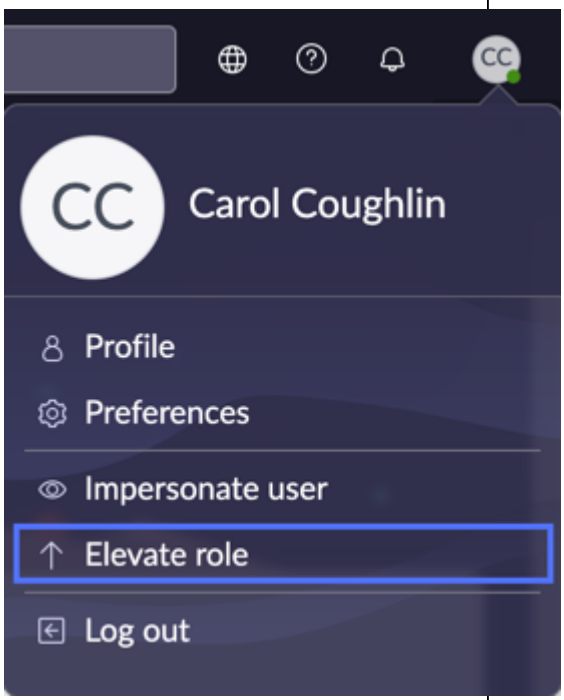
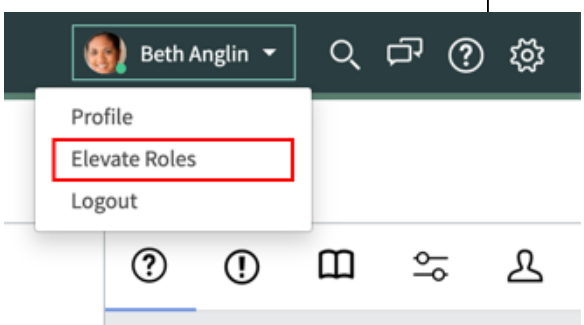
Use the index inspector tool to review individual content items retrieved by an external content connector. You can view an item's indexing status and see whether errors were encountered while retrieving and indexing it. View a content item's details to see its activity and selected fields, or to verify user access to the item in secure search.

Procedure

1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. If prompted to switch scope, select **Switch scope** and select the application scope specified in the prompt.
3. In the Connectors list, select the record for the external content connector whose content items you want to view indexing status for.
4. Elevate to the ais_high_security_admin role:

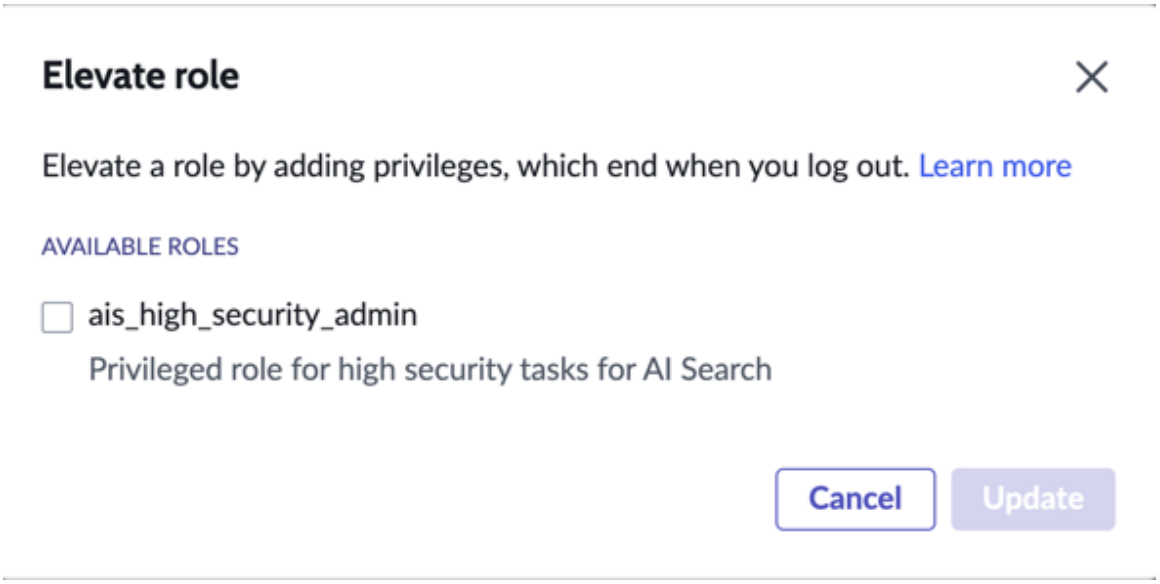
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a. Perform the appropriate action for your version of the UI:

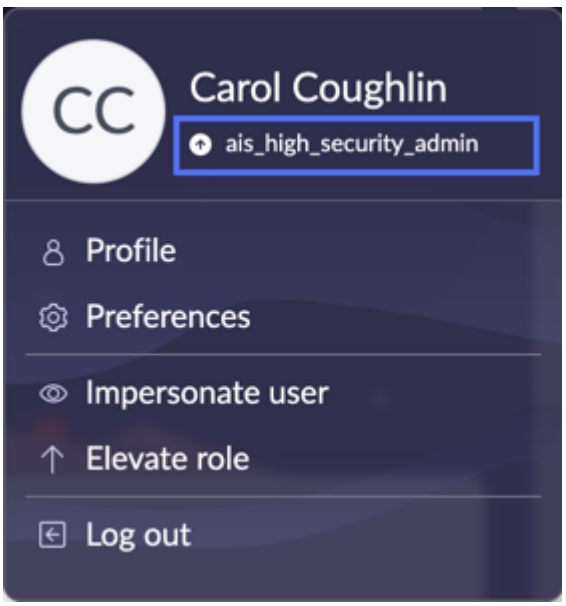
UI version	Action
Next Experience UI	In the banner frame, select the icon for your account to open the user menu, then select **Elevate role**. 
Core UI	In the banner frame, select your name to open the user menu, then select **Elevate Roles**. 

A dialog box appears, displaying a checklist of your available privileged roles.

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b. In the dialog box, select the **ais_high_security_admin** option, then select **Update** (in Next Experience UI) or **OK**.
The page reloads and an elevated role indicator appears next to your user name in the user menu. In Next Experience UI, this indicator displays the names of the active privileged roles.
In Core UI, the indicator displays the elevated role icon .



Note: When the page reloads, any unsaved edits are lost.

5. In the connector editor, select the Index inspector tab.
6. In the **Before you access the index inspector** modal window, select the **I agree to the following disclaimer** option, then select **Access index inspector**.
7. Enter the title, source system URL, or ID for a content item that you want to view indexing status for, then select **Search index** or press Enter.
The system displays a list of content items that match your search. Each content item entry shows indicators for the item's indexing status and the number of errors encountered while retrieving and indexing it.

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8. **Optional:** To view additional details on a content item, select its **Open details** link.
   The system displays details on the item including its URL, ID, and selected fields. A **Who can see this document?** section shows users and groups with access to the item (for secure search). An **Activity** section reports the item's status from the most recent connector crawl and its last seen and last indexed timestamps. This section also displays entries for the most recent errors encountered while retrieving or indexing the item. You can select **See all** to view more error entries.

   Note: You can hide index fields so they're not displayed on documents in the index inspector. For details on hiding fields in the index inspector, see Hide fields in the index inspector.

9. **Optional:** To verify whether a specific user can see the content item in search results, perform these steps.

   a. In the **Who can see this document?** accessibility section, enter a user's email address into the **Test with user** field.

   b. Select the Search icon.
   The system reports whether the specified user can view the content item in search results or not.

Hide fields in the index inspector

Suppress display of fields on documents in the index inspector.

Before you begin
Role required: admin

About this task
By default, the index inspector displays fields found on indexed documents that match your search. Administrators can hide sensitive fields in the index inspector by setting the value of the *glide.ais.externalcontent.query_api_denied_fields* system property. Hidden fields don't appear in index inspector search results.

To learn about the index inspector, see Review indexing status for individual content items.

Procedure
1. Navigate to the System Property [sys_properties] table's list view.
   a. Select **All**.
   b. In the **Filter** field, enter `sys_properties.list`.
   c. Press Enter.
2. Search for the *glide.ais.externalcontent.query_api_denied_fields* system property.
   - If the system property already exists, open it.
   - If the system property doesn't exist, select **New**, then enter the following field values on the System Property form.

Field	Value
Name	glide.ais.externalcontent.query_api_denied_fields

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Field	Value
Type	string

3. In the system property record's **Value** field, enter a comma-separated list of names for fields that you want to hide in the index inspector.
   As an example, you might enter `title,url` to hide the **Title** and **URL** fields for indexed records.

   The default value is empty, meaning that no fields are hidden.

   Note: Field names are case sensitive and all in lowercase. Don't capitalize field names when entering them.

4. To save your changes, select **Save** or **Update**.

Result
The specified fields are hidden when viewing indexed documents in the index inspector.

Review user permissions for an external content connector

View user and group access permissions retrieved by an external content connector, and see how the connector maps those permissions to your ServiceNow AI Platform® instance's users.

Before you begin
Role required: ais_admin, plus ais_high_security_admin to view full user permission details

About this task
The User permissions list for an external content connector shows user and group access permissions retrieved from the connector's source system, along with details of how those permissions are mapped to your ServiceNow AI Platform instance's users. Review this information when you want to verify user and group permission mappings for your external content connector.

To view the user permissions list, you must elevate to the ais_high_security_admin role. If you don't elevate or don't have this role, you can see the number of user permissions created for the external content connector, but can't see details of those user permissions.

Note: The following external content connectors don't retrieve user or group access permissions. You can't run user permission crawls for these connectors.

- Adobe Experience Manager as a Cloud Service external content connector
- Amazon S3 external content connector
- Cornerstone external content connector
- ServiceNow® product documentation external content connector
- Slack external content connector
- Trello external content connector
- Webcrawler external content connector

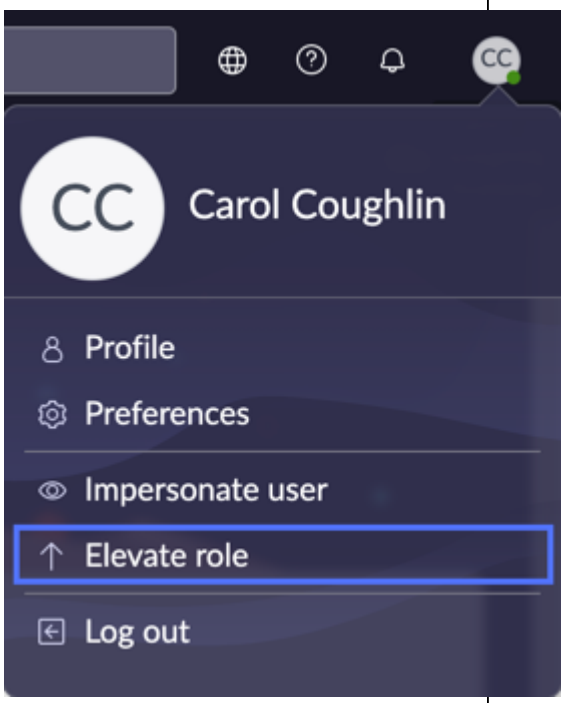
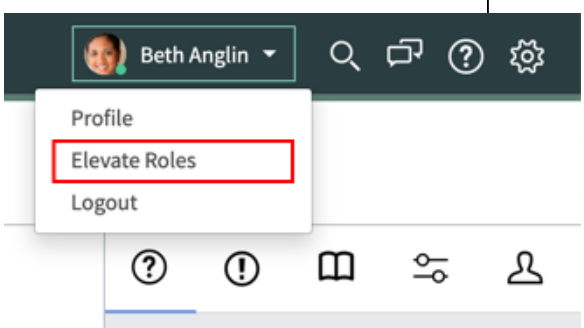
The Atlassian Confluence Cloud external content connector only retrieves permissions for Confluence Cloud users who have made their email addresses visible to all users. To allow user permission, each Confluence Cloud user must set their own email visibility to **Anyone** as explained in the https://support.atlassian.com/confluence-cloud/docs/configure-user-email-visibility/ Atlassian support resource.

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Procedure

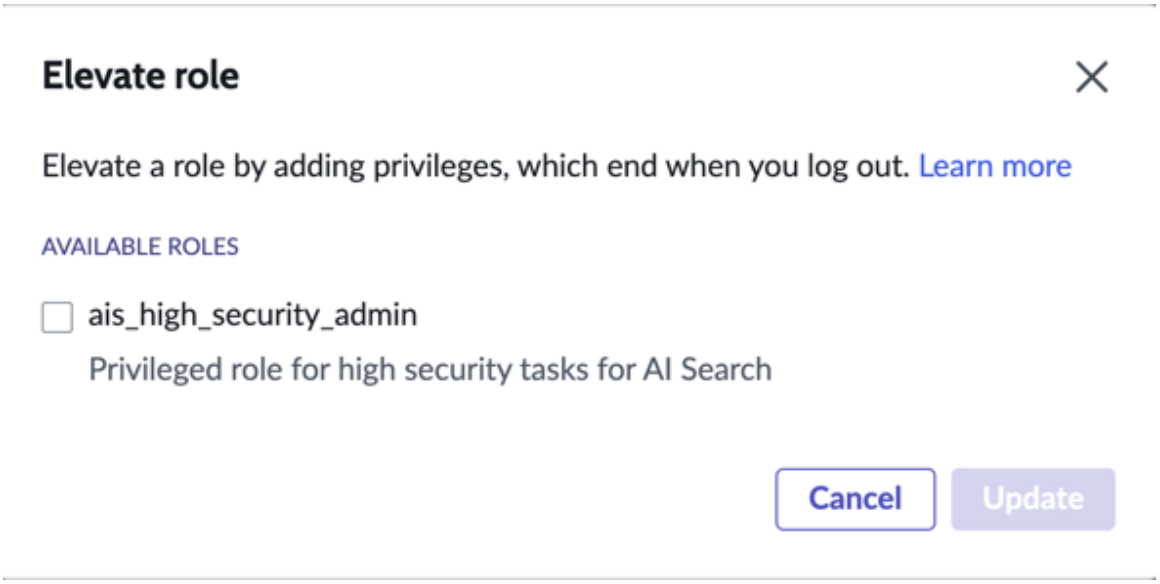
1. Navigate to **All** > **External Content Connectors** > **External Content Admin Home**.
2. In the Connectors pane, select the record for the external content connector whose user permissions you want to review.
3. In the connector editor, select the **User** *permissions* tab.
   The User permissions page shows the total count of user permissions created by the external content connector.
4. **Optional:** Elevate to the ais_high_security_admin role:

   a. Perform the appropriate action for your version of the UI:

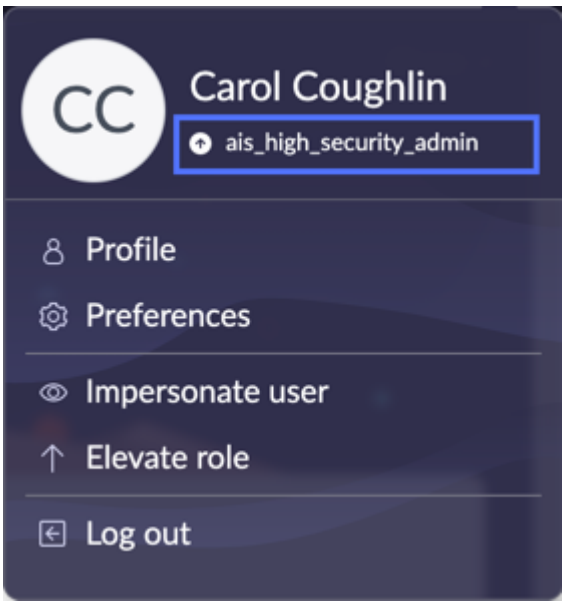
UI version	Action
(Optional) Next Experience UI	In the banner frame, select the icon for your account to open the user menu, then select **Elevate role**. 
Core UI	In the banner frame, select your name to open the user menu, then select **Elevate Roles**. 

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A dialog box appears, displaying a checklist of your available privileged roles.



b. In the dialog box, select the **ais_high_security_admin** option, then select **Update** (in Next Experience UI) or **OK**.
The page reloads and an elevated role indicator appears next to your user name in the user menu. In Next Experience UI, this indicator displays the names of the active privileged roles.
In Core UI, the indicator displays the elevated role icon .



Note: When the page reloads, any unsaved edits are lost.

5. **Optional:** Review the entries in the User permissions list.
Each entry shows a single ServiceNow AI Platform user along with the external user mapped to them and any external group memberships associated with that external user. You can sort and filter the list to locate entries of interest.

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External Content Connectors reference

Reference information for the External Content Connectors application and for individual external content connectors.

Components installed with External Content Connectors

The External Content Connectors plugin installs a connector administrator role and a scheduled job to remove unused OAuth 2.0 credentials for deleted external content connectors.

Roles installed

Role title [name]	Description	Contains roles
External Content Connectors administrator [sn_ext_conn.xcc_admin]	Manages configuration settings for the External Content Connectors application, including the following: • Creates, reads, updates, and deletes external content connectors • Creates, reads, updates, and deletes crawl settings for external content connectors • Tests and validates external content connector configuration and crawl settings • Schedules and runs external content connectors • Views external content connector crawl logs This is a granular admin role that enables you to complete external content connector configuration tasks without requiring the full admin role. To learn more about how granular admin roles improve security and efficiency, see Granular admin roles.	• ais_admin • connection_admin • sn_kmf.cryptographic_manager

Scheduled jobs installed

Scheduled job	Description
Clean orphan external content oauth credential	Deletes stored OAuth 2.0 credentials for external content connectors that have been deleted. By default, this job runs once per day. Users with the admin role can change the schedule for this job: 1. Navigate to **All** > **System Scheduler** > **Scheduled Jobs** > **Scheduled Jobs**. 2. Open the **Clean orphan external content oauth credential** record.

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Scheduled job	Description
	3. Set the desired schedule for the job by modifying the **Trigger type**, **Time zone**, and **Run time** field values. 4. Select **Update**.

Binary file extensions supported in External Content Connectors

Connector administrators can restrict the binary file types an external content connector retrieves by specifying file extensions in inclusion or exclusion filters.

Binary file type	Supported file extensions
Comma-Separated Values	`.csv`
Email Message	• `.eml` • `.msg`
Extensible Markup Language	`.xml`
Hypertext Markup Language	• `.htm` • `.html`
Microsoft Excel	• `.xls` • `.xlsm` • `.xlsx` • `.xltx`
Microsoft PowerPoint	• `.potx` • `.pps` • `.ppsx` • `.ppt` • `.pptm` • `.pptx`
Microsoft Word	• `.doc` • `.docm` • `.docx` • `.dotx`
Plain Text	`.txt`
Portable Document Format	`.pdf`
Rich Text Format	`.rtf`

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Note: Some external content connectors include support for indexing searchable content and metadata from additional content formats, such as video transcriptions or source-specific native document formats. Examples of source-specific native document formats include `.aspx` pages in Microsoft SharePoint Online and Wiki pages in Atlassian Confluence Cloud.

For details on defining file-extension inclusion and exclusion filters for external content connectors, see Configuring crawl settings for external content connectors.

Binary files may be retrieved as content items, or as attachments found on content items. The exact behavior depends on the connector type.

Important: The maximum file size for binary files is 25 MB. Keyword indexing processes up to the first 1 MB of text. Use semantic search to index data containing between 1 MB and 25 MB of text.

Statistics for external content connector content crawls

Each crawl history entry for an external content connector's content crawl includes statistics about the documents (items or files with searchable content and metadata) retrieved by the crawl.

Document statistics entries

Document statistics entry	Description
Indexed	Score shows the total number of new and updated items that were successfully processed by the content crawl and are included in the AI Search index.
Added	Score shows the number of items that were added to the AI Search index by the content crawl.
Updated	Score shows the number of items that were updated in the AI Search index by the content crawl.
Deleted	Score shows the number of items that were deleted from the AI Search index by the content crawl.
Unchanged	Score shows the number of items that were processed by the content crawl without requiring changes to the AI Search index.
Error	Score shows the number of Error-level alerts recorded for the content crawl. Select **Details** to view the Alerts tab for the crawl history entry.
Warning	Score shows the number of Warning-level alerts recorded for the content crawl. Select **Details** to view the Alerts tab for the crawl history entry.
Discovered	Score shows the total number of items that were processed during the content crawl. Chart shows the number of items processed by the content crawl for each result status shown in the following Discovered item result statuses table.

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Discovered item result statuses

Result status	Description
Indexed	The number of items successfully added to or updated in the AI Search index.
Not indexed	The number of items that weren't added to or updated in the AI Search index because of processing errors.
Skipped	The number of items that weren't added to or updated in the AI Search index for any of the following reasons: **The item doesn't satisfy indexing limits** The connector skips an item when any of these conditions is true. • The item is a binary file/attachment with an unsupported format. For the list of supported binary file formats, see Binary file extensions supported in External Content Connectors. • The item is a binary file/attachment that exceeds the maximum file-size limit (25 MB). • The connector has reached its content indexing limit. **The item is excluded by an inclusion or exclusion filter in the connector's crawl settings** The connector skips an item if it or its location is not included in your specified inclusion filter. It similarly skips an item if it or its location is explicitly included in your specified exclusion filter. **The item doesn't satisfy the connector's content validation rules** Individual external content connectors have their own validation rules that determine what content they accept for indexing. As an example, the Webcrawler external content connector rejects HTML pages that don't have a title element. The connector skips any item that doesn't satisfy its content validation rules.

Performance statistics entry	Description
Average crawl speed	Score shows the average speed of the content crawl, expressed in documents (items) processed per second of crawl time.

Statistics for external content connector user permission crawls

Each crawl history entry for an external content connector's user permission crawl includes statistics about the permissions (user and group-membership security principals) retrieved by the crawl.

Permission statistics entry	Description
Mapped users	Score shows the number of users from the source system that were successfully mapped to users on your ServiceNow AI Platform® instance by the user permission crawl.

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Permission statistics entry	Description
Unmapped users	Score shows the number of users from the source system that weren't mapped to users on your ServiceNow AI Platform instance by the user permission crawl.
Error	Score shows the number of Error-level alerts recorded for the user permission crawl. Select **Details** to view the Alerts tab for the crawl history entry.
Warning	Score shows the number of Warning-level alerts recorded for the user permission crawl. Select **Details** to view the Alerts tab for the crawl history entry.
Users	
Users	Score shows the total number of users that were added to the AI Search index by the user permission crawl.
Discovered	Score shows the number of users that were processed by the user permission crawl.
Deleted	Score shows the number of users that were deleted from the AI Search index by the user permission crawl.
Groups	
Discovered	Score shows the number of group-membership permissions that were processed by the user permission crawl.
Deleted	Score shows the number of group-membership permissions that were deleted from the AI Search index by the user permission crawl.

Performance statistics entry	Description
Average crawl speed	Score shows the average speed of the user permission crawl, expressed in users processed per second of crawl time.

Analytics for external content connectors

Metrics that show how your external content connector has run over time.

You can view analytics for an external content connector by navigating to the **Analytics** tab in the connector editor. For more details on this procedure, see Review analytics for an external content connector.

Date range

Use the **Date range** interactive filter to specify the reporting time period for all external content connector analytics reported on this page.

Document statistics

Metric	Description
Documents indexed	*Timeseries visualization:* Graph shows the number of items (documents with searchable content and metadata) the connector retrieved that were included in the AI Search index for each date in the selected date range.
Quota usage	*Single score with progress bar:*

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Metric	Description
	• First value shows the number of items the connector retrieved that are currently included in the AI Search index. **Note:** Deleted items aren't deducted from this quota usage figure. • Second value shows the indexing limit for the connector. • Progress bar shows how close the connector is to its indexing limit.
New	*Single score with trend:* • Score shows the number of new items the connector added to the AI Search index in the selected date range. • Trend shows how this score changed in the selected date range as compared with the previous time period.
Updated	*Single score with trend:* • Score shows the number of items the connector updated in the AI Search index (to reflect content and metadata changes) in the selected date range. • Trend shows how this score changed in the selected date range as compared with the previous time period.
Discovered	*Single score with trend:* • Score shows the number of items the connector processed in the selected date range. • Trend shows how this score changed in the selected date range as compared with the previous time period.
Indexed	*Single score with trend:* • Score shows the number of items the connector fed to the AI Search index in the selected date range. • Trend shows how this score changed in the selected date range as compared with the previous time period.
Deleted	*Single score with trend:* • Score shows the number of items the connector deleted from the AI Search index in the selected date range. • Trend shows how this score changed in the selected date range as compared with the previous time period.
Skipped	*Single score with trend:*

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Metric	Description
	• Score shows the number of items skipped due to processing errors in the selected date range. **Note:** This number doesn't include items excluded by crawl settings specified for the connector. • Trend shows how this score changed in the selected date range as compared with the previous time period.

Crawl statistics

Metric	Description
Crawls executed	*Timeseries visualization:* • Histogram area chart shows the number of successful crawls run for the connector for each date in the selected date range. • Histogram line chart shows the number of failed crawls run for the connector for each date in the selected date range. Select an individual crawl's name from the histogram legend to hide its entries from the histogram or display them again.
Document crawls	*Dual score:* • First value shows the number of successful content crawls run for the connector in the selected date range. • Second value shows the number of failed content crawls run for the connector in the selected date range.
User permission crawls	*Dual score:* • First value shows the number of successful user permission crawls run for the connector in the selected date range. • Second value shows the number of failed user permission crawls run for the connector in the selected date range.

Reassign the External Content Connectors Service Account user to the global domain

Fix issues with missing user permissions for users on your instance by reassigning the External Content Connectors Service Account user to the global domain.

Symptom

On an instance with domain separation configured, if you assign the External Content Connectors Service Account user to a domain other than the global domain, external content connector user permission crawls can only map source system user and group permissions correctly for instance users assigned to the same domain. Instance users assigned to other domains are unable to search private content indexed by your external content connectors.

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Cause

The External Content Connectors application includes an External Content Connectors Service Account user. When you run user permission crawls for your external content connectors, this user account assigns the retrieved source system user and group permissions to users on your instance.

When the External Content Connectors Service Account user is assigned to a domain other than the global domain, it can only map source system user and group permissions to instance users in its own domain. Instance users assigned to any other domain don't get correctly mapped source system user and group permissions and can't search private content retrieved by your external content connectors.

As an example, suppose you have an instance with domain separation configured where you assign the External Content Connectors Service Account user to the PKD/BR 1.0/VK domain. With this configuration, external content connector user permission crawls can only map source system user and group permissions to your instance users who are assigned to the same PKD/BR 1.0/VK domain. Instance users assigned to any other domain don't get source system user and group permissions mapped correctly and can't search private content retrieved by your external content connectors.

Resolution

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Open the user record with ID **xcc-connector-service-account** and name **External Content Connectors Service Account**.
3. On the User form, configure the layout to show the **Managed domain**, **Domain**, and **Domain Path** fields.
   To learn how to show or hide fields on a form, see Configuring the form layout.
4. Select the **Managed domain** option.
5. Set the value of the **Domain** field to `global`.
   This is the default value for the field.
6. Set the value of the **Domain Path** field to `/`.
   This is the default value for the field.
7. Select **Update**.
   The External Content Connectors Service Account user is reassigned to the global domain with default settings.
8. Update your user permission mappings by rerunning user permission crawls for your affected external content connectors.

Contextual search

Contextual search is a search technology that focuses on the context of the query as well as the intent of the user in order to fetch the most relevant set of results. Contextual search displays related results within a form or record producer based on the text you enter in a field.

Example use cases for Incident:

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- An agent, working on an Incident record, can use contextual search to find and attach knowledge articles, order a catalog item on behalf of the caller, or search for an article and link it to a related incident or problem.
- A user, creating an Incident via the Service Portal, can see related catalog items that the user can order. The user can also view related knowledge articles to help them resolve the issue on their own without involving the service desk operators.

Contextual search helps with incident deflection for the following areas:

- Incident record producers: deflecting incidents by helping end users resolve issues before they raise an incident.
- Incident forms: helping service desk staff resolve incidents quickly by providing relevant knowledge.
- Incident email notifications: helping end users resolve their incidents themselves without requiring manual intervention from service desk staff.

Contextual search plugin

Contextual search plugin is activated in the base system.

Contextual search plugin

The Contextual Search plugin (com.snc.contextual_search) is activated by default in the base system. This plugin activates related plugins if they aren't already active.

Before you begin

Role required: admin

About this task

If the related plugins aren't activated, Contextual Search activates the plugins.

Plugins for Contextual Search

Plugin	Description
JSON Service request/response model [com.snc.application.json_service]	Core components and helpers for a JSON request/response model. Includes JSON and XML transports for NG and GlideAjax support. An extension of the processor framework.
Contextual Search — Internal [com.snc.contextual_search.internal]	An internal plugin component for Contextual Search.
GraphQL Schema for Contextual Search [com.snc.contextual_search.graphql]	Provides GraphQL schema for contextual search services.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

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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.

Related topics

List of plugins (Brazil)

Components installed with Contextual Search

Several types of components are installed with the activation of the Contextual Search plugin (com.snc.contextual_search), including tables and user roles.

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

Tables installed

Table	Description
Available Search Resource [cxs_search_resource]	List of available search resources used in configuration of searches.
Email Configuration [cxs_table_email_config]	List of email notifications configured to have contextual search results attached.
Record Producer Configuration [cxs_rp_config]	List of record producers configured to have contextual search.
Relevant Document [cxs_relevant_doc]	Groups the Relevant Document Detail individual recorded actions by search session. **Note:** A new search session group is created every time you create or open a record or reload the page. For more information on the table, refer Feedback information on contextual search.
Relevant Document Detail [cxs_rel_doc_detail]	List of individual recorded actions. For example, **Preview**, **This helped**, **Attach**, or **Order**. For more information on the table, refer Feedback information on contextual search.
Search Context	Search contexts for contextual search.

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Table	Description
[cxs_context_config]	
Search Field [cxs_table_field_config]	All form fields that have contextual search configured to it.
Search Resource [cxs_search_res_config]	Search resource configurations for the related searcher.
Search Resource Context Configuration [cxs_res_context_config]	Conditions for this search context that restrict the results returned to a user.
Search Resource Context Property [cxs_res_context_config_prop]	Property values for search resource context configuration.
Search Resource Property [cxs_search_res_config_prop]	Property values for search resource searcher configuration.
Searcher Configuration [cxs_searcher_config]	Details of available search configurations.
Table Configuration [cxs_table_config]	Lists the tables configured for table configurations.
Wizard Configuration [cxs_wizard_config]	Lists the tables configured for wizard configurations.
Base UI Configuration [cxs_ui_config_base]	Common elements for the record producer, table, and wizard configurations.

Contextual search concepts

Contextual search concepts help you to understand different contextual search components that are used in the documentation, configuration, and user interface. Understanding of the concepts makes it easier for you to comprehend the interconnection between the components.

Contextual search uses terms and concepts that can differ from industry norms due to the unique nature of the ServiceNow platform. Contextual search includes the following concepts and components:

Search resource

Resource that can be searched such as Catalog or Knowledge Articles. As the resources are scripted and contain JavaScript, they can combine results from more than one table.

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Note:

- ServiceNow provides pre-defined scripted search resources. You can't create, update, or delete search resources.
- A search resource uses the Zing search engine to search a table.

Searcher

A single search resource or a group of search resources that can be searched. For example, the Knowledge and catalog searcher contains Knowledge Articles, Questions and Catalog Items as its search resources.

Note: ServiceNow provides pre-defined searchers. You can't create, update, or delete searchers.

Additional resources

An additional resource is a single table source with query conditions that you can search. Additional resources aren't scripted as you search from a single table. For example, Resolved Incidents (within the last six months).

Note:

- ServiceNow provides pre-defined additional resources. You can't create or delete additional resources, but can update additional resources to better match your organization requirements. For example, you can update the condition and description for Resolved Incidents (Last 6 months) to change it to Resolved Incidents (Last 3 months).
- An additional resource performs the search based on the type of the source:
  - Table: The Zing search engine to used to search a table.
  - Predictive Intelligence similarity : Search is based on similarity and not on the Zing search engine.

Search result display fields

Defines the fields whose values are displayed with the search result of an additional resource. The fields can include **Assigned to**, **Opened by**, and **State**. The search result display fields appear at the bottom of a search result record.

Note: ServiceNow provides pre-defined search result display fields. You can't create or delete additional resources, but you can update search result display fields to better match your organization requirements. For example, change which field to use as a title or the description or which fields to show at the bottom of a search result record.

Search context

Brings together a searcher and additional resources (if any) that can be searched.

Note: ServiceNow provides pre-defined search contexts. You can also create search contexts.

Searcher text

Defined in a search context, a searcher text specifies a user-friendly group name for the searcher. When a searcher contains more than one search resource, a group name is used to represent that group of search resources. For example, the Incident Deflection search context uses a searcher that searches Knowledge

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Articles, Questions and Catalog Items. The user-friendly searcher group name that represents all of them is Knowledge & Catalog.

Search on tab

Defined in the search context, **Search on tab** specifies when a contextual search should start the search. The different scenarios when search is performed are:

- If you select the **Search on tab** check box, the search only runs when you update and leave the search field (recommended).
- If you clear the **Search on tab** check box, the search runs when you pause typing.

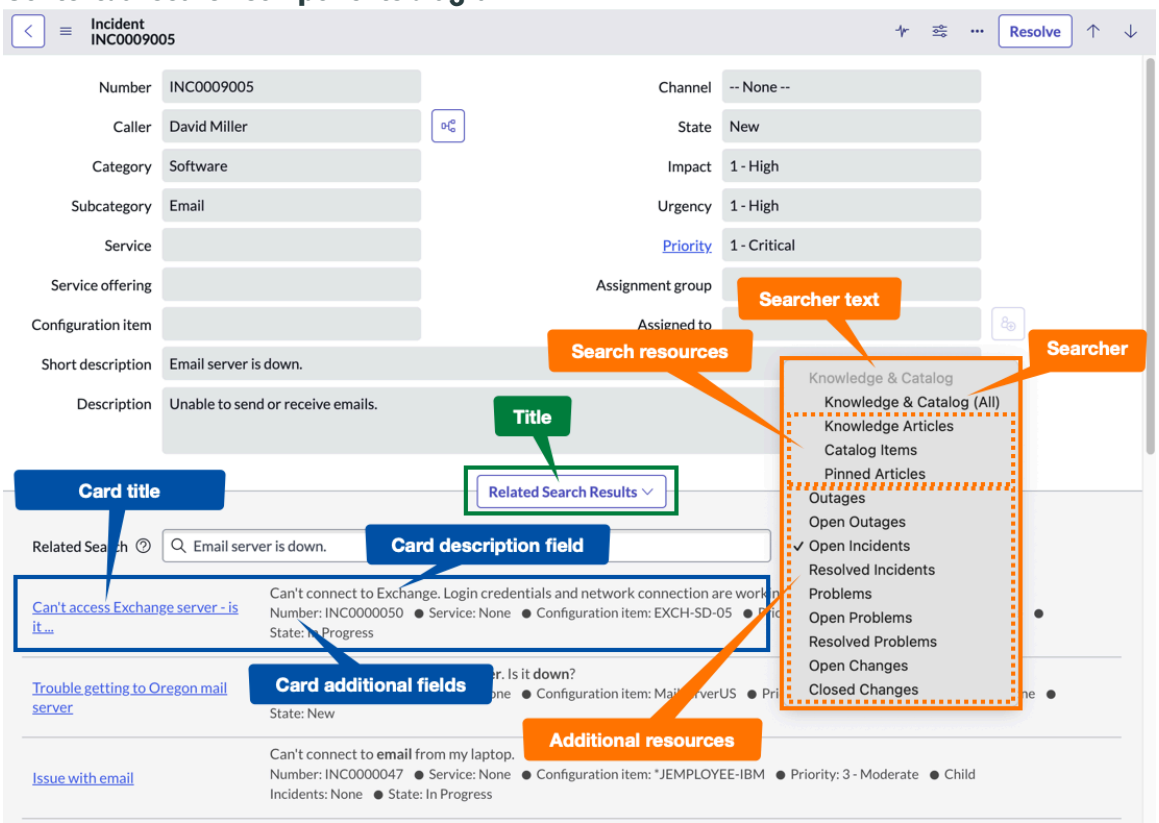
Search actions

Specifies the actions for each such results. For example, for catalog items, the search action is **Order** and for knowledge articles it's **Attach**. All sources have the **This helped** action.

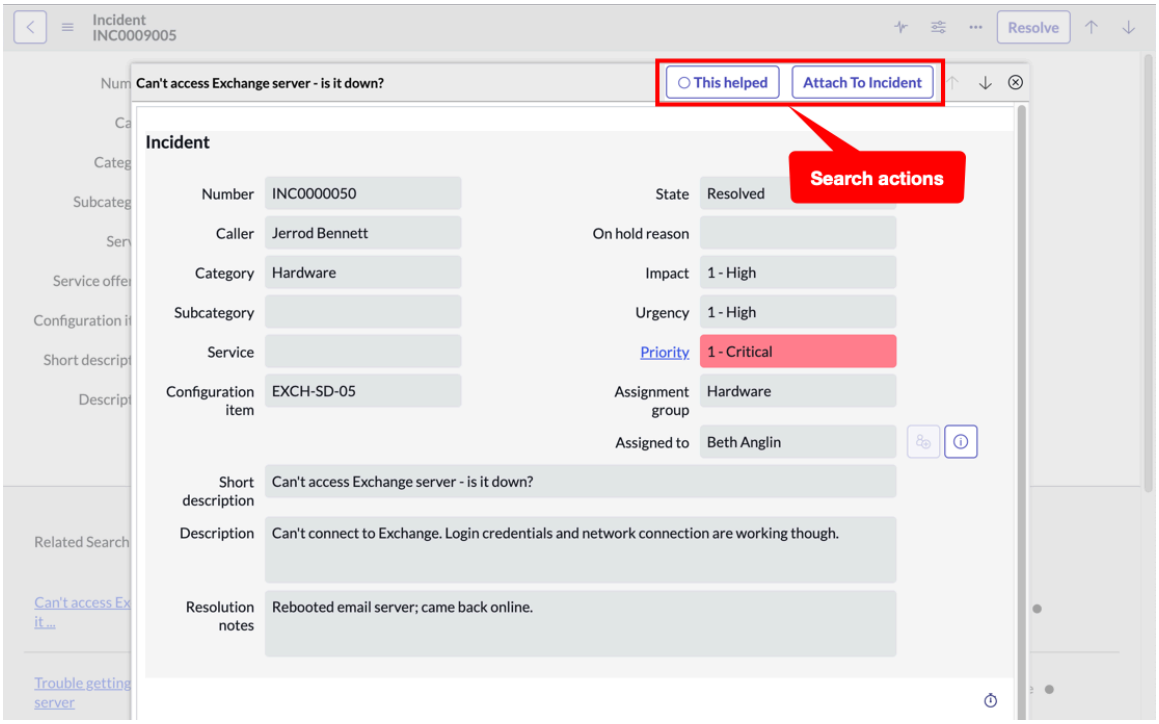
Contextual search components diagram

The contextual search components diagram helps you to understand how contextual search concepts work together to perform a search and from which module you can configure the components.

Contextual search components diagram



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Components	Navigation
Table configuration	You can configure the search title and the form using the **All** > **Contextual search** > **Table configuration** module. For more information, refer Configure table for a contextual search.
Search Contexts	You can configure the searcher text and the searcher using the **All** > **Contextual search** > **Search Contexts** module. For more information, see Define a search context.
Search Result Display Configurations	You can configure the card title, card description field, and card additional fields using the **All** > **Contextual search** > **Search Result Display Configurations** module. For more information, see Edit search resource display field record.
Search Action Configurations	You can configure the search actions using the **All** > **Contextual search** > **Table Configuration** > **Search Action Configurations** module. For more information, see Modify or disable search actions available for contextual search. To add conditional logic such as filtering results by record state, see Define a search context

Tip: To filter contextual search results by conditions such as problem state or record category, configure conditions in the Search Contexts module. For details, see Define a search context.

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Configuring contextual search

You can configure different components of contextual search.

Contextual search properties

Contextual search properties are used to control the fields that you can search from and the number of results displayed per page.

The contextual search properties are available at **Contextual Search** > **Properties**.

Properties for contextual search

Property label	Description
Default value for maximum number of search results returned for table and record producer configurations [com.snc.contextual_search.result.default.limit]	Default value for the maximum number of search results returned when you create a table or record producer configuration. By default, the value is 10.
Number of characters that a configured field needs before triggering a search [com.snc.contextual_search.min_length]	Number of characters that contextual search requires before triggering a search based on the text entered in the search field. By default, the value is set to 3 characters. This property also applies to the Agent Assist search.
Number of milliseconds that a configured field will wait before triggering a search [com.snc.contextual_search.wait_time]	Number of milliseconds that contextual search waits before triggering a search based on the text entered in the search field. By default, the value is set to 1,000 milliseconds (one second).
Records returned above this threshold will log warnings [com.snc.contextual_search.result.threshold]	Triggers a warning message within the system log whenever more than this number of results are returned in a search. This logging helps if you're experiencing performance issues because of large searches. By default, the value is set to 10,000 results.
When a Form configuration is created a search field with a name matching this property will be automatically created [com.snc.contextual_search.widget.form.default_field]	The default field that is used for searching when you create a table configuration. By default, the value is set to short_description.
Collapse the search results widget when creating a new record in a form [com.snc.contextual_search.widget.form.open_collapsed_new_records]	When the value is set to true and you create a record, the search results widget is collapsed to save space. By default, the value is set to false.
Collapse the search results widget when opening an existing record in a form [com.snc.contextual_search.widget.form.open_collapsed_existing_records]	When the value is set to true and you open an existing record, the search results widget is collapsed to save space. By default, the value is set to true.

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Properties for contextual search (continued)

Property label	Description
	Note: The property applies only to existing records and not to new records.
Auto expand the search results widget when search field updates in a form [com.snc.contextual_search.widget.form.expand_on_search_field_update]	When the value is set to true and you update the search field in a form, the search results widget automatically expands and runs the search. By default, the value is set to true.
Show meta data on form contextual search results [com.snc.contextual_search.widget.form.show_meta_data]	When the value is set to true, each search result includes additional metadata below each result record. By default, the property is set to true. • For Knowledge articles, you configure the metadata fields to display by modifying Knowledge search properties. As an example, you can display the article's author, article number, and knowledge base name. For details on Knowledge search properties, see Knowledge Management properties. • Configure the search result display fields for other resources by editing search result display configurations. For details on search result display configuration settings, see Edit search resource display field record.
Always force a relative link in the cxs_new_window UI Page [com.snc.contextual_search.cxs_new_window.force_relative_link]	The property ensures that only relative links open from the contextual search modal window. By default, the property is set to true. When the value is set to true, a link opened from the contextual search modal window is forced to be a relative link. When the value is set to false, a relative or external link can be opened from the contextual search modal window. To review this property in the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

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Properties for contextual search (continued)

Property label	Description
	Note: The contextual search window is displayed in the core UI.

Define a search context

Define where agents can search for a particular resource. You can specify that the search resources are predefined or additional resources outside the system.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Contextual Search** > **Search Contexts**.
2. Select **New**.
3. On the form, fill in the fields.

Search Context form

Field	Description
Name	Unique name of the search context.
Short description	Brief summary of the context.
Searcher	Lookup icon ( ) to select a searcher for this context. The searcher determines the information source to search. ○ Catalog only: Provides search results from service catalog items. ○ Knowledge and catalog: Provides search results from knowledge articles and service catalog items. ○ Knowledge only: Provides search results from knowledge articles. ○ Knowledge, Discussions and pinned: Provides search results from knowledge articles, pinned knowledge articles, and ServiceNow Community. ○ Knowledge, pinned knowledge and catalog: Provides search results from knowledge articles, pinned knowledge articles, and service catalog items. ○ Knowledge and pinned knowledge: Searches knowledge articles and pinned knowledge articles. ○ Knowledge, Pinned, Catalog: Provides search results from Knowledge, Pinned Knowledge, and Catalog Items. ○ Knowledge and pinned: Provides search results from knowledge articles and pinned knowledge articles. ○ Pinned Knowledge only: Provides search results from pinned knowledge articles. **Note:** The **Searcher** field is optional. You can decide whether to show or hide sources from an agent.

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Field	Description
Searcher default search	List used to select a specific resource from the **Searcher** field to search as default.
Searcher text	Unique label for the searcher group that is used when there is more than one resource in the searcher.
Active	Option to activate the search context form.
Enable wildcard searches	Option to enable wildcard characters, such as * and %, for searches.
Search on tab	Option to determine when to perform the search. If you select this option, the search runs only when you enter text in a field and then leave the field. If you clear the check box, the search runs after you stop typing even though the cursor is still in the same field. **Note:** To display the search context in the Source selector on Platform, you must select this option. Search contexts with this option deselected don't appear in the Source selector on Platform.

The **Searcher default search** list is available if the **Searcher** is the default search. If an additional resource is the default search, you see the **Set Searcher as the Default Search** related link. For information on how to set the default source for search context, see Set the default source for search context.

4. Select and hold (or right-click) the form header and select **Save**.

Configure table for a contextual search

Configure the options for the contextual search that a table performs.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Contextual Search** > **Table Configuration** and click **New**.
2. On the form, fill in the fields.

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Table Configuration form

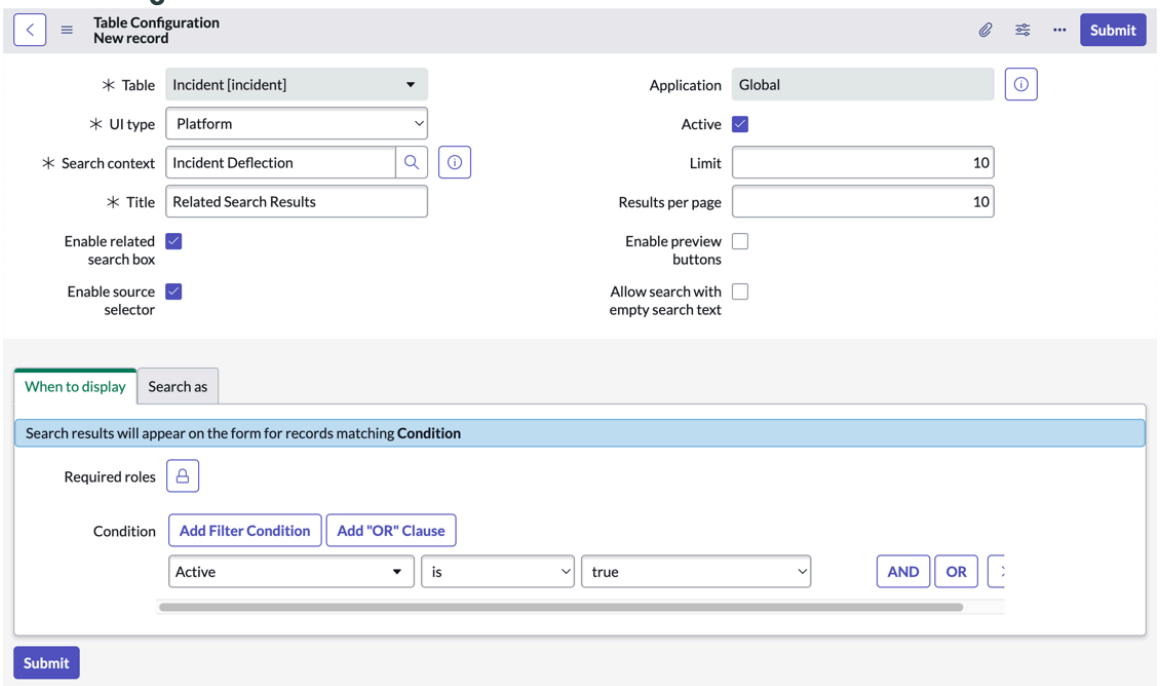
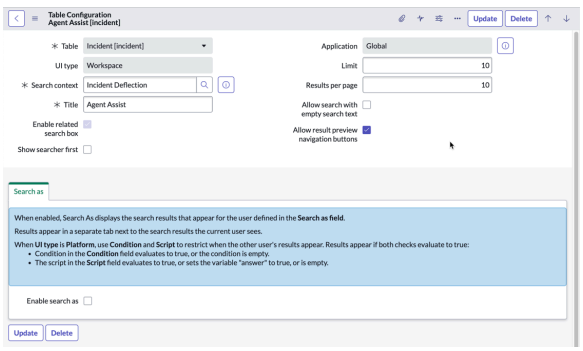
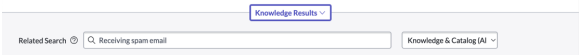


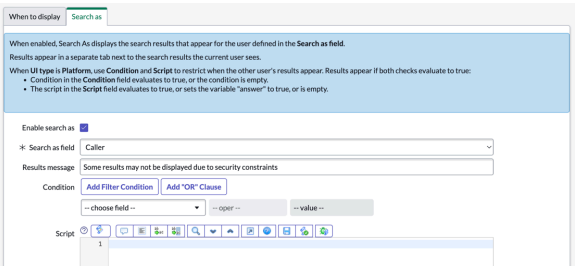
Table Configuration fields

Field	Description
Table	Name and label of the table associated with the form. For example, Incident [incident].
UI type	User interface differs depending on whether you use the table configuration for Platform or Workspace. **Note:** The **When to display** section appears only when you select *Platform* from **UI type**. 
Search context	Lookup icon to select a search context for which you are configuring the table.
Title	Unique title for the search results area that appears in the form. For example, if you enter `Knowledge results` as the value in this field, the related search area displays **Knowledge results** as the title. 

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Field	Description
Enable related search box	Option to show the related search box in the form.
Show searcher first	Option to display searcher resources before additional resources in the search context. This field appears only when you select *Workspace* from **UI type**.
Enable source selector	Option to show the list of search sources that you can search from. **Note:** This field appears only when you select **Enable related search box**.
Application	Application scope of the table configuration. The configuration is available for all applications or for scoped applications.
Active	Option to activate the table configuration.
Limit	Maximum number of search results returned.
Results per page	Number of results to display per page.
Allow expand/ collapse	Option to enable a user to collapse the search results in the form.
Enable preview buttons	Option to show a preview button (platform only) for each search result. The user can then use the preview button or the search result title to preview the result record. **Note:** The option is available from the London release. Clear the option to provide a more compact display for each search result.
Allow search with empty search text	Option to specify whether the search runs when there is no search text. **Note:** There is no search text when there is no **Search Field** specified or when there is a **Search Field** whose value is empty.
When to display	
Required roles	List of roles that grant access to the related search results widget from the table. Users must have one of these roles to see the widget when viewing the table.
Condition	Conditions that records must satisfy to appear as related search results. For example, set **[Active] [is] [true]** to only enable the active records as related search results.
Search as	

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Field	Description
Enable search as	Option to enable searching as a different user. The message box describes the settings available when you select this option.  For more information on using **Search as**, see Enable viewing of search results for the current and another selected user.

3. Click **Submit**.
   The Search Fields, Filter Configurations, Email Configurations, and Search Action Configurations related lists appear. By default, the **Short description** field is added to the Search Fields related list.

   Note: Search results only appear for Search Fields that are visible on the form.

Filter configuration for contextual search

Define filter configurations to map fields from the form to provide a more targeted search result set.

Create a filter configuration using mapping

Create filter conditions using mapping that you can associate with a table configuration. The search result displays result that meets the filter conditions.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Contextual Search** > **Table Configuration**.
2. Open a table configuration record on which to create the filter.
3. In the Filter Configurations related list, click **New**.
4. On the form, fill in the fields.

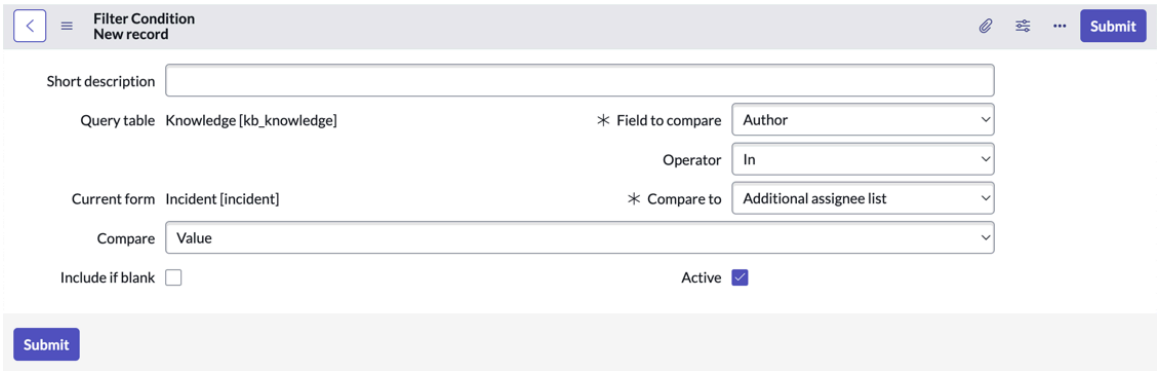
Filter Configuration form

Field	Description
Resource configuration	Lookup icon to select a resource such as Knowledge Articles.
Table configuration	[Read-only field]. Table for which you are applying the filter configuration.
Scripted filter	Option to define the filter using a script. **Note:** Clear this option since you want to create a filter configuration using mapping.

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Field	Description
Active	Option to activate the filter configuration.

5. Click **Submit**.
   The Table Configurations form appears.
6. In the Filter Configuration related list, click the filter that you have created.
7. In the Filter Conditions related list, click **New**.



8. In the form, fill in the fields.

Field	Description
Short description	Brief summary of the filter condition.
Query table	[Read-only] Table from which the filter condition is queried.
Current form	[Read-only] Form for which you created the filter conditions.
Field to compare	Value of the field is compared with the value of the **Compare to** field.
Operator	Operation that should be performed on the **Field to compare** and **Compare to** field.
Compare to	Value of the field is compared against the value of **Field to compare**.
Compare	Comparison of the field can be based on the actual value stored on the database or the value that is displayed on the interface. The available values are: **Value** and **Display Value**.
Include if blank	Option to include a condition when the value of the **Compare to** field is blank.
Active	Option to activate the filter configuration.

9. Click **Submit**.

Create a filter configuration using scripts

Create filter conditions using script that you can associate with a table configuration. The search result displays results that meet the filter conditions.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Contextual Search** > **Table Configuration**.
2. Open a table configuration record on which to create the filter.
3. In the Filter Configurations related list, click **New**.
4. On the form, fill in the fields.

Filter Configuration form

Field	Description
Resource configuration	Lookup icon to select a resource such as Knowledge Articles.
Table configuration	[Read-only field]. Table for which you want to apply the filter configuration.
Scripted filter	Check box to select if you want to enter scripts in the **Script** field. **Note:** The **Script** field appears only when you select **Scripted filter**.
Application	Application scope for your filter configuration.
Active	Check box to activate the filter configuration.

5. Enter a script corresponding to the resource configuration.

Note:

Use one of these dynamic filter scripts to set up your dynamic filter.

6. Click **Submit**.

Configure search resource context properties

Configure the properties to limit the search to a specific catalog or knowledge base. For example, if you want to limit the knowledge search to an IT knowledge base or a service catalog search to software service catalog, you can configure the properties.

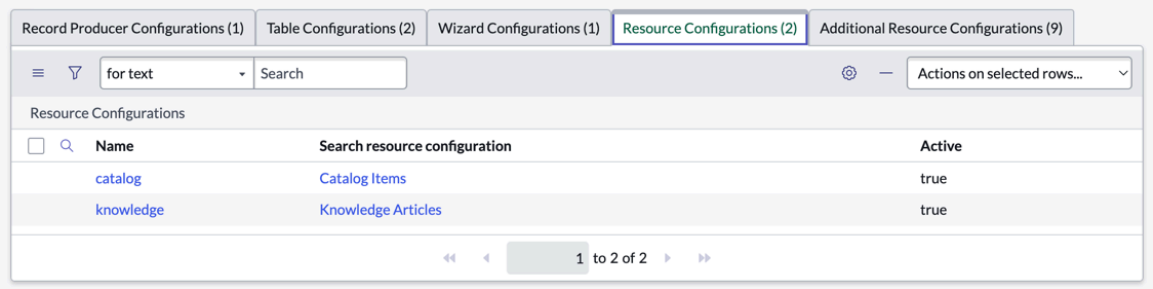
Before you begin
Role required: admin

About this task
The following procedure uses Incident Deflection as an example.

Procedure

1. Navigate to **All** > **Contextual Search** > **Search Contexts**.
2. Open the Incident Deflection record.
3. View the Resource Configurations related list.

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In the Resource Configurations related list, edit a resource configuration record to view the properties of the search resource.

The **knowledge** record displays the following knowledge resource configuration properties:

Knowledge resource configuration properties

Property	Description
Condition	Conditions to specify one or more knowledge bases to search.
Exclude pinned articles	Pinned article is a knowledge article. This property helps to decide whether to exclude pinned articles from knowledge base search or not.

Example use case: To restrict knowledge search to the IT knowledge base only, set the **Condition** property value to a condition that filters by your IT knowledge base sys_id (for example, `kb_knowledge_base=<sys_id_of_IT_KB>`).

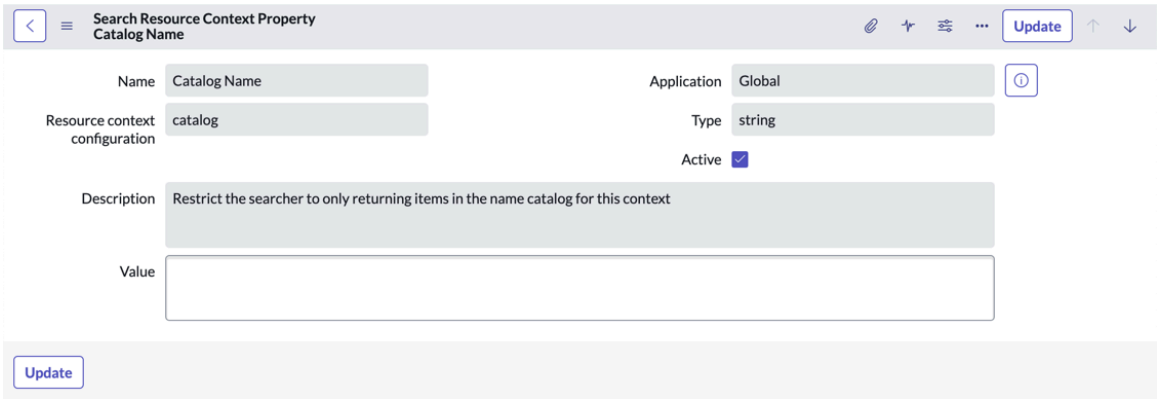
The **catalog** record displays the following catalog resource configuration properties:

Catalog resource configuration properties

Property	Description
Catalog name	A catalog name to search the catalog items.
Search operator	Value of the operator is used in the Zing search engine to instruct how to combine the AND and OR conditions when parsing the search string. The integration of the search strings helps to score the displayed results. The value can only be one of the following values: ○ **IR_AND_OR_QUERY** (the default): Display results with exact matches of all terms if the number of results is greater than the value of the *`glide.ts.query.and_or_limit`* property (default 0) or the (overriding) value of the table custom attribute *`text_search_and_or_limit`* (when added). Otherwise display results with any matches of any terms. ○ **IR_AND_QUERY**: Display results with exact matches of all terms only. ○ **IR_OR_QUERY**: Display results with any matches of any terms.

4. To edit the value of any property, select the property name and in the Search Resource Context Property form, update the **Value** field to `true` or `false`.

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5. Select **Update**.

Managing contextual search

Contextual search provides a way to display results that can be relevant to the issue for which you are creating an incident or requesting a service.

The section covers topics that help you to:

- Understand the actions that are taken on the search results.
- Use contextual search results in a record producer within the Service Portal or as an agent in a form.

Set a search context as default

If you use the contextual search REST API and don't specify which search context to use, the API uses the search context that you have set as default. The search context that you use in the API takes preference over the one marked as default.

Before you begin

Role required: admin

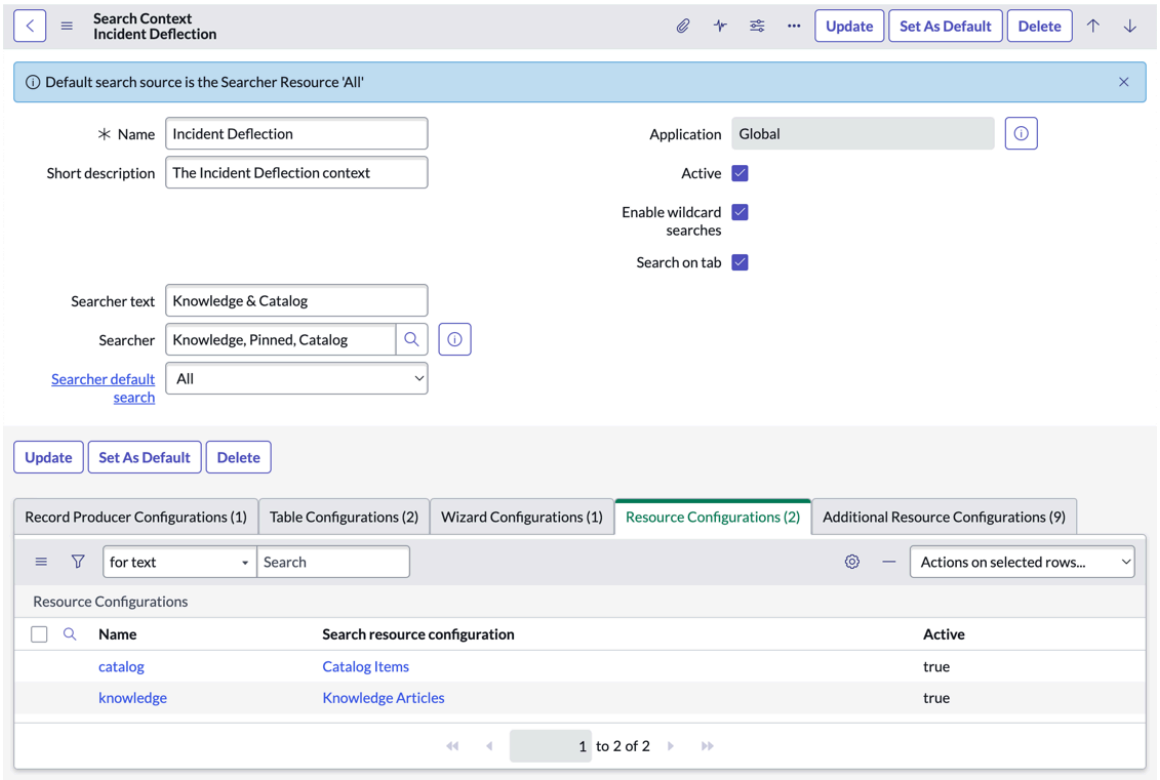
About this task

Procedure

1. Navigate to **All** > **Contextual Search** > **Search Contexts**.
2. Open the search context record that you want to set as default.

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3. Select **Set As Default**.



Set the default source for search context

You can decide which source to set as the default search source.

Before you begin

Role required: admin

About this task

- If you set an additional resource as the default source that source is considered the default search source.
- If you don't mark any additional resource as the default source, then the searcher source is considered the default search source.
- If you don't have a searcher and you have not marked any additional resource as the default source, the default is the additional resource with the lowest value in the **Order** field.

Procedure

1. Navigate to **All** > **Contextual Search** > **Search Contexts**.
2. Open the search context record to change its default source.
3. To set an additional resource as the default search source:
   a. Click the Additional Resource Configuration related list.
   b. Select and hold (or right-click) the search resource configuration record and click **Set as Default Search**.
4. To set a searcher source as the default search source:

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a. Click the **Set Searcher as the Default Search** related link to set **Searcher** as the default search source.

> **Note:** The **Set Searcher as the Default Search** related link appears only if an additional resource is the default search source.

b. To search all searcher sources or a specific searcher source from the list, select **All**.

> **Note:** The **Searcher default search** field appears only when the **Searcher** field contains more than one source.

View a searcher

View the details of a searcher to know which search resources it searches and which search contexts use it.

Before you begin

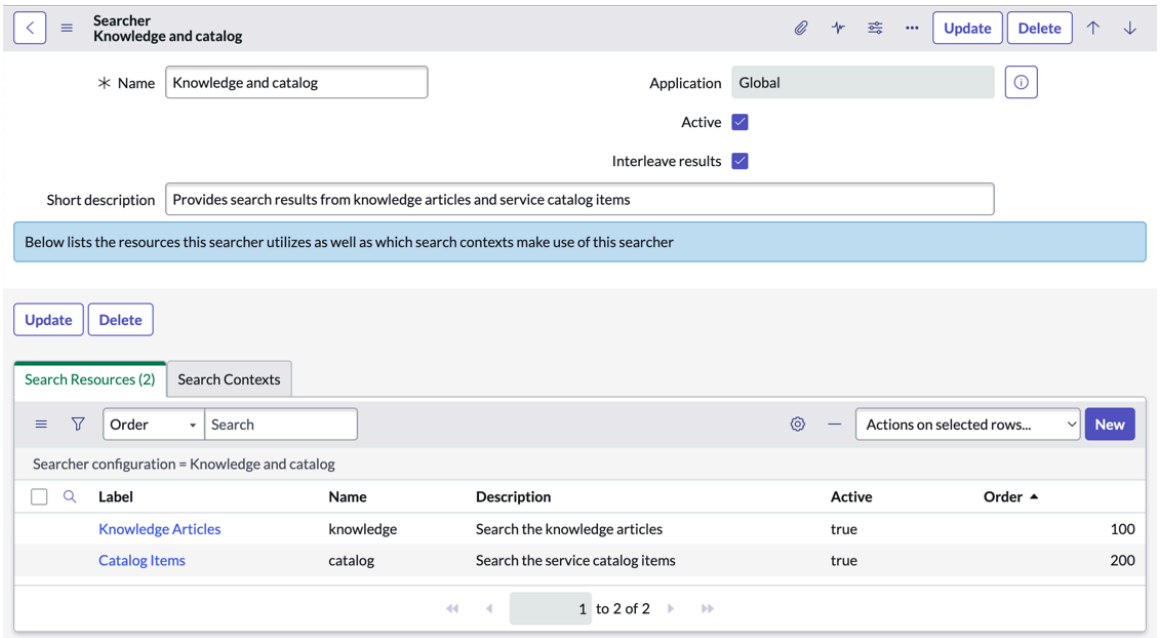
Role required: admin

About this task

ServiceNow provides pre-defined searchers. You can't create, update, or delete searchers.

Procedure

1. Navigate to **All** > **Contextual Search** > **Searchers**.
2. Edit a searcher record.



3. **Optional:** In the Search Resources related list, view the resources searched by this searcher.
4. **Optional:** In the Search Contexts related list, view all the search contexts that use this specific searcher.

Show the related search box in a form

Enable agents to search for related content without having to modify the text in the **Short description** field.

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Before you begin
Role required: admin

About this task
Starting in the London release, the related search box is available in forms by default for new instances. If your form doesn't display the related search box, you can follow this procedure to show it.

Procedure
1. Navigate to **All** > **Contextual Search** > **Table Configuration**.
2. Open the record for the table whose form you want to show the related search box on.
3. Select the **Enable related search box** option.
   The **Enable source selector** option appears.
4. Select and hold (or right-click) the header form and select **Save**.

Add multiple search fields for contextual search

Add multiple search fields if you want to search from a field other than the short description without using the related search box.

Before you begin
Role required: admin

About this task
Search results for the default search field appear automatically when you open a record. You can configure contextual search to search for results even when there is no text in the default search field. Search results in other associated fields only appear when you have updated content in those fields.

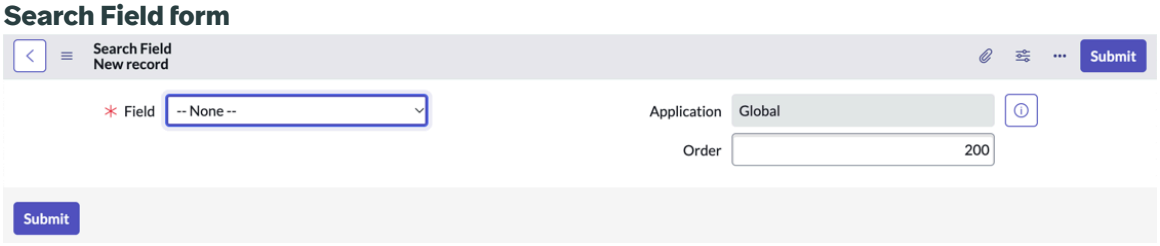
As an example, in the base system the **Short description** field is the default search field for the Incident form, so search results based on the field are displayed automatically. If you configure **Description** as an additional search field, contextual search displays search results for **Description** when you open a record with an empty **Short description**.

Warning: Adding large fields can significantly affect contextual search performance. For best results, only add search fields that are restricted to 100 or fewer characters.

Note: Search results only appear for Search Fields that are visible on the form.

Procedure
1. Navigate to **All** > **Contextual Search** > **Table Configuration**.
2. Open the table configuration record for which you want to add multiple search fields.
3. In the Search fields related list, click **New**.
4. On the form, fill in the fields.

Search Field form



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Field	Description
Field	The search field to be added in the search fields list. **Note:** You can only select a text field.
Application	Application scope of the table configuration. The configuration is available for all applications or for scoped applications.
Order	Order in which the field appears in the search fields list. If there are multiple search fields, this field indicates which searched field is executed first.

5. Click **Submit**.
   The new search field appears in the table configuration record's Search Fields related list.



What to do next
Use the **Default** column to set one search field as the default search field.

Add additional resources to the source selector of a form

Add additional resources when you want the user to search beyond Knowledge and Service Catalog search resources. For example, add additional resources for **Open Incidents**, **Resolved Incidents**, or **Similar Open Incidents**.

Before you begin
Role required: admin

About this task
Additional resources are pre-defined. An additional resource is either a searchable source table with query conditions or a reference to a Predictive Intelligence Similarity solution definition.

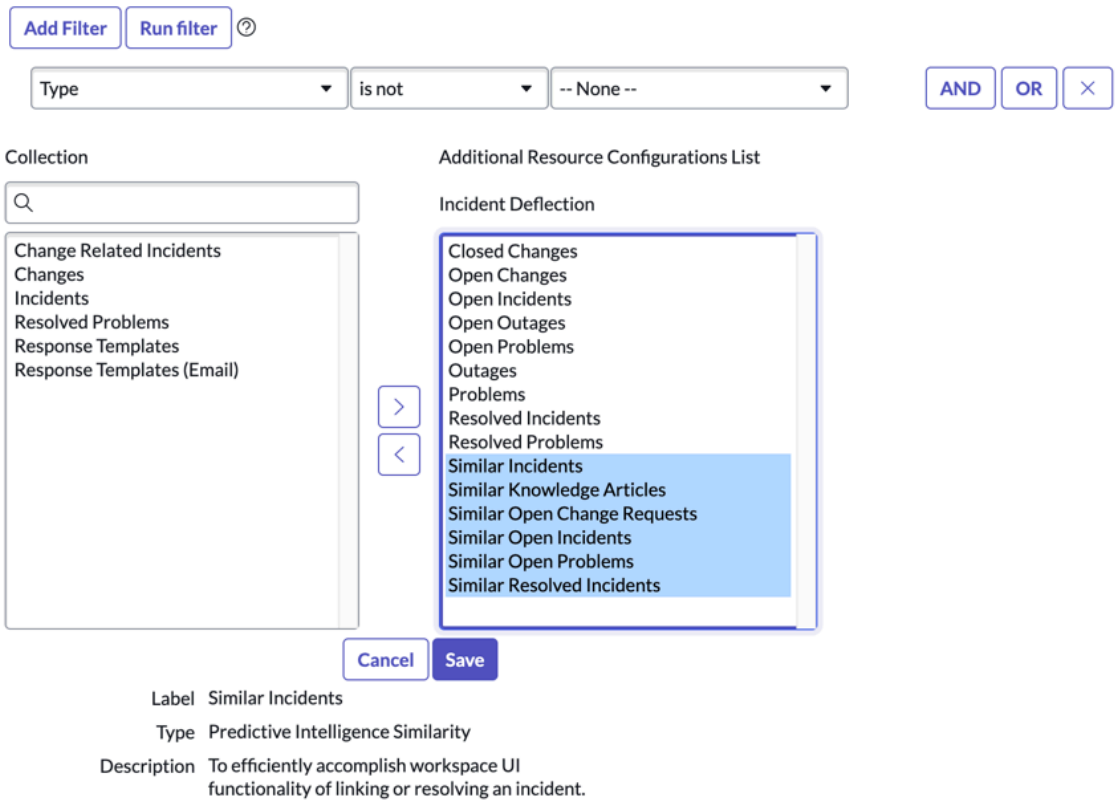
Note: You can only view the Predictive Intelligence resources if you are licensed for Predictive Intelligence and have activated Predictive Intelligence for Contextual Search.

Procedure
1. Navigate to **All** > **Contextual Search** > **Search Contexts**.
2. Open the search context record for which you want to see the additional resources.
3. In the Additional Resource Configurations related list, select **Edit**.
4. **Optional:** Filter the additional resources displayed in the **Collection** field by defining filter conditions and selecting **Run filter**.

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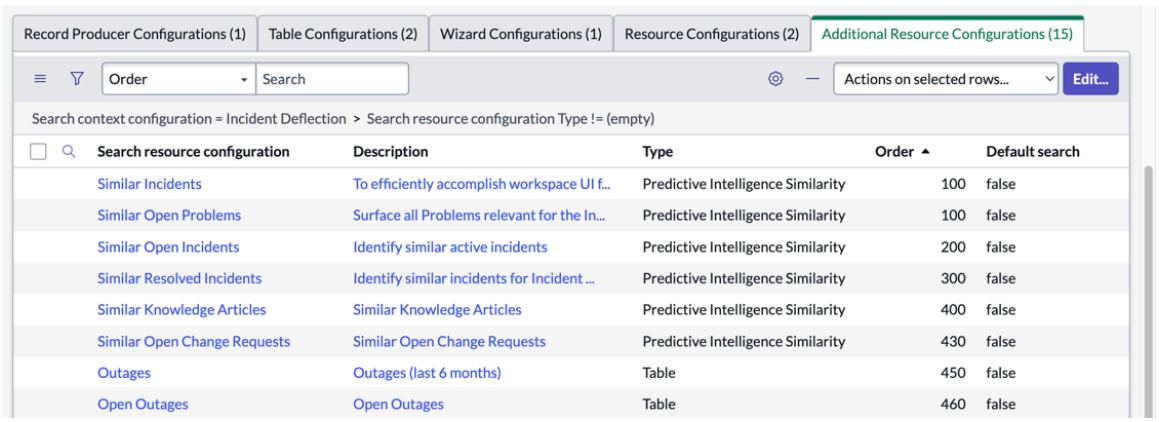
As an example, you can display only additional resources with the Predictive Intelligence Similarity type.

5. From the **Collection** field, move the required additional resources to the **Additional Resource Configurations List** field.
   For example, if you want to move additional resources whose type is **Predictive Intelligence Similarity**, then move **Similar Incidents**, **Similar Knowledge Articles**, **Similar Open Change Requests**, **Similar Open Incidents**, **Similar Open Problems**, and **Similar Resolved Incidents** from the **Collection** field to the **Additional Resource Configurations List** field.



Note: You can view the Predictive Intelligence sources only if you have license for Predictive Intelligence.

6. Select **Save**.
   The additional resources appear under **Additional Resource Configurations**.



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Related topics

- Additional search resources
- Similarity solution definitions

Edit search resource display field record

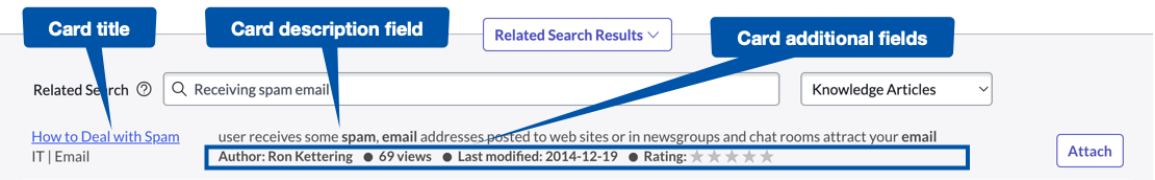
Use the search result display fields to provide titles, descriptions, and additional details for contextual search results.

Before you begin

Role required: admin

About this task

ServiceNow provides pre-defined additional resource or search sources to the user. You can't create or delete search result display configurations. Each table referred by an additional resource has a search result display configuration record. You can edit the values in the **Card title field**, **Card description field**, and the **Card additional fields**.



Note: Ensure that you select the contextual search property **Shows meta data on form contextual search results** to view **Card additional fields** in the search result.

Procedure

1. Navigate to **All** > **Contextual Search** > **Search Result Display Configurations**.
2. Open the search result display configuration record that you want to modify.

   Note: Search result display configuration records with the Platform UI type do not affect search for Knowledge articles, Catalog Items, or pinned articles. You can configure settings for platform Knowledge article searches using Knowledge search properties.

3. In the form, edit the fields.

Search Result Fields form

Field	Description
UI type	[Read-only] Interface where the values of the search result display fields should appear. It can appear in platform or workspace.
Table	[Read-only] Name of the table in which the values of the search result display fields should appear. For example, if you mention Incident [incident] as the table, then the additional resource field values appear in the search result for the Incident [incident] table.
Application	[Read-only] Application scope of the record. The record is available for all applications or for scoped applications.
Card View	

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Field	Description
Card icon	[Workspace] Icon name displayed on the search result card view.
Card label	[Workspace] Label displayed on the search result card view.
Card title field	[Platform or Workspace] Field whose value is shown as title in the search result title.
Card additional fields	[Platform or Workspace] List of field names displayed on the search result to provide more context to the search result. The card additional fields appear at the bottom of a search result record.
Card description field	[Platform or Workspace] Name of the field whose value is shown as the search result description.
Card display updated date	[Workspace] Check box to display the latest date on the search result card view.
Details View (only when the UI type is Workspace)	
Detail title field	Field whose value is shown as title in the search result detail view.
Detail link field	Field used as clickable link on the search result detail view.
Detail additional fields	List of field names displayed on the search result detail view.
Detail show last work note	Check box to display the latest work note on the search result detail view.

4. Select **Update**.

Specify fields for the Cxs_popup view

Edit the Cxs_popup view to specify the fields to be shown for addition resources in the preview window of a task record. The preview helps you with the summary of the record.

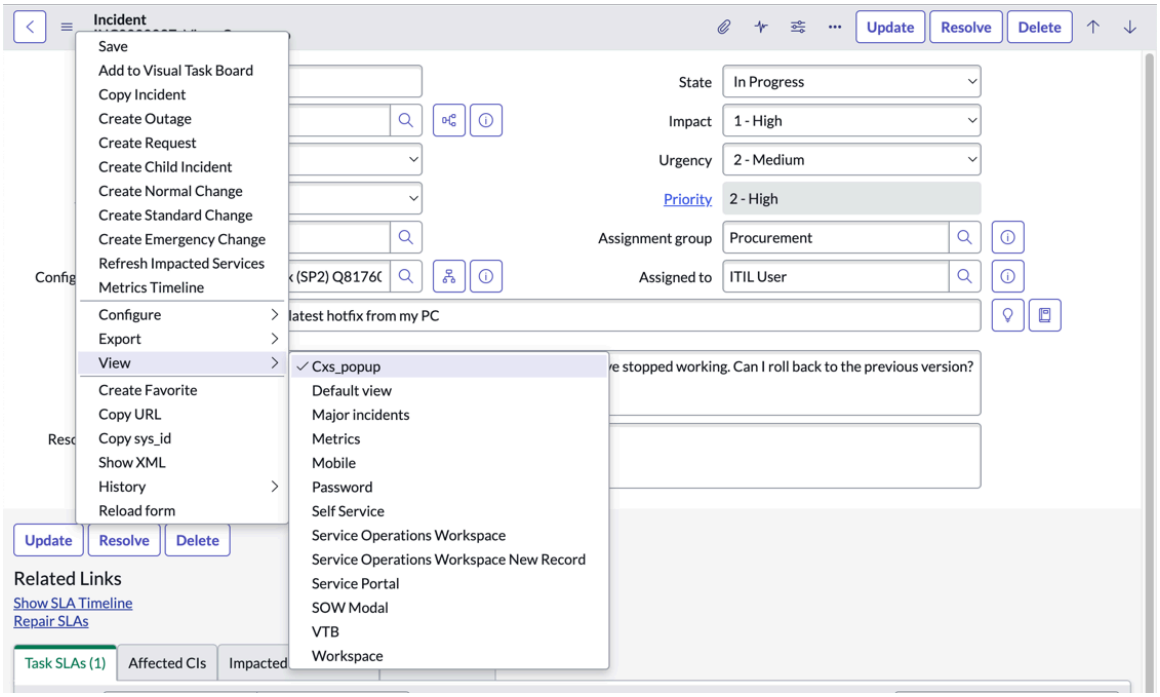
Before you begin
Role required: admin

About this task
If a Cxs_popup view isn't defined for the additional resource table, the sys_popup view is used. If the sys_popup view is also not defined, the default view is considered.

Procedure

1. Navigate to **Incident** > **All**.
2. Open the incident record whose view you want to change to Cxs_popup.
3. Select the additional actions icon ( ) and in the **View** option, select **Cxs_popup**.

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The view of the incident record changes to Cxs_popup view.

4. Select the additional actions icon ( ), and in the **Configure** option, select **Form Layout**.
5. From the **Available** list of fields, select the fields that you want to be available in the Cxs_popup view and move them under **Selected**.
6. Select **Save**.

Modify or disable search actions available for contextual search

Modify or disable search actions to restrict the actions that a user can perform on a search result.

Before you begin

Role required: admin

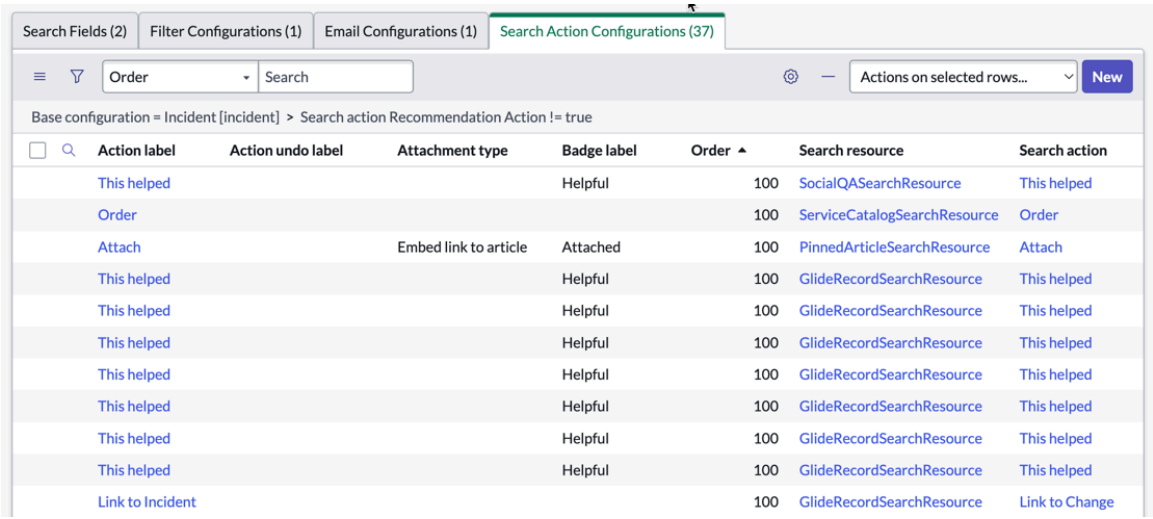
About this task

The Search Action Configurations related list contains all the available Search actions available for the selected Search context. Search actions can be modified and disabled but not deleted.

Procedure

1. Navigate to **All** > **Contextual Search** > **Table Configuration**.
2. Edit a table configuration record.
3. In the Search Action Configurations related list, view the list of search actions available for the contextual search.

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Action label	Action undo label	Attachment type	Badge label	Order	Search resource	Search action
This helped			Helpful	100	SocialQASearchResource	This helped
Order				100	ServiceCatalogSearchResource	Order
Attach		Embed link to article	Attached	100	PinnedArticleSearchResource	Attach
This helped			Helpful	100	GlideRecordSearchResource	This helped
This helped			Helpful	100	GlideRecordSearchResource	This helped
This helped			Helpful	100	GlideRecordSearchResource	This helped
This helped			Helpful	100	GlideRecordSearchResource	This helped
This helped			Helpful	100	GlideRecordSearchResource	This helped
This helped			Helpful	100	GlideRecordSearchResource	This helped
This helped			Helpful	100	GlideRecordSearchResource	This helped
Link to Incident				100	GlideRecordSearchResource	Link to Change

To disable a search action, set the value of **Active** to **false**.

Note: You can't disable the **This helped** action.

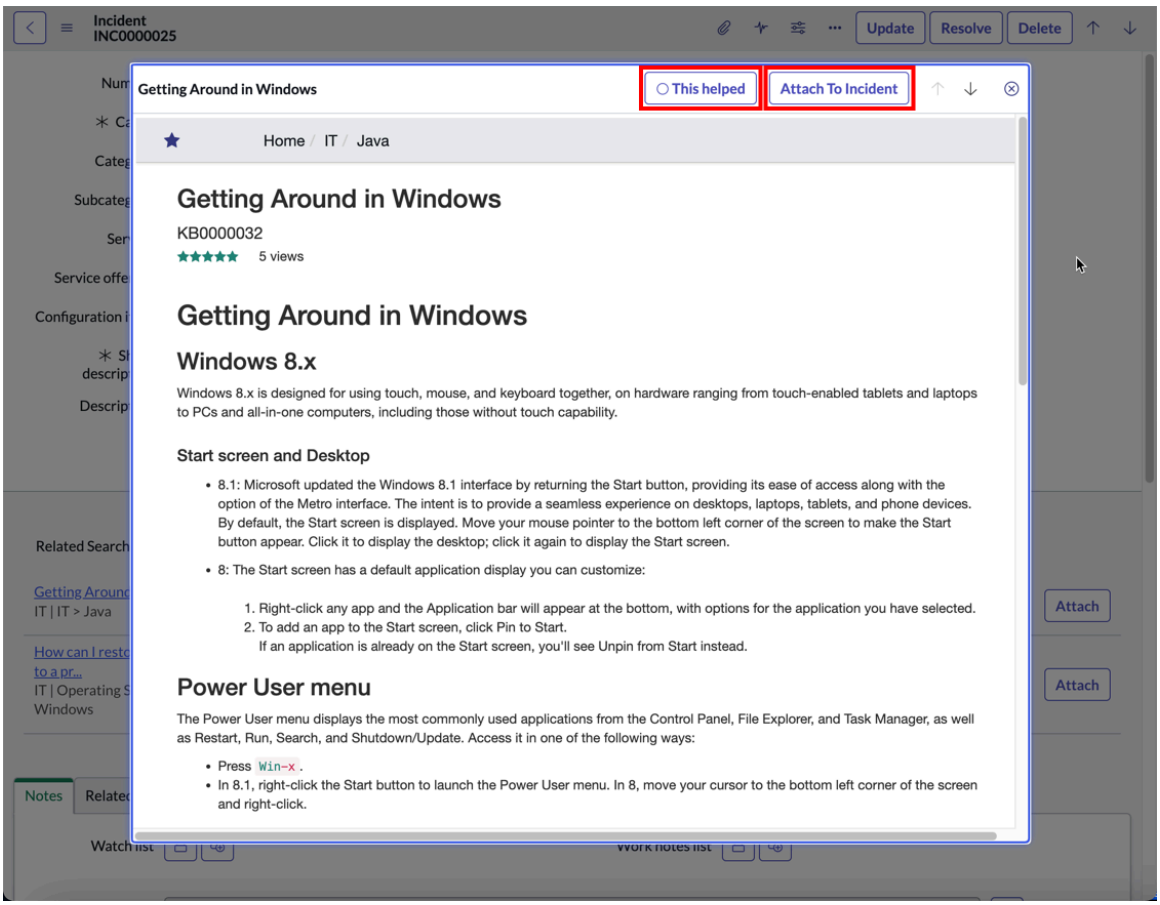
The search actions that you can modify are as follows:

- **Action label**: Label on the action button on the preview window. For example, **This helped** or **Attached To Incident**.
- **Attachment type**: Method to attach a knowledge article with the record. You can embed a link (recommended) to the article or embed a copy of the article.

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- **Show on new record**: Enables the **Attach** button to appear when you are creating a record. Prior to the London release, the user had to fill out and save the form, then re-expand the related search results to access the **Attach** button.

  Note: This option only applies to tables with the Platform UI type. It defaults to **false** to provide a consistent user experience between Platform and Workspace tables.



Enable viewing of search results for the current and another selected user

Enable the search as functionality when you want the ability to view search results common to the current user and another user that you specify.

Before you begin

Role required: admin

About this task

For example, an HR administrator may have some confidential information. A user might have partial access to the information. The Search as functionality applies security access to display results that are common to both the logged in or current user and the user referenced in the **Search as field**. The search result for the other user may have fewer entries than what that current user can actually view.

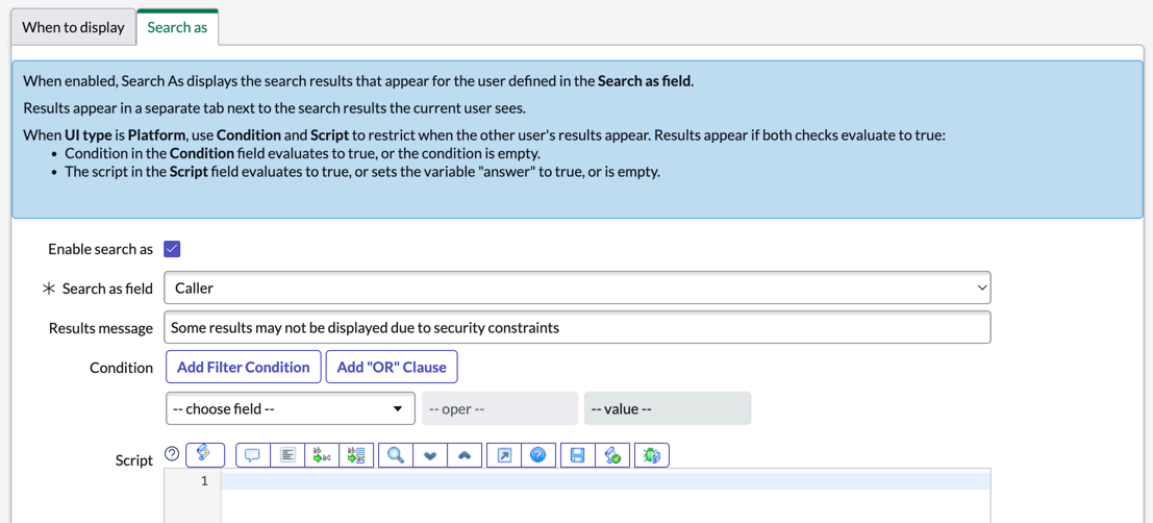
Note: No search result is displayed for **Predictive Intelligence Similarity** additional resources. Record producers only support searching for the current user.

Procedure

1. Navigate to **All** > **Contextual Search** > **Table Configuration**.
2. Edit a table configuration record.

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3. In the Search as section, fill in the fields.



Search as configuration fields

Field	Description
Enable search as	Option to enable the Search as functionality.
Search as field	Field defining the other user to search as. This field appears only when you select **Enable search as**.
Results message	Message to display with search results when searching as a different user. This field appears only when you select **Enable search as**.
Condition	Condition restricting when the search result of the user mentioned in the **Search as field** should appear. This field appears only when you select **Enable search as**. **Note:** Both **Condition** and **Script** must evaluate to *true* for search results to appear. An empty condition or script also evaluates to *true*.
Script	A condition script, enabling administrators to implement more powerful conditions. For example, to restrict access to users that are members of a group, use `gs.getUser().isMemberOf("<group name>")`. This field appears only when you select **Enable search as**. **Note:** Both **Condition** and **Script** must evaluate to *true* for search results to appear. An empty condition or script also evaluates to *true*.

Result

The **My Results** tab displays search results for the currently logged-in user. The **<user-name> Results** tab displays search results for the user referenced in the **Search as field**.

Define contextual search for record producer

Define a record producer to trigger a search based on the text that you enter in a variable field. Search results appear at the bottom of the record producer form.

Before you begin

Role required: admin

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About this task

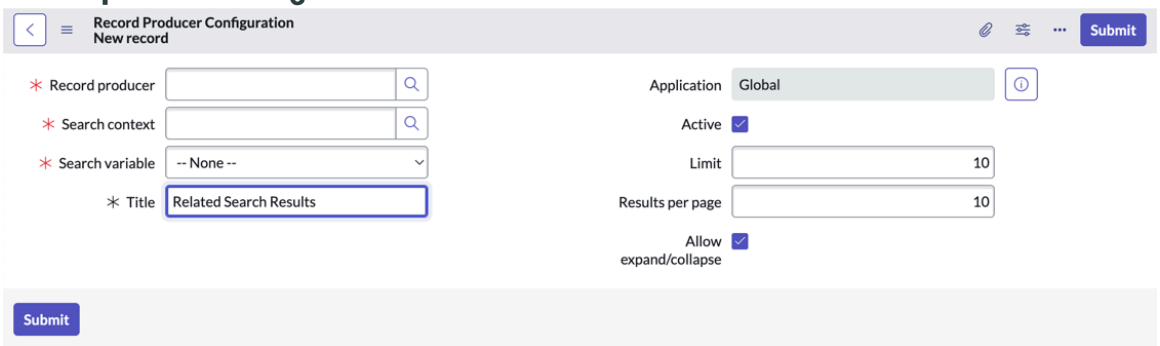
The base system **Create New Incident** record producer is configured to use contextual search. If you have customized this record producer, you can configure contextual search to link to a specific field on your record producer.

Note: Only one variable within a record producer can use contextual search.

Procedure

1. Navigate to **All** > **Contextual Search** > **Record Producer Configuration**.
2. Select **New**.
3. On the form, fill in the fields.

Record producer configuration form



Record producer configuration form

Field	Description
Record producer	Unique name of the record producer where you want to add the contextual search.
Search context	Name of the search context to use.
Search variable	Variable within the selected record producer that uses the contextual search.
Title	Title for the search results area that appears in the form.
Active	Option to activate the record producer configuration.
Limit	Maximum number of search results returned.
Results per page	Number of search results to display per page.
Allow expand/collapse	Option to allow expanding or collapsing the search results in the form.

4. Select **Submit**.

Define email configuration for contextual search

Define email configurations to allow the system to include search results with an email notifications.

Before you begin

Role required: admin

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About this task
When Knowledge articles are associated with a record, those search results can be included in email notifications. For example, email notifications sent when an incident is created can include Knowledge search results. An article in the search results may help the user who raised the incident to resolve the issue independently.

Procedure
1. Navigate to **All** > **Contextual Search** > **Table Configuration**.
2. In the Email Configurations related list, click **New**.
3. In the form, fill in the fields.

Email Configuration form

Field	Description
Email notification	Lookup icon to select an email notification to attach the search results. You can select only from the notifications that are on the same table as the table configuration record.
User field	A reference field that helps to narrow down on the search results. For example, if you select **Opened by**, the search results include only the articles that the **Opened by** user can access based on user criteria.
Application	Application scope of the email configuration. The configuration is available for all applications or for scoped applications.
Limit	Maximum number of search results returned.

4. Click **Submit**.

Provide knowledge in incident email notification

Contextual search results are included in email notifications that are sent to users who create a new incident.

Before you begin
Role required: admin

About this task
The email notification provides links to knowledge articles that may help users resolve their issues faster. For example, if a user raises an incident when the service desk staff isn't available, the email notification provides knowledge links that may help the user.

By default, contextual search results are based on the short description in the incident. Within the automated email response, contextual search adds links to relevant knowledge articles.

Procedure
1. A customer sends an email to IT support with the subject `My laptop keeps crashing`.
2. An incident is created based on this email.
3. The email subject is inserted into the **Short description** field of the new incident.

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4. The automated email notification sent to the user includes search results based on `My laptop keeps crashing`.
   By default, notifications provide three article links.
5. The customer may then be able to use the search results to resolve the incident.

> **Note:** The knowledge links provided are filtered to ensure that the articles are accessible to the user who submitted the email.

What to do next

You can configure notification options, such as changing the number of links provided with notifications. You can also configure contextual search functionality to match the email notifications of your organization or you can use contextual search with notifications for other records.

Related topics

Edit an email notification for the search results

Edit an email notification for the search results

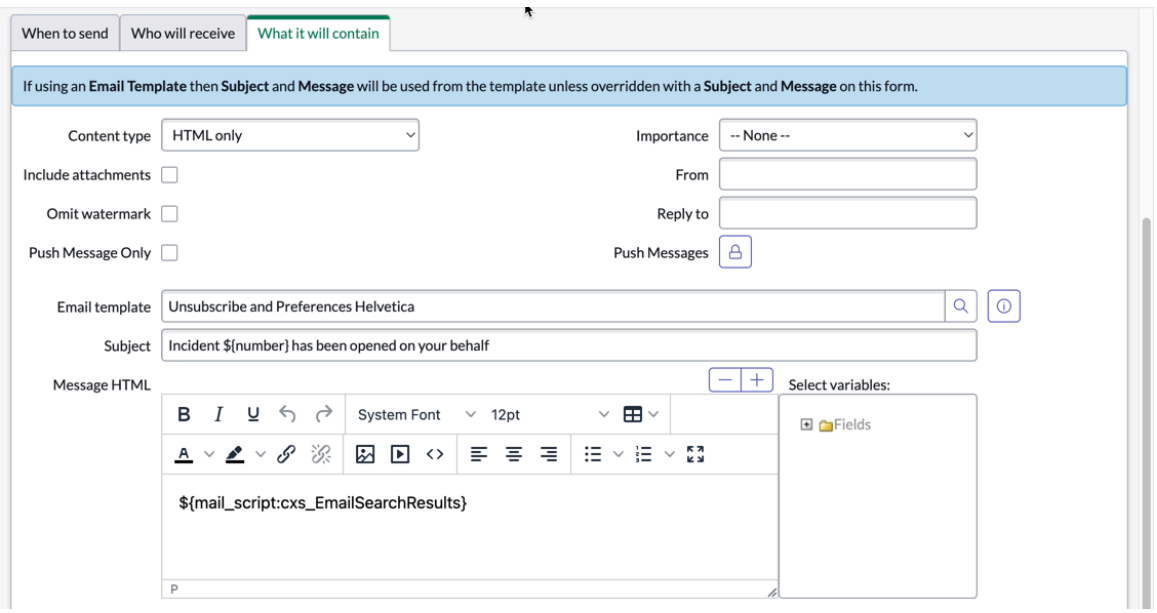
Include search results in an email notification sent to users.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Open the email template that you want to modify to include search results.
3. Select **What it will contain**.
4. In the **Message HTML** field, add the following script:
   `${mail_script:cxs_EmailSearchResults}`



5. Select and hold (or right-click) on the header form and click **Save**.

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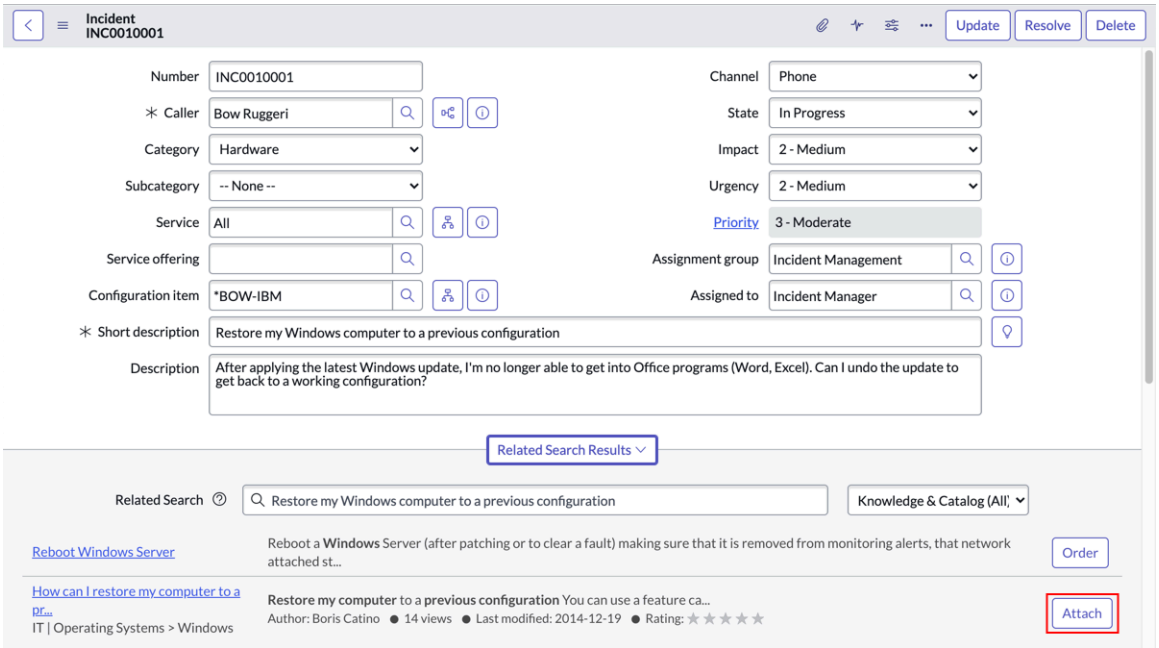
Attach a Knowledge article

Attach a Knowledge article to an incident to solve issues quickly by going through the in-depth troubleshooting steps and other detailed information in the article.

Before you begin

Role required: none

About this task



Procedure

1. Navigate to **All** > **Incident** > **All**.
2. Edit an active incident record.
3. Select **Related Search Results**.
   Search results display in the Related Search Results pane.
4. **Optional:** To display only Knowledge article search results, open the source selector and select **Knowledge Articles**.
5. Select **Attach** in the search result for the Knowledge article that you want to attach to the incident record.
   A note about the Knowledge article is copied or appended to the **Additional comments (Customer visible)** field on the incident record. To set a different destination field on the incident record, see Specify field for attached Knowledge article links.

   Note: Attachments from the selected Knowledge article aren't attached to the incident record.

6. To add the note to the activity stream, select **Post**.
   Alternately, you can select and hold (or right-click) the form header, then select **Save**.

Result

Details of the selected Knowledge article appear in the designated field.

Specify field for attached Knowledge article links

Specify which field to add a note to when you attach a Knowledge article to a record.

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Before you begin
Role required: admin

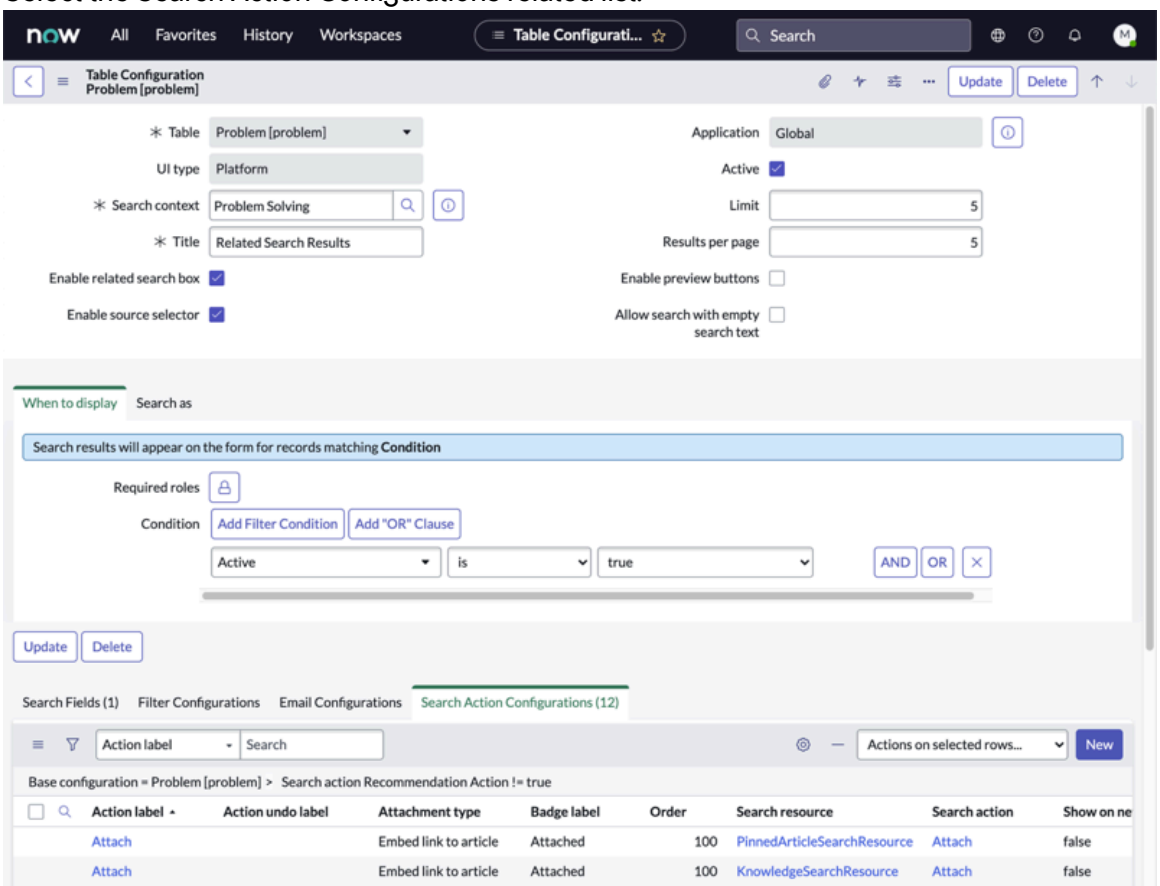
About this task
When you attach a Knowledge article to a record, by default a link to the Knowledge article is added to the **Additional comments (Customer visible)** field. You can specify the field for this link based on the table. For example, a Problem record doesn't have the **Additional comments (Customer visible)** field on the form, so the **Attach** action is configured to add the note to the **Work notes** field.

You can specify the field either globally or locally. The local field for a table overrides the global default field value.

To specify the global field, navigate to *Knowledge* > **Administration** > **Properties** > **Other Knowledge Properties** and specify the name of the field in the *glide.knowman.attach.fields* property.

You can specify the local field using the following procedure.

Procedure
1. Navigate to **All** > *Contextual Search* > **Table Configuration**.
2. Open the table configuration that you want to change attachment fields for.
3. Select the Search Action Configurations related list.



4. For each search action that you want to change the default field for, perform the following steps:

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a. Open the search action.

b. Select the **Use custom field for attach note** option, if not already selected.

c. In the **Attach note field**, enter the name of the field that you want to copy the article information into, such as `comments` or `work_notes`.

If field is not present on the form, Agent Assist will fallback on `comments` or `description` field depending on what is available.

d. Select **Update**.

Note:

- If you don't want to add a note to any field, leave the **Attach note field** blank.
- If the field you have specified in the **Attach note field** isn't found on the form, then the note isn't added to any field.

What to do next

Clear the system cache to make sure the changed field specification applies. You can clear the system cache by appending `cache.do` to the instance URL. For example, `https://<instance name>.service-now.com/cache.do`.

Warning:

Clearing the system cache can affect overall performance and degrade system response times. Don't run cache flushes during business hours, and don't trigger cache flushes automatically.

Feedback information on contextual search

When a user clicks any of the action buttons such as **This helped**, **Order**, or **Attached**, the feedback information is stored in specific tables. The information helps you to understand the effectiveness of the searches. You can also create custom reports by querying these tables.

Table [name]	Description
Relevant Document Detail [cxs_rel_doc_detail]	The list of individual recorded actions. For example, Preview, This helped, Attach, or Order. The key fields in the Relevant Document Detail table are as follows: • **Original search terms**: The original search terms. This field is used only when the fulfiller has overridden the original search terms using the related search box. • **Relevance type**: The recorded action. • **Relevant document**: The reference to the search session group in the Relevant Document table. • **Created by**: The user who performed the action. • **Position**: The position of the recorded action in the result list. • **Search Resource**: The reference to the search resource for that particular result. Used only for a Predictive Intelligence Similarity result.

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Table [name]	Description
Relevant Document [cxs_relevant_doc]	Groups the Relevant Document Detail individual recorded actions by search session. **Note:** A new search session group is created every time you create or open a record or reload the page. The key fields in the Relevant Document table are as follows: • **Search session**: The search session group. • **Displayed on**: The table or record producer where the results were displayed. • **Relevant to**: The reference to the table record when **Displayed on** is **Table**. • **User/Created by**: The user who performed the action.

Run a report on contextual search usage

Run a report on usage such as how many times a knowledge article is attached to a record to know the effectiveness of the contextual search results.

Before you begin
Role required: admin

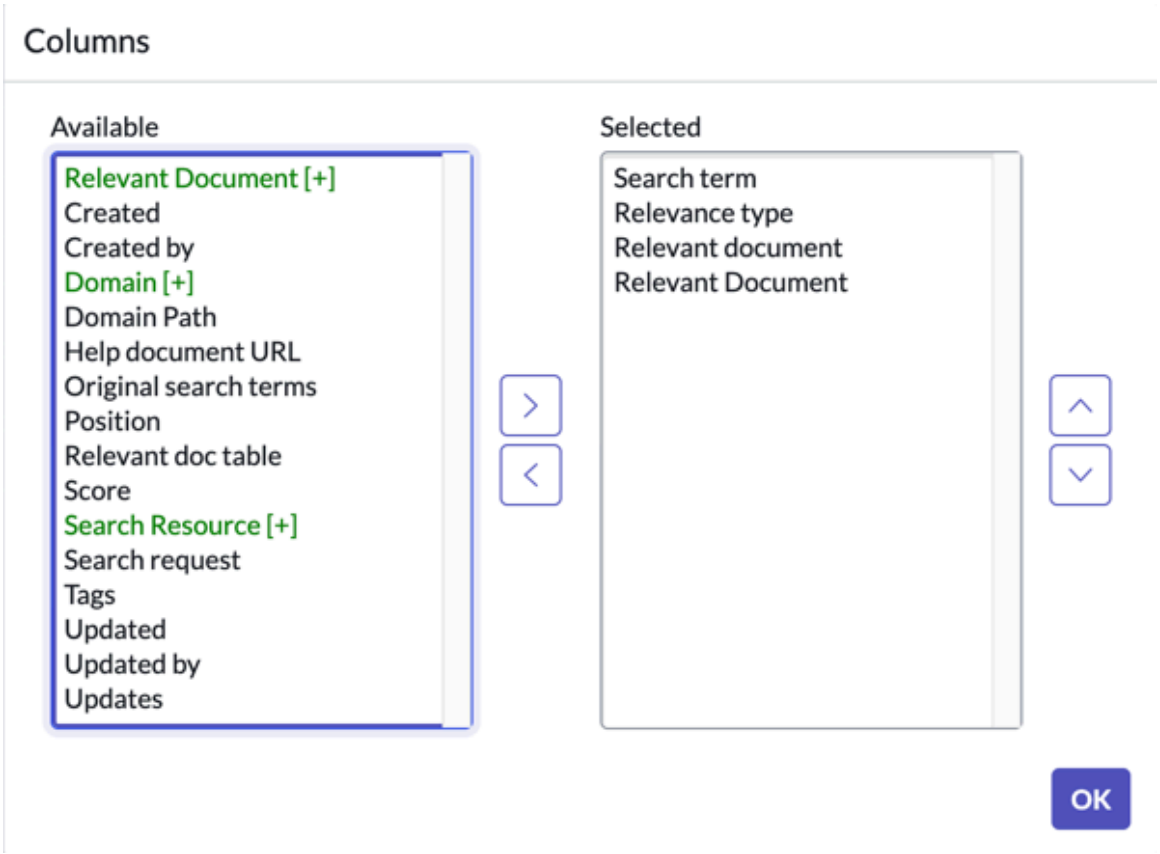
About this task
A service desk manager can generate a report on user issues that were resolved without an incident being raised. The information can help to create targeted knowledge based on trends. You can analyze commonly raised incidents and then create knowledge articles around those incidents which can help resolve or deflect similar incidents in future.

Procedure
1. Navigate to **All** > **Reports** > **View/Run**.
2. Select **Create a report**.
3. Under **Data**, fill in the fields.

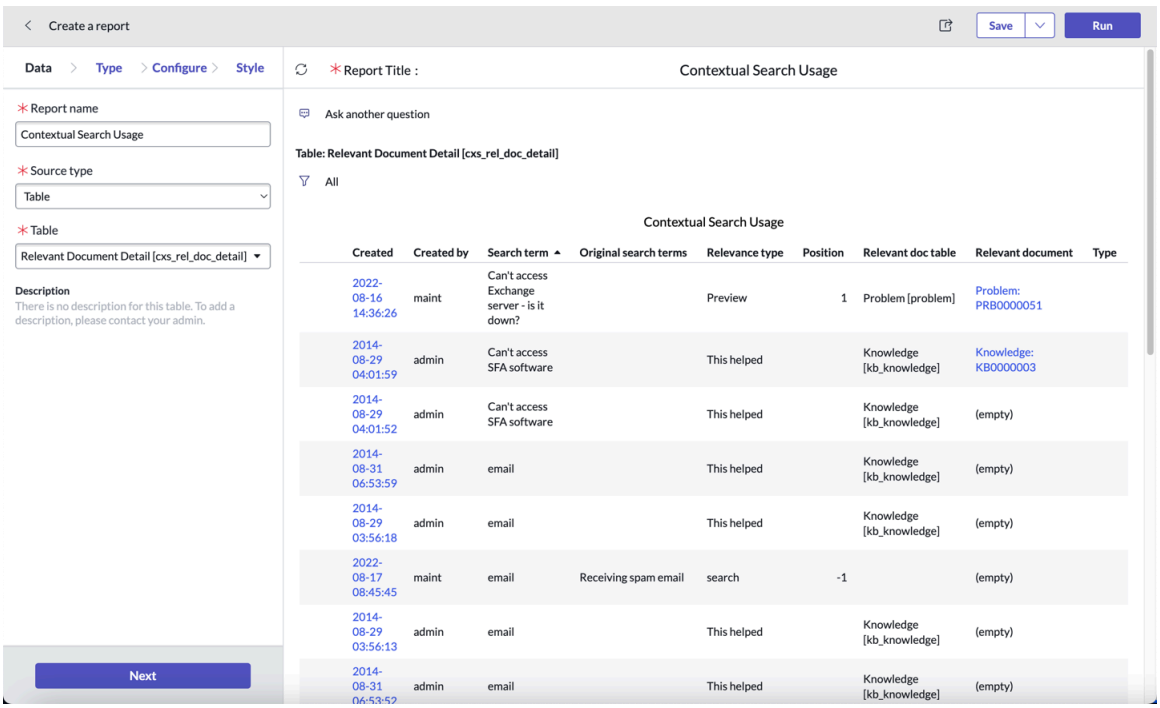
Field	Description
Report name	Unique name for the report.
Source type	Source from which the data is populated. The default value is **Data source**. Select **Table**.
Table	Select the Relevant Document Detail table [cxs_rel_doc_detail].

4. Select **Next**.
5. Under **Type**, select **Next**.
6. Under **Configure**, select **Choose columns** and move the required fields from the **Available** box to the **Selected** box.

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7. Select **OK** and then select **Run**.



Note: When users select the **Search on tab** check box in the Search Context [csc_context_config] table and then modify and leave the search field, an action gets logged in the Relevant Document Detail table [cxs_rel_doc_detail]. The information in the table can help you find the instances where users ran a search but did not take any action. In those cases, the value of the **Position** column is **-1**.

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Domain separation and Contextual Search

Domain separation is supported in Contextual Search. 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.

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 Contextual Search

By default, Contextual Search Suggestions results that appear use the domain of the currently logged-in user.

Search as a different user

In addition to being able to search for results using the domain of the logged-in user, the administrator can also configure Contextual Search to Search as a different user .

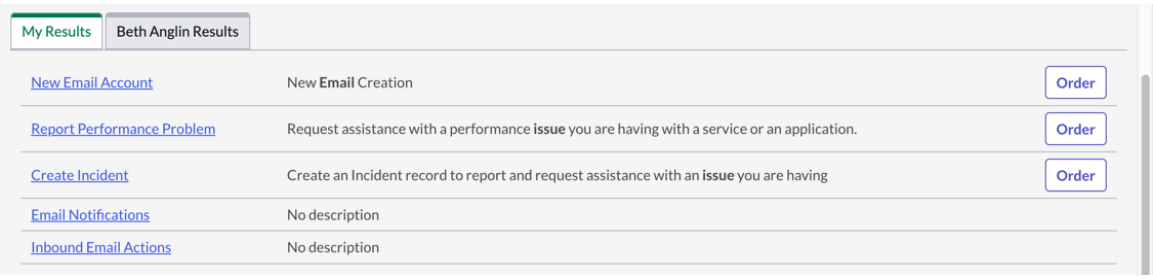
When **Search as** is configured, two tabs appear in the search results:

1. **My Results** tab searches using the currently logged-in user domain.
2. The **Search as** user tab searches using the domain of the User Reference field selected by the administrator. For example, selecting a request's **Opened by** or **Caller** field searches using the domain of the user who made the request.

Note:

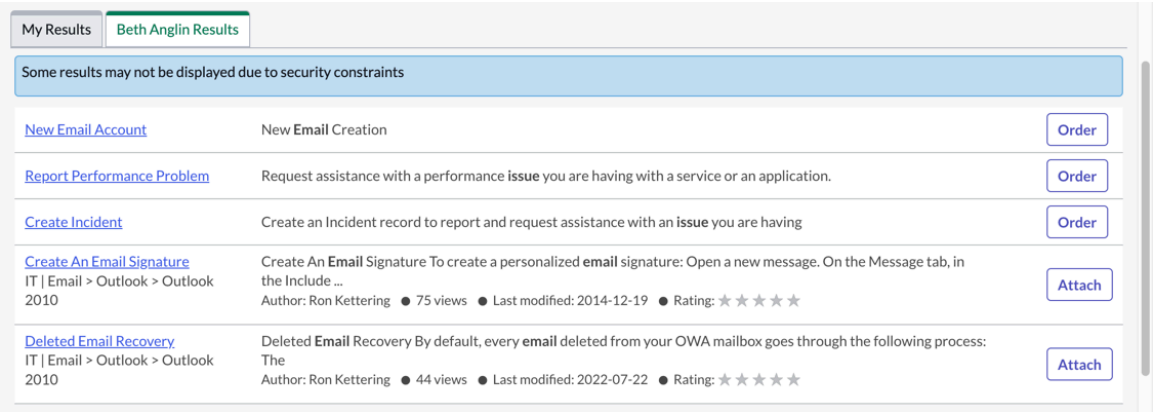
- The **Search as** user results apply security access to display results that are common to both the logged-in user and the **Search as** user. Hence, the search result view for that user may have fewer entries than what that user can actually view.
- Record producers only support searching as the currently logged-in user.

Example: An Incident displaying search results for the currently logged-in user on the **My Results** tab.



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Example: The same Incident displaying search results for the user from the **Caller** reference field on a second tab.



Related topics

Enable viewing of search results for the current and another selected user

Contextual Search roles

Contextual Search is installed with these roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

Contextual Search feedback reader [cxs_feedback_reader]

Read records on the Relevant Document [cxs_relevant_doc] and Relevant Document Detail [cxs_rel_doc_detail] feedback tables.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

For details on these tables, see Feedback information on contextual search.

Intelligent Search for CMDB

Use everyday natural language query (NLQ) in a search string to query for a set of CIs in the CMDB. Intelligent Search for CMDB, parses, resolves ambiguities, and converts your search string into a valid CMDB query. Complex search strings open fully constructed on a canvas of CMDB Query Builder where you can continue and refine, or run.

Intelligent Search for CMDB is supported only on English language instances and isn't supported when the instance preferred language is set to a language other than English.

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Integration with CMDB Workspace

Intelligent Search for CMDB is integrated into the Home view in the CMDB Workspace store app. For more information, see:

- Home view in CMDB Workspace (Intelligent Search section) for details about how to use Intelligent Search, sample search strings, and helpful tips.
- CMDB Workspace for additional details about CMDB Workspace.

Integration with Service Graph Workspace

Intelligent Search for CMDB is integrated into the Search and Explore view in the Service Graph Workspace store app. For more information, see:

- Explore and Search view in CMDB Workspace, Search tab for details about how to use Intelligent Search, sample search strings, and helpful tips.
- for additional details about Service Graph Workspace.

Integration with CMDB Query Builder

Intelligent Search for CMDB is integrated with the CMDB Query Builder in the ServiceNow AI Platform. This integration is controlled by the system property *`glide.cmdb.query.nlq.activated`*, which is set to **true** by default. Intelligent Search for CMDB lets you use natural language processing in the CMDB Query Builder to find CIs and their relationships using Intelligent Search for CMDB functions.

Using Intelligent Search for CMDB

Intelligent Search is tailored to the CMDB, searching only through the CMDB class hierarchy for tables, and for CIs and their relationships.

Use the Intelligent Search search field to construct a search string using everyday natural language. Your queries can span multiple CMDB classes and involve many CIs that are connected by different relationships. After resolving any ambiguities with table names or relationship types, Intelligent Search converts your search string into a query that the CMDB can run. The CMDB query is constructed dynamically as you type into the search box and spell checker is applied if needed. A dynamic list of relevant suggestions appears as you type, with items such as table names, matching single words or part phrases in the typed-in text.

Use Intelligent Search:

- **Search tips**: Shows details and tips about the usage, and examples for single and multi-table search, advanced filtering, and relationships in Intelligent Search. The Relationships tab contains a link to the CMDB Implicit Relationships table.

- **Search**: Depending on whether the search string is already fully converted into a valid CMDB query and whether the search is for a single or multiple tables.

  - If the search string has no ambiguities with the table name or relationships, then the query runs and the results appear in a list view format.

    If the constructed CMDB query contains more than a single table, then the **View in Query Builder** button appears. Click the button to open the CMDB Query Builder with your query fully constructed on the Query Builder canvas. You can use the Query Builder to continue editing the query.

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- If there are any ambiguities with table names or relationship types in the search string, then the search string can't be converted into a valid CMDB query. In this case, the Refine your query dialog box appears to continue and parse your search string into a valid CMDB query. The dialog box contains suggested synonyms and labels for phrases in your search string. Use the drop-down lists to select the synonyms that match your intended search and then click **Go** to run the query.
- If Intelligent Search is unable to convert your search string into a valid CMDB query, then clicking **Search** does not generate any query results. Instead, a feedback form appears. Fill out the form and click **Submit Feedback** to send your feedback to ServiceNow analysis.

- **Results Feedback**: Submit feedback to ServiceNow analysts, to express your assessment of the results. Choose descriptions that capture any gap between the results and your expected results, and add any helpful details.

Sample searches

When you click the search box, the drop-down list of pre-defined sample searches appears. The list consists of more common searches, or searches that are more difficult to construct such as searches that involve application services. Run any of those searches to get started.

- Sample searches are stored in the NLQ Sample Search [sn_cmdb_ws_nlq_sample_search] table
- Referenced tables are stored in the NLQ Sample Search Table [sn_cmdb_ws_nlq_sample_search_table] table

CMDB Admins (sn_cmdb_admin user role) can modify a sample search by directly editing its record in the NLQ Sample Search table. Click **All** and then in the Filter navigator, enter `sn_cmdb_ws_nlq_sample_search.list`. In the NLQ Sample Searches list view edit the record for a search that you want to modify.

Any modification to sample searches is reflected in CMDB Workspace, Service Graph Workspace, and the CMDB Query Builder.

Synonyms

The NLQ Synonym [nlq_synonym] table is pre-populated with synonyms for natural language strings for CMDB table and column names, and relationships. This table is used to match natural language search words to the CMDB query language. For example, the phrase ‘linux server’ has synonyms such as ‘Linux Server’, ‘Server’, and ‘Virtual Machine Instance’.

For details about viewing and adding synonyms customized to your business needs, see NLQ synonyms.

CMDB Implicit Relationships

You can help Intelligent Search find more results by defining some of the relationships between classes as implicit relationships. Implicit relationships can be useful in queries that involve service offering and application services.

NLQ admins can create new implicit relationships by navigating to **All** > **NLQ** > **CMDB Implicit Relationships**.

An implicit relationship defines the relationship between two tables and includes any filters you want to apply. When creating an implicit relationship, you set the following items:

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- From table (from_table): The class that acts as the parent
- Filters: Conditions that are applied to the columns of the from_table
- To table: The class that acts as the child
- Relationship: How the from_table interacts with the to_table. For example, Contains: Contained by means the from_table contains the to_table
- Skipped table: The class that is implied and not captured by the CMDB Query Builder

For example, in CMDB Query Builder, you want to see your service offerings that have had a P1 incident in the last 10 days. However, if you were to type `show me all business service offerings with p1 incidents in the last 10 days`, NLQ wouldn't understand the relationship.

Implicit relationships are stored in the NLQ CMDB Implicit Relationship [nlq_cmdb_implicit_relationship] table and are used in the CMDB Workspace and in Service Graph Workspace, and if integrated, also in CMDB Query Builder.

For more information about NLQ in the ServiceNow AI Platform, see Natural Language Query (NLQ).

Time configuration

A standard feature of the ServiceNow AI Platform, ServiceNow's time configuration system handles scheduling across your entire enterprise, enabling you to manage projects efficiently, track and schedule events, and more.

Get started

Time configuration includes the scheduling of events and tracking of time. There are several functions available which enable tracking of time and using that information across applications.

Explore	Use	References
Learn about time configuration concepts and features.	Discover how to use various time configuration options.	Find useful time configuration reference materials and information.

Exploring time configuration

Time configuration helps you easily handle any necessary timing or scheduling aspects of your online enterprise.

Records stored on the ServiceNow AI Platform are kept with times measured down to the millisecond. Time configuration includes multiple applications to help you use those records correctly, with scheduling and monitoring activities in your business' day-to-day operations.

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Date and Date/Time fields

Records in the ServiceNow AI Platform store date and time values in several different types of fields. These values are stored as integer numbers, in milliseconds, and appear in the appropriate date or date/time format.

Date and Date/Time field types

The ServiceNow AI Platform stores date and date/time information in records using the following field types:

Date and time field types

Field type	Dictionary XML type	MySQL DB type
Date	*glide_date*	DATE
Date/Time	*glide_date_time*	DATETIME
Time	*glide_time*	DATETIME
Duration	*glide_duration*	DATETIME
Due date	*due_date*	DATETIME

For the full listing of field types, see Introduction to Fields.

Global date and time field format

You define default date and time formats globally using system properties.

Date format

The *glide.sys.date_format* property defines the date format. An administrator can modify the property by navigating to **System Properties** > **System**. The default format is: yyyy-MM-dd.

Note: A user can override the global date or time format with a personal preference.

Modifying the *glide.sys.date_format* property changes the date or time format globally. When modifying the standard date format, also verify the format using a Validate date and time script. You can use the same pattern strings as the *java.text.SimpleDateFormat* class, with the following exception:

- You cannot append the 'z' character to include the time zone when adding it to a script.
- If the resulting time zone is not three characters, an Invalid Date appears error appears when you validate the script, because the Date/Time Validation Script (sys_script_validator) fails. This failure occurs even though the script debugger shows that the content of the value meets the requirement of 'g_user_date_time_format'.

MM is months, while *mm* indicates minutes. The format string consists of the following abbreviations.

Field	Full form	Short form
Year	yyyy (4 digits)	yy (2 digits), y (2 or 4 digits)
Month	MMM (name or abbr.)	MM (2 digits), M (1 or 2 digits)
Day of Month	dd (2 digits)	d (1 or 2 digits)

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Note: It is recommended that you use a `yyyy` format-based date. For example, use `MM-dd-yyyy`, `yyyy-MM-dd`, or `dd-MM-yyyy`.

- If your system date format is set to use the `yy` year format, the system considers dates 20 years later or 80 years earlier from the current date as a date in the past or future leading to an unexpected behavior.
- For example, if you set the year as `51` for 2051, the system considers the year as 1951. Similarly, if you set the year as `37` for 1937, the system considers the year as 2037.

Time format

An administrator can modify the *`glide.sys.time_format`* property by navigating to **System Properties** > **System**. Modifying the property changes the date or time format globally. When modifying the standard time format, also verify the format using a Validate date and time script. You can use the same pattern strings as the *`java.text.SimpleDateFormat`* class, with the following exception: Appending 'z' to include the time zone is not supported.

The format string consists of the following abbreviations.

Field	Full form	Short form
Hour (1-12)	hh (2 digits)	h (1 or 2 digits)
Hour (0-23)	HH (2 digits)	H (1 or 2 digits)
Minute	mm (2 digits)	m (1 or 2 digits)
Second	ss (2 digits)	s (1 or 2 digits)

Add the character `a` to the end of the time format string to indicate AM or PM. This option shows AM or PM whether you are using 12-hour time (hh) or 24-hour time (HH).

The default format is: HH:mm:ss.

Note: A user can override the global date or time format with a personal preference.

Related topics

Schedule entry fields

Personalize the system date format

You can personalize the format in which date values appear in your instance.

About this task

Personalizing the date format does not change global settings or impact the way other users see date values.

Note: It is recommended that you use a `yyyy` format-based date. For example, use `MM-dd-yyyy`, `yyyy-MM-dd`, or `dd-MM-yyyy`.

- If your system date format is set to use the `yy` year format, the system considers dates 20 years later or 80 years earlier from the current date as a date in the past or future leading to an unexpected behavior.
- For example, if you set the year as `51` for 2051, the system considers the year as 1951. Similarly, if you set the year as `37` for 1937, the system considers the year as 2037.

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Procedure

1. Navigate to **All** > **Self-Service** > **My Profile**.
2. In the **Date format** field, select an option.
3. Click **Update**.

Personalize the system time format

You can personalize the format in which time values appear in your instance.

Before you begin

An administrator must add the **Time format** field to the Self-Service view of the User form. For more information, see Configuring the form layout.

Role required: Admin

About this task

Personalizing the time format does not change global settings or impact the way other users see time values.

Procedure

1. Navigate to **All** > **Self-Service** > **My Profile**.
2. In the **Time format** field, select an option.
3. Select **Update**.

Configure the date picker for the list editor

A system property enables you to choose between two date picker configurations for the list editor.

Before you begin

Role required: admin

Procedure

1. Navigate to `sys_properties.list`.
2. Search for the property *`glide.ui.list_edit.show_calendar_only`*.
3. Set the property **Value** to either of the following options.

Value	Description
false	Calendar as well as a field appears for a date picker for manual date entry.
true	Calendar only appears for a date picker, which is the default behavior in Core UI.

Related topics

List editor administration

Default date and time fields

Certain time fields are provided by default to store particular date and time fields.

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Global timestamp fields

All records inherit certain time stamp fields from the Global [global] table.

- **Created**
- **Updated**

These fields are automatically populated with the correct date and time, expressed in Greenwich Mean Time (GMT), rather than in the logged in user's local time zone.

Planned Task time fields

The Planned Task plugin provides a table (Planned Task [planned task]) with standard fields for measuring a planned task's time. For more information, see Planned Task.

Task fields for measuring work time

Use default task fields to measure progress and resolution for certain records.

The following base system fields are provided on certain tables to track how long it takes to close tickets:

- Time worked: A timer that runs when you view the record, and pauses while you close it, or when you manually pause it. Used to track the time spent by the help desk while working on the record.
- Resolve time: A calculated field that measures the time from the moment the record is opened, to the moment the record is closed. Used to track how long it takes to resolve the record.

These fields provide different metrics for request response.

The following additional tools are available for tracking work time:

- **Service level agreements (SLAs)**: Measures how long it takes a record fulfill certain conditions (such as an incident being marked **Resolved**).
- **Time cards**: Use the **Time worked** field to break down how much time was spent by day of the week.

Time worked

The Task [task] table provides a time-tracking field called **Time worked**.

Time worked field



This field measures how long a record has been viewed to track work time on a ticket. Any table that extends Task can use this field. To use this field, you must first add it to the form by configuring the form layout. The Time worked field does not appear on forms by default.

As the record is viewed, the timer counts upward. To pause the timer, click the stop icon ( ).

To resume the timer, click the start icon ( ).

When you save a task, the amount of new time in the timer is used to generate a record on the Time Worked [task_time_worked] table. You can view this table as a related list on the task form.

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By default, the time in the **Time worked** field is a cumulative value stored in the task record. If you modify a Time Worked record, the changes are not reflected in the task timer.

You can set the property *com.snc.time_worked.update_task_timer* to enable updating of the task timer value, based on changes to the Time worked records. You do this using the *Update task timer* business rule.

You can also enable the dictionary attribute *time_worked_alert* so that updates to the time worked field make the form dirty. By default the attribute is set to false.

Resolve time

The **Resolve time** field is available on the Incident [incident] and Request [sc_request] tables. This field allows for easy reporting on how long it takes for requests to be closed, and is stored as an integer number of seconds.

Business rule calculation

Specific business rules calculate the **Resolve time** field when the record is resolved or marked closed, and measures the difference between the **Opened** and **Closed** dates. The field is stored in the system as an integer number of seconds.

- On the Incident table, the field is calculated on closure by the business rule *mark_closed*. The following lines of code calculate the resolve time:

```
if (dataChange || current.calendar_stc.nil())
      current.calendar_stc = gs.dateDiff(opened, resolved,
 true);
```

- When the incident is closed directly, the calculation is based on the *mark_closed* business rule. The following lines of code calculate the resolve time:

```
if (dataChange || current.calendar_stc.nil())
        current.calendar_stc = gs.dateDiff(opened, closed,
 true);
```

Display resolve time as a duration

You can display the resolve time as a human-readable duration rather than an integer representing a duration in seconds.

Procedure

1. From the Incident or Request form, right-click the form header and click **Configure** > **Table**.
2. From the **Columns** embedded list, click **Resolve time**.
3. From the **Attributes** related list, click **New**.
4. Enter these values.

Dictionary attribute values

Field	Value
Attribute	Format
Dictionary entry	Resolve time
Value	glide_duration

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5. Click **Submit**.

The resolve time appears in forms and lists as a duration, expressed in days, hours, and minutes.

Note: This attribute does not change the field data format, which remains an integer representing a duration in seconds. In reports and data exports, it still appears as the actual number of seconds, rather than as a duration.

Export date and time formats

Because some export formats are intended for human consumption and others for database usage, various methods are used to provide date and time field information in different formats.

Excel

Date, Date-Time, and Time fields are all exported as their display values, and appear in a custom format, instead of the system date format. However, duration fields, export as the value stored in the database, which is an integer value of seconds.

Note: If the date and time format is `hh:mm:ss` in the *`glide.sys.date_format`* System Properties setting, and you export time values to Excel, they appear in 24-hour military time.

To display the exported values in standard 12-hour am/pm time formats, select the `1:30PM time` format in **Format Cells** > **Time** in Excel.

XML

All Date and Time fields export as the value stored in the database.

PDF

All Date and Time fields (including Duration) export as their display value.

CSV

All Date and Time fields export as the value stored in the database.

Schedules

Use schedules to specify when service level agreements or inactivity monitors are active, or to specify when on-call rotations should take effect. Schedules are rules that include or exclude time for various actions or tasks.

For example, if a service level agreement is set to an 8-5 Weekdays schedule, the SLA only counts time during those hours. Generate and validate schedules in the **System Scheduler** > **Schedules** menu.

Default schedules

Default schedules are available in a base system.

Name	Schedule
8-5 weekdays	Repeats every week on weekdays Monday through Friday.

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Name	Schedule
8-5 weekdays excluding holidays	Repeats every week on weekdays Monday through Friday. Includes the child schedule U.S. Holidays.
Application	Repeats every week on Sunday.
Application FLX	Repeats every week on Sunday.
Blackout Wednesdays (GMT)	Repeats every week on Wednesday.
Database Server FLX	Repeats every week on Saturday.
Default MS Project	Repeats every week on weekdays Monday through Friday from 8:00am to noon and 1:00-5:00pm.
Global Infrastructure	Repeats every week on Saturday.
MySQL Database Service	Repeats every week on Saturday.
Network	Repeats every week on Saturday.
Project Management Schedule	Repeats every week on weekdays Monday through Friday from 8:00am to noon and 1:00-5:00pm. Default schedule for the Project Management application.
Resource Management Schedule	Repeats every week on weekdays Monday through Friday from 8:00am to noon and 1:00-5:00pm. Default schedule for the Resource Management application.
Server	Repeats every week on Saturday.
Servers San Diego	Repeats every week on Wednesday.
Software Blackout	Repeats every week on Wednesday.
U.S. Holidays	Lists 12 U.S. holidays.
WebServer FLX	Repeats every week on Sunday.
Weekends	Repeats every week on Saturday for two days.

Related topics

Schedules

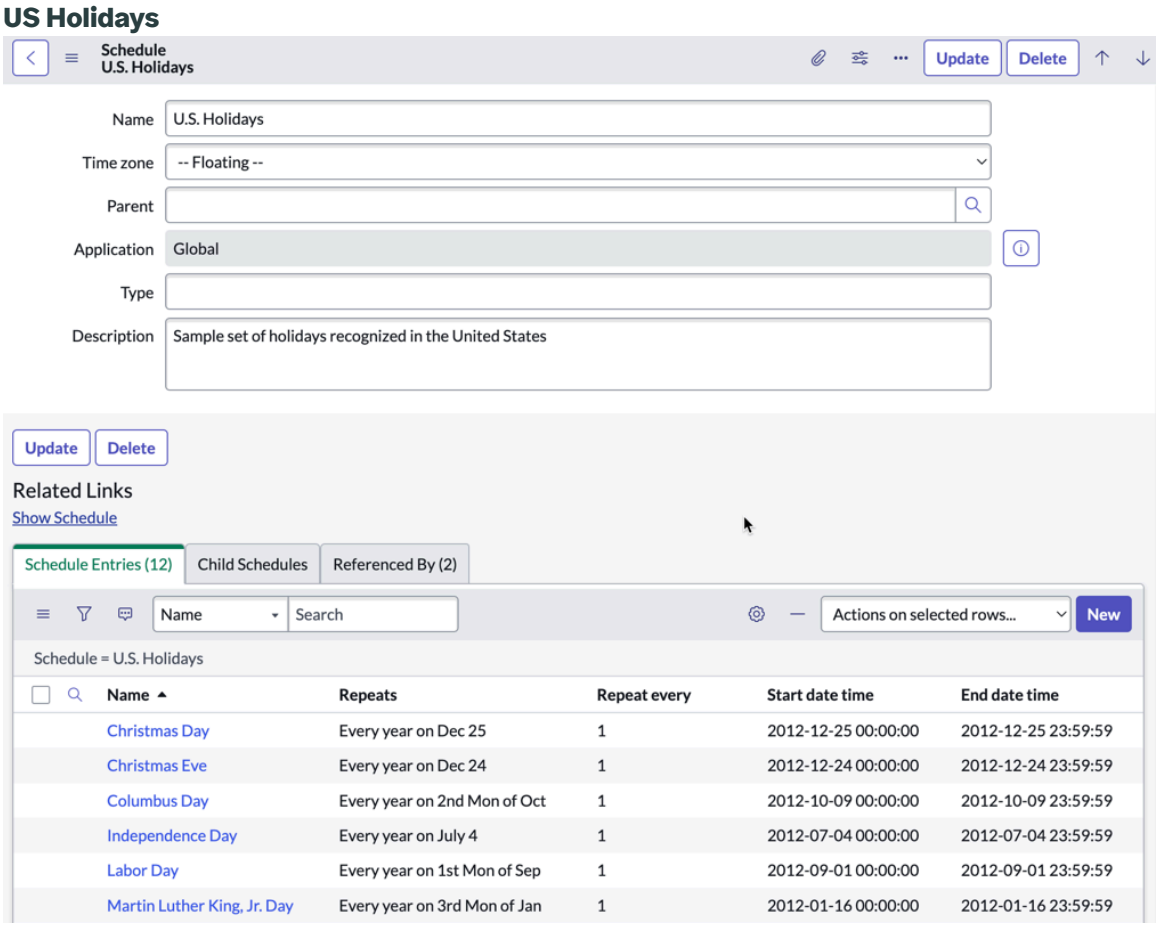
Holidays

You can define each individual holiday as a schedule entry to create exceptions to existing schedules.

For instance, if an SLA requires an incident be resolved within three business days excluding Christmas, create a schedule entry for Christmas. Creating this entry ensures that the SLAs do not count Christmas when calculating elapsed time, even if it falls within the work week.

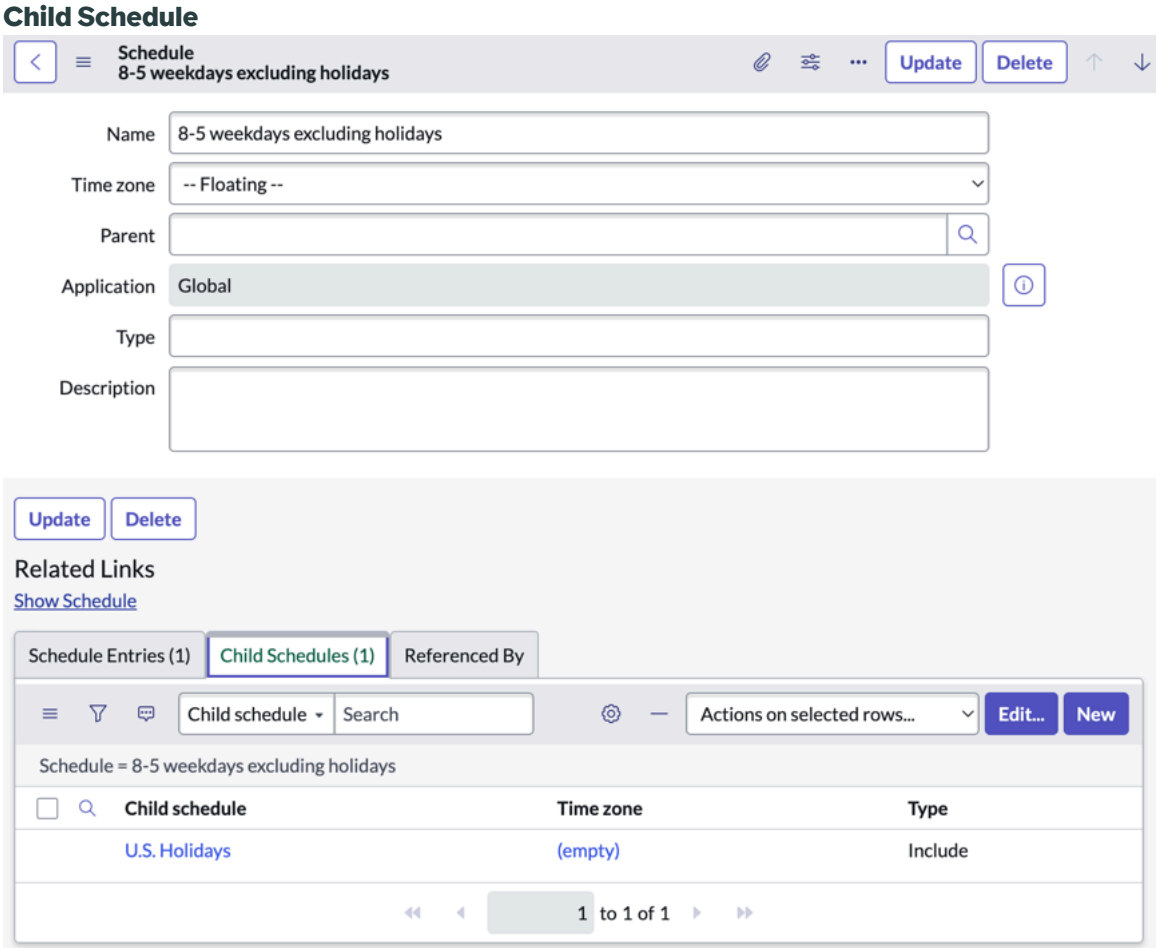
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Because schedules can be included in other schedules through a parent-child relationship, it is also possible to create a holiday schedule and include it in other schedules to keep holidays consistent. The following example shows a holiday schedule.



The following example shows a schedule that includes the preceding holiday schedule.

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Related topics

Schedules

Define a schedule

Create a holiday schedule for multiple regions

You can create holiday schedules for multiple regions that follow the same work schedule but have different holidays.

About this task

The following method supports multiple regions with the same work schedule (for example, an 8-5 weekdays schedule) but with different holiday schedules.

Procedure

1. Create a holiday schedule for each region. For example, U.S. Holidays, British Holidays, and Australian Holidays.
2. Add the work schedule as a child schedule to each region's holiday schedule.

   This method requires making <number of schedules> + 1 total schedules. If you make the regional holiday schedule a child schedule of the work hours schedule, you must create a separate work hours schedule for each region. The total number of schedules in this case is <number of schedules> x two schedules.

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Related topics

Schedules

Define a schedule

Parent and child schedules

Schedules can have one of two parent-child relationships with other schedules.

Parent field

When a schedule record lists a value for the **Parent** field, schedule entries from the parent schedule apply to both the parent schedule and the child schedule. By default, there are no sample schedules that use the **Parent** field.

Child schedule

When a schedule record has one or more child schedules in the **Child Schedules** related list, schedule entries from the child schedule apply to the containing schedule. By default, there are several sample schedules that use child schedules. For example, see the **8-5 weekdays excluding holidays** schedule that includes the **U.S. Holidays** schedule.

Parent and child schedules cannot contain conflicting schedule entry types. For example, a schedule containing maintenance schedule entries cannot also contain blackout schedule entries. Nor can a maintenance schedule have a child schedule containing blackout schedule entries.

Note: To create a Holiday schedule and include it in a parent schedule, you must add it as a child schedule and with an Include type.

Parent schedules must have at least one entry that is not an **Excluded** type. If parent schedules are only exclusionary, they are invalid.

Note: The **Show Schedule** related link shows schedule entries from the current schedule and the child schedule record. For example, when showing the **8-5 weekdays excluding holidays** schedule, holidays are also shown as excluded because the holiday schedule is a child schedule.

Related topics

Schedules

Define a schedule

Define a schedule

Configure schedules using schedule and schedule entry records.

Before you begin

Role required: schedule_admin or admin

About this task

- Schedule records specify a time zone and a type of schedule and use one or more schedule entries. Schedule records are saved in the Schedule [`cmn_schedule`] table.
- Schedule entry records specify the time periods that are included or excluded from a schedule. Schedule entries are saved in the Schedule Entry [`cmn_schedule_span`] table.

Alternately, you can also use the Business Calendar functions to create schedules. To learn more about creating business calendars and schedules, see Creating business calendars.

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Warning: If you're using Performance Analytics, use caution when changing time spans. Any change you make to the time span on a business or fiscal calendar can invalidate the Performance Analytics data. Consult with a Performance Analytics administrator before making such changes.

Procedure

1. Navigate to **All** > **System Scheduler** > **Schedules** > **Schedules**.
2. Select **New**, enter a unique and meaningful **Name** and **Description** and then fill in the form.

   For detailed information on Schedule form fields, see Schedule fields.

   Note: If there are no active entries defined for the current schedule, a warning message appears in the Schedule form. If your schedule is a child schedule that contains only exclusions, ignore the message because exclusions are non-active entries.

3. Right-click the header bar and select **Save**.

   Note:

   - In the Related link, select **Show Schedule** to view the schedule in the calendar using the Next Experience user interface. For more information on this framework, see Next Experience UI. To create schedule entries in the Next Experience UI, refer to Create schedule entries in the Schedule calendar.

     To use the classic schedule calendar, you can add the `glide.schedule.enable_classic_calendar` property and set it to **true**. For information on how to add a system property, see Add a system property.

   - If you create a schedule of type **maintenance** and save the record, a UI policy hides the **Type** field from the form. To view or change the **Type** value, use the list of schedules instead of the schedule form. Add the **Type** column if necessary. You can click the cell for the value in the **Type** column and modify the value in the list view.

4. Configure one or more schedule entries.

   For detailed information on Schedule Entry form fields, see Schedule entry fields.

Related topics

Schedules

Schedule fields

The Schedule form contains the following fields.

Field	Description
Name	Unique name for the schedule.
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.

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Field	Description
	• For example, if a resource manager 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.
Parent	Parent schedule that constraints the new schedule.
Application	Application scope of the schedule.
Type	Text label that describes the purpose of the schedule. You can also use one of these system terms to determine how to process certain schedules: • **Excluded**: Excludes time periods from SLA counts. • **Maintenance**: Specifies time periods where change management activities are allowed. A schedule containing maintenance schedule entries cannot also contain blackout schedule entries. • **Blackout**: Excludes time periods from change management schedules. A schedule containing blackout schedule entries cannot also contain maintenance schedule entries.
Description	Description of the schedule.

Related topics

Schedules

Define a schedule

Schedule entry fields

You can only associate a schedule entry with one schedule. The **Schedule Entries** related list contains the definitions of the time periods you want to include in or exclude from the schedule.

Field	Description
Name	Unique name for the schedule entry.
Type	Label that describes the purpose of the schedule. The system also uses the schedule type to determine how to process certain schedules. • **Excluded**: Excludes time periods from SLA counts. • **Maintenance**: Specifies time periods where change management activities are allowed. A schedule containing maintenance schedule entries cannot also contain blackout schedule entries. • **Blackout**: Excludes time periods from change management schedules. A schedule containing blackout schedule entries cannot also contain maintenance schedule entries.
Show As	Option that indicates how the schedule entry should appear in calendar applications and how it should interact with other schedule entries. • **Busy**: Schedule entry is not available for scheduling a work task. • **At no extra charge**: Schedule entry is available for scheduling a work task.

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Field	Description
	• **Tentative**: Schedule entry is tentatively available for scheduling a work task. • **On call**: Schedule entry is on call, which provides a means to determine which member of a user group is available to complete a task.
When	Date and time to which the schedule entry applies. If the schedule entry applies to a full 24-hour day, select the **All day** check box. **Note:** Changing the global date and time format in the *glide.sys.date_format* System Properties setting has significant impact on schedule calculations made when you select the **All day** check box. To learn more, see Global date and time field format.
Repeats	Repetition interval for the schedule entry, if any. If you select a repetition interval, other fields appear so you can further specify the repeat interval.
Repeat every	Scheduling repetition frequency - weekly, monthly, or yearly. This field is only visible when the **Repeats** field has a value of **Daily**, **Weekly**, **Monthly**, or **Yearly**.
Repeat on	Days of the week a weekly schedule repeats on. This field is only visible when the **Repeats** field has a value of **Weekly**.
Monthly type	Monthly schedule repetition frequency. This field is only visible when the **Repeats** field has a value of **Monthly**. Monthly repeat options include: • Repeat on a specific day of the month • Repeat on a specific day in a specific week of the month • Repeat on the last day of the month • Repeat on a specific weekday in the last week of the month
Yearly type	Yearly schedule repetition frequency. This field is only visible when the **Repeats** field has a value of **Yearly**. Yearly repeat options include: • Repeat on a specific day of the year • Repeat on a floating day
Float week	Week of the month a floating yearly schedule repeats on. This field is only visible when the **Yearly type** field has a value of **Floating**.
Float day	Day of the week a floating yearly schedule repeats on. This field is only visible when the **Yearly type** field has a value of **Floating**.
Month	Month of the year a floating yearly schedule repeats on. This field is only visible when the **Yearly type** field has a value of **Floating**.
Repeat until	Repetition end date. If you leave this field blank, the schedule repeats indefinitely.
Type	[Optional] Schedule entry description.

Related topics

Schedules

Define a schedule

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Schedule for the fifth instance of a week date

You can select a date that computes to the fifth instance of a weekday for a date near the end of a month for a repeating monthly schedule,

About this task

Three options are available for handling months that do not have a matching Fifth instance of the selected day.

- Last: Selects the last instance of the weekday in the month.
- Next: Selects the first instance of the weekday in the next month.
- Strict: Skips any month without a matching Fifth instance and selects only months that have a matching Fifth instance.

Use the *glide.schedules.fifth* system property to control how a schedule entry that selects the fifth occurrence of a weekday behaves in months containing only four occurrences of that day.

- Use of this property is only valid when the *glide.schedules.repeat_nth* property is set to **Day**.
- The following example illustrates computing what day of the month a schedule repeats on when the schedule starts on the Fifth instance of a weekday in the month.

Procedure

1. Navigate to *sys_properties.list*.
2. Open the *glide.schedules.fifth* property.
3. Verify that the **Value** is set to **last**.
4. Navigate to **System Scheduler** > **Schedules** > **Schedules**, define a new schedule, and click **Submit**.
5. Open the new schedule and in the **Schedule Entries** related list, create a new entry with the following parameters:
   - When: November 29, 2012 at 10:00 to November 29, 2012 at 11:00
   - Repeats: Monthly
   - Monthly type: Day of the Week
   - Starting: November 29

   Note: In this example, November 29 is the fifth Thursday in the month.
6. Click **Submit**.
7. Open the same schedule entry.

   Note: The message **Every month on the Fifth Thu** appears on the form.

   The schedule for the first three months is computed as:
   - November 29, 2012 (Fifth Thursday of the month)
   - December 27, 2012 (Last Thursday of the month)
   - January 31, 2013 (Fifth Thursday of the month)
8. If you set the **Value** on the *glide.schedules.fifth* property to **next** instead of **last** in step 3, the schedule for the first three months is computed as:

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- November 29, 2012 (Fifth Thursday of the month)
- January 3, 2012 (First Thursday of the next month since December 2012 does not have five Thursdays)
- January 31, 2013 (Fifth Thursday of the month)

9. If the **Value** on the *glide.schedules.fifth* property is set to strict instead of **last** in step 3, the schedule for the first three months is computed as:
   - November 29, 2012 (Fifth Thursday of the month)
   - No meeting (December 2012 skipped because it does not have five Thursdays)
   - January 31, 2013 (Fifth Thursday of the month)

Related topics

Schedules

Define a schedule

Repeat a monthly schedule

Repeat a monthly schedule

Repeat a monthly schedule to reduce the amount of time required to define schedules and to provide consistency in scheduling.

About this task

You can specify the following options for monthly schedules that start on a particular day of the month (**Monthly type** is set to **Day of the month.**). The following methods are available to compute what day of the week a monthly schedule repeats on:

- **Day**: Calculates the day of the week to repeat on by determining the order of the selected starting date within the month. For example, if you specified that the starting date appears on the first Monday in the month, the schedule repeats every first Monday of every month.
- **Week**: Calculates the day of the month to repeat on by determining what week number the selected starting date appears in the month. For example, if the starting date is a Monday during the second week of the month, the schedule repeats the second Monday of every month.

Use the system property *glide.schedules.repeat_nth* to determine what method your instance uses to compute what day a repeating monthly schedule occurs on. By default, instances use the more accurate Day method.

Note: Use the **Week** method to maintain backwards compatibility with customized schedule logic. To learn more about calculations for the starting day of each month, for monthly schedules that start on the fifth instance of a day, see Fifth Instance of a Day of the Week.

The following example illustrates computing what day of the week a monthly schedule repeats on.

Procedure

1. Navigate to *sys_properties.list*.
2. Open the *glide.schedules.repeat_nth* property.
3. Verify that the **Value** is set to **day**.
4. Navigate to **System Scheduler** > **Schedules** > **Schedules**, define a new schedule, and click **Submit**.

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5. Open the new schedule and in the **Schedule Entries** related list, create a new entry with the following parameters:
   - When: November 5, 2012 at 10:00 to November 5, 2012 at 11:00
   - Repeats: Monthly
   - Monthly type: Day of the Week
   - Starting: November 5

   Note: In this example, November 5 is the first Monday in the month, but it is in the second week.

6. Click **Submit**.
7. Open **Schedule Entry**.

   Note: The message **Every month on the first Mon** appears on the form. The first few dates this schedule runs on are:
   - November 5, 2012 (First Monday of the month)
   - December 3, 2012 (First Monday of the month)
   - January 7, 2012 (First Monday of the month)

8. If you set the **Value** on the *glide.schedules.repeat_nth* property to **week** instead of **day** in step 3, the first few dates this schedule run on are:
   - November 5, 2012 (Schedule starts on Monday in the second week of the month)
   - December 10, 2012 (Second Monday in the month)
   - January 14, 2012 (Second Monday in the month)

Related topics

Schedules

Define a schedule

Using schedules and calendars

Specific applications within the ServiceNow AI Platform generate graphical calendar displays based on schedule pages.

These schedule pages appear in daily, weekly, or monthly views. Currently, the applications using schedule pages include:

- Project Management
- Maintenance Schedules
- Group On-Call Rotation
- Field Service Management

Schedule pages are records that contain the scripts that determine the functionality of the graphical display.

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- Because of the heavy degree of scripting involved in a schedule page, you should, for most instances, use the default schedule pages in the base platform.
- The schedule page uses a URL with a series of parameters attached to generate the graphical display.
- A schedule page controls calendar content (`cmn_schedule_page`) record.

To access Schedule Pages, navigate to **System Scheduler > Schedules > Schedule Pages**. The Schedule Pages form provides the following fields:

Field	Field Type	Description
Name	String	General name used to identity the current schedule page.
Schedule type	String	Schedule type is a string that is used to uniquely identity the schedule page via the "`sysparm_page_schedule_type`" URI parameter. For example, a schedule page cou follows: **/show_schedule_page.do?sysparm_page_schedule_type=gantt_chart&sysparm_timeline_task_id=d530bf907f0** Alternatively, you can access the schedule page can by setting the "**sysparm_page_sys_i** unique 32 character hexadecimal system identifier of the schedule page.
View Type	Choice	Each view type displays different field combinations. There are two options available: • **Calendars** • Schedule Pages
Description	String	General description that provides additional information about the current schedule page. necessary.
Init function name	String	**Note:** This functionality is only used by **Calendar** type schedule pages. The init function name specifies the name of the JavaScript function to call inside the **Clie** calendar type schedule pages.
HTML	String	**Note:** This functionality is only used by **Calendar** type schedule pages. Jelly parses the HTML field, which is a scriptable section. It then injects it into the display p the calendar. It can be used to pass in variables from the server and define extra fields are
Client script	String	The client script is a scriptable section that allows for configuring options of the schedule different depending on the schedule page view type.
Server AJAX processor	String	**Note:** This functionality is only used by **Calendar** type schedule pages. The Server AJAX processor is specific to calendar type schedule pages that is used to retu items and spans that display.

Invoke the Schedule page and view a calendar

You can use the URL from arguments module, a field decoration (dictionary attribute `ref_contributions`), or a UI Action linking to `show_schedule.do` to invoke the Schedule page.

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For example, the On-call calendar module generates the calendar from the following URL:

```
$ocf.do?sysparm_start_date=2016-03-01&sysparm_current_view=monthly&sysparm_include_view=monthly,daily
```

This URL takes the user to the monthly calendar view dated March 1, 2016.

- The URL component `sysparm_current_view = monthly || weekly || daily` determines the current calendar view. If `sysparm_current_view` is given an invalid or empty value, it defaults to monthly view and rewrite the URL to that view. Valid values are monthly or weekly or daily.
- The URL component `sysparm_include_view = monthly,weekly,daily` determines which calendar views are available. If `sysparm_include_view` is given invalid or empty values, only the valid views appear. If all values are invalid, the default three views appears and rewrites the URL to those views. Valid values are `monthly`, `weekly`, and `daily`.

  Note: The `sysparm_include_view` is only available for the new on-call calendar view.

- The URL component `sysparm_group_id=group_sys_id` determines the specified group to filter on. If `sysparm_group_id` is specified, it filters by the specified group. Valid value is a group sysId.
- The URL component `sysparm_start_date=2016-03-02` determines the date based on which every view appears. If `sysparm_start_date` is specified, it opens the calendar contesting that particular date in which every view is selected. The format is YYYY-MM-DD. If an invalid format or date is specified, it uses the current date and rewrites the URL to that date.

Note: The `sysparm_zoom` URL component has been replaced with `sysparm_current_view` in OnCallRotation only.

Schedule calendar

Use the Schedule calendar to create, view, and edit events.

The schedule calendar is available in day, week, or month views in calendar and time line views. To create events in the calendar, see Create schedule entries in the Schedule calendar.

Note: To use the classic schedule calendar, see Define a schedule.

Domain support and schedules

Domain separation is supported in schedules. 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. Activate the Domain Support [com.glide.domain] plugin to enable the domain separation functionality for schedules.

Support level: Basic

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- 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.

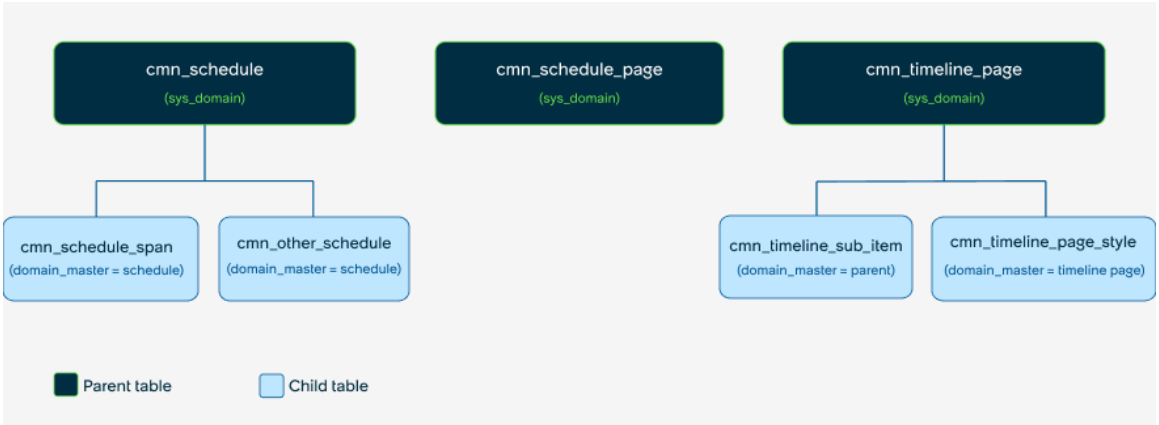
Overview

The records in the Schedule [cmn_schedule], Schedule Page [cmn_schedule_page], and Timeline Page [cmn_timeline_page] tables have a defined domain.

- The child tables use the *domain_master* attribute to derive the domain from the parent table.
- You can find the *domain_master* attribute on the dictionary record for the respective table.

The following diagram illustrates the scope of domain separation in different schedule tables:

Domain support for schedules



Custom domain support implementations

Domain separation support does not automatically occur when you migrate to a new release containing a custom implementation of domain support for tables such as Schedule Entry [cmn_schedule_span]. This action avoids changing any specific configurations that you may have in place.

To implement the base system domain support for schedules, a sys.script utility is provided. To run this utility, navigate to **Background** > **Scripts – Background**. The script is listed under the com.glide.schedules plugin as `fix_schedule_domain_support.js`.

- The utility attempts to add the **Domain** [sys_domain] column to the Schedule [cmn_schedule], Schedule Page [cmn_schedule_page], and Timeline page [cmn_timeline_page] tables.
- It then attempts to add the domain_master attribute to the Schedule Entry [cmn_schedule_span], Other Schedule [cmn_other_schedule], Timeline Sub Item [cmn_timeline_sub_item], and Timeline Page Span Style [cmn_timeline_page_style] tables.
- If the script finds existing records between a child and parent record that have differing domain, the script does not introduce the *domain_master* attribute to the child table.

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For example, consider the relationship of the Schedule [cmn_schedule] (parent) and Schedule Entry [cmn_schedule_span] (child) tables. If the **Domain** [sys_domain] column is available on both tables in the upgrading instance, the utility must migrate to the base system implementation of domain support for schedules.

- If the script detects records where the child Schedule Entry [cmn_schedule_span] domain differs from its parent Schedule [cmn_schedule] domain, it stops executing and logs a warning message.
- If the script does not find differing records, it deactivates and limits read access to the **Domain** [sys_domain] and **Domain Path** [sys_domain_path] columns on the Schedule Entry [cmn_schedule_span] table.
- Finally, the script adds the domain_master=schedule attribute to the dictionary file for the Schedule Entry [cmn_schedule_span] table.

Note: The *domain_master* attribute ensures that the child and parent record domains remain the same as the domain for the child that is derived from the specified reference field.

System scheduler

The System Scheduler application contains two separate engines for scheduling: the Scheduled Jobs engine and the Schedules engine.

Scheduled jobs

Scheduled Jobs executes any work that must be performed at a specific time, or on a recurring basis. The Scheduled Jobs module links to the Schedule [sys_trigger] table. Manipulating records on the Schedule table is not recommended. Use this table to view existing base system scheduled jobs.

The Scheduled Jobs module in System Definition is an admin-friendly interface for scheduling work. Use this module to create new scheduled jobs. For more information, see Create a Scheduled Job.

Schedules

Schedules are rules that include or exclude time on a calendar. They are used by service levels, inactivity monitor, and group on-call rotation. For instance, you can define a schedule to restrict service levels to only apply to weekdays during business hours. You can also exclude holidays from an on-call rotation.

For more information, see Use Schedules.

Event scheduling

You can use various tools for scheduling actions or tasks to happen in the future.

Maintenance schedules

Changes to the CMDB can be managed through the Maintenance Schedules plugin, which enables changes to be proposed and viewed through a timeline.

On-call rotation

The Group On-Call Rotation plugin enables a schedule to be defined to determine what users are primary contacts during particular hours of the day.

Scheduled reports

Once you define reports, you can schedule them for emailing at a specific time, or at regular intervals, using the reporting interface.

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Scheduled workflows

Workflows provide a robust system for automating advanced multi-step processes. Workflows are triggered by conditions, like business rules, or they can be scheduled for a particular time/recurring schedule, like scheduled jobs.

Scheduled jobs

Scheduled jobs are scripts you can specify should automatically generate at a specific date and time, or on a repeating basis.

Event registry

You can use events to schedule actions or tasks to occur when conditions are fulfilled.

For example:

kb.view

An event triggered when a user views a Knowledge Base article. You use it to trigger the script action Knowledge View that create a Knowledge Use record every time an article is viewed.

incident.commented

An event triggered when a user comments on an article, used by two incidents commented email notifications.

Inactivity Monitors

If a record has not been updated for a defined length of time, an inactivity monitor triggers an event.

Script Actions

Scripts that trigger when an event is recorded in the log. You can set scripts to execute whenever a particular activity occurs in the platform, rather than at a particular time, such as scheduled jobs, or in response to particular conditions, such as Business rules.

Notifications

You can also use events to trigger Email Notifications when an event is recorded in the log.

Set an inactivity monitor

You can set an inactivity monitor that triggers an event for a task record when the task has been inactive for a certain amount of time.

Before you begin

Role required: admin

About this task

If the task remains inactive, the monitor repeats at regular intervals. User updates to the task record restart the monitor. If reset conditions you defined for it have not been met, the monitor does not restart when you update the task record. Inactivity monitors only apply to records on tables that extend the `Task` table, or the `Task` table itself.

When an inactivity monitor triggers, it generates an event in the form `<tablename>.inactivity` (for example, `incident.inactivity`). Define an Email and SMS notifications or script action to drive further action for the inactivity monitor.

A record's activity is only based on user updates. System updates do not count as activity.

Inactivity monitors only support one matching inactivity monitor per task.

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If multiple inactivity monitors do match a task record, one of the inactivity monitors will delete all other sys_trigger jobs, leaving only its own, preventing the others from triggering. Since inactivity monitors are driven by condition builder, the definition time can't identify inactivity monitors from intersecting with each other per task record.

Procedure

1. Navigate to **All** > **System Policy** > **SLA** > **Inactivity Monitors** and click **New**.
2. Give the inactivity monitor a name.
3. Specify the type of record to monitor in the **Table** field.
4. Specify how long the inactivity monitor should wait before sending each notification in the **Wait** field.
5. Specify any additional conditions in the **Condition** field.
   At least one condition must be specified for the inactivity monitor to work.
   - If you are using incident auto-close, add a Reset condition because, if you don't, auto-close won't work properly. To prevent this reset, set a **Reset Condition** on your inactivity monitor. To learn more about Incident auto-close, see Configure incidents to close automatically.
   - All conditions need to be True per user update for the Inactivity Monitor to start running. For example, Set this condition only works if the due date is earlier than the current date when user updates the task.
6. Specify an Order if multiple inactivity monitors might have their conditions met for a given record - the one with the lowest order is used.
7. Click **Save**.

> **Note:** If you change conditions on an inactivity monitor, the monitor stops tracking previously tracked records. It does not track records that you created before the inactivity monitor, even if the record meets all other conditions.

Escalation intervals and pause conditions

Escalation Intervals and Pause Conditions are not relevant to an inactivity monitor.

The related list and field are available because the inactivity monitor table extends the table used for SLAs, but these elements are not used in any way when an inactivity monitor attaches or is triggered.

Scheduled jobs

Scheduled Jobs are automated pieces of work that can be performed at a specific time or on a recurring schedule.

You can automate the following kinds of tasks:

- Automatically generate and distribute a report
- Automatically generate and schedule an entity of records, such as an incident, change item, configuration item, from a template
- Run scheduled jobs from scripts or business rules
- Scheduling at the end of the month
- Scheduling for weekdays

For developer training, see Scheduled Script Executions and Events Objectives on the ServiceNow Developer Site.

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Use the System Events and Jobs Dashboard to monitor the system event processing system and the scheduled jobs processing system.

Scheduled job states

A scheduled job can be in any one of the following states.

Ready

Job is ready to run at the next scheduled interval.

Running

Job is in the process of carrying out a task.

Queued

Job has been added to the scheduler queue and is waiting to run.

Error

Error occurred while running the job.

Schedule job errors

If you encounter errors generating a scheduled job, visit for additional information.

Create a scheduled job

Create a scheduled job on the Schedule Job [sysauto] table.

Before you begin

Role required: admin

About this task

Create all new scheduled jobs using this method.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Click **New**.
3. Select the appropriate type of scheduled job.
   - Automate the generation and distribution of a report
   - Automatically generate something (a change, an incident, a ci, etc) from a template
   - Automatically run a script of your choosing

Result

The fields presented depend on the type of scheduled job required.

Automate generation and distribution of a report

Generate and distribute scheduled reports via email.

Before you begin

Roles required: admin

A user with the report_scheduler role can also create a scheduled report through a different navigation path. For more information, see Schedule emails of Core UI reports.

About this task

Scheduled reports can be distributed in PDF, CSV, or XLS format. Graphical reports can be distributed in PNG or PDF format. Multilevel pivot reports can only be scheduled in PDF format.

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Note:

- It is not possible to schedule Calendar, Map, or Single Score reports. You can schedule Pivot Table reports only if the plug-in *com.snc.whtp* is enabled.
- Data may not appear on reports created by an individual whose user account is deactivated. To ensure that the desired data appears, an active user must recreate the scheduled report.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Select **New**.
3. Select **Automate the generation and distribution of a report**.
4. Populate the following fields:

Field	Description
Name	Name of the scheduled report.
Report	Reference to the report you are scheduling. You can use the Search icon to locate the report. **Note:** Automatic email support is not available for Calendar, Map, and Single Score reports.
Users	Individual users who receive the report at the scheduled date and time. Users must have **Notification** set to **Enabled** on their user records to receive reports.
Groups	Groups that receive the report at the scheduled date and time.
Email addresses	Comma-separated list of email addresses of report recipients who are not users on your instance.
Application	Name of the scoped application that contains the report. **Global** appears if the report is in the global scope.
Active	When active, scheduled reports are delivered.
Run	Time interval to use for running the scheduled job: ○ **Daily**: Runs daily, at a designated time. ○ **Day and Month in Year**: Runs yearly on a specific day and month (for example, July 14), at a designated time. ○ **Day in Week in Month in Year**: Runs yearly on a specific day of the week in a specific week of a specific month (for example, the second Monday in October), at a designated time. ○ **Week in Month**: Runs monthly during a specific week of the month (for example, the third week of each month), on designated days and at a designated time. ○ **Weekly**: Runs on a weekly basis, at a designated time and day of the week. ○ **Monthly**: Runs on a monthly basis, at a designated time and day of the month. ○ **Periodically**: Runs on a designated repeating interval.

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Field	Description
	○ **Once**: Runs for a single occurrence only. ○ **On Demand**: Runs immediately on demand. ○ **Business Calendar: Entry Start**: Runs on the starting entry dates for the business calendar that you select in the **Business Calendar** field. A scheduled job runs for the starting date of each of the business entries that you defined for the business calendar. For example, if the business calendar represents a fiscal year, and the starting date of each entry is a fiscal month, the scheduled job runs on the first day of each month. ○ **Business Calendar: Entry End**: Runs for the ending date for the business calendar that you select in the **Business Calendar** field. This selection runs in the same manner as **Business Calendar: Entry Start**, but for the end dates of the associated business calendar entries. **Note:** When you select **Business Calendar: Entry Start** or **Business Calendar: Entry End**, you can apply an offset factor to schedule the job to run before or after the time span of the selected business calendar. If you select a business calendar and all its business calendar spans are in the past, the job would never run since that is an invalid configuration. To learn more, see the **Offset type** and **Offset** fields. To learn more about creating and using business calendars and defining business calendar entries, see Creating business calendars and Define business calendar entries.
Time zone	Time zone to use with the **Time** field entry when you specify the time at which the scheduled job should run. Select a time zone entry: ○ **-None-**: Use the default time zone for the logged-in user who is creating the scheduled job. For example, the scheduled job runs at 04:45 p.m. US/Pacific time if it's the user's assigned time zone, and you enter `16 : 45` into the **Time** field. ○ **Use System Time Zone**: Use the default system time zone that is specified for the instance in which it runs. For example, the scheduled job runs at 10:15 p.m. London time if Europe/London is the default system time zone for the instance, and you enter `22 : 15` in the **Time** field. ○ Actual time zone. For example, the scheduled job runs at 1:30 p.m. in the US Eastern time zone if you select **US/Eastern**, and enter `13 : 30` in the **Time** field.
Time	Time of day at which the scheduled job should run, expressed in hours, minutes, and seconds on a 24-hour clock. The selection that you make in the **Time zone** field determines the time zone for this entry.
Day	Day on which the scheduled job should run.

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Field	Description
	○ If **Run** is set to **Weekly**, select the day of the week. For example, select Wednesday. ○ If **Run** is set to **Monthly**, select the day of the month. For example, select 25 for the 25th day of the month. This field appears only if you select **Monthly** or **Weekly** in the **Run** field.
Repeat Interval	Duration of the repeat interval for each scheduled job execution. Enter the duration in the number of days, hours, or minutes. For example: ○ To run the scheduled job every four days, enter `04` in the **Days** field. ○ To run it every 26 hours, enter `26` in the **Hours** field. ○ If it should repeat at an interval of 13:30:25, enter `13` in the **Hours** field, and then enter `30` and `25` in the two unlabeled fields after it.
Advanced	Enables advanced scheduling options for greater flexibility in job planning and execution. You can configure jobs to start on a future date, end on a particular date, and define how the job should repeat. For more information, see Advanced options for scheduled jobs.
Starting	Allows you to define the beginning window of time (date and time) when you would like your job to start running. Within this window, the job actually starts at the time specified in the **Time** field. The **Starting** field appears only if you select the **Advanced** option and one of the following values in the **Run** field: ○ **Daily** ○ **Day and Month in Year** ○ **Day in Week in Month in Year** ○ **Monthly** ○ **Once** ○ **Periodically** ○ **Week in Month** ○ **Weekly** For the run type **Periodically**, the starting time is the date and time of the first scheduled job generation. For more information, see Starting and Ending fields.
Ending	Allows you to define the ending window of time (date and time) when you would like your job to stop running. Within this window, the job actually stops at the time specified in the **Time** field. The **Ending** field appears only if you select the **Advanced** option and one of the following values in the **Run** field: ○ **Daily** ○ **Day and Month in Year** ○ **Day in Week in Month in Year** ○ **Monthly**

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Field	Description
	○ **Once** ○ **Periodically** ○ **Week in Month** ○ **Weekly** For the run type **Periodically**, the ending time is the date and time of the first scheduled job generation. For more information, see Starting and Ending fields.
Business Calendar	Business calendar entry that you're using to determine the business calendar start or end date for the scheduled job. This field appears only if you select **Business Entry: Start Date** or **Business Entry: End Date** in the **Time** field.
Offset type	Type of time offset, if any, to apply to the business calendar that you selected for scheduling this job: ○ **Past**: Apply an offset factor to schedule the job to run before the start of the time span of the selected business calendar. ○ **Future**: Apply an offset factor to schedule the job to run after the end of the time span of the selected business calendar. ○ **--None--**: Don't apply a time offset when scheduling this job. Adding an offset factor enables you to schedule the job to run before or after the formal time span that is defined in the business calendar for the following use cases:
Offset	Amount of time offset, expressed in days, hours, minutes, and seconds, to apply to the business calendar that you selected for scheduling this job. For example, if you want to schedule the job to start three days, 14 hours, 10 minutes, and 45 seconds before the business calendar start date, do the following actions: ○ Select **Past** in the **Offset type** field. ○ Enter **3** in the **Days** field. ○ Enter **14**, **10**, and **45** in the **Hours** field. The **Offset Days** and **Hours** fields appear only if you select **Business Calendar: Entry Start** or **Business Calendar: Entry End** in the **Run** field, and **Past** or **Future** in the **Offset type** field.
Priority	Numerical priority for the scheduled job: ○ Set essential jobs to a priority value below 100. ○ Set nonessential jobs to a priority above 100. ○ If 70 percent or more of all scheduled jobs are **Overdue**, any jobs that are marked with a value above 100 don't run.
Conditional	When enabled, specify a scripted condition for generating the report.
Omit if no records	When enabled, empty reports are not distributed.

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Field	Description
Condition	A conditional script that determines if a scheduled job should run. The last expression of the script should evaluate to a Boolean (true/false) value. This text box appears only if you select **Use conditions**. For more information about scripts on the ServiceNow platform, see Scripts. **Warning:** Conditional scripts for scheduled emails are executed in the sandbox. Therefore, function definitions aren't allowed. Some API calls and keywords are also not allowed. For more information, see Script sandbox property.
Subject	Text that appears in the subject line of the distribution email.
Introductory message	(Optional) Add a message to the report. If the report output type is Embedded PNG, ○ Use the tag `${report:png}` in the message body to position the report in the message. Otherwise, the report appears at the bottom of the message. ○ Use the tag `${report:include_with}` to position other reports included with the email. Otherwise, these reports appear at the bottom of the message.
Type	Report output type. Graphical reports can be PNG or PDF files. List reports can be PDF, Excel, or CSV files. When scheduling a graphical report, select the output type **PDF** or **PDF-landscape** to include the chart grid data. When scheduling a List report, select output type **Excel** or **CSV**. Select **Embedded PNG** to embed the report visualization in the body of the email. Large images are scaled to fit the email. For more information, see the section Report output formats. **Note:** It is only possible to schedule multilevel pivot reports in PDF output.
Zip output	When selected, the report is sent as a zip file attachment to the email.
Include with	One or more additional reports to include with the email. It is not possible to order the reports within the email. You can use the Search icon to locate the additional reports.
Page size (Multilevel pivot report only)	Choose from A3, A4, Letter, or Legal size. To specify a different paper size, select **Custom** and enter the **Page height** and **Page width** in pixels.
Page height (in pixels) (Multilevel pivot report only)	Shows when **Page size** is set to **Custom**. For non-standard paper sizes, multiply the page height in inches by 72 and enter the value in this field.
Page width (in pixels) (Multilevel	Shows when **Page size** is set to **Custom**. For non-standard paper sizes, multiply the page width in inches by 72 and enter the value in this field.

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Field	Description
pivot report only)	

5. Select **Submit**.

What to do next

To edit the scheduled email of a report job, open the job from the Scheduled Jobs list. To stop scheduled emails of a report, delete the relevant job's row from the Scheduled Jobs list.

Related topics

- Advanced options for scheduled jobs
- Create a scheduled job
- Personalize the system date format
- Set a system time zone

Automatically generate something from a template

Schedule the generation of entities, which include changes, incidents, and CIs.

Before you begin

Roles required: template_scheduler

Procedure

1. Navigate to Scheduled Entity Generations [sysauto_template] table.
2. Select **New**.
3. Populate the following fields:

Schedule entity generation

Field	Description
Name	Name that identifies this scheduled job.
Active	Option that indicates that scheduled job is active and should be executed at the specified date and time.
Application	Name of the application that contains the entity. **Global** appears if the entity is in the global scope.
Conditional	Option for enabling the running of the scheduled job if certain conditions are met in the associated script.
Condition	A conditional script that determines if a scheduled job should run. The last expression of the script should evaluate to a Boolean (true/false) value. This text box appears only if you select **Use conditions**.
Run	Time interval to use for running the scheduled job: ○ **Daily**: Runs daily, at a designated time. ○ **Day and Month in Year**: Runs yearly on a specific day and month (for example, July 14), at a designated time.

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Field	Description
	○ **Day in Week in Month in Year**: Runs yearly on a specific day of the week in a specific week of a specific month (for example, the second Monday in October), at a designated time. ○ **Week in Month**: Runs monthly during a specific week of the month (for example, the third week of each month), on designated days and at a designated time. ○ **Weekly**: Runs on a weekly basis, at a designated time and day of the week. ○ **Monthly**: Runs on a monthly basis, at a designated time and day of the month. ○ **Periodically**: Runs on a designated repeating interval. ○ **Once**: Runs for a single occurrence only. ○ **On Demand**: Runs immediately on demand. ○ **Business Calendar: Entry Start**: Runs on the starting entry dates for the business calendar that you select in the **Business Calendar** field. A scheduled job runs for the starting date of each of the business entries that you defined for the business calendar. For example, if the business calendar represents a fiscal year, and the starting date of each entry is a fiscal month, the scheduled job runs on the first day of each month. ○ **Business Calendar: Entry End**: Runs for the ending date for the business calendar that you select in the **Business Calendar** field. This selection runs in the same manner as **Business Calendar: Entry Start**, but for the end dates of the associated business calendar entries. **Note:** When you select **Business Calendar: Entry Start** or **Business Calendar: Entry End**, you can apply an offset factor to schedule the job to run before or after the time span of the selected business calendar. If you select a business calendar and all its business calendar spans are in the past, the job would never run since that is an invalid configuration. To learn more, see the **Offset type** and **Offset** fields. To learn more about creating and using business calendars and defining business calendar entries, see Creating business calendars and Define business calendar entries.
Time	Time of day at which the scheduled job should run, expressed in hours, minutes, and seconds on a 24-hour clock. The selection that you make in the **Time zone** field determines the time zone for this entry.
Time zone	Time zone to use with the **Time** field entry when you specify the time at which the scheduled job should run. Select a time zone entry: ○ **-None-**: Use the default time zone for the logged-in user who is creating the scheduled job. For example, the scheduled job runs at 04:45 p.m. US/Pacific time if it's the user's assigned time zone, and you enter 16 : 45 into the **Time** field. ○ **Use System Time Zone**: Use the default system time zone that is specified for the instance in which it runs.

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Field	Description
	For example, the scheduled job runs at 10:15 p.m. London time if Europe/London is the default system time zone for the instance, and you enter 22 : 15 in the **Time** field. ○ Actual time zone. For example, the scheduled job runs at 1:30 p.m. in the US Eastern time zone if you select **US/Eastern**, and enter 13 : 30 in the **Time** field.
Day	Day on which the scheduled job should run. ○ If **Run** is set to **Weekly**, select the day of the week. For example, select Wednesday. ○ If **Run** is set to **Monthly**, select the day of the month. For example, select 25 for the 25th day of the month. This field appears only if you select **Monthly** or **Weekly** in the **Run** field.
Repeat Interval	Duration of the repeat interval for each scheduled job execution. Enter the duration in the number of days, hours, or minutes. For example: ○ To run the scheduled job every four days, enter 04 in the **Days** field. ○ To run it every 26 hours, enter 26 in the **Hours** field. ○ If it should repeat at an interval of 13:30:25, enter 13 in the **Hours** field, and then enter 30 and 25 in the two unlabeled fields after it.
Advanced	Enables advanced scheduling options for greater flexibility in job planning and execution. You can configure jobs to start on a future date, end on a particular date, and define how the job should repeat. For more information, see Advanced options for scheduled jobs.
Starting	Allows you to define the beginning window of time (date and time) when you would like your job to start running. Within this window, the job actually starts at the time specified in the **Time** field. The **Starting** field appears only if you select the **Advanced** option and one of the following values in the **Run** field: ○ **Daily** ○ **Day and Month in Year** ○ **Day in Week in Month in Year** ○ **Monthly** ○ **Once** ○ **Periodically** ○ **Week in Month** ○ **Weekly** For the run type **Periodically**, the starting time is the date and time of the first scheduled job generation. For more information, see Starting and Ending fields.

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Field	Description
Ending	Allows you to define the ending window of time (date and time) when you would like your job to stop running. Within this window, the job actually stops at the time specified in the **Time** field. The **Ending** field appears only if you select the **Advanced** option and one of the following values in the **Run** field: ○ **Daily** ○ **Day and Month in Year** ○ **Day in Week in Month in Year** ○ **Monthly** ○ **Once** ○ **Periodically** ○ **Week in Month** ○ **Weekly** For the run type **Periodically**, the ending time is the date and time of the first scheduled job generation. For more information, see Starting and Ending fields.
Business Calendar	Business calendar entry that you're using to determine the business calendar start or end date for the scheduled job. This field appears only if you select **Business Entry: Start Date** or **Business Entry: End Date** in the **Time** field.
Offset type	Type of time offset, if any, to apply to the business calendar that you selected for scheduling this job: ○ **Past**: Apply an offset factor to schedule the job to run before the start of the time span of the selected business calendar. ○ **Future**: Apply an offset factor to schedule the job to run after the end of the time span of the selected business calendar. ○ **--None--**: Don't apply a time offset when scheduling this job. Adding an offset factor enables you to schedule the job to run before or after the formal time span that is defined in the business calendar for the following use cases:
Offset	Amount of time offset, expressed in days, hours, minutes, and seconds, to apply to the business calendar that you selected for scheduling this job. For example, if you want to schedule the job to start three days, 14 hours, 10 minutes, and 45 seconds before the business calendar start date, do the following actions: ○ Select **Past** in the **Offset type** field. ○ Enter **3** in the **Days** field. ○ Enter **14**, **10**, and **45** in the **Hours** field.

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Field	Description
	The **Offset Days** and **Hours** fields appear only if you select **Business Calendar: Entry Start** or **Business Calendar: Entry End** in the **Run** field, and **Past** or **Future** in the **Offset type** field.
Generate this	Reference to the template record from which you are generating a scheduled job.

Related topics

- Advanced options for scheduled jobs
- Create a scheduled job
- Enable run types for scheduled job child tables
- Personalize the system date format
- Set a system time zone

Automatically run a script of your choosing

Schedule both conditional and non-conditional scripts. If Domain Separation is installed in the instance, you can also select, filter, sort, and schedule scripts based on their assigned domains.

Before you begin

Roles required: admin

About this task

The following is an example of a conditional script. It runs the scheduled job only if there are active incidents older than 30 days.

```
// Only run this Scheduled Job if there are active Incidents
 over 30 days old
var ga = new GlideAggregate('incident');
ga.addAggregate('COUNT');
ga.addQuery('active', 'true');
ga.addQuery('sys_created_on', '<', gs.daysAgo(30));
ga.query();
ga.next();
ga.getAggregate('COUNT') !== '0'
```

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Select **New**.
3. Select **Automatically run a script of your choosing**.
4. On the form, fill in the fields.

Schedule script execution

Field	Description
Name	Name that identifies this scheduled job.
Active	Option that indicates that scheduled job is active and should be executed at the specified date and time.
Application	Name of the application that contains the script. **Global** appears if the script is in the global scope.

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Field	Description
Conditional	Option for enabling the running of the scheduled job if certain conditions are met in the associated script.
Condition	A conditional script that determines if a scheduled job should run. The last expression of the script should evaluate to a Boolean (true/false) value. This text box appears only if you select **Use conditions**. ⚠ **Warning:** Conditional scripts for scheduled report emails and Performance Analytics data collection jobs are executed in the sandbox. Therefore, function definitions aren't allowed. Some API calls and keywords are also not allowed. For more information, see Script sandbox evaluator. After upgrade, jobs with conditional scripts that contain these disallowed API components finish with errors.
Run	Time interval to use for running the scheduled job: ○ **Daily**: Runs daily, at a designated time. ○ **Day and Month in Year**: Runs yearly on a specific day and month (for example, July 14), at a designated time. ○ **Day in Week in Month in Year**: Runs yearly on a specific day of the week in a specific week of a specific month (for example, the second Monday in October), at a designated time. ○ **Week in Month**: Runs monthly during a specific week of the month (for example, the third week of each month), on designated days and at a designated time. ○ **Weekly**: Runs on a weekly basis, at a designated time and day of the week. ○ **Monthly**: Runs on a monthly basis, at a designated time and day of the month. ○ **Periodically**: Runs on a designated repeating interval. ○ **Once**: Runs for a single occurrence only. ○ **On Demand**: Runs immediately on demand. ○ **Business Calendar: Entry Start**: Runs on the starting entry dates for the business calendar that you select in the **Business Calendar** field. A scheduled job runs for the starting date of each of the business entries that you defined for the business calendar. For example, if the business calendar represents a fiscal year, and the starting date of each entry is a fiscal month, the scheduled job runs on the first day of each month. ○ **Business Calendar: Entry End**: Runs for the ending date for the business calendar that you select in the **Business Calendar** field. This selection runs in

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Field	Description
	the same manner as **Business Calendar: Entry Start**, but for the end dates of the associated business calendar entries. **Note:** When you select **Business Calendar: Entry Start** or **Business Calendar: Entry End**, you can apply an offset factor to schedule the job to run before or after the time span of the selected business calendar. If you select a business calendar and all its business calendar spans are in the past, the job would never run since that is an invalid configuration. To learn more, see the **Offset type** and **Offset** fields. To learn more about creating and using business calendars and defining business calendar entries, see Creating business calendars and Define business calendar entries.
Day	Day on which the scheduled job should run. ○ If **Run** is set to **Weekly**, select the day of the week. For example, select Wednesday. ○ If **Run** is set to **Monthly**, select the day of the month. For example, select 25 for the 25th day of the month. This field appears only if you select **Monthly** or **Weekly** in the **Run** field.
Repeat Interval	Duration of the repeat interval for each scheduled job execution. Enter the duration in the number of days, hours, or minutes. For example: ○ To run the scheduled job every four days, enter `04` in the **Days** field. ○ To run it every 26 hours, enter `26` in the **Hours** field. ○ If it should repeat at an interval of 13:30:25, enter `13` in the **Hours** field, and then enter 30 and 25 in the two unlabeled fields after it.
Time zone	Time zone to use with the **Time** field entry when you specify the time at which the scheduled job should run. Select a time zone entry: ○ **-None-**: Use the default time zone for the logged-in user who is creating the scheduled job. For example, the scheduled job runs at 04:45 p.m. US/Pacific time if it's the user's assigned time zone, and you enter `16 : 45` into the **Time** field. ○ **Use System Time Zone**: Use the default system time zone that is specified for the instance in which it runs. For example, the scheduled job runs at 10:15 p.m. London time if Europe/London is the default system time zone for the instance, and you enter `22 : 15` in the **Time** field. ○ Actual time zone. For example, the scheduled job runs at 1:30 p.m. in the US Eastern time zone if you select **US/Eastern**, and enter `13 : 30` in the **Time** field.
Time	Time of day at which the scheduled job should run, expressed in hours, minutes, and seconds on a 24-hour clock. The selection that you make in the **Time zone** field determines the time zone for this entry.

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Field	Description
Day	Day on which the scheduled job should run. ○ If **Run** is set to **Weekly**, select the day of the week. For example, select Wednesday. ○ If **Run** is set to **Monthly**, select the day of the month. For example, select 25 for the 25th day of the month. This field appears only if you select **Monthly** or **Weekly** in the **Run** field.
Repeat Interval	Duration of the repeat interval for each scheduled job execution. Enter the duration in the number of days, hours, or minutes. For example: ○ To run the scheduled job every four days, enter `04` in the **Days** field. ○ To run it every 26 hours, enter `26` in the **Hours** field. ○ If it should repeat at an interval of 13:30:25, enter `13` in the **Hours** field, and then enter `30` and `25` in the two unlabeled fields after it.
Advanced	Enables advanced scheduling options for greater flexibility in job planning and execution. You can configure jobs to start on a future date, end on a particular date, and define how the job should repeat. For more information, see Advanced options for scheduled jobs.
Starting	Allows you to define the beginning window of time (date and time) when you would like your job to start running. Within this window, the job actually starts at the time specified in the **Time** field. The **Starting** field appears only if you select the **Advanced** option and one of the following values in the **Run** field: ○ **Daily** ○ **Day and Month in Year** ○ **Day in Week in Month in Year** ○ **Monthly** ○ **Once** ○ **Periodically** ○ **Week in Month** ○ **Weekly** For the run type **Periodically**, the starting time is the date and time of the first scheduled job generation. For more information, see Starting and Ending fields.
Ending	Allows you to define the ending window of time (date and time) when you would like your job to stop running. Within this window, the job actually stops at the time specified in the **Time** field. The **Ending** field appears only if you select the **Advanced** option and one of the following values in the **Run** field: ○ **Daily** ○ **Day and Month in Year** ○ **Day in Week in Month in Year**

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Field	Description
	○ **Monthly** ○ **Once** ○ **Periodically** ○ **Week in Month** ○ **Weekly** For the run type **Periodically**, the ending time is the date and time of the first scheduled job generation. For more information, see Starting and Ending fields.
Business Calendar	Business calendar entry that you're using to determine the business calendar start or end date for the scheduled job. This field appears only if you select **Business Entry: Start Date** or **Business Entry: End Date** in the **Time** field.
Run as [Optional]	Select another user to run the script execution as. Configure the form to add this field if it is not present.
Run this script	Name of the script to run at the scheduled date and time. For example, copy script logic from a business rule, or call a script include.

5. If Domain Separation is installed in this instance, the following fields also appear for selecting, sorting, and scheduling jobs by domain.

   Note: The Domain Support - Domain Extensions Installer plugin installs these fields. To learn more, see Request domain separation.

Field	Description
Domain iterator	Check box that enables this job to run across multiple domains. If selected, the **Domain source table** and **Domain source filter** fields appear.
Domain source table	Name of the domain-separated table that is the source of the domains in which the scheduled job should run. For example, select **Department (cmn_department)** if you want to use it as the source of the assigned domains used to schedule scripts. The scheduled job determines these domains from the sys_domain field of the source table records. To learn more, see Domain assignment. **Note:** It's a good idea to create a domain-separated table solely dedicated to sourcing domains, unless you have a use case that warrants using an existing one. If you do create a new one, simply select it using this field.
Domain source filter	Optional condition you can specify to filter the records queried from the selected domain source table. **a.** Select the field to use for filtering records. **b.** Add filtering conditions and operators to narrow the domain selection criteria. To learn more, see Filters.

The following processing takes place when scheduling a job in a domain-separated instance:

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- It first queries the selected domain source table.
- If you specified a condition in the **Domain source filter** field, it applies the filtering condition to narrow down the resulting set of records.
- Finally, it retrieves its list of unique domains from the sys_domain columns of these records.

6. Select **Update** to update the scheduled job, **Execute Now** to execute the scheduled script immediately, or **Delete** to delete the job.

Related topics

Advanced options for scheduled jobs

Create a scheduled job

Enable run types for scheduled job child tables

Personalize the system date format

Set a system time zone

Domain separation for service providers

Enable run types for scheduled job child tables

The run types; **Day and Month in Year**, **Day in Week in Month in Year**, and **Week in Month**, require the fields; **Day**, **Month**, and **Year** to be visible. Child tables which don't display those fields can't create jobs with that run type selected.

Before you begin

Identify the child table for which you're configuring new run times. To find child tables, follow the instructions in Find child tables for scheduled jobs.

Role required: admin

Procedure

Configure **Run** time options:

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Select **New**.
3. Select **Automatically run a script of your choosing**.
4. Select the **Run** menu to display available choices.
   If the choices for the **Run** menu have been previously modified, the new run types won't be visible. To add them:
   a. Select and hold (or right-click) **Run** and select **Configure Choices**.
   b. Select the choices for **Run** that you want to add and select **Add**.

Find child tables for scheduled jobs

Identify child tables in scheduled jobs to promote consistent configuration across all related tables. This helps maintain data integrity and uniform processing logic throughout the table hierarchy.

Before you begin

Role required: admin

About this task

There are two ways to locate child tables of a scheduled job; either by running a script or using search parameters.

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Procedure

1. **Optional:** Run a background script such as:
   ```
   gs.info(GlideDBObjectManager.get().getAllExtensions('sysauto'));
   ```
   (Optional) The script is an efficient and thorough way to gather the names of all child tables to a parent table.

2. **Optional:** Search the **sys_db_object_list** table, using the search parameters: **Extends table label starts with Scheduled Job or Extends table Extends table label starts with scheduled Job or Extends table Extends table Extends table label starts with scheduled jobs.**
   (Optional) Depending on the depth of the table hierarchy, additional parameters might be needed to find all child tables.

Related topics

Scheduled jobs

Create a scheduled job

Advanced options for scheduled jobs

Enable run types for scheduled job child tables

Special cases in job schedules

Some special cases require care in job scheduling.

End of the month schedules

Because months have different lengths, take care when scheduling jobs for the end of the month.

- Scheduling an event for the 29th or 30th is not recommended, because the scheduled job is executed in months (like February) which are shorter than those dates.
- If an event is scheduled for the 31st, it executes on the last day of the month, even if the month is shorter.

For example, something scheduled to run on the 31st of the month runs on February 28 or February 29 in a leap year.

Weekday schedules

For scheduled scripts, use the following script to run only on weekdays:

Warning: Conditional scripts for scheduled report emails are executed in the sandbox. Therefore, function definitions are not allowed. Some API calls and keywords are also not allowed.

```
var isWeekday;
var today = new Date();
var dayOfWeek = today.getDay(); // Get day of the week(0 =
 Sunday, 1 = Monday, ... , 6 = Saturday)
switch (dayOfWeek) {
case 0: // Sunday
case 6: // Saturday
isWeekday = false;
```

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```
break;
default:
isWeekday = true;
}
answer=isWeekday;
```

If the conditional script on a Scheduled Report is more complex and you need to make use of our Glide classes, then please use the following steps as a workaround:

1. Create a Scheduled Job and complete all the conditional logic of the Scheduled Report inside the Scheduled Job.
2. If all the conditional logic is satisfied, you can trigger the Scheduled Report with the following script inside the Scheduled Job.

```
var schRpGr = new GlideRecord("sysauto_report");
schRpGr.get("<sys_id of the scheduled report>");
gs.executeNow(schRpGr);
```

Scheduled jobs from scripts

To execute a scheduled job triggered by an event, use the following script:

```
//Execute a scheduled script job
var rec = new GlideRecord('sysauto_script');
rec.get('name', 'YOUR_JOB_NAME_HERE');
SncTriggerSynchronizer.executeNow(rec);
```

You can run the script using one of several tables:

- scheduled_import_set (Scheduled Import Sets)
- sysauto_script (Scheduled Script Execution)
- sysauto_template (Scheduled Template Generation)
- sysauto_report (Scheduled Report)

Note: `SncTriggerSynchronizer` does not provide methods to execute scheduled jobs in the future.

Running scheduled scripts and jobs imported from another instance

Scheduled Script Execution and Scheduled Jobs are categorized as data records in the ServiceNow AI Platform, which means they are excluded from update sets. To determine if a table is included, navigate to **All** > **System Definition** > **Dictionary** and view the **Attribute** value for the table in question. Only tables with the attribute update_sync=true are included in update sets.

You can optionally export and import data records via XML. However, to prevent unexpected data changes, Schedule Item [sys_trigger] records are not created for data records imported from an XML file such as an update set. To run scheduled jobs or scripts imported from another instance, update the corresponding job or script record in the target instance.

Related topics

Advanced options for scheduled jobs

Create a scheduled job

Enable run types for scheduled job child tables

Personalize the system date format

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Set a system time zone

Domain separation for service providers

View a schedule item

You can view scheduled items, which are individual instances of a scheduled job, from the system scheduler.

Before you begin

Role required: admin

About this task

Procedure

Navigate to **All** > **System Scheduler** > **Today's Scheduled Jobs**.

Note: It is inadvisable to modify the schedule items themselves. It is best to modify the scheduled jobs that contain them.

Each schedule item appears on the table listing.

Related topics

Scheduled jobs

Advanced options for scheduled jobs

Create a scheduled job

Enable run types for scheduled job child tables

Advanced options for scheduled jobs

Advanced scheduling options for scheduled jobs support greater flexibility in job planning and execution. You can configure jobs to start on a future date, end on a particular date, and define how the job should repeat.

When the **Run** field is set to one of the following values, an **Advanced** option displays on the scheduled job form:

- Daily: Runs daily, at a designated time.
- Day and Month in Year: Runs yearly on a specific day and month (for example, July 14), at a designated time.
- Day in Week in Month in Year: Runs yearly on a specific day of the week in a specific week of a specific month (for example, the second Monday in October), at a designated time.
- Monthly: Runs on a monthly basis, at a designated time and day of the month.
- Periodically: Runs on a designated repeating interval.
- Week in Month: Runs monthly during a specific week of the month (for example, the third week of each month), on designated days and at a designated time.
- Weekly: Runs on a weekly basis, at a designated time and day of the week.

If you select the **Advanced** option, the following advanced fields display on the form:

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- Starting or Starting (Timezone): Specifies the beginning of a window in the future within which the job starts running. The **Time** field determines the actual start time in the window.
- Ending or Ending (Timezone): Specifies the ending of a window in the future within which the job stops running. The **Time** field determines the actual stop time in the window.
- Repeat every: Enables custom recurrence patterns. For example, a daily job that repeats every two days or a weekly job that repeats every three weeks.

Note: The **Repeat every** field isn't supported with the Day and Month in Year and Day in Week in Month in Year run types.

Starting and Ending fields

The Scheduled Job [sysauto] table has multiple **Starting** and **Ending** fields. Each field behaves differently depending on whether a time zone is selected in the **Time zone** field.

Starting and Ending field behavior by time zone selection

Column name	Column label	When used	Behavior
run_start	Starting	No time zone selected	Stores the value you enter directly. The job starts at the entered time in the time zone of the user who runs the job. By default, the user who creates the job is the user who runs the job.
entered_run_start	Starting (Timezone)	Time zone selected	Uses the value you enter and the selected time zone to automatically calculate the value of the other **Starting** [run_start] field by converting your entered time to the equivalent local time as displayed in the UI.
run_end	Ending	No time zone selected	Stores the value you enter directly. The job stops at the entered time in the time zone of the user who runs the job. By default, the user who creates the job is the user who runs the job.
entered_run_end	Ending (Timezone)	Time zone selected	Uses the value you enter and the selected time zone to automatically calculate the value of the other **Ending** [run_end] field by converting your entered time to the equivalent local time as displayed in the UI.

When setting the **Starting** and **Ending** fields, follow these guidelines based on your time zone selection:

- Time zone selected: In the **Time zone** field, select a time zone, and then enter your desired starting and ending times in the **Starting (Timezone)** [entered_run_start] and **Ending (Timezone)** [entered_run_end] fields. The system automatically calculates the values of the other **Starting** [run_start] and **Ending** [run_end] fields.
- No time zone selected: In the **Time zone** field, select **-- None --**, and then enter your desired starting and ending times in the **Starting** [run_start] and **Ending** [run_end] fields. The job runs in the time zone of the user who runs the job.

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Note: If you select a time zone, you must enter the starting and ending times after setting the **Time zone** field otherwise the times might be reset.

Example: Daily scheduled job with no time zone

The following example of a daily job illustrates the behavior of the **Starting**, **Ending**, and **Repeat every** fields. The daily job has the following schedule:

- **Starting** [run_start]: June 1 at 00:00
- **Ending** [run_end]: June 30 at 23:59
- **Time**: 9:00 a.m.
- **Repeat every**: 1 day

Although the job is scheduled to start on June 1 at 00:00, it doesn't run at that time. Instead, the job first runs at 9:00 a.m. on June 1 because that is the specified run time. The starting and ending times define the window of time during which the job is set to run. The first valid scheduled run within that window is when the job will run, in this case at 9:00 a.m. on June 1. When creating scheduled job records, if the value of the **Starting** field is empty, the system uses the current time.

If you change the value of the **Repeat every** field to 2, the job runs every 2 days at 9:00 a.m. starting on June 1. That means it runs on June 1, June 3, June 5, and so on, continuing every other day until June 29—the last occurrence before the ending time of June 30 at 23:59.

Related topics

Scheduled jobs

Create a scheduled job

Enable run types for scheduled job child tables

Using time configuration

Handle scheduling, set up events, track metrics, and more with this feature.

Use time configuration apps for everything from basic time and task tracking, to calendars for business and fiscal events, all customizable to any given time zone.

Creating business calendars

Create business calendars in the ServiceNow AI Platform so that you can schedule events for your users and track their time across applications. You define schedules and calendars of all types, including fiscal calendars, in the Business Calendar menu.

Business calendar components

Use the following forms when you define calendars and schedules in the Business Calendar menu:

Business calendar definition record

Identifies an individual business calendar where you can specify a reference name, labeling, parent business calendar (if any), and a time zone. A business calendar can represent any time period, and its definition record is saved in the Business Calendar [business_calendar] table.

To learn more about creating a business calendar definition, see Create a business calendar.

Business calendar entries

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Defines the individual entries that make up a business calendar, and saves them in the Business Calendar Entry [business_calendar_span] and Business Calendar Entry Name (business_calendar_span_name) tables. In contrast to legacy schedule entries, which have repeating and excluding time spans, you must create individual business calendar entries for all time spans in the calendar. You can also create business calendar spans across both global and scoped applications using the Script Includes **BusinessCalendarGeneratorUtil**. To learn more see Create a business calendar span using a Script includes.

To learn more about creating entries for a business calendar, see Define business calendar entries and Create business calendar entry names.

Business calendar filter options

Defines the date and time filtering options for the business calendar that you're creating. These filtering options are in addition to the standard date and time filtering in the ServiceNow AI Platform.

To learn more about creating filtering options for a business calendar, see Create a business calendar.

Calendars for package

Pairs a business calendar with a ServiceNow AI Platform package so that you can enable the calendar for use in that functional area. A package is a collection of scopes and applications that make up a functional area, such as HR Service Delivery.

To learn more about associating a business calendar with a package, see Pair business calendars with packages.

⚠ **Warning:** If you're using Performance Analytics, use caution when changing time spans. Any change you make to the time span on a business or fiscal calendar can invalidate the Performance Analytics data. Consult with a Performance Analytics administrator before making such changes.

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Fiscal calendar example

In this example, you create a fiscal calendar with 4 quarters and 12 fiscal periods.

Parent Calendar — **Fiscal Year**
Business Calendar Entry — **October 1, 20nn to September 30, 20nn**

Child Calendar — **Fiscal Year Quarter**			
Business Calendar Entries — **Each Quarter in Fiscal Year**			
Fiscal Quarter 1 **Oct 1 – Dec 31, 20nn**	**Fiscal Quarter 2** **Jan 1 – Mar 31, 20nn**	**Fiscal Quarter 3** **Apr 1 – Jun 3, 20nn**	**Fiscal Quarter 4** **Jul 1 – Sep 30, 20nn**

Child Calendar — **Fiscal Year Period**			
Business Calendar Entries — **Each Period in Fiscal Quarters**			
Fiscal Period 1 **October 1 – 31, 20nn**	**Fiscal Period 2** **November 1 – 30, 20nn**	**Fiscal Period 3** **December 1 – 31, 20nn**	**Fiscal Period 4** **January 1 – 31, 20nn**
Fiscal Period 5 **February 1 – 28, 20nn**	**Fiscal Period 6** **March 1 – 31, 20nn**	**Fiscal Period 7** **April 1 – 30, 20nn**	**Fiscal Period 8** **May 1 – 31, 20nn**
Fiscal Period 9 **June 1 – 30, 20nn**	**Fiscal Period 10** **July 1 – 31, 20nn**	**Fiscal Period 11** **August 1 – 31, 20nn**	**Fiscal Period 12** **September 1 – 30, 20nn**

- When you navigate to **Business Calendar** > **Business Calendars**, you create:
  - A business calendar with a title of Fiscal Year.
  - A calendar for quarters that belong to the fiscal year.
  - A calendar for periods with a parent of Fiscal Year or Fiscal Quarter.

  When you create the Fiscal Year Quarter child calendar, you designate that the Fiscal Year is its parent calendar. For the child Fiscal Year Period calendar, you designate a Fiscal Year Quarter as its immediate parent.
- When you create each calendar, use the Business Calendar Entries related list, or navigate to **Business Calendar** > **Business Calendar Entries** to create business calendar entries for it. For each business calendar entry, create a reference name (for example, Fiscal Period 1) and designate start and end dates for each time span within the calendar.
  - For example, the parent Fiscal Year calendar has a business calendar entry for the time span of October 1, 20nn 12:00 through September 30, 20nn 23:59:59.
  - The child Fiscal Year Quarter calendar consists of four business calendar entries, each with the start and end dates of each quarter that makes up the fiscal year.

    Note: You can also create 13 period, 445, 454 and 544 types of fiscal calendars. To learn more about these types of fiscal calendars, see Defining fiscal calendars.

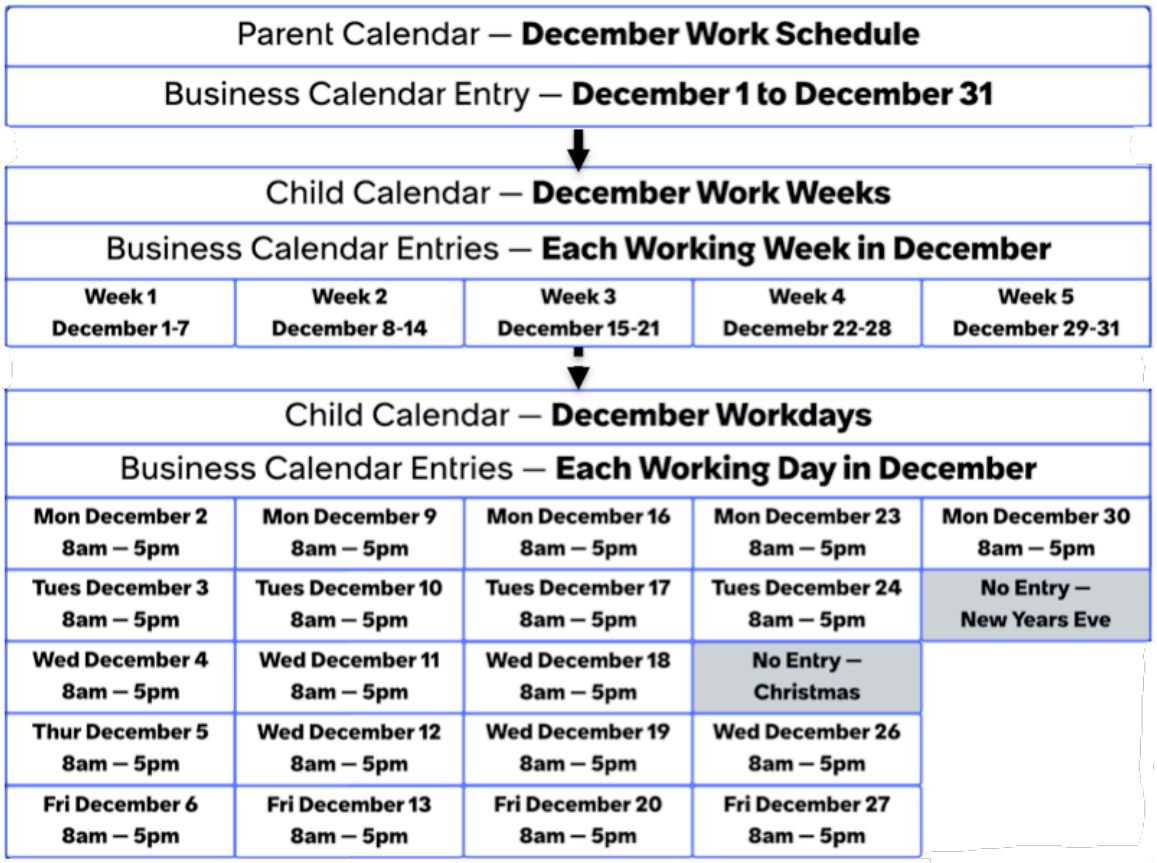
  - The child Fiscal Year Quarters calendar consists of multiple business calendar entries, with the start and end date times for each period in the fiscal year.
- Use **Business Calendar** > **Calendars for Package** to pair the parent Fiscal Year 20nn calendar with ServiceNow AI Platform packages, such as HR Service Delivery or Finance Close Automation.

Business calendar schedule example

In this example, you create a work schedule for the month of December.

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- The work schedule consists of a parent calendar, a child calendar for the working weeks in December, and another child calendar for the working days in December.
- The December Workdays calendar consists of business calendar entries for each working day. You don't include non-work days such as Saturdays, Sundays, and company holidays.



- Use **Business Calendar** > **Business Calendars** to create a parent business calendar with a title of December Work Schedule, and a child business calendar for December work weeks. When you create the child calendar, you designate that the December Work Schedule is its parent calendar.

  Note: You can make the December Work Schedule even more granular by creating a subordinate child calendar for December workdays. In this case, its immediate parent is the December Work Weeks calendar.

- When you create each calendar, use the Business Calendar Entries related list, or navigate to **Business Calendar** > **Business Calendar Entries** to create, at minimum, one business calendar entry for it. For each business calendar entry, you give it a reference name, and designate the start and end date times for each time span within the calendar.

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- For example, the parent December Work Schedule calendar is for a time span of December 1, 20nn 12:00 through December 31, 20nn 23:59:59.
- The child December Work Week calendar consists of five business calendar entries. Each entry is for the start and end dates of each calendar week in December.
- The child December Workdays calendar consists of multiple business calendar entries. Each entry is for the start and end date times for each working day in December. You don't create business calendar entries for company holidays such as New Year's Eve or New Year's Day.

- Use **Business Calendar** > **Calendars for Package** to pair the parent business calendar December Work Schedule with the appropriate ServiceNow AI Platform packages, such as Customer Service Management.

Using business calendars in place of legacy calendar and schedule definitions

The legacy functions that you may have used, on the **System Scheduler** > **Schedules** and Fiscal Calendar menus, to define schedules and fiscal calendars, continue to be supported. However, you should use the Business Calendar menu in their places to define calendars and schedules and then associate them with specific ServiceNow AI Platform packages.

Note: For Strategic Portfolio Management (SPM) applications, you must define Fiscal Calendars using the Generate a fiscal calendar feature.

- If you use the legacy functions to create fiscal calendars and schedules, the resulting definition records are internally flagged as belonging to the legacy [cmn_schedule] table hierarchy. These records appear on the lists on the Business Calendar menu, as well as on the lists on the respective menus for the legacy functions used. For example, if you defined fiscal calendars using legacy fiscal calendar functions, the resulting records appear on lists on the Business Calendar Fiscal Calendar menus.
- If you select a legacy fiscal calendar or schedule from these lists, you can only modify it using the legacy function that you originally used to create it. For example, if you select a legacy fiscal calendar, you can only modify it by using the functions on the Fiscal Calendar menu. You can't modify it with the Business Calendar menu functions.

Related topics

Using schedules and calendars

Create a business calendar

Create a definition record for an individual parent or child business calendar. You create this record so that you can easily identify a business calendar when you use it in a ServiceNow AI Platform package or functional area. A business calendar can represent any length of time, such as a week, a month, a year, or a fiscal period.

Before you begin

Role required: admin

About this task

When you create a business calendar, you specify a reference name, labeling, parent business calendar, if any, and a time zone for it.

You first create a business calendar record and then create business calendar entries for it in the Business Calendar Entries related list. To learn more about how business calendar entries work, see Define business calendar entries and Create business calendar entry names. You can also create records from the Business Calendar Entries table itself.

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Using the Business Calendar Filter Options related list, you can also define the date and time filtering options for the business calendar that you're creating.

You can also create a business calendar span using a Script includes titled, **BusinessCalendarGeneratorUtil**. For more information, see Create a business calendar span using a Script includes.

Note: Fiscal calendars or schedules you may have created in the **Fiscal Calendar** or **System Scheduler** > **Schedules** menu also appear on the lists on the **Business Calendar** menu. If you select a fiscal calendar or schedule, it appears in the legacy function that you originally used to create it. You can't view or update legacy fiscal calendars or schedules using this form.

Procedure

1. Navigate to **All** > **Business Calendar** > **Business Calendars**.
2. Select **New**.
3. On the form, fill in the fields.

Business calendar form

Field	Description
Name	Unique reference name and identifier for the business calendar record. The name should be unique per domain.
Label	Unique singular label for identifying the business calendar when you perform filtering. For example, you can assign a week-long work calendar with a label of `Workweek`.
Plural Labels	Unique plural label for identifying the business calendar. For example, you can assign a week-long work calendar with a label of `Workweeks`. Use plural labels when you do filtering that is based on more than one unit in the past or future. For example, Last 2 Fiscal Quarters.
Parent	Parent business calendar to the current business calendar that you're creating. To search for an existing business calendar, select the **Lookup using list** icon ( ). For example, you created a business calendar for 2020, and an individual child calendar for each month within the year, each with its own business calendar entries. As you create a business calendar for each month, you would select 2020 as the parent calendar for each. These entries create the relationship between a parent and its child business calendars. Leave this field empty if you're creating a parent business calendar.
Application	Application that is associated with this business calendar. If you are working on an application or are creating a business calendar from an application record, the field defaults to that application. Otherwise, the field defaults to **Global**. Any records that are created from the table record, such as modules and security rules, are assigned to this application by default. To learn more about application scoping, see Application scope
Time zone	Time zone to use for the business calendar when you specify the starting and ending times for each associated business calendar entry. Select a time zone entry:

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Field	Description
	○ **-None-**: Use the time zone specified in the logged in user's profile. ○ **Use System Time Zone**: Use the default system time zone specified for the instance. ○ **– Floating --**: Time zone is relative to whatever is accessing the business calendar entry at any given time. For example, if an administrator in Amsterdam creates a floating business calendar for 08:00 a.m. to 5:00 p.m., a person in San Jose, California, sees it as 08:00 a.m. to 5:00 p.m. When you define a business calendar in a specific time zone, users in different time zones see the business calendar in their own time zone. ○ Actual time zone. For example, Europe/London, US/Pacific, US/Central.
Description	Description of the business calendar.

4. Select **Submit**.
5. In the Business Calendars list, select the business calendar that you created.
6. In the Business Calendar Entries related list, create entries that define each span of time within the business calendar.
   Create, at minimum, one business calendar entry for the selected calendar.

   Note: To learn more about creating business calendar entries, see Define business calendar entries and Creating business calendars.

7. In the Business Calendar Filter Options related list, select **New** to create filtering options for the business calendar.
   You can define the date and time filtering options for the business calendar that you're creating. These filtering options are in addition to the standard date and time filtering in the ServiceNow AI Platform.

   Note: To learn more about creating business calendar filtering options, see Define business calendar filtering options.

8. Select **Submit**.

Result
A business calendar record is saved in the Business Calendar [business_calendar] table.

If you create business calendar entries in the Business Calendar Entries related list, records are created in the Business Calendar Entry (business_calendar_span) table. The records are associated with the business calendar.

If you created business calendar filter options in the Business Calendar Filter Options related list, a record is saved in the Business Calendar Filter Option (business_calendar_filter_option) table. The record is associated with the business calendar.

Create a business calendar group

For Performance Analytics and Reporting to use business calendars, organize several calendars into a business calendar group. An application might also contain a business calendar group.

Before you begin
Role required: admin

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About this task

You can base a Performance Analytics indicator or a report on business calendars instead of the standard calendar. The business calendars themselves are too granular in scale, and have to be grouped. The report or indicator then uses that group. Work with your Performance Analytics team to design the business calendar groups.

Note: Fiscal calendars are also supported. When you generate a fiscal calendar, a corresponding business calendar group is also generated automatically.

Procedure

1. Navigate to **All** > **Business calendars** > **Business calendar group**.
2. Select **New**.
3. Name the group and save it.
   The **Business calendars** related list appears.
4. In the **Business calendars** related list, select **Edit**.
5. Choose from existing business calendars to add to the group.
   You can also create a new business calendar from this list.

   Important: Do not select business calendars that cover a period shorter than a 24-hour day for use with Performance Analytics indicators. Performance Analytics does not store times, only dates. If only reports will use the group, you can select a shorter period.

6. Select **Update** when finished.

Example: Gregorian calendar group

The Gregorian Calendar group comes with the base system. It includes the Week, Month, Quarter, and Year business calendars, which also come with the base system.

Each business calendar record (Week, Month, Quarter, and Year) also shows which groups it belongs to.

Related topics

"Indicators with business calendars" in Create an automated indicator

Create a business calendar span using a Script includes

You can generate business calendar spans and their names using the **Script includes** titled **BusinessCalendarGeneratorUtil**. The calendars you create are accessible across both global and scoped applications.

Before you begin

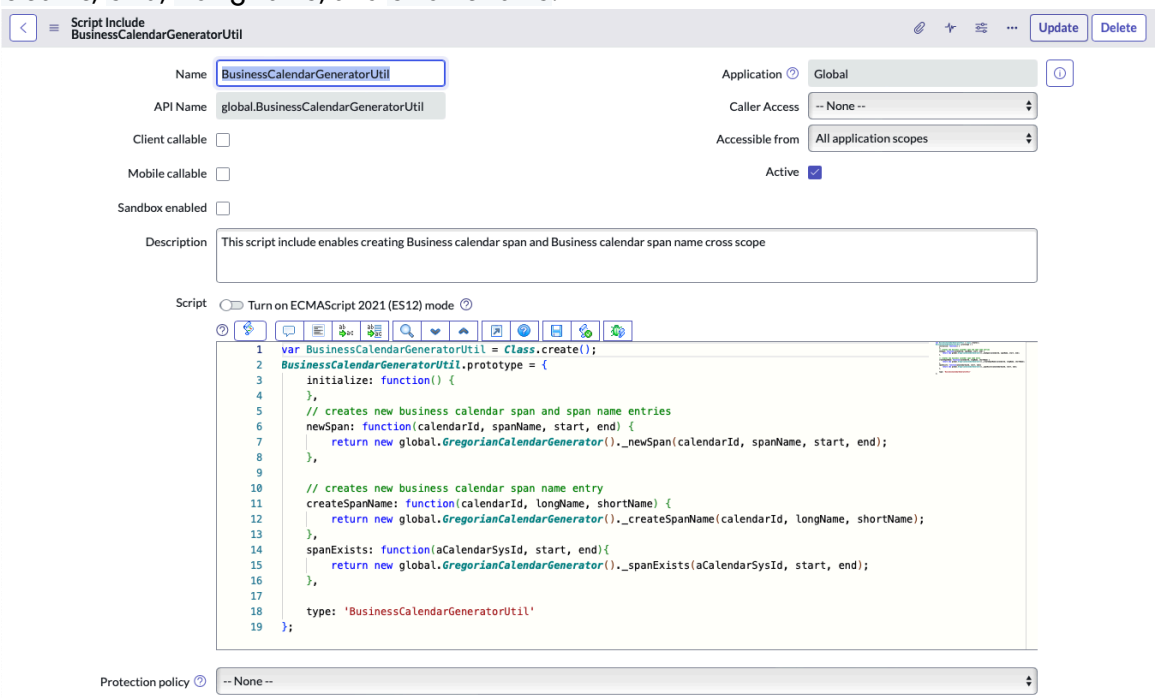
Role required: admin

Procedure

1. Access the **BusinessCalendarGeneratorUtil** script.
   a. Navigate to **All** and search `Script Includes`.
   b. Select the `Script Includes` option listed under **System UI**.
   c. Type `BusinessCalendarGeneratorUtil` in the search bar near the top of the form, and press **enter** or **return** on your keyboard.
   d. Select `BusinessCalendarGeneratorUtil`.

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2. Set options such as the scope of the script and who can call it (**Client callable** or **Mobile callable**), whether it's **Sandbox enabled**, and the description of the script, at the beginning of the form.
3. Modify the description of the script as needed.
4. Enter the necessary values where you see placeholders for `calendarId`, `spanName`, `start`, `end`, `longName`, and `shortName`.



5. Select **Update** to save changes.

Result

A business calendar span script includes is created. The year is appended to the beginning of the display name from the `longName` field.

Related topics

Script includes

Define business calendar entries

Create business calendar entry records that define the individual time periods that make up a business calendar. You create a business calendar entry for every individual time span in the calendar.

Before you begin

Role required: admin

About this task

In contrast to legacy schedule entries that have repeating and excluding time spans, you have to create individual business calendar entries for every business calendar time span. For example, if you are creating a Fiscal Year 2020 business calendar with 13 fiscal periods, you have to create individual business calendar entries for each fiscal period. For each fiscal period, you specify start and end date times. The year is appended to the beginning of the display name, according to the information entered in the `long name` field. This helps in avoiding confusion between similarly named entries.

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Note: Fiscal calendars or schedules you may have created in the **Fiscal Calendar** or **System Scheduler** > **Schedules** menu also appear on the lists on the **Business Calendar** menu. If you select a fiscal calendar or schedule, it appears in the legacy function that you originally used to create it. You can't view or update legacy fiscal calendars or schedules using this form.

To create business calendar entries and associate them with a business calendar, use the Business Calendar Entries related list in the Business Calendar form. To learn more about creating a business calendar, see Create a business calendar.

Procedure

1. Navigate to **All** > **Business Calendar** > **Business Calendar Entries**.
2. Select **New**.
3. On the form, fill in the fields.

Business calendar entry form

Field	Description
Name	Unique reference name for the business calendar entry. To select a business calendar name or to create one: **a.** To search for an existing business calendar entry name, select  . **b.** If no business calendar entry name exists and you want to create a business calendar entry name, select **New**. The Business Calendar Entry Name form appears. **Note:** To learn how to create business calendar entry names, see Create business calendar entry names.
Start	Start date and time for the business calendar period. It uses the time zone that you specified in the business calendar record that you associate with it. For example, if you're defining a fiscal period for the month of January, the starting date time is January 1, 2020 00:00
End	End date and time for the business calendar period. It uses the time zone that you specified in the business calendar record that you associate with it. For example, if you're defining a fiscal period for the month of January, the ending date time is January 31, 2020 23:59

4. Select **Submit**.
5. Select the business calendar entry that you created from the list that populates.
6. Verify that the info in the fields for the `Short name`, `Long name`, `Label`, `Calendar`, and `Application` is correct.
7. Select **Update** to save any changes and return to the list.

Create business calendar entry names

Create a name for an individual business calendar entry. You create this record so you can easily identify a specific business calendar entry when you use it in a business calendar.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Business Calendar** > **Business Calendar Entry Names**.

   Note: Alternately, you can create a business calendar entry name at the time you create the associated business calendar entry. To learn more about creating a business calendar entry, see Define business calendar entries.

2. Select **New**.
3. On the form, fill in the fields.

Business calendar entry name form

Field	Description
Short name	Abbreviated name for the business calendar entry. For example, January.
Long name	Longer name for the business calendar entry. For example, January fiscal period. It is from this field that the year is pulled and appended to the display name.
Label	Unique label for identification of the business calendar entry when you perform filtering.
Calendar	Name of the business calendar that you want the business calendar entry to belong to. This entry creates the relationship between a business calendar and the business calendar entries that define each individual time span with it. For example, if you're creating a business calendar entry for the January fiscal period, you select FY20 to associate it with Fiscal Year 2020. To select an existing business calendar: **a.** Select the **Lookup using list** icon ( ) or **b.** Select inside the **Calendar** field to view and select from a listing of recent business calendars that are created in **Business Calendar** > **Business Calendars**. **Note:** If you attempt to use the **Lookup using list** icon ( ) and see a dialog box with **Cancel** and **Leave** options, select **Cancel** and then select inside the **Calendar** field to select from a listing of recent business calendars.
Calendar type	Select the type of calendar. By default, no option is selected. The base system options are, **Business calendar** and **Fiscal calendar**. You can add other choices for the calendar type by extending the table and adding the choices you prefer. For scoped applications, you should extend the table with in the scope, create a choice list, then add choices from the choice set.
Application	Application that is associated with this business calendar. If you are working on an application or are creating a business calendar from an application record, the field defaults to that application. Otherwise, the field defaults to **Global**. Any records that are created from the table record, such as modules and security rules, are assigned to this application by default. To learn more about application scoping, see Application scope

4. Select **Submit**.

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Result

Records are created in the Business Calendar Entry (business_calendar_span) and the Business Calendar Entry Name (business_calendar_span_name) tables. If you create business calendar entries in the Business Calendar Entries related list in the Business Calendar form, these records are also associated with the specific business calendar.

Define business calendar filtering options

Define date and time filtering options for a business calendar. These filtering options are in addition to the standard date and time filtering in the ServiceNow AI Platform. You can provide your users with additional filtering options when they use the business calendar with ServiceNow AI Platform packages and functional areas.

Before you begin

Role required: admin

About this task

To learn more about standard filtering options, see Values for date/time fields.

Note: The easiest way to create business calendar filtering options and associate them with a business calendar is to use the Business Calendar Filter Options related list in the Business Calendar form. To learn more about creating a business calendar, see Create a business calendar.

Procedure

1. Navigate to **All** > **Business Calendar** > **Business Calendar Filter Options**.
2. Click **New**.
3. On the form, fill in the fields.

Business calendar filter options form

Field	Description
Period	Number of periods that should be traversed forward, backward, or both, for the business calendar. For example, if the business calendar reflects a week: ○ Provide a filter option for the current week by entering 0 for the base period. ○ Provide a filter option for a previous period by entering a negative number that represents the number of periods that should be traversed from the base period. For example, enter -1 for the last period, or enter -2 for two periods ago. ○ Provide a filter option for a future period by entering a positive number. For example, enter 1 for the next period, or enter 2 for the next two weeks. If the business calendar reflects a week: ○ Provide a filter option for the current week by entering 0 for the base period. ○ Provide a filter option for a previous period by entering a negative number that represents the number of periods that should be traversed from the base period. For example, enter -1 for the last period, or enter -2 for two periods ago. ○ Provide a filter option for a future period by entering a positive number. For example, enter 1 for next period, or enter 2 for the next two weeks. If the business calendar reflects a fiscal year with 13 periods:

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Field	Description
	○ Provide a filter option for the current fiscal year by entering `0` for the base period. ○ Provide a filter option for a previous fiscal year by entering a negative number that represents the number of periods that should be traversed from the base period. For example, enter `-2` for two fiscal periods ago, or enter `-13` for the last fiscal year. ○ Provide a filter option for a future fiscal year by entering a positive number. For example, enter `13` for the next fiscal year. If the business calendar reflects a fiscal year with four fiscal quarters: ○ Provide a filter option for the current fiscal quarter by entering `0` for the base period. ○ Provide a filter option for a previous fiscal quarter by entering a negative number that represents the number of periods that should be traversed from the base period. For example, enter `-1` for the last fiscal quarter, or enter `-2` for the last two fiscal quarters. ○ Provide a filter option for a future fiscal quarter by entering a positive number. For example, enter `1` for the next fiscal quarter, or enter `2` for the next two fiscal quarters.
Calendar	Name of the business calendar that you want the filter options to belong to. To select a business calendar, or create a new one: **a.** Search for an existing business calendar by clicking  . **b.** If no business calendar exists, or if you want to create a new business calendar, click **New**.
Application	Application that is associated with this business calendar. If you are working on an application or are creating a business calendar from an application record, the field defaults to that application. Otherwise, the field defaults to **Global**. Any records that are created from the table record, such as modules and security rules, are assigned to this application by default. To learn more about application scoping, see Application scope

Note: Within a calendar filtering option record, you can only associate a business calendar with a single filter option. To create multiple filtering options, you have to create multiple filtering option records, each with its own period entry.

4. Click **Submit**.

Result

Records are created in the Business Calendar Filter Option (business_calendar_filter_option) table. If you create business calendar filtering options in the Business Calendar Filter Options related list in the Business Calendar form, these records are also associated with the specific business calendar.

Pair business calendars with packages

Pair a business calendar that you created with a package, or functional area, in the ServiceNow AI Platform. When you associate a business calendar with a package, it enables the use of the calendar in that specific functional area. Until you pair a business calendar definition with at least one package, it remains a definition record only.

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Before you begin
Role required: admin

About this task
A package is an application, or generic set of functions, such as HR Service Delivery or Finance Close Automation, in the ServiceNow AI Platform. For example, if you created a fiscal calendar, you can associate it with the Finance Close Automation package.

Note: Within a single calendar package record, you can only associate a business calendar with a single package. To associate business calendars with multiple packages, you have to create multiple calendar package records. For example, if you created a fiscal calendar and want to associate it with the HR and Fixed Assets packages:

- In the first record you create, in the **Calendar** field, select the fiscal year, and in the **Package** field, select **HR**.
- In the second record you create, you again select the same fiscal calendar, and then select **Fixed Asset** in the **Package** field.

Procedure
1. Navigate to **All** > **Business Calendar** > **Calendars for Package**.
2. Select **New**.
3. On the form, fill in the fields.

Package form

Field	Description
Calendar	Name of the business calendar that you want to associate with a ServiceNow AI Platform package. Select  to access Business Calendars where you can search for an existing business calendar. If there is no existing calendar, you can create a new one.
Package	Name of the ServiceNow AI Platform package that you want to associate with the selected business calendar. Select  to access Packages where you can search for an existing package. If there is no existing package, you can create a new one.

4. Select **Submit**.

Result
A record is created in the Calendars for Package (calendars_for_package) table that associates the selected business calendar with a ServiceNow AI Platform package.

Defining fiscal calendars

Create fiscal calendars with defined fiscal periods, for use with Financial Management applications, such as Finance Close Automation. You can define fiscal periods, such as one month long, four weeks long, Q1 2015, or July 2015.

To create a fiscal calendar, activate the Fiscal Calendar [com.snc.fiscal_calendar] plugin. You can then use the legacy functions on the **Fiscal Calendar** menu to generate and validate fiscal calendars and their associated fiscal periods. You can create one of these types:

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Calendar type	Description
Regular	A calendar with 12 periods, each of which is one month long.
13 Period	A calendar with 13 periods, each of which is four weeks long. **Note:** This calendar is the only type that doesn't use quarters.
445	A calendar that divides a year into subsequent 4-week, 4-week, 5-week periods. The first and second periods have four weeks, and the last has five weeks. The application creates these periods for the calendar duration.
454	A calendar that divides a year into subsequent 4-week, 5-week, 4-week periods. The first period has four weeks, the second has five weeks, and the third has four weeks. The application creates these periods for the calendar duration.
544	A calendar that divides a year into subsequent 5-week, 4-week, 4-week periods. The first period has five weeks, and the second and third have four weeks.

Important: After you start working with a set of financial data with a fiscal calendar type, you can't change to another type of fiscal calendar. Verify that your fiscal calendar can be used with your financial data. If you import records into the Fiscal period [fiscal_period] table, you should validate that they're correct and don't contain any gaps.

After the fiscal calendar has been generated, don't change either **Start date time** or **End date time** fields of fiscal period records to avoid validation issues.

Note:

- The legacy functions that you may have used, on the **System Scheduler** > **Schedules** and Fiscal Calendar menus, to define schedules and fiscal calendars, continue to be supported. However, you should use the Business Calendar menu in their places to define calendars and schedules and then associate them with specific ServiceNow AI Platform packages. To learn more about defining and using business calendars, see Creating business calendars.
- For Strategic Portfolio Management (SPM) applications, you must define Fiscal Calendars using the Generate a fiscal calendar feature.

Activate Fiscal Calendar plugin

If you have the admin role, you can activate the Fiscal Calendar plugin (com.snc.fiscal_calendar). This plugin includes demo data and activates related plugins if they are not already active.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

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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.

Related topics

List of plugins (Brazil)

Generate a fiscal calendar

You can generate a fiscal calendar for a specified time period.

Before you begin

Role required: fiscal_calendar_admin

About this task

Important: Once you start working with a set of financial data with a fiscal calendar type, you cannot change to another type of fiscal calendar. Verify that your fiscal calendar can be used with your financial data.

Note: Instead of generating fiscal calendars, can also use the Business Calendar functions to create fiscal calendars. To learn more about creating business calendars and schedules, see Creating business calendars.

Procedure

1. Navigate to **All** > **Fiscal Calendar** > **Generate**
2. In the **Fiscal Calendar Types** section, select the type of fiscal year calendar.
3. In the **Fiscal Calendar Configuration** section, fill in the fields.

Field	Description
Fiscal Unit	Base unit for the calendar. ○ **Month**: Generate fiscal calendar with monthly periods. ○ **Quarter**: Generate fiscal calendar with quarterly periods.
Start Month	Month that is the beginning of your fiscal year.
Start Year	Starting year for the calendar.
Prefix for Year	Prefix that the application uses in the name of the records that represent the fiscal year.
Prefix for Quarter/Period	Prefix that the application uses in the name of the records that represent the fiscal quarter or period.
Start Day	Day that represents the beginning of each month.
End Year	Ending year for the calendar.
Prefix for Month/ Period	Prefix that the application uses in the name of the records that represent the month or period.

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4. Select **Generate Calendar**.
5. Navigate to **System Definition** > **Fiscal Periods** and verify that the monthly, quarterly, and annual fiscal period records exist.

View, modify, and validate fiscal periods - Legacy

After you generate a fiscal calendar, you can view fiscal period records, modify the start and end date, deactivate a fiscal period if necessary, and validate.

Before you begin

Role required: fiscal_calendar_user

Procedure

1. Navigate to **All** > **System Definition** > **Fiscal Periods**.
2. Open any of the fiscal periods (see table for field descriptions) to view, modify, or deactivate.

Fiscal period form

Field	Description
Name	Name of the fiscal period.
Start date time	Date the fiscal period starts.
End date time	Date the fiscal period ends.
Fiscal Type	[Read-Only] Type of period, either **Year** or **Quarter**.

3. Validate the fiscal periods to ensure that there are no gaps and that they match a valid style of calendar.
   a. To validate, return to the list view of fiscal periods and click **Validate Periods**.

Set a system time zone

Set your system time zone with a system property.

Before you begin

Role required: admin

About this task

The ServiceNow AI Platform stores time values in Universal Coordinated Time. Times appear globally based on the system time zone (glide.sys.default.tz), or if specified, based on user settings.

Procedure

1. Navigate to **All** > **System Properties** > **System**.
2. Locate the property **System timezone for all users unless overridden in the user's record** [glide.sys.default.tz].

   By default, the field is empty. If you have not defined a time zone for this property, *America/Los Angeles* is the default.

   For more information on setting the default time, see Configure Next Experience language and region preferences.

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3. Add a time zone in the format Country/City or using the name of a time zone (for example, *GMT*) and select **Save**.

   For available values, see Time zone representation.

   The new system time zone automatically cascades to all users who don't already have a specified time zone. If a user selects a different time zone, or if the administrator selects a different time zone for them, the selected time zone is assigned to the user. The system time zone isn't used.

Change the time zone choice list

Wherever users have a choice of time zone, the choices are populated using the **Time Zone** choice list on the `User [sys_user]` table. Not all time zones appear by default.

About this task

To add or remove time zones from the list of time zones:

Procedure

1. Navigate to **All** > **User Administration** > **Users** and open any user record, or click **New**. Notice that the default time zone is **System (America/Los_Angeles)**.
2. Right-click the Time zone label, and then select **Configure Choices**.
3. Highlight the desired time zone from the **Available** or **Selected** lists, and then **Add** or **Remove** the time zones as needed.

Change a time zone in a scheduled report

By default, scheduled reports use the time zone of the user who runs them (the user in the **Run As** field) to evaluate the query parameters. You are able to change this time zone.

About this task

For example, a report on 'incidents open today' resolves 'today' based on the user's time zone. To manually specify the time zone used to resolve the parameters of the report:

Procedure

1. Navigate to **All** > **Reports** > **Scheduled Reports**.
2. Choose the report with the time zone you want to edit.
3. Add Run as fields to the layout.

   a. Configure the form layout to add the **Run as tz** field to the **Scheduled Report** form. See Configuring the form layout for instructions.
   The Run as tz field lets you choose either a the time zone of the user who configured the schedule, or a specific time zone.

   b. **Optional:** Configure the form layout to add the **Run as [+]** field to the **Scheduled Report** form. See Configuring the form layout for instructions.
   The Run as [+] field lets you choose a specific user to run the report as.

4. Select the time zone you would like to use.
5. **Optional:** Select the user to run the report as.
6. Click **Submit**.

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Change a time zone in a scheduled data import

By default, scheduled data imports are run using the time zone of the user who creates them. However, there is a way to manually specify the time zone for the import.

About this task

To change the time zone of the scheduled data import:

Procedure

1. Configure the form to add the **Run As tz** field to the **Scheduled Data Import** form.
2. Select the appropriate time zone.
3. Click **Update**.

Define a relative duration

Define relative durations to calculate duration time for SLAs based on business schedules and specific time requirements.

Before you begin

Role required: admin

About this task

Relative durations calculate time periods based on business schedules. You can customize existing relative durations or create new ones to meet specific SLA requirements.

Procedure

1. Navigate to **System Scheduler** > **Relative Durations**.

   Four base relative durations are available:

   - Two business days by 4pm
   - Three business days by 4pm
   - Next business day by 4pm
   - End of next business day

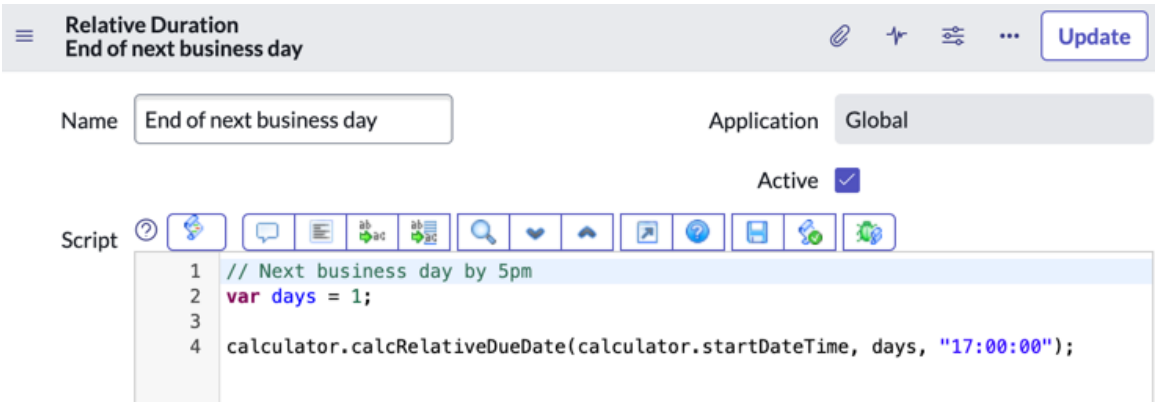
   Note: The business schedule you use defines business day durations. If you define no schedule, durations default to 24 x 7.

2. Select a relative duration to view or modify its configuration.
3. Customize the script variables and logic as needed for your requirements.

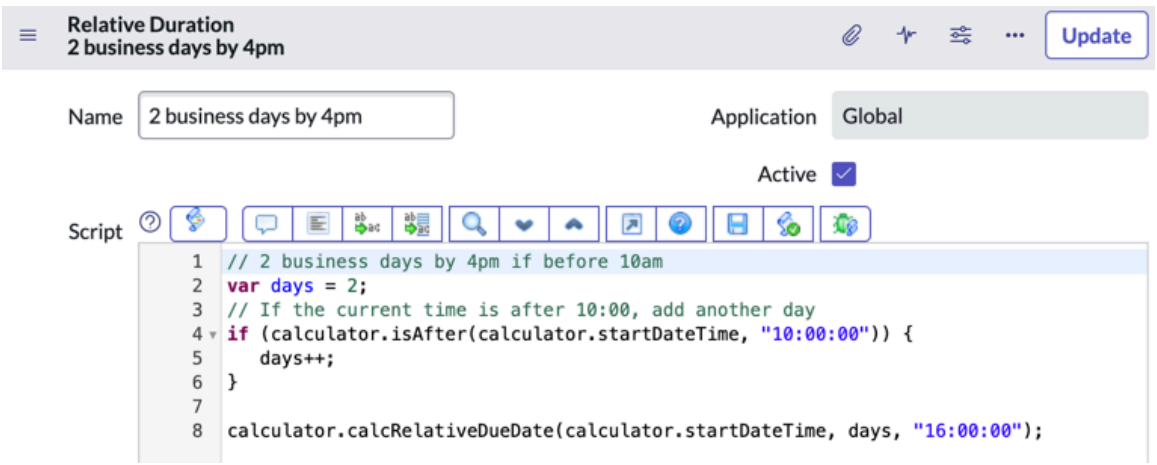
Example:

The **End of next business day** relative duration shows how to configure a basic calculation. The *days* variable is set to one because the result should land one day in the future. You can customize the end time (currently set to 5pm) in the script.

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The **2 business days by 4pm** relative duration demonstrates conditional logic. The script includes an if-statement that checks whether the calculated time is after 10am. If it is, an extra day is added to the calculation. Therefore, the description reads `2 business days by 4pm if before 10am`.



The end time of 17:00 is hard-coded into the relative duration script and is not related to the associated schedule. To change the end time from 5pm, modify the script directly.

Use a relative duration

When you define an SLA, you can set the **Duration type** to be a relative duration.

Before you begin

Role required: admin

About this task

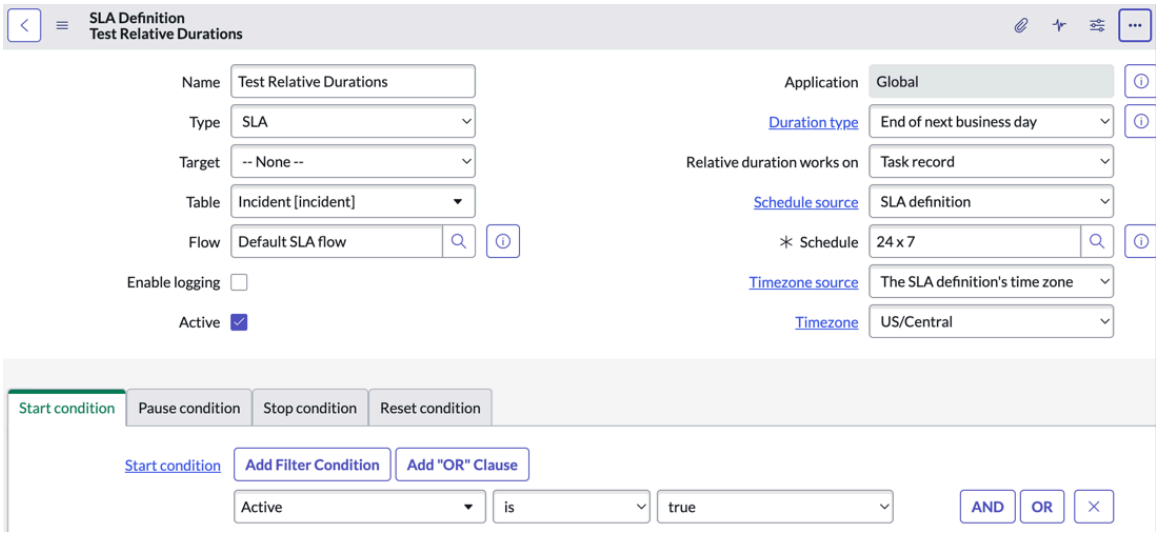
When using relative durations, you can also use the **Relative duration works on** field. It calculates against the SLA record, or the task record that the SLA record is used for.

This example demonstrates how a relative duration of *End of next business day* works.

Procedure

1. Create an SLA that has a relative duration of **End of next business day**.
2. Complete the rest of the fields of this SLA with the values as shown, also setting a Timezone if you want.

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3. To show how this Relative Duration works, create a new incident.

   The SLA starts for this incident. In the **Task SLAs** related list, if you look at the **Business time left** and **Start time** fields, notice that the time left is until the next business day at 5pm.

   Note: Pause conditions are not compatible with Relative Durations.

Create schedule entries in the Schedule calendar

Add events such as meeting, time-off, or appointment to display them in the schedule calendar.

Before you begin

Role required: schedule_admin, itil_admin, admin

About this task

You can add and analyze the events using a calendar view. You can also do this in a time line view for a given day, week, or month, which is defined as four weeks in the time line view.

A calendar view displays events for a specified time period. A time line view displays all events for the selected time line in the calendar.

Procedure

1. Navigate to **All** > **System Scheduler** > **Schedules** > **Schedules**.
2. Select a schedule.
3. Select **Show Schedule** related link.
   Using the Next Experience user interface, you can view the schedules in the schedule calendar for all schedule types except the roster type. The schedules of roster type display in the on-call schedule.
4. Create a schedule entry.

   a. Do any of the following to open the **Add event** form:
      - Select a day in the calendar.
      - Drag the span of days for which you want to create the event.

   b. In the **Name** field, enter a name for the event.

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c. From the **Type** menu, select the type of event.

d. From the **Show as** field, select the status you want to display for this event.

e. In the **Start** field, select the calendar icon and select the start date for the event.

f. In the **End** field, select the calendar icon and select the end date for the event.
If the event is for the entire day, select **All Day**.

g. From the **Repeats** menu, select how often you want this event repeated.

h. Select **Save**.

- The schedule entry displays in the calendar for that time period and is based on the user's time zone.
- You can reschedule an event by dragging and moving it to another date. You can also update that particular occurrence or all occurrences for an event.
- You can click on an event to view the details in a pop-up display and edit or delete the event by selecting the respective icon.
  - When you add or edit an event, the time zone in the event displays the **Timezone** field value from the schedule record.

    Note: If the **Timezone** field value is **Floating**, then the time zone isn't displayed.

  - When you add or edit an event, the calendar uses the start and end dates from the time zone of the schedule.

    Note: If the **Timezone** field value is **Floating**, then the calendar uses the start and end dates from the time zone of the logged-in user.

Time configuration references

This section provides information on properties of time configuration.

Time zones

All times are stored in Coordinated Universal Time (UTC) and appear globally based on the system time zone. However, times appear to users in their local time zone, according to their user preference settings.

Time zone representation

Time zones that have the Country/City format are primary time zone IDs. Other time zone IDs are links to the primary time zone.

- For example, US/Pacific is a link to the America/Los_Angeles time zone. Both America/Los_Angeles and US/Pacific represent Pacific Standard Time with the same zone offset and Daylight Savings Time (DST) schedule.
- Other than the representation, there is no impact on date and time functionality.

In the absence of a default time zone for the user or the system, JVM reads default time zone information from the server.

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- Depending on how the server is configured, it might return the Country/City or link, for example, US/Pacific or America/Los_Angeles.
- Administrators should configure their system with a default time zone `glide.sys.default.tz` to avoid system dependencies. For more information, see Time zone representation.

Daylight Saving Time

In general, if you specify a time zone based on location (for example, **America/Los Angeles**), the system automatically adjusts for daylight saving time.

- If you specify a time zone based on the time zone name (for example, **GMT**), which is discouraged, it does not typically adjust for daylight saving time. There are however exceptions to these guidelines.
- For more detailed information on how daylight saving time is handled in Java, see https://www.iana.org/time-zones and https://en.wikipedia.org/wiki/Tz_database.

User preferences

Once the System Time Zone is defined, users can also select their own time zone from their user form, accessed through **Self-Service** > **My Profile**.

Note:

The System default appears as **System ([name of the default time zone])**. For example, if the System time zone is **America/Los_Angeles**, the user sees **System (America/Los Angeles)**.

Java time zone class

The ServiceNow AI Platform supports all Java time zone class time zones. To view a listing of these time zones:

1. In the **Type filter text** field, enter `sys_user.list`.
2. Open one of the user records in the listing.
3. Right-click the **time zone** field and select **Show Choices**.

The resulting list is a complete listing of available time zone IDs.

Time zones in email notifications

The date and time stamp of a notification uses the **system time zone** and not the time zone of any recipient.

Note:

The *glide.email.append.timezone* property in **System Properties** > **Email** controls whether to append the time zone. If set to true, the system time zone of the instance is appended to any dates or date/times in outbound email messages (for example, 2010-07-02 04:01:14 PST).

Time zones in service level agreements

Service level agreements have different options for which time zone to use. To set a time-zone for SLAs, navigate to the SLA definition and locate the **Timezone source** field, and select an option.

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Some special considerations:

- If you select the time zone for the caller, unpredictable behavior can occur if the caller does not have a time zone defined.
- If you select the time zone for the SLA definition, you must manual specify the time zone on the form for the SLA.

Time zone in scripting

When you create scripting on the server, the script uses several `GlideSystem` date and time functions to obtain time values. For more information about specific methods and to learn the format in which each returns the requested time, see the GlideSystem API.

Enhancements

DST enhancement requires that reports and queries observe Daylight Saving Time rules. Changes affect trend charts, line charts, and filters using the "trend on" operation.

Time zone changer

The time zone changer is active by default. Users can change their time zone for the current session in the system settings (the gear on the top right of the banner). At the next login, the time zone setting reverts to the system default, or user profile setting for time zone.

Related topics

Set a system time zone

Change the time zone choice list

Change a time zone in a scheduled report

Change a time zone in a scheduled data import

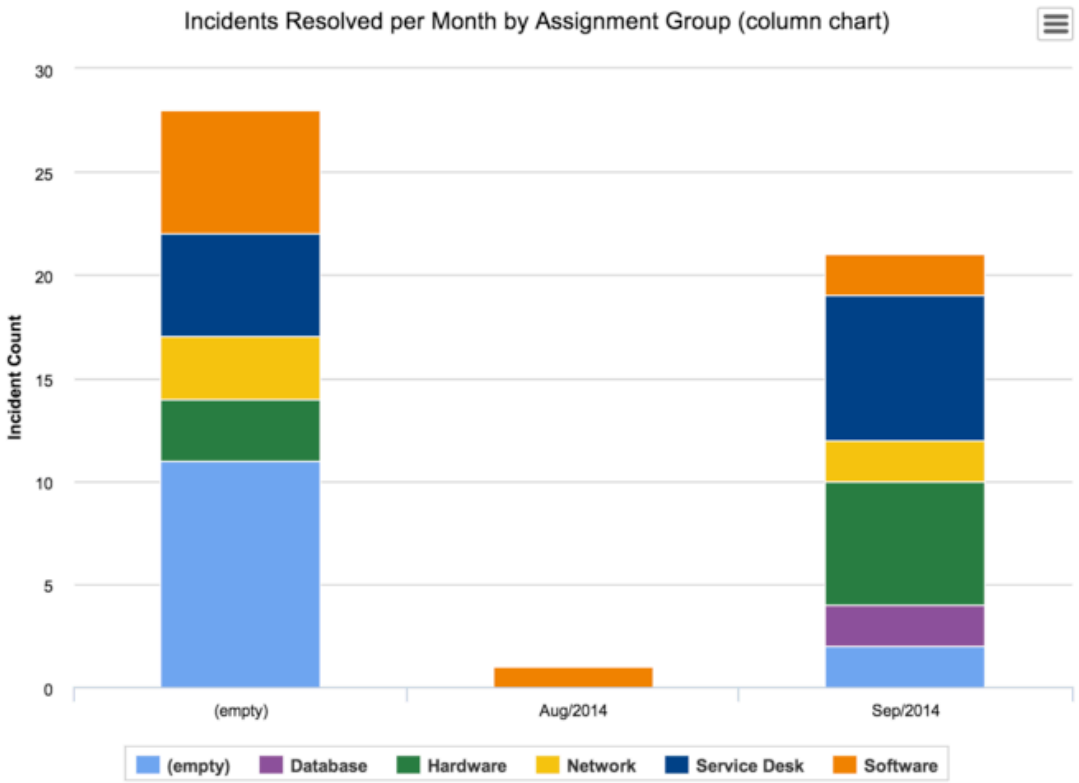
Viewing record information over time

You can use three different interfaces to view record information over time: reports and performance analytics, timeline pages, and schedule pages.

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Reports and performance analytics

Report example



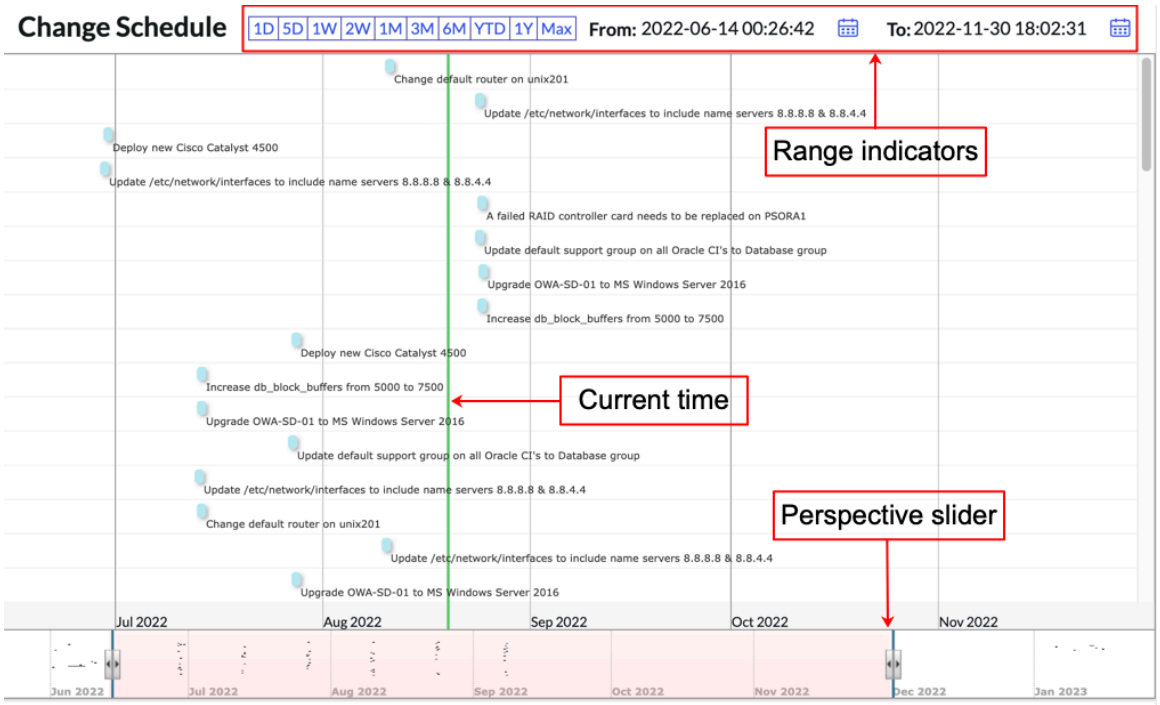
You can visualize data using Reporting.

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Timeline pages

Timeline pages example

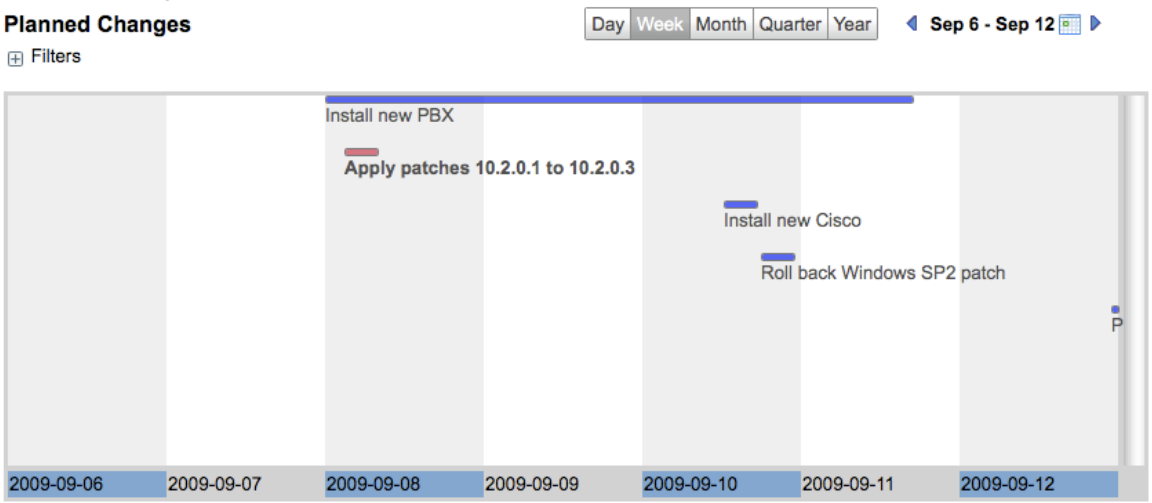
This type of page enables you to define linear time lines from records with time information.



This type of page enables you to define linear time lines from records with time information.

Schedule pages

Schedule pages example



Timeline pages

Use timeline pages to track any activity bounded by two dates, such as change request start and end dates, or incident open and close dates. Administrators can create timeline pages, which are user interactive.

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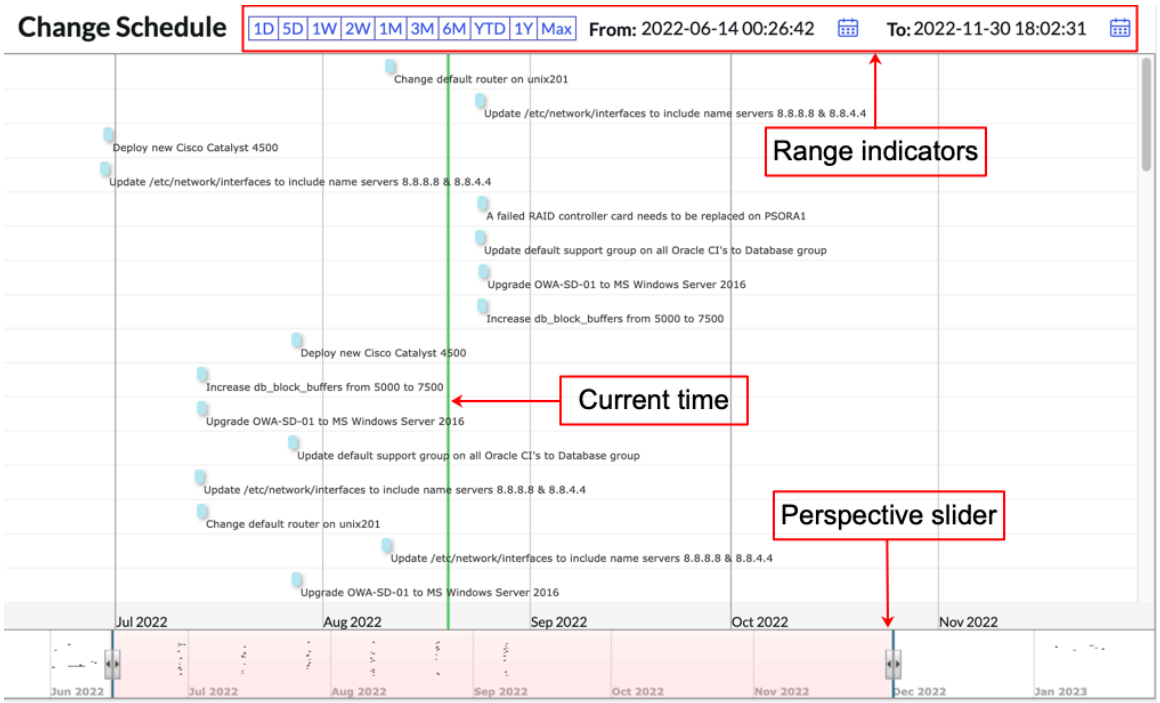
Features

- Make selected timelines available to users by role.
- Select perspective from daily to yearly views.
- Create dynamic labels for timeline spans.
- Configure tooltips for each span.
- Permit span dragging and resizing by users.
- Lock timelines to prevent editing.

Viewing timelines

By default, only administrators have a module to access timeline records. ITIL users can only view timelines by selecting a context menu item from an incident record.

Timeline View



Administrator role users

Users with an administrator role can view timelines from the timeline page records.

1. Navigate to **System UI** > **Timeline Pages**.
2. Select a timeline record to view.
3. Click **View Timeline**.

Other users

By default, timeline metrics only appear for incident records. ITIL users can view timelines associated with any task record where the metrics are set to appear as timeline records. To view the Assigned to duration and the State duration metric timelines, ITIL users can select the **Metrics Timeline** context menu UI action.

1. Navigate to active task record, such as an incident.
2. Right-click the banner, and select **Metrics Timeline**.

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To enable non-administrators to view other timelines, create a custom module.

Timing functionality

Timing functionality are tools that exist to answer the question "How Long?"

Related topics

- Time worked fields
- Time configuration SLAs
- Metric definitions

Metric definitions

Defined metrics can track how long an audited field holds a certain value.

For instance, a metric can track how long an incident is assigned to an individual, or how long an incident is in the state *Active*.

See Metrics for more information.

Time configuration SLAs

Service Level Agreements time how long a task meets a certain condition, and is primarily used to ensure that tasks are handled within a pre-determined time limit.

SLAs define the following conditions:

- Start Conditions
- Pause Conditions
- Stop Conditions

Once a task meets the Start Conditions, the SLA will time how long the task remains in that condition (unless it meets Pause Conditions). The timer will end if the Stop Conditions are met. If the time-limit is passed, the SLA will be marked *breached*.

Notifications can be driven off of the SLA to warn interested parties as the time limit approaches.

Time worked fields

The Task [task] table provides a time-tracking field called **Time worked**. This field measures how long a record has been viewed in order to measure work time on a ticket.



Any table that extends Task can use this field. To add the field, Personalize a form.

As the record is viewed, the timer counts upward. To pause the timer, click the stop icon ( ).

To resume the timer, click the start icon ( ).

When the task is saved, the amount of new time in the timer is used to generate a record on the Time Worked [task_time_worked] table. This table can be viewed as a related list on the task form.

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By default, the time displayed in the **Time worked** field displays a cumulative value stored in the task record. If you modify a Time Worked record, the changes will not be reflected in the task timer.

You can set the property `com.snc.time_worked.update_task_timer` to enable updating of the task timer value based on changes to the time worked records. This is accomplished through the **Update task timer** business rule.

Note: Timer fields, such as Time Worked, do not display correctly in Service Portal. For more information and a workaround, see the Timer fields do not display the correct data in Service Portal [KB0752404] article in the Now Support Knowledge Base.

Related topics

Timing functionality

Create a timeline page

Create a timeline page to track any activity bounded by two dates.

Procedure

Navigate to **System UI** > **Timeline Pages** and create a new record (see table for field descriptions).

Creating a timeline page

Field	Description
Name	Unique name that describes the function of this timeline. For example, `High Priority Change Requests`.
Table	Name of the table associated with this timeline, such as Change Request `[change_request]`.
Start date field	Time-related field from the specified table to use as the start date for the timeline. The timeline begins with the span for the record with the earliest start date from this field, after it applies the filter and sort order. For example, you can select **Updated** as the start date field. It then starts the span for each active change request on the date it was updated to a high priority.
End date field	Time-related field from the specified table to use as the end date for the timeline. The timeline ends with the span for the record with the latest date from this field, after it applies the filter and sort order. For example, you can select **Closed** as the end date field and display all high priority change requests by the date on which they were closed.
Display Options	
Show grid lines	Select this check box to show horizontal background shading to highlight alternate spans.
Show left pane	Select this check box to show label text in a pane on the left of the timeline. The text that appears in this pane is defined in **Span text fields**.
Show summary pane	Select this check box to show the pink, perspective slider at the bottom of the timeline. Move the slider from right to left to scroll across the chart. Adjust the end points of the slider to change the magnification. A narrow slider zooms in on the spans and provides a more detailed view. A wide slider pulls the view out and makes more of the timeline visible on the screen.

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Field	Description
Auto refresh	Select an automatic refresh interval or disable automatic refresh. When auto refresh is disabled, the timeline adjusts only when the browser is manually refreshed or when a start or end date field is updated in a record.
CSS span color	Enter a custom span color using any CSS color format, such as RGB or hexadecimal. If this field is blank, the default span color, light blue, is used. The dark blue color indicates tasks that have a planned start date only, with no planned end date. Adding a planned end date updates the color to light blue.
Show span text	Select this check box to display the content of the **Span text fields** as labels below each span.
Span text fields	Select fields from the specified table to have those values appear as span labels. For example, you might select **Number** and **Short description**. The span labels also appear in the left pane if the left pane is visible.
Show tooltips	Select this check box to display tooltips when the cursor rests on a span.
Tooltip text fields	Select from the specified table the fields whose values appear as tooltips. For example, you might select **Category**, **Assigned to**, and **Due date**.
Filtering and Sorting	
Condition	Create a condition to filter the results that appear in the timeline. For example, a condition that displays only active, high priority incidents. Add the condition count to a condition field to preview what records will be returned by this condition set.
Perform custom sort?	Select this check box to enable custom sorting. Configure the sort order by selecting fields in the **Sort by** and **Sort by order** fields.
Sort by	Select any field in the list for sorting the spans in the timeline. Common practice is to select either the **Start date field** or the **End date field** as the sorting field. If you select a different sorting field, also include that field in the list of **Tooltip text fields** to give users a way of discovering the sort criteria.
Sort by order	Select the sort order for the sorting fields selected.
Interactive Options	
Allow horizontal moving?	Select this check box to permit users to drag timeline spans horizontally. Dragging changes the start and end dates and updates the record.
Allow start time dragging?	Select this check box to permit users to update the record by dragging the start time of a span.
Allow end time dragging?	Select this check box to permit users to update the record by dragging the end time of a span.
Range calculator	Specify a script include that Using DurationCalculator to calculate a due date range restrictions and processes parent updates, if appropriate.

Customize the timeline page span style

The Timeline Page Span Styles related list allows you to define conditional span styles.

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Procedure

1. Navigate to **All** > **System UI** > **Timeline Pages**.
2. Open the timeline page for which you want to define the span style.
3. Go to the Timeline Page Span Styles related list and click **New**.
4. Fill in the form and click **Submit**.

Customizing timeline page span styles

Field	Description
Condition	Condition Builder that filters the results that appear in the timeline.
Label color	Color for the text under each span.
Label decoration	Character style for the text under each span: **Bold**, **Italic**, **Underline**, or **Line-through**.
Order	Number to determine the sequence in which the style conditions are evaluated. Style conditions with a lower order are evaluated first.
Span color	Color of each span.
Timeline page	Timeline page to which the span style applies. By default, the span applies to the current timeline.

Timeline sub item

Use the Timeline Sub Items related list to define child spans for the timeline, based on records in a table that references the parent timeline's table.

About this task

You can create a timeline sub item generate a hierarchical relationship, starting from a timeline page to any number of levels. For example, if there is a timeline page for a release, the sub item might be sprints, and the sprint might have stories as a sub item.

Procedure

1. Navigate to **All** > **System UI** > **Timeline Pages**.
2. Open the timeline page for which you want to add a sub item.
3. Go to the Timeline Sub Items related list and click **New**.
4. Fill in the form (see table for field descriptions) and click **Submit**.

Timeline Sub Items

Field	Definition
Parent	[Read-only] Identifies the parent of the timeline sub item.
Name	Enter a unique name that describes the function of this timeline. For example, Sprints for late Priority Changes.
Table	Select the table called by this timeline. The selected table must contain at least one field that references the table you selected for the parent timeline page. For example, if the parent timeline page uses the Scrum Release [rm_release_scrum] table, you might choose the Sprint [rm_sprint] table for a timeline sub item.

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Field	Definition
Start date field	Select a time-related field from the specified table to use as the start date for the timeline. For example, Planned start date.
End date field	Select a time-related field from the specified table to use as the end date for the timeline. For example, Planned end date.
Parent Reference Column	Select a reference field on which to base the timeline connection between the sub item records and the parent records. ○ If multiple reference fields are available, choose the reference field that forms part of the hierarchy modeled by this timeline. ○ If this list is blank, the sub item table contains no reference fields to the parent table. In this case, you must choose a different table for the sub item. ServiceNow uses the parent reference column to determine which records appear at each level of the timeline.
Display Options	
CSS span color	Enter a custom span color using any CSS color format, such as RGB or hexadecimal. If this field is blank, it uses the default span color, light blue. The dark blue color indicates tasks with a planned start date only, with no planned end date. Adding a planned end date updates the color to light blue.
Span text fields	Select fields from the specified table to have those values appear as span labels. For example, you might select **Number** and **Short description**. If the timeline displays the left pane, span labels also appear in the left pane
Tooltip text fields	Select fields from the specified table to have those values appear as tooltips. For example, you might select **Category**, **Assigned to**, and **Due date**.
Filtering and Sorting	
Condition builder	Create a condition to filter the results that appear in the sub item. For example, you might create a condition that displays only active, high priority incidents.
Perform custom sort	Select this check box to enable custom sorting. Configure the sort order by selecting fields in the **Sort by** and**Sort by order** fields.
Sort by	Select any field in the list for sorting the spans in the timeline. Common practice is to select either the **Start date field** or the **End date field** as the sorting field. If you select a different sorting field, also include that field in the list of tooltip text fields to give users a way of discovering the sort criteria.
Sort by order	Select the sort order for the sorting fields selected.
Interactive options	
Allow horizontal moving?	Select this check box to permit users to drag timeline spans horizontally. Dragging changes the start and end dates and updates the record.
Allow start time dragging?	Select this check box to permit users to update the record by dragging the start time of a span.
Allow end time dragging?	Select this check box to permit users to update the record by dragging the end time of a span.

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Field	Definition
Restriction	Specify the behavior when you drag a child span. This option is available only if you did not specify **Range calculator** for the parent timeline page. ○ **None**: No restriction is in place. ○ **Restrict by parent**: Move the child span only within the time frame defined by the parent span. ○ **Update parent**: Update the span when you move the child span outside the time frame defined by the parent span.

Display a metric as a timeline

Administrators can enable users to display any metric on a timeline by activating the *Timeline Metrics* UI action.

Procedure

1. Navigate to **All** > **Metrics** > **Definitions**.
2. Select the metric you want to display on a timeline. For example, Problem State Duration.
3. Select the **Timeline** check box.
4. Click **Update**.

Make a timeline visible to a selected user

Create a custom module within an application and defining the roles that can access it, to make selected timelines available to users.

About this task

To permit these users to update task records directly from the timeline, configure the timeline to enable span dragging.

Note: Timelines delivered by a custom module are not entirely dynamic. The left pane, summary pane, auto-refresh feature, and the grid lines are not dynamic, and do not reflect updates to the timeline record after creating the module link. However, the data represented by the spans, labels, and tooltips display all updates in the custom module.

To create a timeline page module:

Procedure

1. Click the **Edit application** icon on an application (such as Incident) in the navigation pane.
2. In the application Modules related list, click **New**.
3. Configure the Module form to add the **Timeline page** field.
4. Fill in the form as described in the table and click **Submit**.

The Module form provides the following fields.

Making timelines visible to selected users

Field	Description
Title	Name of the module as it appears in the navigation pane. For example, you might use Planning Timeline.

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Field	Description
Order	Number to determine the sequence in which this condition should be evaluated if more than one matching condition exists. Conditions with a lower order are evaluated first.
Application	Application for the new module.
Hint	Brief description of the module that appears when the user places the cursor over the module name. For example, you might enter Weekly view of high priority changes.
Active	Check box that enables the module for the defined roles. Clear this check box to disable the module for all users.
Image	Icon that should appear with the module name.
Link type	Select **Timeline Page**. When you select this link, the **Timeline Page** field appears.
Timeline Page	Timeline page you want to appear in this module. For example, for the Change application select a change-related timeline, for the Incident application select an incident-related timeline.
Roles	Roles that can access this module.
Override application menu roles	Check box that indicates that this module should appear when the user has the specified roles. Otherwise, the user must have the roles specified by both the application menu and the module.

Range calculator scripts

You can specify a script include that calculates range restrictions and processes parent updates in a timeline page.

Range Calculator Scripts

Following are three examples of script includes that help specify range restrictions.

ExampleUpdateParentsRangeCalculator

Updates parent records when a child record span is moved or resized in the timeline.

```
var ExampleUpdateParentsRangeCalculator = Class.create();
ExampleUpdateParentsRangeCalculator.prototype = {
initialize: function() { },
updateParents: function(id, table, startDate, endDate){
 if (table == "rm_sprint"){
   var releaseID;
   var sprint = new GlideRecord(table);
   sprint.addQuery('sys_id', id);
   sprint.query();
   if (sprint.next())
     releaseID = sprint.release + "";
   if (releaseID) {
         var now_GR = new GlideRecord("rm_release_scrum");
         gr.addQuery("sys_id", releaseID);
         gr.query();
         if (gr.next()) {
           if (startDate  && startDate <
 this.getTimeMs(gr.start_date))
```

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```
                gr.start_date = this.getTimeObject(startDate);
            if (endDate && endDate > this.getTimeMs(gr.end_date))
               gr.end_date = this.getTimeObject(endDate);
               gr.update();
         }
    }
  }
},
getMinRangeDetails: function(id, table){ return [-1, -1, "",
 ""]; },
getMaxRangeDetails: function(id, table){ return [-1, -1, ""]; },
getTimeMs: function(date){
  return new GlideScheduleDateTime(date).getMS(); },
getTimeObject: function(timeMS) {
  var gdt = new GlideDateTime();
  gdt.setNumericValue(timeMS);
  return gdt; },
logMessage: function(message){ gs.log(message); },
type: 'ExampleUpdateParentsRangeCalculator'
}
```

In this example, the span is identified based on the id and table from function(id, table, startDate, endDate).

ExampleMinRangeCalculator

Defines the earliest start date and the latest end date for a specified span.

```
var ExampleMinRangeCalculator = Class.create();
  ExampleMinRangeCalculator.prototype = {
      initialize: function() { },
      updateParents: function(id, table, startDate, endDate){ },
      getMinRangeDetails: function(id, table){
           var min = -1;
           var max = -1;
           var minID = "";
           var maxID = "";
           if (table == "rm_release_scrum"){
                    var now_GR = new GlideRecord("rm_sprint");
                    gr.addQuery("release", id);
                    gr.query();
                    while(gr.next()){
                         var start =
 this.getTimeMs(gr["start_date"]);
                         var end =
 this.getTimeMs(gr["end_date"]);
                         var id = gr["sys_id"];
                         if (min == - 1 || start <= min){
                                if (start != min)
                                     minID = "";
                         min = start;
                         minID += "," + id;
                         }
                         if (max == -1 || end >= max){
                                   if (end != max)
                                           maxID = "";
                                   max = end;
```

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```
                                    maxID += "," + id;
                                }
                            }
                        }
                return [min, max, minID, maxID];
},
getMaxRangeDetails: function(id, table){ return [-1, -1, ""]; },
getTimeMs: function(date){ return new
 GlideScheduleDateTime(date).getMS(); },
getTimeObject: function(timeMS) {
  var gdt = new GlideDateTime();
  gdt.setNumericValue(timeMS);
  return gdt; },
logMessage: function(message){ gs.log(message); },
type: 'ExampleUpdateParentsRangeCalculator'
}
```

ExampleMaxRangeCalculator

Defines the earliest start date and the latest end date for a specified span.

```
var ExampleMaxRangeCalculator = Class.create();
ExampleMaxRangeCalculator.prototype = {
   initialize: function() { },
   updateParents: function(id, table, startDate, endDate){ },
   getMinRangeDetails: function(id, table){ return [-1, -1, "",
 ""]; },
   getMaxRangeDetails: function(id, table){
      if (table == "rm_sprint"){
         var sprint = new GlideRecord(table);
         sprint.addQuery('sys_id', id);
         sprint.query();
         if (sprint.next())
            releaseID = sprint.release + "";
         if (releaseID) {
            var now_GR = new GlideRecord("rm_release_scrum");
            gr.addQuery("sys_id", releaseID);
            gr.query();
            if (gr.next())
               return [this.getTimeMs(gr.start_date),
                this.getTimeMs(gr.end_date), gr.sys_id];
         }
      }
      return [-1, -1, ""];
   },
   getTimeMs: function(date){ return new
 ScheduleDateTime(date).getMS(); },
   getTimeObject: function(timeMS) {
     var gdt = new GlideDateTime();
     gdt.setNumericValue(timeMS);
     return gdt; },
   logMessage: function(message){ gs.log(message); },
   type: 'ExampleUpdateParentsRangeCalculator'
}
```

Use the following two functions to obtain the correct start and end dates in the three example script includes provided for reference.

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```
getTimeMs: function(date){
        return new ScheduleDateTime(date).getMS();
    }
```

```
getTimeObject: function(timeMS) {
        var gdt = new GlideDateTime();
        gdt.setNumericValue(timeMS);
        return gdt;
    }
```

Timelines

Timelines display a linear calendar of tasks, such as incidents and change requests, defined by their start and end dates.

A span represents each task on the timeline, which is displayed as a horizontal bar and may have distinctive color coding. Each span has a label and can have tooltip text containing additional information about the task. You can also change the perspective of the calendar for a more granular view of the data.

Changes in perspective

Use the range selectors at the top of the timeline to change the perspective.

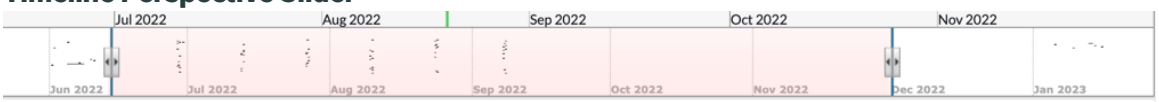
The increments go from one day to one year. To limit the timeline to an increment between the start date of the first span and the end date of the last span, select **Max**. Use the starting and ending calendar fields to select the timeline perspective. These fields control the same perspective as the slider at the bottom of the timeline. The green, vertical line indicates the current date and time, and sweeps across the timeline automatically.

Timeline Perspective Bar



The pink slider at the bottom of the timeline offers another way to change the perspective. Move the slider from right to left to view all the spans on a long timeline. Adjust the end points of the slider to make arbitrary changes to the magnification. A narrow slider zooms in on the spans and provides a more detailed view of complex timelines. A wide slider pulls the view out and makes more of the timeline visible on the screen.

Timeline Perspective Slider



Managing spans

You can view span details, focus and zoom spans, and edit spans.

A span represents each task on the timeline, which is displayed as a horizontal bar and may have distinctive color coding. Each span has a label and can have tooltip text containing additional information about the task. You can also change the perspective of the calendar for a more granular view of the data.

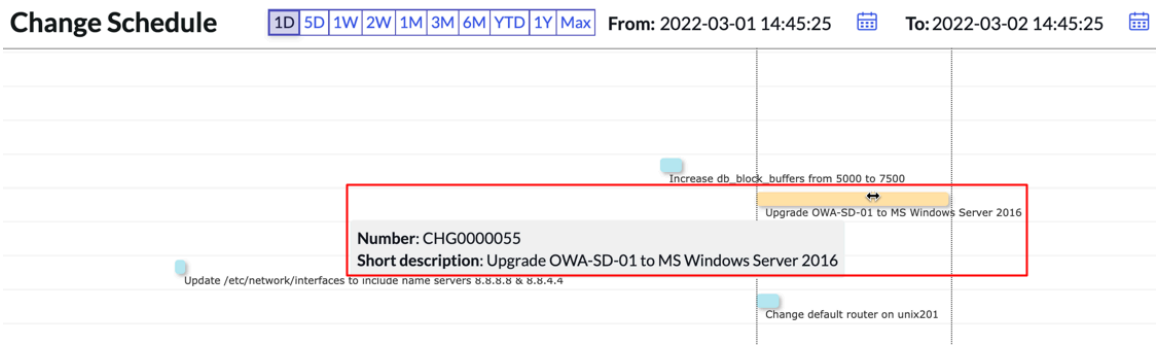
Span details

If the left navigation pane is visible, the span label is visible in the left pane.

If the left pane is hidden, point the cursor over a span to view the tooltip.

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Timeline Tooltip



Span focus and zoom

You can use keyboard shortcuts when using timelines.

Focusing and Zooming on a Span

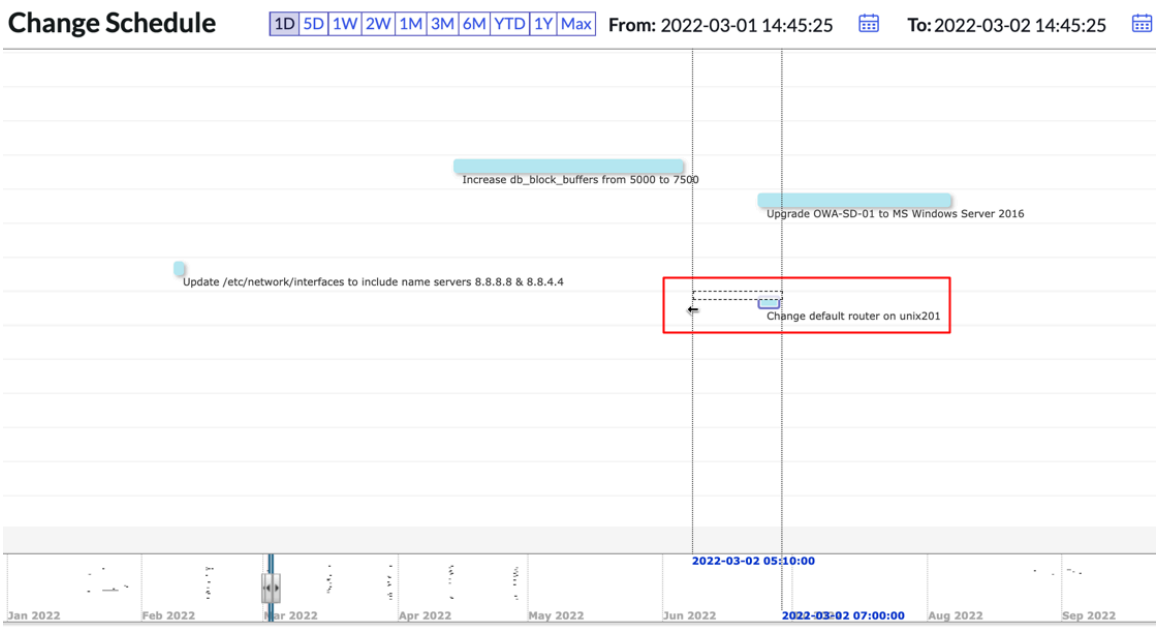
Operating System	Shortcut
Macintosh	Command + Click
Windows	Control + Click

Span edits

If the timeline has been configured for editing (horizontal moving, start and end date dragging), use the mouse to adjust the spans to suit your needs.

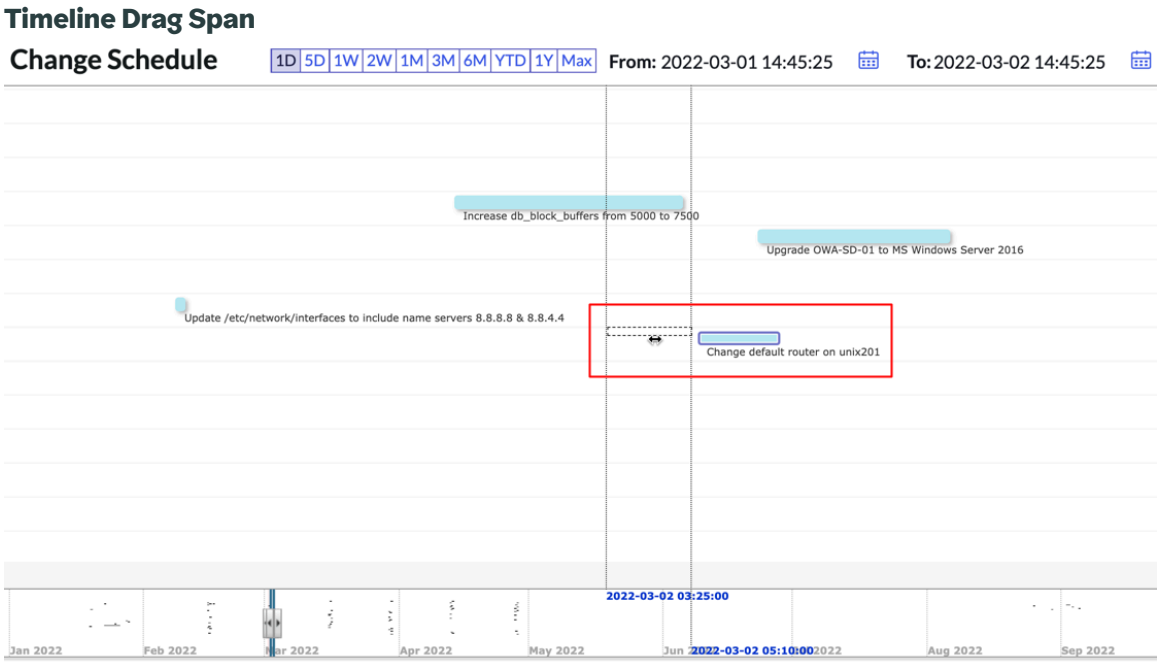
Move the start or end dates to change the duration of the task.

Timeline Drag Start



Move the entire span horizontally to adjust the start and end dates but not the duration.

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Client transaction timings

The Client Transaction Timings plugin enhances the system logs by providing additional information about the durations of transactions taking place between the client and the server.

You can track down performance issues to their source by viewing where the time is being consumed, and how time was spent during a transaction.

This plugin requires the Response Time Indicator Response Time Indicator to be enabled, and collects information from the following browsers:

- Firefox
- Internet Explorer
- Chrome

Client Transactions Information

Installing the plugin adds the *Client Transactions* module to the *System Logs* application. It provides a list of every logged transaction between client and server within the last day:

Client Transactions Information

Field	Description
Created	Moment the transaction was recorded.
Response Time	Number of ms spent by the server in fulfilling the transaction.
Business Rule Time	Number of ms spent by business rules triggered by the transaction.
SQL Time	Number of ms spent by the SQL database.
Client Response Time	(Load_completion_time) - (start_time). It is inclusive of server time.
Client Network Time	Number of ms spent by the network the client is connecting through.
Browser Time	Number of ms spent by the browser during the transaction.
Client Script Time	The number of ms spent executing client scripts.

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Client Transactions Information (continued)

Field	Description
UI Policy Time	Number of ms spent executing ui policy.
Type	Type of transaction: • Form • List • Other
Table	Name of table that appeared. For example, incident, change_request.
View	View for this form/list.

Client Detailed Information

A more detailed breakdown of the client timings for all Form rendering (but not list rendering) is also tracked. To see details, drill into a particular client transaction record and observe the related list at the base of the screen.

Client Detailed Information

Field	Description
Order	Order during the load in which this operation occurred.
Type	Type of operation.
Name	Descriptive name of this particular operation
Duration	Number of ms this operation took to complete.

Components installed with Client Transaction Timings

The Client Transaction Timings plugin installs several components.

Database Table Structure

The plugin adds the table *syslog_client_transaction*.

Scripts

The plugin relies on the new script include *AJAXClientTiming*. This script gathers the information required and populates them on the *syslog_client_transaction* table.

Dependencies

This plugin does not require any other plugins, but does not gather information unless the Response Time Indicator Response Time Indicator is enabled.

Activating the Plugin

To activate the plugin, navigate to **System Definition** > **Plugins** and activate the plugin.

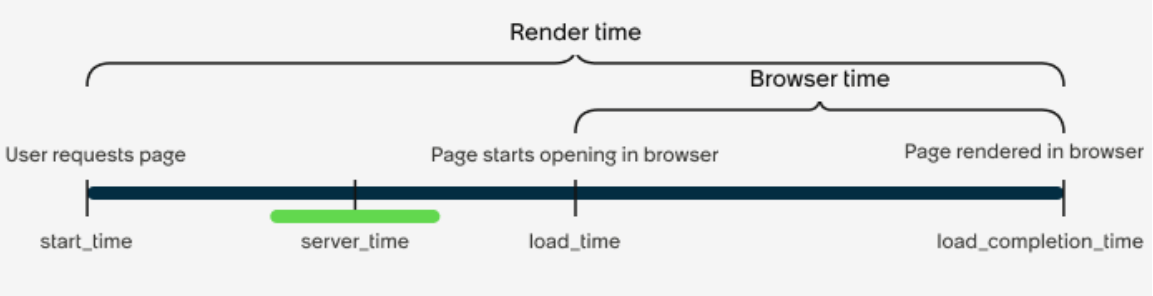
Note: New instances have the plugin activated by default.

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Timing values

Timing values are broken down into several sections.

Client Transaction Timing



The variables in this diagram are defined as follows:

Timing Values

Variable	Description
start_time	Date and time the user requests a page (the user clicks on a link). This value is set by hooking into the *before unload* event of the previous page. WebKit browsers do not properly support the *beforeunload* event, which is why the client timings are not supported i Safari or Chrome.
load_time	Date and time that the current page starts loading in the browser. An inline javascript that runs as the first script in the HTML body sets this value.
server_time	Time in ms spent by the server processing the transaction. The server reports this value to the client.
load_completion_time	Date and time that the page is fully rendered in the browser. This operation is performed as the last script on the page and identifies the time the page completed loading.

The following timings are reported at the bottom right of many forms and lists:

Timing Values

Label	Element	Description	Calculation
Response Time	client_response_time	Overall time to deliver the page by subtracting the time the user requests the page from the time the page is fully rendered in the browser.	load_completion_time - start_time
Server Time	client_server_time	Time the server takes to process the transaction.	server_time
Network Time	client_network_time	Time the network takes to process the request. Calculated by subtracting the time of the user's request, from the time the page starts loading in the browser,	load_time - start_time - server_time

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Timing Values (continued)

Label	Element	Description	Calculation
		and then subtracting the server processing time.	
Browser Time	browser_time	Time the browser takes to deliver the page by subtracting the time the page is fully rendered from the time the page starts loading in the browser.	load_completion_time - load_time

Currency administration

Currency fields provide features for handling the calculation, conversion, and display of currency values.

Get started

Choose one of these tiles to get started.

Explore



Learn about currency administration concepts and features.

Configure



Configure defaults for standard currency and FX currency.

References



Get details about currency administration properties.

Exploring currency administration

The ServiceNow AI Platform® supports two types of currency fields: default (or standard) currency and Foreign Exchange (FX) currency.

Default (standard) currency

The default, or standard, currency fields that are delivered with the ServiceNow AI Platform.

FX Currency

FX Currency is an alternate type of currency field that is highly configurable, supports custom rate tables, and provides for improved visibility into conversion calculations. You can add FX Currency fields to base and custom applications, and they work independently of existing standard currency fields.

Standard currency fields

The standard, or default, currency fields are installed with the base system and used in most non-financial applications.

A standard currency field stores a currency value, a currency code, and a reference currency value.

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- Three-letter ISO code that identifies the currency that you select for the currency amount. For example, USD for the US Dollar, or EUR for the Euro.
- The reference currency value is the currency value, expressed in the reference currency. When you save a currency value, the reference currency value is calculated using a rate conversion.

A price field is similar to a currency field, but with special features for conversion and display. To learn more, see Price fields.

Locale settings

There are two locale settings, system and user. The system locale determines the reference currency, and the user locale determines the session currency.

System locale

You set the system locale using the *glide.system.locale* property. The value is in the format `Language.Country`, where the:

- `Language` is an ISO 639 language code.
- `Country` is an ISO 3166 language code.

Internally, this value is used as specified by Java. The system locale setting should be in the Java supported locales list. Set the system locale once after a fresh zBoot, because reference currency values that appear in currency fields are in the currency implied by the system locale. To set this property, see Control default currency field configuration and use in an instance.

Note: Do not change the system locale after currency values have been entered into the instance. When you change the system locale, the reference currency values are not adjusted. There is no rate conversion. This persistence results in invalid aggregations and filtering.

User locale

The ServiceNow AI Platform® determines the user locale in the following sequence:

- User record in which the country, or both the country and language, are specified.
- System locale set using the *glide.system.locale* property.
- Browser locale.

Amounts in currency fields are composed of a currency code and amount. Amounts always appear in the session currency, and are formatted in the Java-specified format for the user locale.

Session and reference currency

The default, or standard, currency fields in the ServiceNow AI Platform® use two kinds of currency, Session and Reference.

Session currency

The session currency is defined for the user by the user's locale or single-currency mode.

Reference

The system local determines the reference currency, and is the standard used across the entire instance.

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Each time you enter a value into a currency or price field, the system stores three pieces of information:

- Value as entered, in the user's locale.
- Currency code, in the user's locale.
- Value converted to the reference currency using the current exchange rate.

Note: In multiple-currency mode, the currency code saved in the currency field may not be the same as the session currency code. For example, the session currency could be the Euro and the number entered could be the Japanese Yen.

Session currency

When users view a currency value, they can see the value as entered or in the session-currency format. The format contains the:

- Currency symbol
- Value converted to the session currency and shown in a localized number format.

The user's locale determines the session currency format.

The number format can differ in features such as the decimal separator based on the locale. For example, the US formatting is 1,234,567.89, while German formatting is 1.234.567,89. The ServiceNow AI Platform® determines the session currency in the following sequence:

- Single-currency mode setup using *glide.i18n.single_currency* and *glide.i18n.single_currency.code*.
- Default currency for the user's locale.

Reference currency

To perform calculations on heterogeneous currency values, the ServiceNow AI Platform® stores currency values converted to a system currency, referred to as the reference currency. Every currency field contains a reference currency value. The system determines the reference currency in the following sequence:

- System locale set using the property *glide.system.locale*
- Java default locale, typically en.US

The filtering and aggregation features use the reference currency value to perform calculations on default currency fields. These features can yield inaccurate results because of conversion rate changes.

Issues with currency fields

Users are often confused by the results of filtering, sorting, and displaying currency fields because the system works with at least two currencies for each value: the session currency and the reference currency.

Note: Aggregations and filtering of currency fields use the reference currency, and the user sees the session currency. Because of changing conversion rates, the filtered reference currency values might not result in the same order as the session currency values would suggest. The same issue happens with aggregations.

The user might see the following issues:

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- Lists filtered on currency fields might not be in the expected order. It uses the reference currency values for filtering but displays session currency values.
- Aggregation of currency fields may not produce the expected results because reference currency values are aggregated, and then converted to the session currency.
- Currency values may not appear as expected because currency values are formatted based on the user's locale and not on the currency code.

This confusion may be the result of the difference between session and reference currencies, changing conversion rates, and different session currencies used by different users.

Single-currency mode

Single-currency mode enables all users of the platform to view currency values in the same currency.

Before enabling single-currency mode, set the system locale. To configure single-currency mode, set the following properties:

- *glide.i18n.single_currency*: **true** or **false**
- *glide.i18n.single_currency.code*: the three-letter ISO currency code
- *glide.system.locale*: the system locale

Note: For detailed information about valid locale formats, see Locale settings.

Using the single-currency mode has the following limitations:

- The single-currency mode changes the currency that appears in the user views, but does not change the number formatting. Even though users in different countries see currency values in one currency, the number formatting, as determined by the user's locale, might not be what they expect.
- Price fields, which have flexible conversion and currency features, can't be used because currency value input is constrained to the single currency.

You can avoid the effects of rate conversions by setting the system locale and the reference currency to be the single currency.

Price fields

A price field is a currency field that enables control over conversions and display.

You can select conversion and display options per price field, and change them at any time. There are three variations:

Calculated [Default]

Behaves in the same way as the default currency field type. Whenever conversions are performed, it uses the latest currency conversion rates. The price field appears in the session currency for the user.

Fixed

When the price field appears, it is shown in the currency code used when you entered the value. Whenever conversions are performed, it uses the latest currency conversion rates.

Multiple

Enables you to enter multiple price values for an item using a different currency for each price. The field value is the value entered in the user's session currency.

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Otherwise, the first price entered converts to the user's session currency. Whenever conversions are performed, it uses the latest currency rates.

Note: The first value entered is used during display. The additional values are not used during calculations.

You can change the currency code and numeric value for a price field. When you click the **Edit** icon that appears next to the price field, a form appears that you use to edit the details for the price field:

Price field currency details

Field	Description
Currency	List of currencies enabled in the system in the combo box. In single currency mode, the currency is a label and cannot be changed.
Amount	Numeric value formatted in the user's locale.
Type	Calculated, Fixed, Multiple. • When you change the price type to Multiple, the system creates child records for all currencies enabled in the platform. The child records are populated with values converted from the amount field, using latest currency conversion rates. • You cannot change the price type in single currency mode. • You can modify the price type at any time.

Default currency values in forms

In forms, currency values appear in the currency in which they were entered.

A combo box provides a list of available currencies, and the user's locale determines its format. When entering or changing the numeric currency value, enter it in the same format specified by the user's locale. In the form for a new record, the reference currency is pre-selected in the currency list, with the numeric value set to zero.



- If the record is read only, the currency value appears in the **Currency** field as it was entered, and is formatted in the user's locale. In the **Price** field, the session currency value appears.
- In Single currency mode, the currency is a label that cannot be changed, and the **Edit** icon does not appear.

Editing the currency instance record

If a currency instance record exists, an **Edit** icon appears next to the **Currency** field if you have edit rights for the fx_currency_instance table. Users with the financial_mgmt_user role can edit the values associated with the currency field.

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Note: Normally, you should not edit the fx_currency_instance table directly. The ServiceNow AI Platform maintains these tables, and your changes could have unintended consequences.

Default currency values in reports

Currency values in reports appear in the user's session currency, and are formatted in the user's locale with a currency symbol.

The user determines how the report is run.

- Shared report: The user who runs the report.
- Scheduled report: Generally run as the user who scheduled the report.

The two user-specific values in the report are:

- User session currency
- Converted value

Note: A user that has a different session currency than the person who runs a report might receive unexpected results.

Default currency values in lists

In lists, default currency values appear in the user's session currency, formatted for display in the user's locale. Typically, a formatted number follows the currency symbol.

Different field types appear as follows in lists:

Field	Description
Currency field type	Value expressed in the user's session currency.
Price field type	• **Calculated**: Value in the user's session currency. • **Fixed**: Currency value, as entered by the user. • **Multiple**: Value associated with the user's session currency if this value exists. Otherwise, the first value entered converts to the user's session currency.

A Globe icon appears beside the currency value that enables you change to one of the following values:

- Value as entered by the user.
- Value in session currency.
- Value as entered and, in brackets, the value in reference currency.

The icon appears when the user's session currency is different from the currency entered. Clicking the icon cycles through the listed displays. In the preview for the record, currency values appear as entered, formatted in the user's locale.

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Aggregation

Aggregation operations can be used on currency columns. Aggregation operations include total, group by, average, minimum, and maximum. Aggregation is done in two steps:

- Aggregate the reference currency values for all records.
- Convert this aggregate to the user's session currency for display.

Note: The resulting value may not be what you expect. The conversion rate used for the value that appears for the currency field, and for its reference currency, that is used for the aggregation, may have changed.

This limitation extends to different price types.

- For price type fixed, the calculated reference value can be old.
- For price type multiple, the reference value of the first price entered is used. The other values are not used.

The aggregate value is shown formatted in user's locale with a currency symbol. Currency fields are stored with four decimal places, and aggregates have four decimal places. For upgrades, you must set the *glide.currency_price.use_all_fraction_digits* property. See Change default currency decimal places for more information.

Filtering

You can set up filters on currency fields. The currency value is entered as a currency code and numeric value. Filtering is done in two steps:

- The filter currency value is converted to the reference currency.
- The filter's calculated reference value is compared with the reference value in the records.

Matching records are shown in the list view.

Note: At times, the filtering results might not provide the expected result. The conversion rate used when you run the filter might be different than the conversion rate used when calculating the reference values in the individual records. This limitation extends to the following price types:

- For a Fixed price field type, the calculated reference value can be old.
- For a Multiple price field type, it uses the reference value of the first price, and does not use the other values.

Default currency values in import and export

In general, currency values crossing the boundaries of the platform are represented in the user's session currency and formatted in the user's locale.

Import

Currency values are imported as strings, just like other fields. The default transform mapping to a currency field uses *setDisplayValue()*. The expected format for this function is:

- A number formatted in the user's locale. The number is taken as a value in the user's session currency, for example, 1,234.56.
- The number prefixed by the three-letter currency code separated by a semicolon, for example, EUR;1.234,56.

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This behavior can be customized in transform map scripts.

Export

Currency values can be exported in several formats, including CSV, XLSX, PDF, and XML. Depending on the export format, currency values are exported in the user's session currency and formatted in the user's locale or they're exported in the reference currency value with no formatting.

Related topics

Exporting currency fields to Excel

Default currency values in scripts

You can use currency fields in scripts.

These methods are available on GlideElement objects.

To display currency values, use the `getDisplayValue()` display API. To work with currency values in any way other than display, use the APIs that return/accept unformatted numbers.

Note: Before performing calculations on the value, do not use the `getDisplayValue()` methods and then process the string to remove formatting information.

Methods such as `getValue()` and `getCurrencyValue()` return unformatted numbers as strings. To obtain the floating point value, use the JavaScript function `parseFloat()`, and then use resulting value to perform calculations. To obtain the currency associated with these values, use the APIs that return the currency code. You can also use the `getCurrencyCode()` methods to determine a field's currency.

```
var rate = parseFloat(current.base_rate);
var currencyCode = current.base_rate.getCurrencyCode();
```

Use the `setValue()` method to set the value of a currency field. If this currency is the user's session currency, use a plain number or the floating point number of a string containing it. Otherwise, prefix the value with the 3-letter ISO currency code.

```
var totalCost = rate*current.hourly_rate;
current.total_cost.setValue(currencyCode + ";" + totalCost);
```

You are working with the reference currency value when you use GlideAggregate on currency or price fields. Be sure to convert the aggregate values to the user's session currency for display. The resulting value may not be what you expect. The conversion rate used for the currency or price field value, and for its reference currency, which is used for the aggregation, may have changed.

When you delete a record containing a currency value, the platform deletes any associated currency records.

Note: Do not use `deleteMultiple()` on tables with currency fields. Always delete each record individually.

Currency values contain four decimal places.

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- APIs that return values such as `getValue()` return up to four decimal places. Trailing zeros are always removed.
- APIs that return display values such as `getDisplayValue()` have at least two decimal places and up to four decimal places.
- GlideAggregate returns four decimal places.

You can have the system use two decimal places. When you set it to two decimal places, numeric values returned by the API contain two decimal places. Although currency conversion rates may have more decimal places, currency fields store only two decimal places. APIs that accept numeric values round decimal places to two places.

- APIs that return values such as `getValue()` return up to two decimal places. The trailing zeroes are removed for values read from the database, but if a value such as 00 is set later, 1.00 can be returned. The number of trailing zeros returned is not consistent.
- APIs that return display values such as getDisplayValue() contain up to two decimal places. It could sometimes return two places even for values such as 7.10, but could remove trailing zeros at other times. The number of trailing zeros returned is not consistent.
- GlideAggregate returns two decimal places.

Note: To learn how to change the number of decimal places used by the system, see Change default currency decimal places.

The following example, the user's locale is set to German (de.DE), and the reference currency set to USD. The values use a currency value of 21345.67 in Japanese yen, 1563.72 in Euros, and 1152.48 in US dollars.

Methods to access currency fields

Method name	Description	Example
`getValue()`	Returns the currency value in the user's session currency as an unformatted number.	1563.72
`getReferenceValue()`	Returns the currency value in the reference currency as an unformatted number.	1152.48
`getSessionValue()`	Returns the currency value in the user's session currency as and unformatted number.	1563.72
`getCurrencyValue()`	Returns the currency value as entered as an unformatted number.	21345.67
`getDisplayValue()`	Returns the currency value in the user's session currency, formatted in the user's locale with a currency symbol.	€1.563,72
`getSessionDisplayValue()`	Returns the currency value in the user's session currency, formatted in the user's locale with a currency symbol.	€1.563,72

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Methods to access currency fields (continued)

Method name	Description	Example
`getReferenceDisplayValue()`	Returns the currency value in the reference currency, formatted in the user's locale with a currency symbol.	$1,152.48
`getCurrencyDisplayValue()`	Returns the currency value as entered formatted in the user's locale with a currency symbol.	¥21.345,67
`getCurrencyString()`	Returns the currency value as entered as an unformatted number, prefixed by the 3-letter ISO currency code, separated by a semicolon.	JPY 21345.67
`getCurrencyCode()`	Returns the 3-letter ISO currency code for the currency value as entered.	JPY
`getSessionCurrencyCode()`	Returns the 3-letter ISO currency code for the user's session currency.	EUR
`getReferenceCurrencyCode()`	Returns the 3-letter ISO currency code for the reference currency.	USD
`setValue()`	Sets the currency value as: • An unformatted number taken as a value in the user's session currency. • An unformatted number prefixed by a 3-letter currency code separated by a semicolon.	4369.21 or JPY 4369.21
`setDisplayValue()`	Sets the currency value as: • A number formatted in the user's locale that is taken as a value in the user's session currency. • A number formatted in the user's locale prefixed by a 3-letter currency code separated by a semicolon.	4369.21 or JPY 4369.21

FX Currency fields

Use FX (Foreign Exchange) Currency fields as an alternative to the standard (default) currency fields found in most applications. They are highly configurable, support use of custom rate tables, report aggregations, and provide for improved visibility into conversion calculations.

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Note: You don't have to install a plugin to use FX Currency functionality. It's activated by default.

Use considerations

Use the FX Currency field type in place of the standard currency fields when you must:

- Support values expressed in multiple currencies, for example, EUR 100, JPY 200, USD 30, as values in a field. FX Currency fields provide better support for multi-currency applications than do standard currency fields.
- Control how the FX Currency field is configured, including specifying its internal behavior and currency value formatting.

  To learn more about currency configuration, see Configuring FX Currency field behavior.
- Create custom conversion rate tables.

  To learn more about custom table rates, see Add conversion rates using a custom rate table.
- Have more control over when the actual currency conversion occurs. FX Currency values convert on demand only, making the conversion results much more transparent.

  To learn more about currency conversions, see Understanding how FX Currency field conversions work.
- Provide greater transparency into currency conversion calculations. You can view and configure the calculation components, including conversion dates, reference currency, and number of displayed decimals.
- Build query conditions using FX Currency field values. For available query conditions, see Operators available for filters and queries.
- Access FX Currency fields through richer scriptable APIs.
- Aggregate currency values as entered by users, or aggregate them in selected reference currencies, for reporting purposes.
- Use the three-digit ISO 4217 numeric currency code for a currency with Numeric code field on the Currency [fx_currency] table and the `ScriptableCurrencyCode` API. For more information, see .

Important: You can add FX Currency fields to base and custom applications, and they work independently of existing standard currency fields. However, you can't convert or change a standard currency field to an FX Currency type field. No functions are available to convert standard currency fields to FX Currency fields, then migrate the data from one to the other.

Related topics

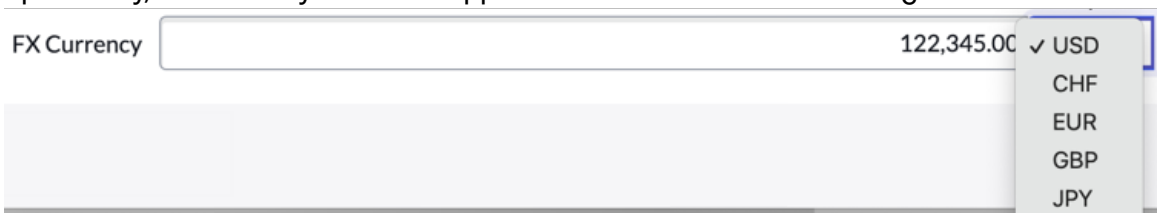
Field types reference

Understanding FX Currency values in forms

In forms, the FX Currency field behaves like a dot walkable field in script. It consists of an entry field, and an accompanying list for selection of a currency code.

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Specifically, FX Currency fields that appear on forms contain the following:



- An empty field for entry of a numeric currency value, formatted according to your assigned user locale. For example, in the US, it is formatted with two decimal places, for entry of cents.

  If this is a new record, the field is empty. If it is an existing record, the previous currency amount that you entered appears.

- A selection list of active currencies from the Currency [fx_currency] table. The default currency code is based on your user locale. You can select another currency for use during the entry session.

  For example, in the US, the default currency value, based on the user locale, is USD. You can select another currency code to use in the current entry session.

- An edit icon ( ). Users with an assigned currency_instance_admin role can click it to edit currency detail in the accompanying Currency Instance [fx_currency2_instance] record.

Understanding how FX Currency field conversions work

You can use existing system currency rates or define a custom conversion rate table for use in FX Currency processing.

A currency conversion rate represents the conversion factor for exchanging one currency for another. The conversion rate is used when converting a currency value, expressed in one currency, to another currency. Conversions can occur for storage (for example, conversion to a reference currency) or for display (for example, conversion to a session currency).

When conversions occur

FX Currency fields expose the values inside the Currency Instance [fx_currency2_instance] record as dot walkable fields. You can access to all data held in an FX Currency field without any transformations. Conversions can happen in these situations:

1. Calculation of a reference value, calculated when you enter a currency value, whether on insert or update. The reference currency value is saved as well as the currency value as entered. Once this calculation takes place, the reference value is not recalculated.
2. Calculation of the session display value returned from `getDisplayValue()`, which performs conversions to the required currency.

   The conversion rate is based on the settings of the **Conversion Rate Table** and **Conversion Date Source** fields in **System Localization** > **FX Currency Configuration.**

   Note: To learn more about these settings, see Specify the rate table and date source for currency conversions.

Conversion rates

FX Currency conversion rates are stored in the following ways:

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- System rate [fx_system_rate] table: Contains system conversion rates. Each record contains the conversion rate from the Euro to a given currency. The rates are downloaded daily from the ECB website by a scheduled job called Retrieve System Rates. To learn more, see Schedule the rate update job.
- Custom rate table: Contains custom currency conversion rates, and custom rate tables extend the Currency Conversion Rate [fx_conversion_rate] table. To learn more about creating custom rate tables, see Add conversion rates using a custom rate table.

Understanding FX Currency values in lists and reports

By default, the currency values that appear in the FX Currency fields in lists and reports are the values that you directly enter into the FX Currency fields. For reports, the aggregations of FX Currency fields are, by default, reference currency values.

FX Currency values in list views

In lists, FX Currency values appear as a formatted currency string returned from *`getDisplayValue()`*.

- The settings in the **Display Digits** and **Display Value Currency** fields in **System Localization** > **FX Currency Configuration** determine how the currency values appear in lists.
- To learn more, see Identify the FX Currency field and its display parameters.

For an FX Currency field that depends on another FX Currency field, the currency value comes from the Currency Instance [fx_currency2_instance] record associated with the latter. The display value format is based on how you configured its display settings in **System Localization** > **FX Currency Configuration.**

Note: An FX Currency field in a custom table is a reference field that stores the reference (sys_id) to the actual record. Because the sys_id is 32 characters, the **Max length** of the FX Currency column must be 32 (default).

Filtering FX Currency values in lists

In lists, FX Currency field filtering behaves differently than with standard currency fields. The filtering takes place using the currency type selected when a currency value is originally entered into an FX Currency field. It doesn't take reference currencies into account when you filter a list. So, if the unfiltered list contains FX Currency field entries in multiple currencies, a filtered list would only contain those records originally entered using the specified filtering currency.

- For example, if you entered a currency value in Euros (EUR) and the reference currency is US Dollars (USD), the reference currency value may appear in an unfiltered list.
- However, if you filter the list, and select USD as the currency, the currency value, originally entered in Euros, doesn't appear. In this case, only currency values originally entered in USD would appear.

Dependent FX Currency fields

Use of FX Currency view or dependent fields enable you to use alternate display configurations defined in **System Localization** > **FX Currency Configuration** for a particular FX Currency field. To learn more about FX Currency field configurations, see Configuring FX Currency field behavior.

When you create an FX Currency field, you can mark it as dependent on another FX Currency field. Marking an FX Currency field as dependent enables it to use the configuration settings for the original FX Currency field to display the amount values in different currency. Any changes that you make to the dependent field don't affect the original FX Currency field.

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FX Currency reporting, aggregation, and group by

You can select FX Currency fields for inclusion on reports, and they display in the same manner as in list views.

- FX Currency fields appear as a formatted currency string returned from *`getDisplayValue()`*.
- If you set the **Display Value Currency** field in **System Localization** > **All Properties** to **Display in Session Currency**, the session currency assigned to the user running the report appears.

You can aggregate like reference currency values within a Currency Instance record. The following is the aggregated FX Currency data format in the ServiceNow AI Platform®:

Aggregate FX Currency value

Type	Description
String	Value of the aggregation. If the values being aggregated are FX Currency values, the returned value is in the format `currency_code:currency_value`, such as: `USD:134.980000` Otherwise, the returned value is just the currency value, such as: `134.980000`. **Note:** If the field contains FX Currency values of mixed currency types, the values cannot be aggregated. The value is returned as a semicolon (;).

For example, if the **Cost** field on a transaction record is an FX Currency field, you can group by *`cost.amount`* or *`cost.currency`*.

- Aggregation operations, such as SUM, translate as `SUM(amount)` or `SUM(reference_amount)`. The aggregation source determines the translation when the currency associated with the currency values in the grouping is the same.

  For example, the aggregate value returned by `GlideAggregate.getAggregate()` is a string of the format USD; 1234.56. The total currency value is expressed in the single reference currency that is associated with all currency values in the grouping.

- If there are different currencies associated with currency values in the grouping, then the aggregate value is empty. For example, if some of the currency values are in US Dollars, some are in Euros, and others in Yen, the aggregate value would be empty.

You can also use a Group By command on FX Currency fields.

- It is equivalent to grouping by currency and amount, or by reference_currency and reference_amount, as dictated by the aggregation source.
- The value of the grouping is available by dot-walking on the FX Currency field, or using an API such as `getDisplayValue()`.

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Related topics

- Configuring FX Currency global settings
- Configuring FX Currency field behavior

FX Currency values in import and export

FX Currency values that you import must include a three-letter ISO currency code, a semicolon, and an amount formatted for the user's locale, such as `USD;1,234.56`. In general, imported and exported values represent the display value returned by `getDisplayValue`.

FX Currency import

If using the default `setDisplayValue()` import method, FX Currency works in a manner similar to the standard currency field. It imports a value such as `USD;1,234.56` as `setDisplayValue("USD;1,234.56")`. It then parses the value as a three letter ISO currency code, followed by a semi-colon, followed by a number formatted in the locale of the user. The currency code is required. FX Currency values are imported as display value strings, so each value in the source file must include the code. For example, to import 100 US dollars from an Excel file, enter `USD;100` in the source column. If you import only a number, such as `100`, the value might not be imported. This method should work for most use cases.

Defaults for other Currency Instance fields come from FX Currency field configuration you defined in **System Localization** > **FX Currency Configuration**. To explicitly set these fields, you can use a custom import script that sets those fields to desired values, possibly using values from another import column.

There are various ways to import FX Currency data.

Method	Description
Importing data into custom rate tables	Main method for importing custom rates, other than editing rates directly. When you modify existing rates, existing currency values that use that rate aren't updated. **Note:** This is specific for importing only.

FX Currency export

There are various ways to export FX Currency data.

Method	Description
Show XML	Shows an XML file with instance records for each FX Currency field bundled inside the XML payload.
Export to XML	Shows an unload XML with unloads for all instance records.
Export to Excel/PDF	Uses the default method of exporting data that extracts data from fields using `getDisplayValue()`. For FX Currency fields, using this method returns a formatted currency string of the form $1,234.56.

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Method	Description
	To access specific information inside an FX Currency field directly without any transformations, simply export that column using dot walking.

Configuring currency fields

Configure defaults for standard currency and Foreign Exchange (FX) currency.

Setting up defaults required for standard currency use

Set up the defaults required for use of standard currency fields in your instance.

Control default currency field configuration and use in an instance

You can control how currency fields are configured and used in your instance.

These properties are available for currency fields.

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

Properties for default currency fields

Property	Description
glide.sys.audit_currency_value	When **true**, currency fields in audit records are the value entered by the user, in the format USD;1234.56. When **false**, the value is the numeric value in the session currency. • Type: Boolean • Default value: **false** • Location: System Property [sys_properties] table • Learn more: Configure default currency fields in audit records
glide.currency_price.use_all_fraction_digits	When **true**, currency fields have four decimal places. When **false**, two decimal places are used. • Type: Boolean • Default value: **false**

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Properties for default currency fields (continued)

Property	Description
	• Location: System Property [sys_properties] table • Learn more: Change default currency decimal places
glide.currency_price_optimizer.enabled	When **true**, the optimizer is used. When **false**, the optimizer is not used. • Type: Boolean • Default value: **true** • Location: System Property [sys_properties] table • Learn more: Configure the currency optimizer
glide.currency_price_optimizer.min_rows	Minimum number of rows in parent table needed for the optimizer. When fewer than this number of rows are present, the optimizer is not used. • Type: Number • Default value: **4** • Location: System Property [sys_properties] table • Learn more: Configure the currency optimizer
glide.excel.convert_to_user_currency	When **true**, currency fields in a table are output in the user's session currency. • Type: Boolean • Default value: **false** • Location: System Property [sys_properties] table • Learn more: Exporting currency fields to Excel
glide.excel.fixed_currency_usd	When **true**, currency fields in a table are converted to US dollars.

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Properties for default currency fields (continued)

Property	Description
	• Type: Boolean • Default value: **false** • Location: System Property [sys_properties] table • Learn more: Exporting currency fields to Excel
glide.system.locale	Value is of the format `Language.Country` where the language is an ISO 639 language code and the country is an ISO 3166 language code. Internally, this value is used as specified by Java. The system locale setting should be in the Java supported locales list. • Type: String • Default value: empty • Location: **System Properties** > **System Localization** • Learn more: Locale settings

Related topics

Exporting currency fields to Excel

Change default currency decimal places

You can specify the number of decimal places stored and used in currency fields and calculations.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **sys_properties.list**.
2. Find *glide.currency_price.use_all_fraction_digits*, and set to the desired value.

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Value	Description
false	Uses two decimal places.
true	Uses four decimal places. This value is the default.

Configure default currency fields in audit records

You can control what currency value is stored in audit records.

Before you begin

Role required: admin

About this task

Procedure

1. Navigate to **All** > **sys_properties.list**.
2. Find *glide.sys.audit_currency_value*, and set to the desired value.

Value	Description
false	Value entered in the audit record is the numeric value in the session currency. It does not include the currency code. This value is the default.
true	Value as entered by the user in the format USD. For example, 1234.56.

Configure the currency optimizer

You can configure the system to use an optimizer for currency/price fields to speed up list view (reading currency/price values).

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **sys_properties.list**.
2. To turn on the currency optimizer, find *glide.currency_price_optimizer.enabled*, and set to the desired value.

Value	Description
false	Optimizer is not used.
true	Optimizer is used. This value is the default.

3. To set the minimum number of rows needed by the currency optimizer, find *glide.currency_price_optimizer.min_rows*, and set to the desired value. The default value is 4.

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Default currency conversions

Currency values can be converted to other currencies when stored and accessed.

Conversions can happen in these situations.

- The currency value converts to the reference currency when stored, whether on insert or update. The reference currency value is saved as well as the currency value.
- The currency value converts to the user's session currency for display.
- The value entered into a filter converts to the reference currency using the currency specified in the filter.

Conversion rates are stored in the Exchange Rate [fx_rate] table. Each record contains the conversion rate from a given currency to the Euro. The rates are updated daily from the ECB website by a scheduled job called Update Currency Conversion Rates.

A currency conversion from one currency to another involves two rates.

- Actual: In the Exchange Rate table, each record contains the conversion rate from a given currency to the Euro.
- Expected: In the Exchange Rate table, each record contains the conversion rate from the Euro to the given currency.

Whenever you perform a conversion, it uses the latest conversion rates. Therefore, calculations can potentially yield unexpected results. For example:

- Different currency values can have different rates applied to them while storing the reference currency value. Therefore, aggregation can combine values at different rates and convert back at another rate.
- A filter value is converted at current rates while the values it filters in the database can be converted at different rates. A filter for $100 at today's rate can match a value of $99 obtained at yesterday's rates.

Note: For display purposes, the currency value used is what the user entered converted to session currency. However, for aggregation and filtering, the reference currency value is used. Using the reference currency enables currency values converted at different rates to be compared together.

Schedule the rate update job

Schedule the Update Currency Conversion Rates job to perform a nightly download of currency-conversion tables from the European Central Bank.

Before you begin

Role required: admin

About this task

You can adjust the frequency of this behavior or turn it off it entirely. For information about turning off the regularly scheduled update and maintaining the Exchange Rate table [fx_rate] manually, see Use your own currency-conversion rates and FX Currency fields.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the job named **Update Currency Conversion Rates**.

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3. Modify the schedule, as needed.

   After the job runs, it stores and loads the rates from the Exchange Rate table. Navigate to **System Localization** > **Exchange Rates** to see the exchange rates.

Use your own currency-conversion rates

All currency conversions are based on the rates stored in the Exchange Rate table. You can turn off the regularly scheduled update from the European Central Bank (ECB), and maintain the table manually.

Before you begin

Role required: admin

About this task

Daily exchange rates are loaded in the Exchange Rate [fx_rate] table automatically using the Euro foreign exchange reference rates from the ECB and the Update Currency Conversion Rates scheduled job.

If ECB does not supply the daily rates for a specific currency, you can manually enter rates into the Exchange Rate table. Use an import set or another service (for example, JSON or SOAP) that supports uploading additional currency rates. You can then add a scheduled job similar to the Update Currency Conversion Rates scheduled job to update these currencies.

Note: The Update Currency Conversion Rates job replaced the ECB Exchange Rate Load and Retrieve System Rates jobs, which are turned off by default. They must remain turned off to use custom conversion rates.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the job named **Update Currency Conversion Rates**.
3. Clear the **Active** option.
4. Select **Update**.
5. Enter new exchange rates either manually or with an import set.

Setting up defaults required for FX Currency use

Set up the defaults required for use of FX Currency fields in your instance.

Perform the following setup tasks to enable FX Currency processing:

Add conversion rates using a custom rate table

You can create a custom rate table to ensure repeatable and consistent calculations. In a custom rate table, you control the conversion rates and the frequency of rate conversions. If you don't define custom rate tables, FX Currency fields use the System Conversion Currency Rate [fx_system_rate] table, which updates rates daily from the ECB (European Central Bank) website.

Before you begin

Role required: admin, currency_admin

About this task

A conversion rate can be quoted in different ways.

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- Direct conversion rate (A -> B) that may or not be invertible (that is, given rate R for A -> B, the rate for B -> A can be derived as 1/R).
- Indirect conversion rate through some intermediate currency (A -> C and C -> B).

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Click **New**.
3. In **Label** field, enter the name of the conversation rate.
   For example, Convert-US-Euro.
4. In the **Extends** field, select the Currency Conversion Rate [fx_conversion_rate] table.
5. Complete the remaining fields to create the new extended table.
   For more details, see Create a table for details.
6. Click **Submit**.
7. Navigate to the new table and fill in the fields on the form.

Field	Description
From Currency	Currency to convert the rate conversion table from. For example, USD if you are converting from US Dollars.
To Currency	Currency to convert the rate conversion table to. For example, EUR if you are converting to Euros.
Span start	Date/time from which this currency rate is valid, for example, January 1, 2020 00:00:00.
Span end	Date/time to which this currency rate is valid, for example, January 30, 2020 23:59:59.
Order	Order in which a currency conversion selects currency rates when their time spans overlap. For a date/time and a currency pair, if there are multiple rates with a Span start less than or equal to the date/time, and Span end greater than or equal to the date/time, the currency conversion selects the highest order rate.
Rate	Actual conversion rate, stored as a decimal with six decimal places.

8. Click **Update**.

What to do next

After you create the custom rate table:

1. Manually populate the table, or import data to populate it.
2. To use this rate table on a global basis, change the *glide.currency2.system_rate_table* system property.

   To use it for a specific FX Currency field, change the **Conversion Rate Table** field setting in **System Localization** > **FX Currency Configuration.**

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Related topics

- FX Currency values in import and export
- Configuring FX Currency global settings
- Specify the rate table and date source for currency conversions

Configuring FX Currency global settings

Before setting up and using FX Currency, review the related system properties to confirm or modify its default behavior.

Before you begin

Role required: admin

About this task

The global defaults you establish in system properties apply the configuration option to all FX Currency fields. You can then customize them for specific dictionary attributes in **System Localization** > **FX Currency Configuration.** When you create a currency configuration, it applies those settings only to the FX Currency field that you add it to. To learn more about FX Currency configurations, see Configuring FX Currency field behavior.

FX Currency configuration settings for specific FX Currency fields take precedence over system properties. Administrators can set a global configuration for a property, and then apply exceptions on a field-by-field basis.

- If you change system defaults, except for *`display_digits`* and *`display_value`*, the changes apply to updated and new values only.
- Existing values and data don't change but rather display differently, depending on configuration.

Important: Don't edit the Currency [fx_currency] table directly. The system maintains this table and your changes could have unintended consequences.

Procedure

1. Navigate to **All** > **System Localization** > **FX Currency Configuration.**
2. Review the system defaults and make any desired changes.

FX Currency field properties and attributes

System property	FX Currency configuration mapping	Description
glide.currency2.display_digits	currency_display_digits	Default number of digits displayed in FX Currency fields. **Note:** In a form, FX Currency fields display the number of digits you enter, up to 12 digits in length. ○ **Type**: Number ○ **Default value**: -1, or currency default

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System property	FX Currency configuration mapping	Description
		○ **Available options**: 0–12 ○ **Develop**: GlideCurrencyFormatter
glide.currency2.display_value	currency_display_value	Default currency display value returned from `getDisplayValue()`. ○ **Type**: String ○ **Default value**: as_entered ○ **Available options**: ▪ as_entered: Currency value as entered by the user ▪ in_session_currency: Currency value as entered by the user and converted to the session currency ▪ in_reference_currency: Currency value as entered by the user converted to the reference currency ○ **Develop**: GlideCurrencyFormatter
glide.currency2.system_rate_table	conversion_rate_table	Conversion rate table used to perform currency conversions. By default, the source for currency conversions is the System Currency Conversion Rate [fx_system_rate] table, which stores the daily reference rates retrieved from the European Central Bank. If you have defined a custom rate table, you can change the rate table used in currency conversions. ○ **Type**: String ○ **Default value**: fx_system_rate ○ **Available options**: Any table that extends the **Currency Conversion Rate** table [fx_conversion_rate] ○ **Learn more**: Understanding how FX Currency

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System property	FX Currency configuration mapping	Description
		field conversions workand Default currency conversions ○ **Develop**: GlideCurrencyConverter GlideCurrencyExchangeValue
glide.currency2.default_reference_currency	reference_currency	Three-digit ISO currency code used for the reference currency. The default reference currency for FX Currency fields is the system reference currency. ○ **Type**: String ○ **Default value**: If you set *glide.system.reference_currenc* to true, the three-digit ISO currency code determined by *glide.system.reference_currenc* If set to false, the system locale is the default. ○ **Learn more**: Session and reference currency ○ **Develop**: GlideElementCurrency2

Add an FX Currency field to a table

Before using and configuring an FX Currency field, you first add it an existing table, or to a new one, in **System Definition** > **Tables.**

Before you begin

Role required: admin

About this task

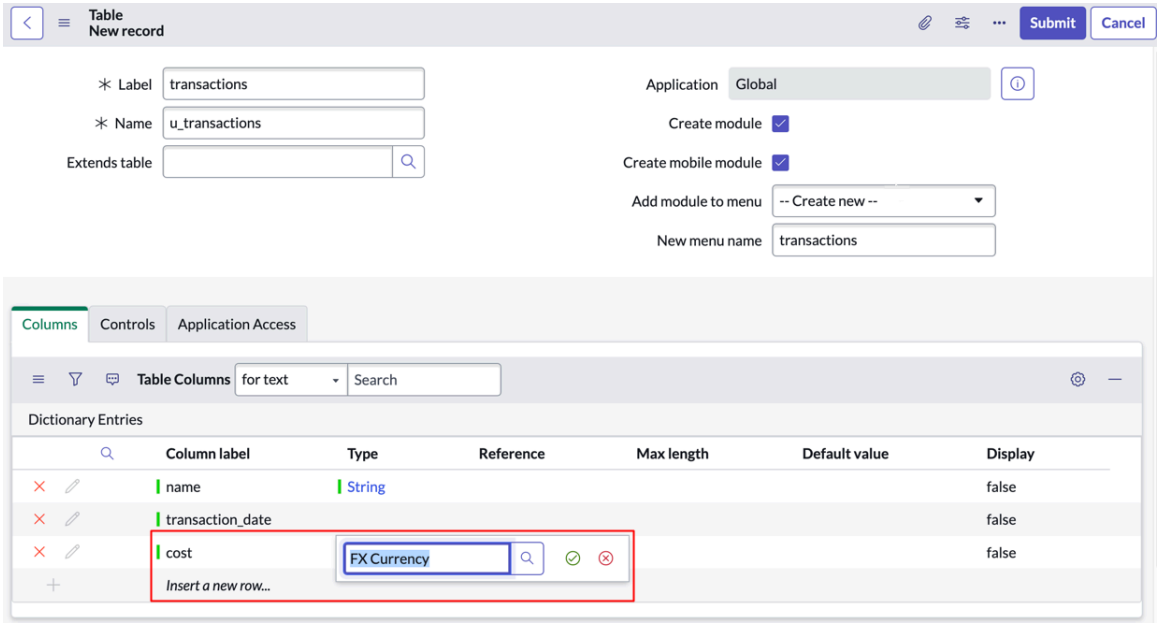
For example, you create a new custom table, named `transactions`, that stores transactional information and contains an FX Currency field called `cost`.

Procedure

1. Follow the normal procedures to add a table, or access an existing table.
   To learn more about creating and modifying tables in an instance, see Create a table.
2. In the **Columns** section, use the **Table Columns** embedded list to add columns to the table.
3. In the **Column label** field, enter the column name.
   For example, `cost`.
4. In the **Type** field, select **FX Currency** as the field type.

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Example



5. As needed, enter other required parameters.

> **Note:** Do not change the **Max length** value for **FX Currency** in custom tables. **Max length** must be 32 (default).

6. Click **Submit**.

Configuring FX Currency field behavior

After establishing global currency defaults, you can create custom FX Currency configurations for specific table fields. Identify the table fields that use FX Currency, and define how currency conversion calculations should be performed, displayed, filtered, and aggregated.

For each selected field that uses FX Currency, you configure settings that:

- Govern decimal precision and currency display in lists, forms, and reports.
- Identify the reference currency code for converting currency values entered into an FX Currency field into a common currency for report aggregations.
- Identify the rate table and data source to use for currency conversions.
- Specify the rate and target fields to use for filtering custom conversion rates.

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Note: When you create a currency configuration, it applies those settings only to the FX Currency field that you add it to. An FX Currency configuration takes precedence over global system properties that you established in **System Localization** > **All Properties.**

To learn more about global currency defaults, see Configuring FX Currency global settings.

You can change the defaults at any time. Doing so doesn't affect existing values, but it can make working with existing values difficult.

- For example, if you modify the **Reference Currency** field in the Currency tab, existing instance records have the old reference currency, but new instance records have the new reference currency. You can't perform an operation such as sum aggregation because the reference values are in different currencies.
- However, because the actual reference currency in the Currency Instance [fx_currency2_instance] table is accessible in an FX Currency field, you can use any script that performs this aggregation.

Identify the FX Currency field and its display parameters

Specify the table, and the field within the table (for example, cost), that the FX Currency configuration applies to. Then, select the decimal precision and currency display parameters for the field.

Before you begin

Role required: admin, currency_admin

Procedure

1. Navigate to **All** > **System Localization** > **FX Currency Configuration**.
2. Click **New**.
3. In the **Table** field, select the table that contains the FX Currency dictionary attribute.
   For example, if you created a custom table that stores transactional information and contains an FX Currency field, select it from the table listing. To learn more about creating tables in an instance, see Create a table.
4. In the **Field** field, select the column with the FX Currency field type.
   For example, if you created a custom table column for entry of the transaction cost, select it from the listing of fields for the table.
5. Click **Save**.
6. Click the Display tab.
7. In the **Display Digits** field, select the number of digits that should appear after the decimal point in lists and reports.

Option	Description
Currency Default	Number of digits that appear on lists and forms, based on what is ap propriate and customary for the specified currency itself. For exam ple: ○ USD: Two digits appear after the decimal, for example, 12.33. ○ Dinar: Three digits appear after the decimal, for example, 69.535. ○ Yen: No digits appear after the decimal, because the Yen uses no cents and numbers round to the next latest value. For example, a calculated currency value of 69.535 rounds up to, and appears as, 67 Yen.

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Option	Description
0–12	Specific number of digits that should appear after the decimal, with selectable values from 0 through 12. If you select more than 1, it pads the values with zeroes. ○ For example, if you select 3, and the calculated value is 1.1, the currency value appears as 1.100. ○ If you select 5, this value appears as 1.10000.

Note: In a form, FX Currency fields display the number of digits as entered by the user, up to 12 digits in length.

8. In the **Display Value Currency** field, select what currency value appears in the designated FX Currency field on forms and lists.

Option	Description
Use Global Default	Use the global default you established in the *glide.currency2.display_value* system property in **System Localization** > **All Properties.**
Display As Entered	Currency value, as entered into the designated FX Currency field. For example, if the user locale is US Dollars, the value appears in Euros if they select the Euro as the currency during an entry session.
Display in Session Currency	Currency value entered into the designated FX Currency field, converted to the session currency. ○ For example, if the user locale is the United States, the session currency appears in US Dollars. ○ If the user locale is Japan, the session currency appears in the Yen. To learn more about the user locale, see Locale settings.
Display in Reference Currency	Currency value entered into the designated FX Currency field, converted to the reference currency designated in the **Reference Currency** field in the Reference tab. For example, if you enter the currency amount in Euros, it converts to and appears in US Dollars if that is the designated reference currency. To learn more the reference currency, see Set the reference currency.

9. In the **Aggregation Source** field, select the currency type to use when aggregating currency amounts for the designated field on reports.

Option	Description
Use Global Default	Use the global default you established in the *glide.currency2.default_reference_currency* property in **System Localization** > **All Properties.**
As Entered Values	Currency values, as entered into the designated FX Currency field.

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Option	Description
	Note: If you select this option, you may experience situations where amounts entered in dissimilar currencies can't be aggregated on reports. For example, if you enter currency amounts in US Dollars, Yen, and Euros, the amounts can't be properly aggregated, or may result in erroneous totals.
Reference values	Currency values, as entered into the designated FX Currency field, converted to the reference currency you designate in the **Reference Currency** field in the Reference tab. For example, if you designate USD as the reference currency, values entered into this field convert to the reference currency, regardless of the currency you entered them in. The currency values that appear on reports are the aggregated converted reference values.

10. Click **Save**.

Set the reference currency

Set the reference currency for the designated FX Currency field. The ServiceNow AI Platform uses the reference currency to convert values entered into the FX Currency field into a common currency for report aggregation purposes.

Before you begin

Roles required: admin

Procedure

1. Click the Currency tab.
2. In the **Reference Currency** field, select the three-digit ISO currency code used for the reference currency.
   For example, select **USD** if the currency values expressed in various currencies convert into US Dollars for report aggregation.

   To use the global reference currency default you established in the *glide.currency2.default_reference_currency* property in **System Localization > All Properties.**
3. In the **Reference Currency Source** field, designate the source of the reference currency.
   - To use as the source of its reference currency when creating or updating a currency value for this FX Currency field, select the dot-walked field.
     - For example, `Cost` is an FX Currency field, and `my_currency` is a reference or string field in the Currency [fx_currency] table that contains a currency code such as USD.
     - When you create an FX Currency configuration for the `Cost` field, you select `my_currency` as its reference currency.
   - If you do not want to select the reference currency from another field, select **--None--**.
4. Click **Save**.

Specify the rate table and date source for currency conversions

Identify the rate table and data source to use for currency conversions for the designated FX Currency field.

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Procedure

1. Click the Rate Table tab.
2. In the **Conversion Rate Table** field, select the rate table used for conversions of currency values in the FX Currency field:
   - To use the default system rate table you defined in the *glide.currency2.system_rate_table* property in **System Localization** > **All Properties.**, select **System Currency Conversion Rate**. This table stores daily reference rates retrieved from the European Central Bank.

     To learn more about the system rate table, see Default currency conversions.
   - If you have defined a custom rate table, you can select it to use in currency conversions for the FX Currency field. To learn more about how to define custom rate tables, see Add conversion rates using a custom rate table.
3. In the **Conversion Date Source** field, select the field to use as the source of the date and time for the currency conversion for the FX Currency field:
   - To use the date and time at which the user performs the currency conversion, select **--None--**.
   - To use as the source of the date and time for the currency conversion, select the dot-walked field.

     For example, to perform the currency conversion based on the currency rates in effect, select a transaction date field. So, if you entered the transaction on July 15, and you perform the currency conversion on July 31, it uses the currency conversion rates in effect on July 15.
4. Click **Save**.

Related topics

Understanding how FX Currency field conversions work

Add conversion rates using a custom rate table

Select the rate and target table fields used for filtering

Optionally specify the rate table and target table fields to use for filtering conversion rate information.

About this task

For example, you maintain interfaces to several ERP systems, have currency conversion rates that are unique to each ERP, but you maintain all rates in a single table.

- To identify rates for a specific ERP system, there is a **System** field in the rate table that contain entries identifying each ERP system, for example, ABC, XYZ. In the target table with the FX Currency field, you have a similarly named field for identifying the conversion rates required for specific ERP systems.
- When you perform currency conversions, and the rate and target table field entries match, it uses the rates that are unique to that specific ERP.

Procedure

1. Click the Rate Filter tab.
2. In the **Rate Table Field** field, select the field in the rate table to match against the specified target table field for conversion rate filtering.
   Select **--None--** skip use of a rate table field for conversion rate filtering.

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3. In the **Target Table Field** field, select the field in the target table to match against the specified rate table field for rate filtering.
   Select **--None--** skip use of a target table field for rate filtering.
4. Click **Save**.

Related topics

Understanding FX Currency values in lists and reports

Understanding FX Currency values in forms

Update a Currency Instance record

Review and edit the details of a currency entry in an FX Currency field.

Before you begin

Role required: currency_instance_admin, with ACL access to the FX Currency field, or admin

Procedure

1. Access the Currency Instance record using one of the following methods.

Access method	Description
Direct access from an FX Currency field	Select the edit icon ( ) that appears next to the FX Curren cy field in a transaction record.
From the navigator bar	**a.** Navigate to **System Localization** > **FX Currency Instances**. **b.** Select the Currency Instance record to edit. **Note:** Only users with an assigned admin role can ac cess this selection from the navigator.

2. On the form, fill in the fields.

Currency Instance

Field	Description
Amount	Currency amount that you entered into the FX Currency field, formatted according to the currency code in your user locale. The amount stores internally as a currency code and a numerical value of up to 12 digits in length. For example, `USD; 1234.56`. **Note:** The currency value has two parts: the currency amount and a currency code. The amount stores as a decimal value, for example, `1234.56`.
Currency Code	Three-letter ISO code that identifies the currency that you select for the currency amount. For example, USD for the US Dollar, or EUR for the Euro.
Conversion Rate	Conversion rate used to calculate the reference currency value. It converts a session currency value, expressed in one currency, to another, and stores as a reference to a record in the Currency Conversion Rate [fx_conversion_rate] table.

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Field	Description
	The conversation rate is based on the **Conversion Rate Table** and **Conversion Date Source** settings for the FX Currency field in the Rate tab of FX Currency Configuration. To learn more about these settings, see Configuring FX Currency field behavior. You change or select the conversion rate as needed.
Reference Amount	Calculated reference currency amount. The ServiceNow AI Platform converts the currency value entered into the **Amount** field into a common reference currency. It uses the settings in the **Reference Currency Source** and **Reference Currency** fields in **System Localization** > **FX Currency Configuration** to do so. You can't change the calculated reference amount. **Note:** To learn more about reference currencies, see Set the reference currency.
Reference Currency Code	Three-letter ISO code that identifies the reference currency, for example, USD, to which the entered currency value converted. You can't change the reference currency code.

Note: You can't edit the reference currency and value because they are calculated automatically.

3. Select **Save**.

Currency administration references

The following sections show the properties associated with currency administration.

Life cycle of records containing FX Currency fields

The behavior of FX Currency fields varies during the processing that occurs during the lifetime of a record containing them.

Insert / Update

The FX Currency field points to a Currency Instance [fx_currency2_instance] record. When you change the currency value in an FX Currency field, it determines the conversion rate and calculates the reference currency before:

- The *before* business rules run.
- The *after* business rules run, and it includes any further changes you may have made to the *before* business rules.

Note: If the FX Currency field contains an invalid currency code, an exception condition may appear before these two stages occur.

Auditing

Since an FX Currency field points to a Currency Instance record that stores multiple values, the audit string is a composite that contains this information.

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The string stored in the System Audit [sys_audit] table is in the format of `EUR;111.222;4555525f5553445f3230313931323033`, with the following values, separated by semicolons:

- Three letter ISO currency code. For example, `EUR`.
- Amount as an unformatted number. For example, `111.222`.
- System identifier (sys_id) for the conversion rate record in the Currency Conversion Rate [fx_conversion_rate] table. For example, `4555525f5553445f3230313931323033`.

When creating history lines for a user, the audited string is formatted, using the locale of the user. It's in the format of `€111.22;2019-12-03 17:00:00-3000-01-01 23:59:59;fx_system_rate`, with the following values, separated by semicolons:

- Formatted currency string in the user locale. For example, `€111.22`.
- Start span-End span, as expressed in the conversion rate record in the System Rate [fx_system_rate] table. For example, `2019-12-03 17:00:00-3000-01-01 23:59:59`.
- Name of the conversion rate table. For example, `fx_system_rate`.

Dot-walkable Currency Instance fields

You can dot-walk certain fields in the Currency Instance [fx_currency2_instance] record, and field values stored in the database are consistent with each other. However, in script, since fields can be changed individually, and you change only some of the fields, they can be inconsistent.

Currency code

The **Currency** field isn't a reference field, so you can set it to any value. However, if you enter an invalid currency code, an exception message is generated. An empty value is considered a session currency code.

Query conditions

You can add query conditions on dot-walked fields in the instance table. However, when the query condition value is in a special format with currency code and amount, it's treated as a compound condition on the dot walked fields. The value has to be in format `XYZ, abc` where:

- `XYZ` is a currency code, and
- `abc` is an amount.

For example, `USD, 12.34`.

A condition such as `cost>USD,12.34` is treated as `cost.currency>USD AND cost.amount12.34`.

When the second operand is another Currency2 field, the condition translates in a similar manner:

`cost1>cost2` is treated as `cost1.currency=cost2.currency AND cost1.amount>cost2.amount`.

ServiceNow AI Platform translation and localization

Provide service around the globe with language translation and localization for specified regions.

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Dynamic Translation



Translate user-generated content live on your instance to streamline communication for your agents and end users.

Localization Framework



Standardize the process of translating artifacts such as Service Catalog items, Knowledge Base articles, and Document Templates across the platform.

Localization Workspace



Localization Workspace is a targeted translation management experience for content owners and translation requesters. With Localization Workspace you can manage and deliver multilingual content at scale.

System Localization



Set up location-based translation and currency support for users on your instance, wherever they are in the world.

For additional resources about globalization tools on the ServiceNow AI Platform, see the Localization page in the ServiceNow Customer Success Center.

Dynamic Translation

Translate user-generated content live on your instance to streamline communication for your agents and end users. Integrate with the machine translation service provider of your choice to enable translation on forms, activity streams, and chats. Microsoft Azure and Google Cloud Translator Service are partially preconfigured with the activation of Dynamic Translation, or you can configure a custom service provider using Integration Hub.

Localization Framework

The Localization Framework app uses configurable workflows to standardize the process of translating artifacts across the platform. Translate Service Catalog items, Knowledge Base articles, Document Templates, and more.

Localization Workspace

Localization Workspace is a targeted translation management experience for content owners and translation requesters. It streamlines and automates task creation and translation workflows. With Localization Workspace you can manage and deliver multilingual content at scale.

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System localization

Give your users specialized support with System Localization. Define locales and adjust localization settings to display specific time/date and currency to users. Multiple languages are available on the ServiceNow AI Platform, along with options to create custom translations for ServiceNow materials, as well as for languages not translated on the platform.

Dynamic Translation

With Dynamic Translation you can support machine translation from one language to another across your instance.

Dynamic Translation works with your choice of third-party machine translation services so you can offer your users content in their own languages. Enable your agents to translate form fields, Agent Chat messages, and knowledge articles on demand.

Get started

Explore  Explore Dynamic Translation	Configure  Configure Dynamic Translation	Integrate  Integrate with third-party translation services
Use  Use Dynamic Translation across your instance	Reference  Reference for Dynamic Translation properties, actions, and error messages	

Troubleshoot and get help

- Localization in the ServiceNow Customer Success Center
- Read articles on the Now Community site
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Dynamic Translation

Learn more about Dynamic Translation and integrating with third-party translation services so you can enable live translation of user-entered text across your instance.

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Dynamic Translation overview

Activating the Dynamic Translation plugin (com.glide.dynamic_translation) enables real-time machine translation of user-entered text in form fields, activity streams, chats, and knowledge articles. You can integrate with a machine translation service provider of your choice. You can configure which tables and features offer on-demand translation for your users.

To localize your instance, including static UI elements, currency, and time displays, see System Localization.

To manage and deliver multilingual content at scale, see Localization Workspace.

Dynamic Translation workflow

1. Procure any ServiceNow, Inc. subscription that is Professional or above, and includes Dynamic Translation.
2. Activate your choice of language or languages. For more information, see Activate a language. The language plugin also activates Localization Framework.
3. Activate the Dynamic Translation plugin (com.glide.dynamic_translation). For information, see Activate Dynamic Translation.
4. Sign up and create an account with a translation service provider. By default, the following translation service providers are partially preconfigured:
   - Microsoft. To sign up, see the Microsoft documentation. For more information, see Microsoft Azure Translator Service spoke.
   - Google. To sign up, see the Google website. For more information, see Google Cloud Translator Service Spoke and Set up Google Cloud Translator Service spoke.

     Note: The Google Cloud Translator Service spoke is installed from the ServiceNow Store.

   You can also configure any translation service provider of your choice. For information about custom configurations, see Integrate with a translation service provider.
5. Configure your translation service provider in Dynamic Translation.
   - After you have signed up with a translation service provider, do the following in your instance: create a connection, specify the credential information, then activate the translator configuration.
   - Set at least one translator configuration as the default for detection, to detect the language of the user-entered text.
   - Set at least one translator configuration as the default for translation request calls.
   - Dynamic Translation uses the ServiceNow® language codes and supports all the languages that the translation service providers support.

     Note: For languages where there is a difference in language codes, see Create a language code mapping to create a language code mapping record and associate it with the translator configuration record.
6. Configure your use cases as needed.

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- To enable dynamic translation in a form field, configure the dictionary attribute. For more information, see Enable dynamic translation for a field.
- To enable dynamic translation in an activity stream, include the table name in the allow list property. For more information, see Dynamic translation on forms and activity streams.
- For other use cases, see the links in the Features column of the following Dynamic Translation benefits table.

Dynamic Translation benefits

Benefit	Feature	Users
Live translation on forms	Dynamic translation on forms and activity streams	Agent
Knowledge article translation	Together with Localization Framework, enable the translation of Knowledge Base articles.	Agent
Set your preferred translation services	Dynamic Translation spoke and integrating with third-party services	Administrator
Use an API and enable machine translation for multiple languages	DynamicTranslation API	Administrator
Translate text in conversations between end users and agents	Dynamic Translation for Agent Chat	End user, agent
Regulated market support	From the Zurich release, support for certain regulated markets is available. For information see KB0743854 on the Now Support portal.	Administrator, end user, agent
Self-hosted (on-premise) support	Dynamic Translation is available to self-hosted (on-premise) customers who permit integrations to machine translation vendors.	Administrator
Domain separation support	For information about domain separation with Dynamic Translation, see Domain separation and Dynamic Translation	Administrator

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Configuring Dynamic Translation

Activate and configure Dynamic Translation to integrate with a third-party machine translation provider to enable live translation of user-generated content across the ServiceNow AI Platform.

Configuration overview

Activate dynamic translation and integrate with your preferred service provider.

Activate Dynamic Translation

Activate the Dynamic Translation plugin (com.glide.dynamic_translation) to enable all the required APIs.

Before you begin

You must have the Glide Notification Translation (com.glide.notification.translation) plugin installed and enabled.

Role required: admin

About this task

Dynamic Translation plugin (com.glide.dynamic_translation) activates these related plugins if they are not already active.

Plugins for Dynamic Translation plugin (com.glide.dynamic_translation)

Plugin	Description
Flow Designer - Installer [com.glide.hub]	Supports the Flow Designer application.
ServiceNow IntegrationHub Runtime [com.glide.hub.integration.runtime]	Enables execution of IntegrationHub actions and flows.
ServiceNow IntegrationHub Action Step - REST [com.glide.hub.action_step.rest]	Action Step - REST
Microsoft Azure Translator Service Spoke [com.glide.microsoft_translation_spoke]	Provides subflows and actions to dynamically translate the user-entered text, and to detect the language of the text using Microsoft translation services.
ServiceNow Language Detection Service Spoke [com.glide.language_detection_spoke]	Uses ServiceNow® Language Detection service to provide the ability to detect the language of given text.
Dynamic Translation Spoke [com.glide.dynamic_translation.spoke]	Provides actions that enable the ability to translate text(s) from one language to other language(s) and to detect the language of given text.
Translation Commons [com.glide.translation.commons]	Common utilities for translation features.

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Note: If you activate the Microsoft Azure Translator Service Spoke plugin when the Dynamic Translation plugin (com.glide.dynamic_translation) is inactive, the subflows and actions of the Microsoft Azure Translator Service Spoke plugin are enabled. These subflows can be used in other flows and subflows. However, you cannot call Dynamic Translation APIs.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

Related topics

Available plugins and applications

Request for domain separation in Dynamic Translation

Enable the support for the Dynamic Translation framework in domain-separated instances.

Before you begin
Role required: admin

About this task
There are two ways to request a plugin.

- Access the Now Support Service Catalog directly by selecting **Automation Store** > **Service Catalog** > **Activate Plugin** on Now Support.
- Access the Now Support Service Catalog through the All Applications page on your instance by following these steps.

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.

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Field	Description
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.

What to do next

For information about configuring domain separation in Dynamic Translation, see Domain separation and Dynamic Translation.

Related topics

Available plugins and applications

Exclusion Framework in Dynamic Translation

Preserve text such as product names or technical terms during machine translation. With Exclusion Framework in Dynamic Translation, you can specify words and patterns that should not be translated.

Exclusion Framework is a set of rules ensuring that your designated text bypasses the machine translation process and appears unchanged in the resulting output. Dynamic Translation applies Exclusion Framework rules to your text before submitting the request to your machine translation provider. Two types of rules are supported: Exact Match (specific terms) and Pattern Match (regex).

Examples of text to consider for exclusion from machine translation

In response to your organization's business requirements, you can create Exclusion Framework rules for text strings such as the following.

Exclusion rule examples

Rule type	Examples
Exact match	• Product or company names • Acronyms, stock ticker symbols

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Exclusion rule examples (continued)

Rule type	Examples
	• Technical terms or identifiers • Terminology that has unique meaning in your organization
Pattern match	• Case numbers, incident numbers • KB article numbers • Sys IDs

Review your organization's glossaries and taxonomies to identify candidates for exclusion.

Activating Exclusion Framework

An upgrade to Xanadu Patch 3 or higher, when Dynamic Translation is active, includes activation of Exclusion Framework by default.

Note: Dynamic Translation requires a Professional or above subscription. For information see Activate Dynamic Translation.

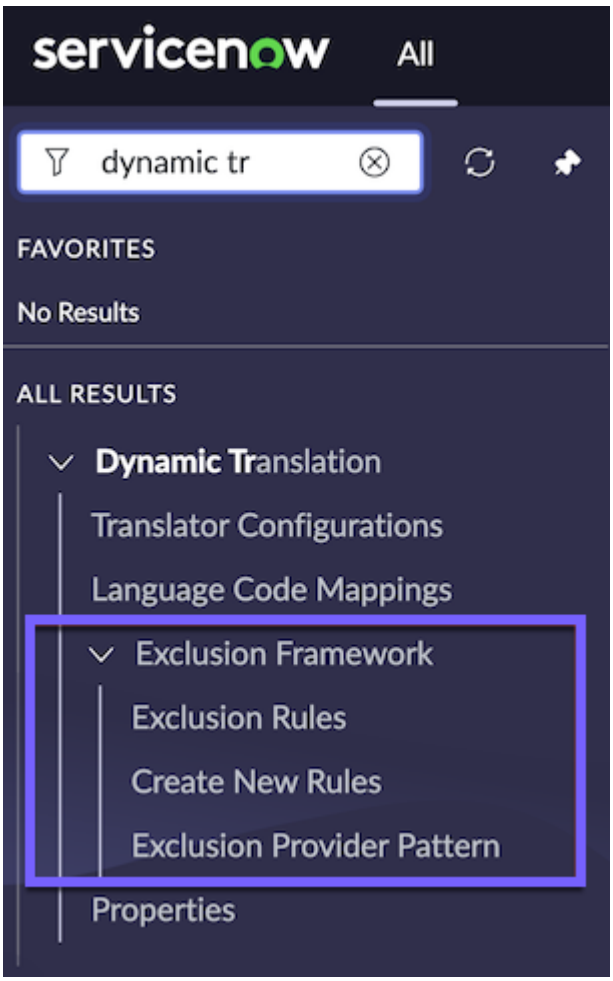
An upgrade to Xanadu Patch 3 or higher also converts the Dynamic Translation flows from v3 to v4. The v4 flows contain subflows for working with Exclusion Framework. Translator configurations available by default are automatically upgraded to v4. For more information, see Migrate customized Translator Configurations to v4 flows.

A system property in **All** > **Dynamic Translation** > **Properties** enables you to activate or deactivate Exclusion Framework: sn_dt.dynamic_framework.enable_exclusion_framework.

Exclusion Framework appears as a module under Dynamic Translation.

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The Exclusion Framework module



By default Exclusion Framework provides several exclusion rules, and you can add your own rules during configuration.

Exclusion Rules | Order | Search | Actions on selected rows...

All

Name	Active	Rule type	Order	Exclusion term	Ignore Case	Description	Domain
KB numbers	true	Pattern Match		KB\d+	false	Matches any string that starts with "KB"...	global
Stock name	true	Exact Match		NOW	false		global

Configuring Exclusion Framework

Because Exclusion Framework is activated by default you can complete its configuration as follows.

1. Ensure that your third-party machine translation service has an active record in the Exclusion Provider Pattern [sn_dt_provider_exclusion_pattern] table. If you have chosen a custom translator service you must input their exclusion tags. For information see Add an Exclusion Provider Pattern.
2. Review any existing records in the Exclusion Rules [sn_dt_exclusion_rules] table to check whether they are appropriate for your needs. Rules that are provided by default can be deactivated by clearing the Active check box, but they can't be edited.
3. Add more exclusion rules according to your organizational requirements. For information see Add new rules to Exclusion Framework.

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Exclusion Framework's operational process

After configuration, Exclusion Framework's subflows operate within Dynamic Translation. The Exclusion Framework process is outlined as follows.

1. Exclusion Framework searches the original text (before translation) to find any matches to terms and patterns that are active in the Exclusion Rules table.
2. Any matches are wrapped in exclusion tags. These tags are pulled from the relevant record in the Exclusion Provider Pattern table.
3. The tagged text is submitted to your machine translation provider.

Text that is wrapped in the exclusion tags is shielded from translation. It is written into the translation results in its original language, so the output contains unmodified text embedded in translated text.

Domain separation support in Exclusion Framework

Exclusion Framework supports domain separation. Each domain on an instance can have its own set of Exclusion Framework rules, so the rules apply at the domain level. Within a domain, each rule must be unique. Create rules in the domain where you want them to operate.

When multiple domains exist on one instance, Exclusion Framework is activated on all domains. Deactivating Exclusion Framework on a per-domain basis isn't supported. As an alternative, deactivate every rule in a domain where you want Exclusion Framework to be inactive.

Add new rules to Exclusion Framework

Add terms and patterns that shouldn't be machine translated to the Exclusion Rules table. You can create either exact match rules or pattern match rules, and you can edit your rules later.

Before you begin

Role required: admin

About this task

By default Exclusion Framework provides several activated rules in the Exclusion Rules table [sn_dt_exclusion_rule]. Before creating your own rules, review the default rules to check whether they are appropriate for your requirements. Navigate to **All** > **Dynamic Translation** > **Exclusion Framework** > **Exclusion Rules** and select a rule name to open its record.

Default rules can be deactivated but not edited, and they are in the Dynamic Translation application scope. The rules you create can be deactivated or edited.

There are two types of exclusion rules.

- Exact match rules search for the term you input. Case sensitivity can be enabled for these rules using the **Ignore Case** check box.
- Pattern match rules use regular expressions (regex) to find text strings such as Sys IDs and KB article numbers. These text strings may contain varying combinations of characters but they follow a defined pattern. The **Add Row** form performs a basic validity check on the regex, displaying the error "The input is not a valid regex pattern" when the check fails.

Note: ServiceNow supports only Java regular expressions (regex), not Perl or other vendor options.

The **Create New Rules** module opens a record producer that supports adding multiple rules at one time. There is a maximum limit of 50 rules per type per submission. That limit applies only to the submission form, not to the Exclusion Rules table.

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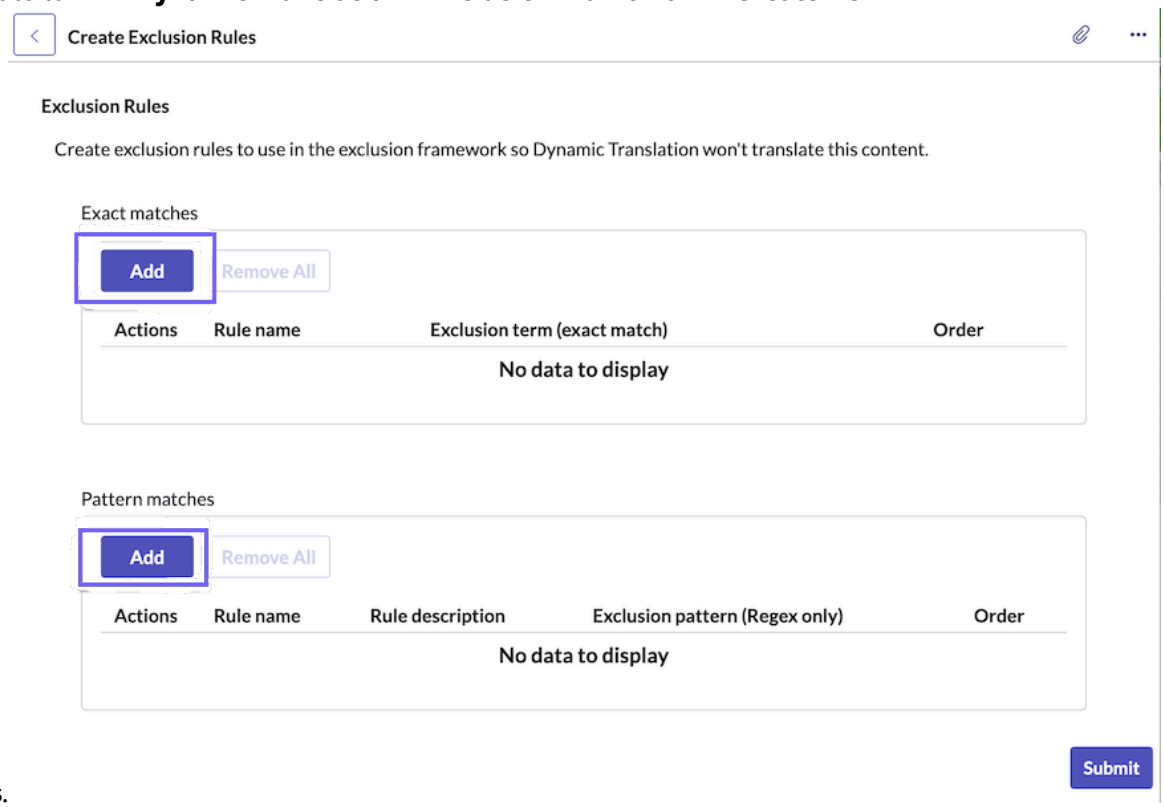
Exclusion rules are applied to your text in sequence. When Exclusion Framework finds a match it stops, so later rules are not applied. You can set the order in which rules are applied by filling in the optional **Order** field.

1. Rules with a value in the **Order** field are evaluated from lowest number first (such as 1) to highest number last (such as 100).
2. Next, rules without a value in the **Order** field are evaluated according to age. The oldest rule is evaluated first, and the newest rule is evaluated last.

Exclusion rules must be unique within a domain. An attempted duplicate submission displays a banner with the message "Exclusion term and Domain combination already exists."

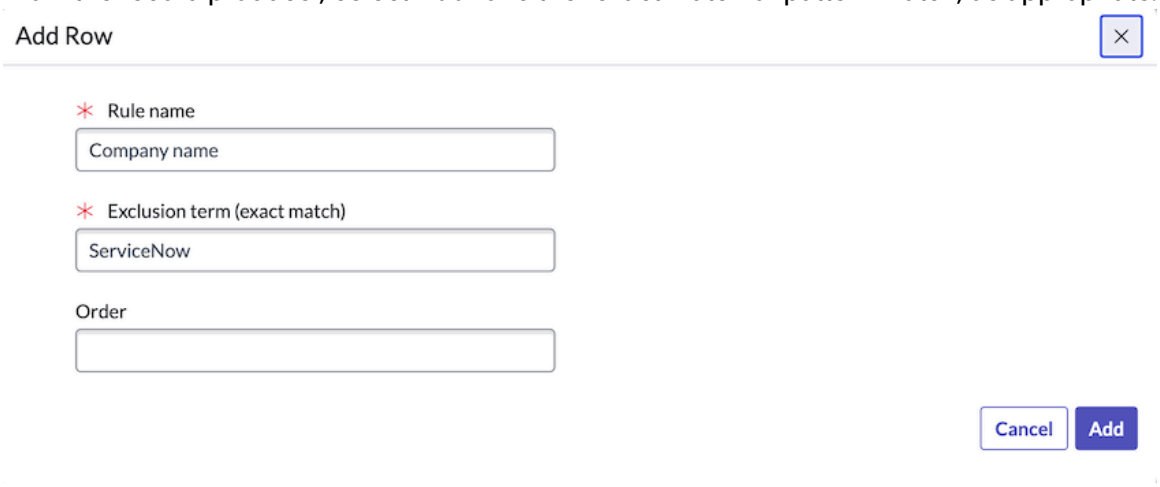
Procedure

1. Ensure that you are in the application scope that you want for your rules, then navigate to **All** > **Dynamic Translation** > **Exclusion Framework** > **Create New Rules**.



A modal for a record producer opens, so you can add multiple rules at one time.

2. From the record producer, select **Add** for either exact match or pattern match, as appropriate.



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3. On the **Add Row** form, configure the fields according to the following guidance.

Rule type	Fields
Exact Match	○ **Rule name** ○ **Exclusion term (exact match)**: You can enter terms that contain spaces. ○ **Order**: Optional. See the previous explanation.
Pattern Match	○ **Rule name** ○ **Rule description**: Describe what the regex pattern is looking for. ○ **Exclusion pattern (regex only)**: enter the pattern as a regular expression. ○ **Order**: Optional. See the previous explanation.

4. Edit or delete any rows as needed, then select **Submit**.
   Your rules are added to the Exclusion Rules table and activated.

What to do next

You can edit and deactivate your rules in the Exclusion Rules table. Navigate to **All** > **Dynamic Translation** > **Exclusion Framework** > **Exclusion Rules**, then select the rule name to open its record.

For exact match rules, you can modify the case sensitivity in its Exclusion Rules record.

- Select the **Ignore Case** check box to enable case insensitive matching (for example, the entry "hello" would match "Hello", "hEllo", "helLo" and so forth.)
- Clear the **Ignore Case** check box to match the entry exactly as it appears in the table, including its casing.

From the Zurich release, you can manually test your pattern. For more information see Test Exclusion Rule.

Test Exclusion Rule

Test Exclusion Rule in Dynamic Translation enables you to test your exclusion pattern manually. You can check whether the pattern accurately excludes a text string from translation.

Before you begin

At least one additional language must be available on your instance. For more information about installing languages, see Activate a language.

Role required: admin

About this task

Test Exclusion Rule opens a record producer where your exclusion pattern can be tested manually on a text string that you enter. Several of the fields on the record producer change depending on the following choices.

- You can test an exclusion pattern before or after you create an exclusion rule (New or Existing rule).
- You can test either type (Exact match or Pattern match).

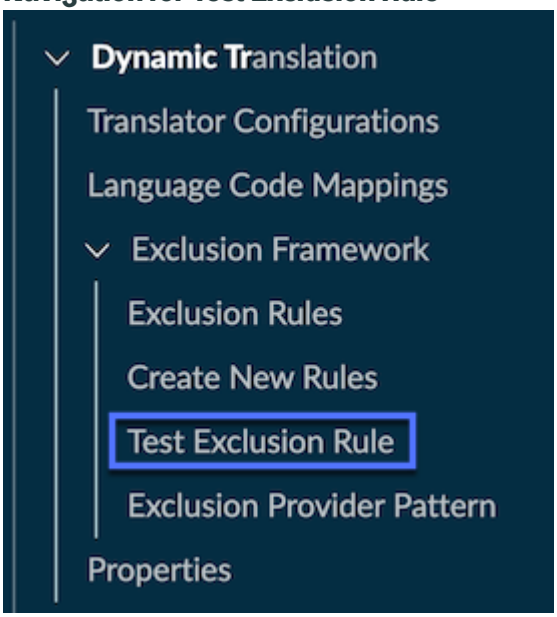
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If you choose New exclusion rule, you can opt to create a new rule based on your test pattern.

You can select a target language from among the languages enabled on the instance. The target language is the language you want to translate into. The output shows the translation with the matching sequence displayed in bold font.

You can test iteratively to refine your exclusion pattern.

Navigation for Test Exclusion Rule



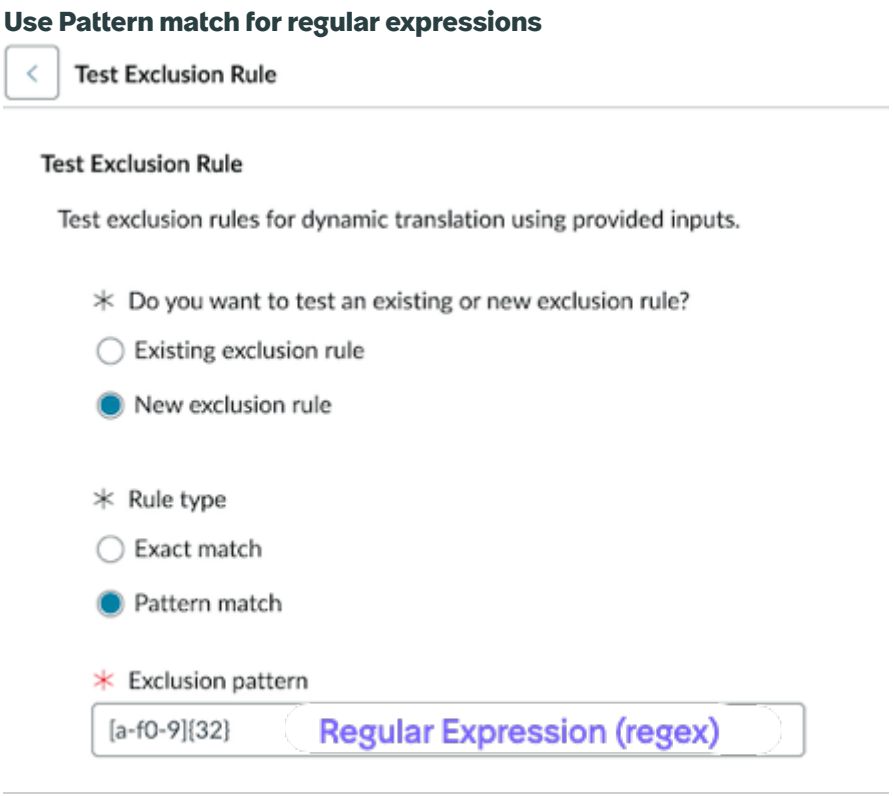
Procedure

1. Navigate to **All** > *Dynamic Translation* > **Test Exclusion Rule**.
   A record producer opens.
2. Select the appropriate option for the first question, **Do you want to test an existing or new exclusion rule?**

Option	Description
Existing exclusion rule	If you choose this option, the next field opens: **Which exclusion pattern would you like to test?** Select your pattern from the list, or use the field's search function. The information icon (ⓘ) offers a read-on ly summary of the selected rule.
New exclusion rule	If you choose this option, two fields and a but ton appear on the form. **a. Rule type**: Choose from ▪ **Exact match** ▪ **Pattern match** (regex) **b. Exclusion term** (for Exact match): enter a text string.

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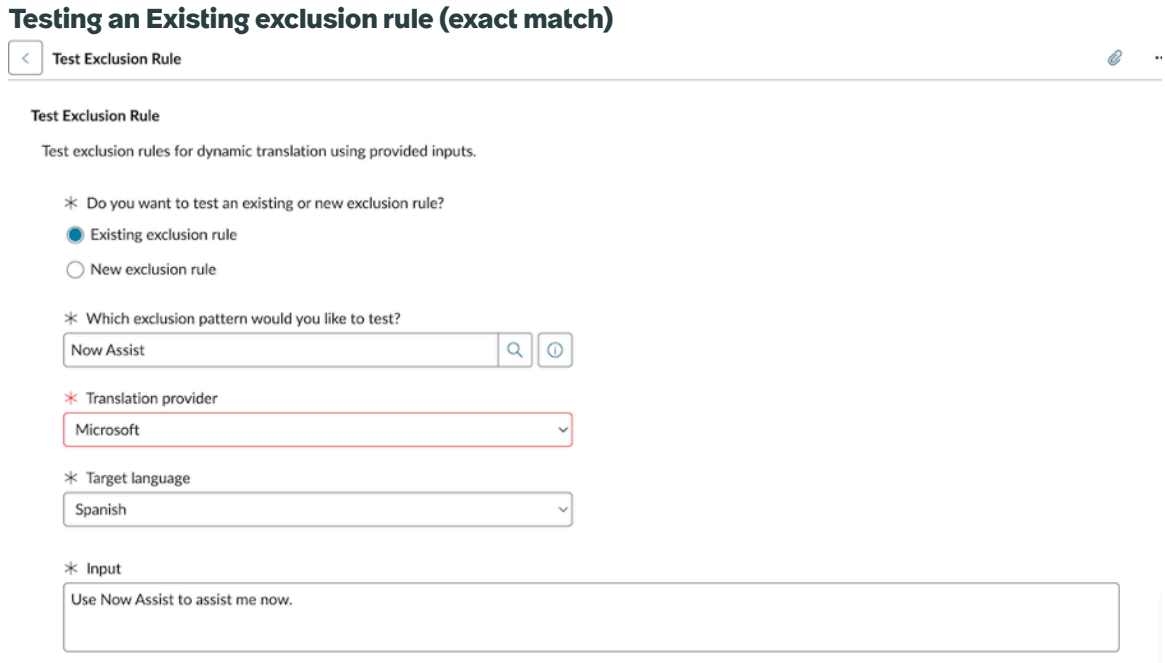
Option	Description
	Exclusion pattern (for Pattern match): enter a regular expression (regex) pattern. c. **Create Rule**: You can optionally use this button to open a form for a new exclusion rule. The most recent exclusion pattern that you tested is imported into this form.



3. **Target language**: Select a language from the languages installed on your instance. This is the language you want to translate into.

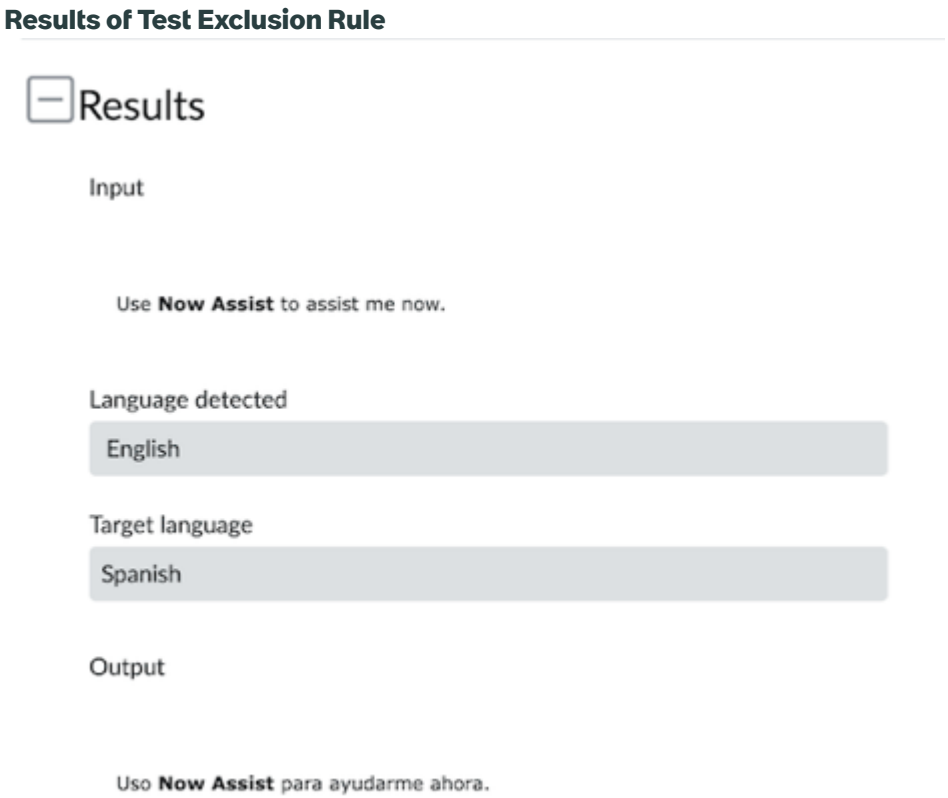
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4. **Input**: In the source language, enter text containing the string that you want your exclusion pattern or term to match, then select **Submit**.



Result

The input is translated into the target language, but the part that matched the exclusion pattern remains in the source language. The result is a mix of translated and untranslated text. The match is highlighted in bold font.



If your test pattern did not match any part of the input, the result displays a translation with no bold font.

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Note: Your input might match other exclusion rules active on your instance. If this occurs, the result displays a mix of translated and untranslated text without bold font. Only matches to the current test pattern display bold font.

When testing variations of existing rules, temporarily deactivating similar rules could help focus on the test pattern.

What to do next

If you chose **New exclusion rule**, you can create a rule based on the exclusion pattern that you tested. For more information see Add new rules to Exclusion Framework.

Add an Exclusion Provider Pattern

As part of the configuration of Exclusion Framework in Dynamic Translation, enter the tags used by your translation provider to mark text that should not be machine translated.

Before you begin

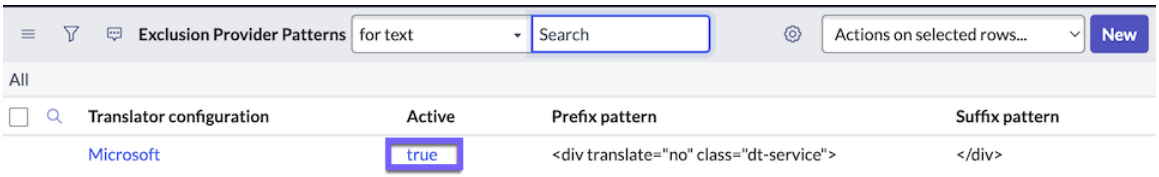
Consult your machine translator provider's documentation or account portal to obtain the tags it uses to mark text strings for exclusion from translation.

Role required: admin

About this task

The Exclusion Provider Pattern [sn_dt_provider_exclusion_pattern] table stores the exclusion tags used by machine translation providers. From this table's list view, select the value in the Active column to view a record. (Selecting the value in the Translator Configuration column opens the corresponding Translator Configuration table entry in Dynamic Translation).

To open a record, use the value in the Active column on the list view of Exclusion Provider Pattern



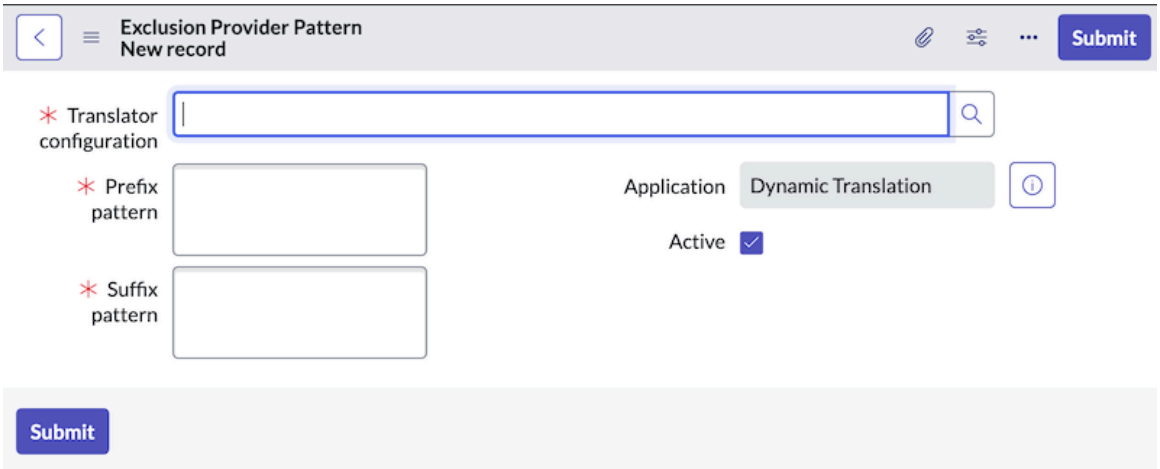
By default Exclusion Framework provides an Exclusion Provider Pattern record for Microsoft. If you have a different machine translation service, use the following procedure to add its exclusion pattern.

Procedure

1. Ensure that you are in the application scope that you want for your record, then navigate to **All** > **Dynamic Translation** > **Exclusion Framework** > **Exclusion Provider Pattern**.
2. Select **New** to open **Exclusion Provider Pattern New record**.

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The New record form on the Exclusion Provider Pattern table



3. On the form, configure the fields according to the following guidance.

Fields in the Exclusion Provider Pattern form

Field	Value
Translator Configuration	Select your third-party translation provider. You can use the look-up icon ( ), or start typing the name into the field. The available records are pulled from Dynamic Translation's Translator Configurations table.
Prefix pattern	The start or opening tag to mark a text string for exclusion.
Suffix pattern	The end or closing tag of an excluded text string.
Application	Displays the application scope in which this record was created. This value can't be edited.
Active	Select this check box to activate, or clear the check box to deactivate.

4. Select **Submit** to save the record.

Integration with other translation services

Enable machine translation on your instance by integrating third-party translator services with Dynamic Translation. You can configure one or more translation service providers of your choice.

Translator services are listed in the Translator Configurations [sn_dt_translator_configuration] table. By default several third-party translators are partially preconfigured in this table. You can complete the configuration of a default translator by providing your account credentials and connections.

Alternatively, you can also create a custom spoke. In addition to your account credentials and connections, you must configure flows and any needed language code mappings for your custom translator. See Integrate with a translation service provider.

Also listed in the Translator Configurations table is a default record for the **ServiceNow** translator. This translator can be used for language detection only, not for translation, so its **Mark as default for translation** check box is not selectable. This optional language detection service is included in your Dynamic Translation subscription.

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Note: If you activate dynamic translation in the Generative AI Controller, a fully preconfigured spoke to Microsoft Azure OEM Translator Service is added as a row in Translator Configurations.

Consult your service provider's portal for details regarding data privacy policies, cost and usage structure, and other information related to your account with that provider. Test your integration in a non-production instance, including examining logs, before deploying to production.

Integrate with a translation service provider

Integrate with a third-party translation provider of your choice for machine translation of user-generated text.

Before you begin

- Create an account with your third-party translation service provider, and obtain the connection and credentials needed for integration.
- Role required: admin

About this task

By default Dynamic Translation provides partially preconfigured translator records for several third party services. However, you can also create your own custom integration for a different service provider.

Custom integrations require you to create subflows for language detection and translation, including actions, in Workflow Studio.

Use default subflows as examples when you build your own subflows. For example:

- Detect Language [detect_language_v4]
- Translate Text [translate_text_v3]

For background information, see Workflow Studio and Migrate customized Translator Configurations to v4 flows.

Procedure

1. Confirm your application scope, then navigate to **All** > **Process Automation** > **Workflow Studio**, and select **New**.
   To map error codes try using actions in subflows. For example, the Translate Text subflow has a Translate Text action. On that action, you can select **Open in Action Designer**. In the **Action Outline** section of the Action Designer, you can select **Error Evaluation**. You can overwrite the default error status that a step produces at runtime by entering new status code and status message values. See Action error evaluation.

   a. Map error codes from your machine translation provider to the error codes and standardized error messages supported by ServiceNow.

Standard error codes and message

Error code	Error message
40050	Error code to populate error messages from the machine translation provider instead of standardized error messages.
40051	Unknown error occurred.
40052	Text ('text' field) has exceeded its maximum length.

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Error code	Error message
40053	Source language is invalid.
40054	Target language is invalid.
40055	Request is not authorized because credentials are missing or invalid.
40056	Text cannot be translated to target languages.

b. Ensure that the inputs and output fields are in the following format for subflows.

Detect subflow

Field name	Description	Type
Inputs		
texts	Input texts whose language should be detected. Version v3 supports bulk detection (detection of multiple texts input in a single string). With the Xanadu Patch 3 release, version v4 supports Exclusion Framework as well as bulk detection.	Array.String
Outputs		
detections	Information about the code and confidence of the languages detected by the translator and their respective alternatives, error codes, and error messages. ▪ Code: Language code of the detected language as specified by the translation service provider. ▪ Confidence: Value that indicates the confidence in the result. The value is between zero and one. A low value indicates a low confidence. For example, French text with confidence of 0.93 `{ 'code' : 'fr', 'confidence' : '0.93' }` For more information refer to the getDetectedLanguages section of DynamicTranslation - Scoped.	Array.Object. Each element of the Object is a String value.
status	Status of the request.	Choice

Translate subflow

Field name	Description	Type
Inputs		
texts	Texts to be translated. Version v3 and above support bulk translation (translation of multiple texts input in a single string).	Array.String

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Field name	Description	Type
target_languages	Array of language codes to which the text needs to be translated. For example, `['fr','it']`	Array String. Each element of the array is a String value.
source_language	Language code of the source text. For example, `en`	String
additional_parameters	Array of additional parameters. For example, `[{'parameter_name': 'textType', 'parameter_value': 'html'}]`	Array.Object. Each element of the array is an Object with String values.
Outputs		
translations	Translated texts in the specified target languages. Each element of the array is an Object containing target language and the translated text. For example, `[ {'target_language':'fr', 'translated_text':'Bonjour'}, {'target_language':'it', 'translated_text':'ciao'} ]` For more information refer to the getTranslations section of DynamicTranslation - Scoped.	Array.Object. Each element of the array is an Object with String values.
status	Status of the request.	Choice

Note: Ensure that the **Run As** field is set to **User who initiates session** in the flow properties.

2. Create a custom translator configuration for your service provider in the Translator Configurations table, and set the record to active.
   When you create the record in the Translator Configurations table, search for the subflows you created in the previous step..
3. **Optional:** If your instance is on Xanadu Patch 3 or higher, and you intend to use Exclusion Framework, enter your translation provider's exclusion tags in the Exclusion Provider Pattern table.
   Refer to your provider's documentation to obtain these tags. For more information about entering the tags, see Add an Exclusion Provider Pattern.

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4. **Optional:** Create a language code mapping to associate your provider's language codes to ServiceNow language codes.
   For more information, see Create a language code mapping.

What to do next
For information about APIs, see DynamicTranslation API.

Create a custom translator configuration

Configure Dynamic Translation for a third-party machine translation provider of your choice.

Before you begin
Ensure that the Dynamic Translation plugin (com.glide.dynamic_translation) is activated.

Create subflows for your custom translation provider. See Integrate with a translation service provider.

Create language code mappings as needed. For more information see Language Code Mapping in Dynamic Translation.

Role required: admin

About this task
By default, Google and Microsoft translator configurations are available and ready for you to add your account details. Also by default the ServiceNow translator configuration, for language detection only, is available and active.

However, you can also configure a custom translator with the following procedure.

Procedure
1. Complete the prerequisites and confirm your application scope, then navigate to **All** > **Dynamic Translation** > **Translator Configurations**.
2. Select **New**.
3. On the form, fill in the fields.

Translator Configuration form fields

Field	Description
Name	Identifier of the translator configuration.
Active	Option to activate the translator configuration.
Version	Version of the contract used in subflows. Version v3 is used in releases before Xanadu Patch 3. Version v4 is used in releases from Xanadu Patch 3.
Preferences	
Choose a translate subflow	Workflow Studio subflow that interacts with the translation service provider to translate the input text. Search for the subflow that you created in the previous procedure (Integrate with a translation service provider).
Mark as default for translation	Option to mark the translator configuration as the default configuration for translation. When no translator configuration is specified while translating the text, the default configuration is used.

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Field	Description
	The ServiceNow translator configuration is for language detection only, so this check box is not available on that record. ○ The translator configuration must be active to be marked as default. ○ You can select only one translator configuration as default for translation.
Choose a detect subflow	Workflow Studio subflow that interacts with the machine translation provider to detect the language of the input text. Search for the subflow that you created in the previous procedure (Integrate with a translation service provider).
Mark as default for detection	Option to mark the translator configuration as the default configuration for detection (determining the language of the submitted text). When no translator configuration is specified while detecting the text, the default configuration is used. ○ The translator configuration must be active to be marked as default. ○ You can select only one translator configuration as default for detection.
Language Code Mappings	
Language code mappings	Mapping codes for languages to associate with the translator configuration record. Associate with the translator configuration record by selecting the magnifying glass icon ( ), then selecting the language code mapping. ○ Only languages for which the language code mapping was created are available for selection. ○ You can select only one language code mapping per language. For more information, see Create a language code mapping.

4. Select **Submit**.

What to do next

If you are on Xanadu Patch 3 or above, and want to use Exclusion Framework in Dynamic Translation, add your translation provider's exclusion tags. For more information, see Add an Exclusion Provider Pattern.

Google Cloud Translator Service Spoke

Provides subflows and actions to dynamically translate the user-entered text, and to detect the language of the text using the Google translation service.

Request apps on the 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.

Subscription

This spoke requires one of the following subscriptions:

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- Any ServiceNow subscription that is Professional or above, and includes Dynamic Translation.
- Integration Hub subscription. For more information, see Legal schedules - IntegrationHub overview.

See the Google Cloud Translator Service Spoke in ServiceNow Store.

Spoke version

Google Cloud Translator Service Spoke v3.2.8 is the latest version. For version history of the spoke, see Google Cloud Translator Service spoke release notes.

Supported versions

Google Translate API version v3.

Scope of the spoke in the Dynamic Translation framework

To use Google Cloud Translator Service spoke in the Dynamic Translation framework, ensure that the spoke is installed in ServiceNow Store and the Dynamic Translation plugin is active. For more information, see Dynamic Translation.

Spoke flows

This spoke has no sample flows.

Spoke subflows

The Google Cloud Translator Service spoke provides subflows in the Published state to integrate with the Google translation service. These subflows can be used as part of other subflows and flows.

Subflow	Description
Detect Language	Contains a set of inputs, actions, and outputs to detect the language of the input text.
Translate Text To Multiple Languages	Contains a set of inputs, actions, and outputs to translate the input text to multiple languages.

Spoke actions

The Google Cloud Translator Service spoke provides actions to integrate with the Google translation service. Available actions include:

Action	Description
Detect Language	Detects the language of the input text.
Translate Text To Single Language	Translates the input text to a single language.
Translate Text To Multiple Languages	Translates the input text to multiple languages.

Google account requirements

The Google Cloud Translator Service spoke requires configuring your Google Cloud account to generate an OAuth 2.0 JWT Bearer Grant token.

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Connection and credential alias requirements

Integration Hub uses aliases to manage connection and credential information, and OAuth credentials. Using an alias eliminates the need to configure multiple credentials and connection information profiles when using multiple environments. If the connection or credential information changes, you don't need to update any actions that use the connection.

This spoke uses the GoogleTranslation alias record (sn_google_trans.GoogleTranslation) to authorize actions. For information about setting up the spoke, see Set up the Google Cloud Translator Service spoke.

Set up the Google Cloud Translator Service spoke

Integrate your Google account with your ServiceNow instance.

Before you begin

- Request an Integration Hub subscription.
- Activate the Google Cloud Translator Service spoke.
- Create a service account on Google Cloud, generate a service account key of JSON type and download it. For information on creating the service account key, see the Google documentation.
- Enable the Cloud Translation API service. For information on enabling a service, see the Google documentation.
- Role required: admin

Create a Java KeyStore certificate

Encrypt the security certificates obtained from Google by creating a Java KeyStore (JKS) file.

Before you begin

- Role required: admin
- Download a JSON file containing the service account key from Google. For information on downloading the JSON file, see the Google documentation. Following is a sample JSON file:

```
{
  "type": "service_account",
  "project_id": "primeval-nectar-242610",
  "private_key_id": "0c6c7b1511f1c236c1300c5933d528bbf45314e5",
  "private_key": "-----BEGIN PRIVATE KEY-----\n...\n-----END
 PRIVATE KEY-----\n",
  "client_email":
 "service-now-google-trans-v3@primeval-nectar-242610.iam.gservi
ceaccount.com",
  "client_id": "113255944370425109391",
  "auth_uri": "https://accounts.google.com/o/oauth2/auth",
  "token_uri": "https://oauth2.googleapis.com/token",
  "auth_provider_x509_cert_url":
 "https://www.googleapis.com/oauth2/v1/certs",
  "client_x509_cert_url":
 "https://www.googleapis.com/robot/v1/metadata/x509/service-n
ow-google-trans-v3%40primeval-nectar-242610.iam.gserviceaccount
.com"
}
```

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Procedure

1. In the JSON file, perform the following for the `private_key` value.
   a. Unescape the `\n` characters.

      Tip: To unescape characters in a JSON file, you can parse a JSON string into a JavaScript object.

   b. Store the private key in a file with .pem extension.
2. In the JSON file, perform the following for the `client_x509_cert_url` value.
   a. Open the link specified for `client_x509_cert_url`.
   b. Unescape the `\n` characters for the certificate associated with the private_key_id mentioned in the JSON file.
   c. Store the certificate value in a file with .pem extension.
3. Use the openssl command to create a PKCS 12 file using the recently created private key and certificate files.

   ```
   openssl pkcs12 -export -in [path to certificate] -inkey
    [path to private key] -certfile [path to certificate ] -out
    testkeystore.p12
   ```

   For example, if certificate.pem is the certficate and privatekey.pem is the private key:

   ```
   openssl pkcs12 -export -in certificate.pem -inkey
    privatekey.pem -certfile certificate.pem -out testkeystore.p12
   ```

   A PKCS 12 file, testkeystore.p12, is created.
4. Specify an export password or source keystore password.

   Note: You should specify this password when creating a JWT key for Google Cloud Translator Service spoke.

5. Use the keytool command to create a JKS file from the PKCS 12 file.

   ```
   keytool -importkeystore -srckeystore testkeystore.p12
    -srcstoretype pkcs12 -destkeystore wso2carbon.jks
    -deststoretype JKS
   ```

   Note: testKeyStore.p12 is the PKCS 12 file and wso2carbon.jks is the JKS file.

6. Specify a destination keystore password.

   Note: You should specify this password when attaching a JKS certificate to Google Cloud Translator Service spoke.

Attach a Java KeyStore certificate to Google Cloud Translator Service spoke

Enable the JWT client authentication by attaching a valid Java KeyStore (JKS) certificate to Google Cloud Translator Service spoke.

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Before you begin

- Role required: admin
- Valid Java KeyStore certificate

Procedure

1. Navigate to **All** > **System Definition** > **Certificates**.
2. Click **New**.
3. On the form, fill in the fields.

X.509 Certificate form fields

Field	Description
Name	Identifier of the certificate.
Notify on expiration	Users to be notified when the certificate expires.
Warn in days to expire	Number of days to send a notification before the certificate expires.
Active	Option to activate the certificate.
Type	Type of the certificate. Select **Java Key Store**.
Expires in days	Number of days until the certificate expires.
Key store password	Password to access the certificate. Use the destination keystore password specified when creating the JKS certificate. For more information on this password, see Create a Java KeyStore certificate.
Short description	Summary about the certificate.

4. Click the manage attachments icon ( ) and attach a JKS certificate.
5. To validate the JKS certificate, click **Validate Stores/Certificates**.
6. Click **Submit**.

Create a JWT signing key for Google Cloud Translator Service spoke

Assign a JSON Web Token (JWT) signing key to your Java KeyStore certificate.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System OAuth** > **JWT Keys**.
2. Click **New**.
3. On the form, fill in the fields.

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JWT Keys form fields

Field	Description
Name	Identifier of the JWT signing key.
Signing Keystore	Valid JKS certificate for which you want to assign the key.
Key Id	Key ID to identify which key is used when multiple keys are used to sign tokens.
Signing Algorithm	Algorithm to sign with the key.
Signing Key Password	Password associated with the key. Use the export password or the source keystore password specified when creating the JKS certificate. For more information on this password, see Create a Java KeyStore certificate.
Active	Option to activate the key.

4. Click **Submit**.

Create a JWT provider for Google Cloud Translator Service spoke

Add a JSON Web Token (JWT) provider to Google Cloud Translator Service spoke.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System OAuth** > **JWT Providers**.
2. Click **New**.
3. On the form, fill in the fields.

JWT Provider form fields

Field	Description
Name	Identifier of the JWT provider.
Expiry Interval (sec)	Number of seconds that indicate the lifespan of the JWT provider token. Specify `3600`.
Signing Configuration	JWT signing key.

4. Right-click the form header, and click **Save**.
5. In the Standard Claims related list, enter the values for these claims.

Claim

Claim name	Claim value
aud	https://www.googleapis.com/oauth2/v4/token
iss	*`client_email`* value from the JSON file.

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6. In the Custom Claims related list, create the **scope** claim and enter its value as `https://www.googleapis.com/auth/cloud-translation`.
7. Click **Update**.

Configure the credential for the GoogleTranslation alias

Authorize actions of Google Cloud Translator Service spoke by configuring the Google OAuth 2.0 credential.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Connections & Credentials** > **Credentials**.
2. Select the Google OAuth 2.0 credential.
3. Open the record specified in the **OAuth Entity Profile** field.
4. In the **JWT Provider** field, specify the JWT provider that you want to use.
5. Click **Update**.
6. To verify if an OAuth Access token is generated to connect to Google's translation services, click the **Get OAuth Token** related link of the Google OAuth 2.0 credential.

Configure the connection attributes for the GoogleTranslation alias

Connect to the Google's translation service by configuring the Google connection. Provide information that is used by HTTP(s) actions or activities to connect to that service.

Before you begin
Role required: connection_admin

Procedure
1. Navigate to **All** > **Connections & Credentials** > **Connections**.
2. Open for the record for **Google**.
3. In the Attributes related list of the HTTP(S) Connection form, fill in the fields.

HTTP(S) Connection form fields

Field	Value required
location	Location of the customer. If the value is not specified when creating an account on Google Cloud, then specify `global`.
project_id	Identifier of a project. Specify the *`project_id`* value from the JSON file.
version	API version that the related spokes are built for. The default value is `v3beta1`. Because Google now supports the v3 version, you can override this value as `v3`.

4. Right-click the form header and click **Save**.

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Microsoft Azure Translator Service spoke

Microsoft Azure Translator Service spoke provides subflows and actions to detect and translate user-entered text, using the Microsoft machine translation service. Dynamic Translation supports detection and translation of single texts and multiple texts.

https://player.vimeo.com/video/1019025021?h=e0b4f4b24b&badge=0&autopause=0&player_id=0&app_id=58479

Activation

Activate the Dynamic Translation plugin (com.glide.dynamic_translation) or the Microsoft Azure Translator Service Spoke plugin (com.glide.microsoft_translation_spoke).

Subscription

This spoke requires any ServiceNow subscription that is Professional or above, and includes Dynamic Translation.

Supported versions

API version v3 and v4.

Spoke subflows

The spoke provides subflows in the Published state to integrate with Microsoft translation service. These subflows can be used as part of other subflows and flows.

Spoke subflows

Subflow	Description
Detect Language [detect_language_v3]	Contains a set of inputs, actions, and output to detect the language of the input text. Releases before Xanadu Patch 3 use v3 flows.
Detect Language V4 [detect_language_v4]	Contains a set of inputs, actions, and output to detect the language of the input text. Releases from Xanadu Patch 3 use v4 flows. For more information about v4 flows, see Migrate customized Translator Configurations to v4 flows.
Translate Text [translate_text_v3]	Contains a set of inputs, actions, and outputs to translate the input text to multiple languages. This subflow uses v3 for releases before and after Xanadu Patch 3.

Spoke actions

The spoke provides actions to integrate with Microsoft translation services.

Spoke actions

Action	Description
Detect Language [detect_language_v3]	Detects the language of the input text.
Translate Text [translate_text_v3]	Translates the input text to multiple languages.

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Microsoft account requirements

Ensure that you are registered with Microsoft and obtain the credential information. For more information, see Microsoft documentation.

For information on Microsoft Translator Text API, see the Microsoft documentation.

Connection and credential alias requirements

IntegrationHub uses aliases to manage connection and credential information. Using an alias eliminates the need to configure multiple credentials and connection information profiles when using multiple environments. If the connection or credential information changes, you do not need to update any actions that use the connection. For more information, see Credentials and connection information.

To use the spoke connection aliases, create an associated connection record and a credential record for each alias.

This spoke uses the MicrosoftTranslation alias (sn_ms_trans_spoke.MicrosoftTranslation) to authorize actions.

The following are the connection alias requirements.

- Connection type: HTTP
- Connection URL: For example, `https://api.cognitive.microsofttranslator.com`.

> **Note:** The URL provided here is a sample only. Microsoft translation customers may need to use custom API URLs or virtual network type API URLs, even when they do not subscribe to a virtual network. Microsoft customers who use multi-service or regional translation services also need to know their Ocp-Apim-Subscription-Region attribute, and their API URL may contain a regional reference. Check your Azure portal for this information. Refer to the Microsoft documentation for further details.

Perform the following tasks to connect to the Microsoft machine translation service.

Create a credential for the MicrosoftTranslation alias

Authorize actions of Microsoft Azure Translator Service spoke by creating a credential for the MicrosoftTranslation connection and credential alias.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Credentials**.
2. Click **New**.
3. Select **API Key Credentials**.
4. In the API key Credentials form, fill the fields.

API key Credentials form fields

Field	Description
Name	Identifier of the credential.
Active	Option to activate the credential for use.

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Field	Description
Applies to	MID servers for which the credentials are applicable. Possible options are: ○ All MID servers in your network. ○ Specific MID servers. In this case specify the servers in the **MID servers** field.
MID servers	Specific MID servers for which the credentials are applicable. This field is displayed only when you select **Specific MID servers** for the **Applies to** field.
Order	Sequence in which the credential is applied.
API Key	Unique code that is passed to an API to identify the connection.
Credential alias	Alias to use the credential.

5. Select **Submit**.

Create a connection for the MicrosoftTranslation alias

Connect to the Microsoft translation service by creating a connection. Provide information that is used by HTTP(s) actions or activities to connect to that service.

Before you begin

Ensure that you are in the application scope that you want for your connection. The default application scope is **Microsoft Azure Translator Service Spoke**.

Role required: connection_admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.
2. Select the MicrosoftTranslation alias (sn_ms_trans_spoke.MicrosoftTranslation).
3. In the **Connections** tab, click **New**.
4. In the HTTP(S) Connection form, fill the fields.

HTTP(S) Connection form fields

Field	Description
Name	Name of the HTTP(s) connection.
Credential	Credential record used to authorize the connection.
Connection alias	Alias record to associate with the connection. Using an alias enables you to update the connection record without having to reconfigure any actions or activities that use the alias.
Active	Option to activate the connection.
Domain	Domain where the connection is applicable.
URL builder	Option to enable the system to build the connection URL. Clear this check box.
Connection URL	Base URL to connect to the Microsoft's translation service. For example, `https://api.cognitive.microsofttranslator.com`.

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Field	Description
	Note: This URL is a sample only. Microsoft translation customers may need to use custom API URLs or virtual network type API URLs, even when they do not subscribe to a virtual network. Check your Azure portal to obtain your API URL. For further information, refer to Microsoft documentation.
Use MID server	Option to use a MID Server for this connection.
Connection timeout	Timeout value in milliseconds. Overrides the global property for this usage.
Attributes	
Version	API version that the related spokes are built for. The default value is v3. Do not edit this value.
Ocp-Apim-Subscription-Region	Value of the regional translator resource. This value is optional when using a global translator resource. **Note:** This value is mandatory for customers using Microsoft's multi-service or regional translator resources. For information on supported regions, see the Microsoft documentation.

5. Click **Submit**.

Activate the Microsoft translator configuration

Make the Microsoft translation service available for use by activating the Microsoft translator configuration.

Before you begin

- Create an account with Microsoft Azure for machine translation services, and set up the integration. For information see Microsoft Azure Translator Service spoke and Create a connection for the MicrosoftTranslation alias.
- Role required: admin.

Procedure

1. Navigate to **All** > **Dynamic Translation** > **Translator Configurations**.
2. Select **Microsoft**.
3. Select the **Active** check box.
4. In the **Preferences** section, choose this translator as default for translation or detection, or for both.

Preferences

Field	Description
Mark as default for translation	Option to mark the translator as default for translation.

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Field	Description
Mark as default for detection	Option to mark the translator as default for detection of the language of a text.

5. Select **Update**.

Migrate customized Translator Configurations to v3 flows

Implement the contract with subflows using complex objects in the input and output fields for dynamic translation of text.

Before you begin

Role required: admin

About this task

Important: With the Xanadu Patch 3 release, default Translator Configurations are automatically updated to v4 flows. For more information, see Migrate customized Translator Configurations to v4 flows.

The previous v3 flows are still supported as follows. However, Exclusion Framework functionality may not be available with v3.

After an upgrading to releases prior to Xanadu Patch 3, default translator configurations that are not customized are automatically updated to v3 flows.

You need to manually migrate to version v3 for the following translator configurations:

- Translator configurations that are available by default but customized from New York onwards.
- Custom translator configurations that you added to integrate with a third-party translation service provider.

For a translator configuration that you added to integrate with a translation service provider of your choice, implement Integration Hub subflows with complex objects in the input and output fields. These subflows are required to interact with the translation service provider for language detection and translation. For information on this implemention, see Integrate with a translation service provider.

Procedure

1. Navigate to **All** > **Dynamic Translation** > **Translator Configurations**.
2. Select a translator configuration.
3. In the Translator Configuration form, update these fields.

Translator Configuration form fields

Field	Description
Active	Activates the translator configuration to integrate with Dynamic Translation.
Version	Version of the contract used in subflows. Select **v3**.
Choose a translate subflow	Integration Hub subflow with complex objects in the input and output fields to translate the input text.

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Field	Description
	○ For the translator configurations that are available by default but customized, select Translate Text [translate_text_v3]. ○ For a translator configuration that you added to integrate with a translation service provider of your choice, select the subflow that you implemented with complex objects. The contract now supports multiple texts in a single method call.
Choose a detect subflow	Integration Hub subflow with complex objects in the input and output fields to detect the language of the input text. ○ For the translator configurations that are available by default but customized, select Detect Language [detect_language_v3]. ○ For a translator configuration that you added to integrate with a translation service provider of your choice, select the subflow that you implemented with complex objects. The contract now supports multiple texts in a single method call.
Mark as default for translation	Marks the translator as the default configuration for dynamic translation of text.
Mark as default for detection	Marks the translator as the default configuration to detect language of the input text.

4. Select **Update**.

Migrate customized Translator Configurations to v4 flows

Migrate your customized translator configurations to v4 flows. Version 4 flows for Dynamic Translation are available from the Xanadu Patch 3 release.

Before you begin
Role required: admin

About this task
After upgrading to Xanadu Patch 3 or above, the update to v4 flows is automatically applied to default translator configurations that are not customized.

You must manually migrate custom or customized translator configurations.

Using v4 flows ensures that the functionality of Exclusion Framework in Dynamic Translation is available.

Procedure
1. Navigate to **All** > *Dynamic Translation* > **Translator Configurations**.
2. Select the translator configuration that you want to migrate to v4 flows.
3. In the Translator Configurations form, update the fields according to the following guidance.

Translator Configuration form fields

Field	Description
Active	Activates the translator configuration.

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Field	Description
Version	Version of the contract used in subflows. Select v4.
Choose a translate subflow	The subflow to translate the input text. For default translator configurations that were customized, select Translate Text .
Choose a detect subflow	The subflow to detect the input text. For default translator configurations that were customized, select Detect Language .
Mark as default for translation	Marks the translator as the default provider for dynamic translation of text.
Mark as default for detection	Marks the translator as the default provider for detection of the language of the input text.

4. Select **Update**.

Translating with Dynamic Translation

Translate user-generated content live on your instance to streamline communication for your agents and end users.

After you activate the Dynamic Translation plugin (com.glide.dynamic_translation), you can do the following tasks using a translation service provider:

- Detect the language of the input text
- Translate user-entered text from a source language to a target language

For information on activating this plugin, see Activate Dynamic Translation.

Default translation service providers for Dynamic Translation

By default, Dynamic Translation supports the following Microsoft and Google service providers for machine translation.

- Connections and credential aliases and the corresponding connection attributes.

  Note: You should create a connection for each translation service provider and specify the credential information.

- IntegrationHub subflows and actions for these spokes.
  - Microsoft Azure Translator Service spoke
  - Google Cloud Translator Service spoke
- Translator configurations

Note: The Google Cloud Translator Service spoke for Dynamic Translation must be installed from ServiceNow Store.

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Using Dynamic Translation

When your admin has configured Dynamic Translation, look for the translate icon ( ) next to fields on forms and in workspaces.

Dynamic translation on forms and activity streams

For a seamless localization experience on forms and activity streams, you can dynamically translate text based on the preferred language of a user.

Dynamic translation on forms

You can translate the field values on forms on the ServiceNow AI Platform and the configurable workspaces. For more information on Dynamic Translation support for configurable workspaces, see Dynamic Translation support for configurable workspace.

To enable dynamic translation at the field-level on Platform forms, see Enable dynamic translation for a field. After dynamic translation is enabled, select the translate icon ( ) to show or hide the translated content.

Dynamic translation in activity streams

You can enable dynamic translation in activity streams on the ServiceNow AI Platform, configurable workspace, and Service Portal. For more information on Dynamic Translation support for configurable workspaces, see Dynamic Translation support for configurable workspace.

Use the dynamic translation properties to enable or prevent the option for dynamic translation in the activity stream of the tables you list. When enabled, select the translate icon ( ) to show or hide the translated content for each comment or work note in the activity stream. For more information, see Dynamic Translation properties.

Length limitations for machine translation service providers

The following are the length limitations for some translation service providers. If you use a different third-party provider, check that provider's documentation.

- For Google, the recommended maximum length of each request is 5,000 characters. The maximum size of the input text can't exceed 30,000 code points. For more information, see the Google Documentation .
- For Microsoft, the input text for translation can't have more than 50,000 characters including spaces. The input text for detection also has a maximum of limit of 50,000 characters. For more information, see the Microsoft Documentation .

Note: Starting with the Rome release, you can use Dynamic Translation without the snc-internal role.

Enable dynamic translation for a field

Translate the dynamically generated text for a field on Platform forms by enabling the field-level dynamic translation. You can translate the text based on the preferred language of a user.

Before you begin
Role required: admin
Activate the Dynamic Translation plugin (com.glide.dynamic_translation).

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About this task

Dynamic Translation supports only the following field types:

- String
- String (Full UTF-8)
- Multi Line Small Text Area
- Wide Text
- HTML

Note:

- The following are the length limitations for some translation service providers. If you use a different third-party provider, check that provider's documentation.
  - For Google, the recommended maximum length of each request is 5,000 characters. The maximum size of the input text can't exceed 30,000 code points. For more information, see the Google Documentation.
  - For Microsoft, the input text for translation can't have more than 50,000 characters including spaces. The input text for detection also has a maximum of limit of 50,000 characters. For more information, see the Microsoft Documentation.
- You cannot translate a field on Agent Workspace forms.

Procedure

1. Navigate to any form, for example, an Incident form.
2. Right-click the required field and select **Configure Dictionary**.
3. In the Attributes related list, click **New**.
4. In the Dictionary Attribute form, fill the fields.

Dictionary Attribute form fields

Field	Value
Attribute	Dynamic Translation Enabled
Value	true

5. Click **Submit**.
6. Click **Update**.

Dynamic translation for a field



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A translate icon appears next to the field. The logged-in user can click this icon to translate the text to the user's preferred language using the default translation service provider specified in the translator configurations. For information about error messages during translation, see Error messages in Dynamic Translation.

Note: If you do not have any default translator configuration, you cannot view the translate icon .

Dynamic Translation for Agent Chat overview

Dynamic Translation for Agent Chat (DTAC) translates chat conversations from one language to another. This translating enables agents and requesters to have chat conversations with each other without the need of a shared language.

For example, a requester who speaks only French starts a chat conversation with a live agent who speaks only English. From the requester's view, the entire conversation is conducted in French, while from the agent's view, the entire conversation is conducted in English.

DTAC enables cross-locale support teams and merger and acquisition projects to save time and money by handling larger volumes of chat conversations from other regions.

Note:

- DTAC is supported on Agent Workspace, not on Connect Support.
- DTAC is currently not supported when autopilot is in progress. When the requester responds to prompts from autopilot topics, these responses are not translated for the agent, even if DTAC is turned on for that conversation. See Conversation Autopilot for more information.

How DTAC works

DTAC uses Dynamic translation and a translation service provider to translate chat conversations in real time. Available translation service providers include:

- Set up Google cloud translator service spoke
- Microsoft Azure Translator Service spoke
- Microsoft Azure OEM

Mobile clients

DTAC is available for requesters on Agent Chat in mobile for iOS and Android.

Translation support limited to one language

DTAC can only support translation from one language to another therefore additional agents or managers joining chat sessions should speak the same language as the primary agent.

- Agent chat transfers – Agents transferring a chat conversation should both speak the same language.
- Managers joining chat conversation – Managers joining chat conversation to monitor or assist agents should speak the same language as the primary agent.

Chat summarizations

DTAC also translates chat summarizations.

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Agent presence states

DTAC does not translate agent presence states.

Attachments within DTAC

When inserting an attachment into a chat, DTAC does not translate the file name or the contents of the attachment.

Translate a knowledge article from a translation task

Start translating articles once they are published and assigned to you for translation.

Before you begin

- Activate the Dynamic Translation plugin (com.glide.dynamic_translation).
- Enable the *glide.knowman.translation.enable_translation_task* property. For more information, see Translation management.

Role required: admin, knowledge_admin, or knowledge

About this task

Note: This procedure has been superseded by the Localization Framework. For more information see Localization Framework support for Knowledge Base. This information is provided for legacy context.

For information about how administrators configure the translation API, see DynamicTranslation API.

Procedure

1. Navigate to **All** > **Knowledge** > **Translation Management** > **My Assigned Tasks**.
2. In the Knowledge Translation Tasks page, select one of the listed translation tasks assigned to you.
3. Select **Translate**.
   The **Translate from** and **Translate to** panes are side-by-side for easy comparison.
4. Select **Machine translate** to automatically translate to the targeted languages.
5. Select **Create draft article** to create a draft version of the translated article.
   If a translated article is already present for that language, a new draft version overwrites the existing translated content.
6. Select **Publish**.

Note: By default, the translated version is always created as v1.0 so that the parent version remain same for all the translated versions. For more information, see Translated KB articles always show Parent version 1.0 regardless of version used for translation.

Result

The newly created draft is listed in the **Translated Versions** tab.

DynamicTranslation API

You can use the *DynamicTranslation* API to translate text into multiple languages by connecting to your choice of machine translation service providers.

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This API is available for interactions with third-party translation service providers, as part of Server APIs, Client APIs, and Service Portal APIs. See DynamicTranslation - Scoped and DynamicTranslation - Client.

No matter what translation service provider you choose, this API works on a standard set of inputs and outputs, and displays standard error codes and messages. Test your integration in a non-production instance, including examining logs, before deploying to production.

Consult your service provider's portal for details regarding data privacy policies, cost and usage structure, and other information related to your account with that provider.

Most machine translation service providers enforce limitations such as an upper limit on the number of characters per request. For more information, see Limitations in Dynamic Translation.

Dynamic Translation spoke

The Dynamic Translation spoke provides actions to enable the ability to translate multiple texts from one language into one or more languages and detect the language of multiple texts seamlessly.

The Dynamic Translation APIs are accessible across the ServiceNow platform through the following access points:

- Server
- Platform Client
- Portal Client

In the Brazil release, the Dynamic Translation spoke enables you to access the Dynamic Translation APIs from the Workflow Studio.

The Dynamic Translation Spoke is a plugin (com.glide.dynamic_translation.spoke) that is available with activation of the Dynamic Translation plugin (com.glide.dynamic_translation).

The Dynamic Translation spoke contains actions that are built corresponding to the Dynamic Translation APIs.

The following actions are built in the Brazil release in Dynamic Translation spoke:

Dynamic Translation Spoke actions and APIs

Action Name	API
Detect Language	getDetectedLanguage()
Detect Languages	getDetectedLanguages()
Translate Text	getTranslation()
Translate Texts	getTranslations()
Is Dynamic Translation Enabled	isDynamicTranslationEnabled()

For more information about accessing the actions from the Workflow Studio, see Access Dynamic Translation spoke actions from Workflow Studio.

Access Dynamic Translation spoke actions from Workflow Studio

Access Dynamic Translation spoke actions from Workflow Studio to detect and translate user-generated text.

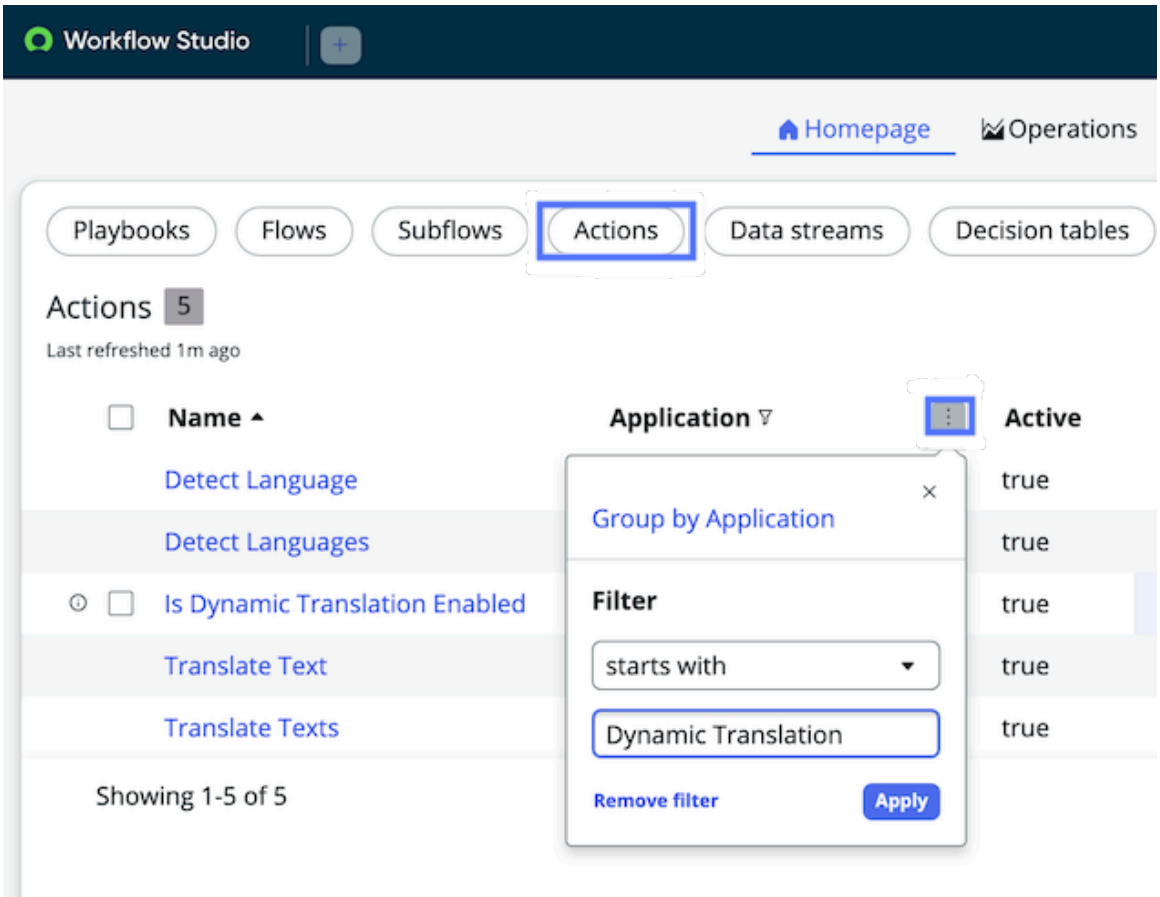
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Before you begin

- Ensure that the Dynamic Translation spoke (com.glide.dynamic_translation.spoke) is activated with the Dynamic Translation plugin (com.glide.dynamic_translation), and configure a machine translation service provider for both detection and translation.
- Role required: admin

Procedure

1. Navigate to **All** > **Process Automation** > *Workflow Studio*.
2. Select the **Actions** tab.
3. In the **Application** column, select the more options icon ( )and use the filter to search for Dynamic Translation.



All the actions built in the Dynamic Translation spoke are displayed.

For more information, see Actions in Dynamic Translation spoke.

Language Detection spoke

The ServiceNow Language Detection Service spoke is an in-house language detection service offered by the ServiceNow platform. It provides a single subflow and action to identify the language of a given text.

The ServiceNow Language Detection Service spoke plugin (com.glide.language_detection_spoke) is available with the activation of Dynamic Translation plugin (com.glide.dynamic_translation).

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This spoke creates an entry named ServiceNow in Dynamic Translation's Translator Configurations (sn_dt_translator_configuration) table. By default, this entry is active and marked as default for detection. To configure your own language detection service, see Integration with other translation services.

Subscription

This spoke requires any ServiceNow subscription that is Professional or above, and includes Dynamic Translation.

Supported versions

API versions v3 and v4.

Spoke subflow

The spoke provides the subflow in the Published state to integrate with the ServiceNow language detection service.

Spoke subflow

Subflow	Description
Inputs	
Detect Language [detect_language_v3] or [detect_language_v4]	Detects the languages of texts using ServiceNow Language Detection Service. The v4 flows for Dynamic Translation are supported from the Xanadu Patch 3 release. For more information, see Migrate customized Translator Configurations to v4 flows.

Spoke action

The spoke provides the action in the Published state to integrate with the ServiceNow language detection service.

Spoke action

Subflow	Description
Inputs	
Detect Language [detect_language_v3] or [detect_language_v4]	Detects the languages of texts using ServiceNow Language Detection Service. The v4 flows for Dynamic Translation are supported from the Xanadu Patch 3 release. For more information, see Migrate customized Translator Configurations to v4 flows.

The ServiceNow Language Detection service uses the following Dynamic Translation APIs to detect the language of the input texts:

- getDetectedLanguage: Provides text to identify the languages.
- getDetectedLanguages: Provides texts to identify the languages.

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For more information, see DynamicTranslation API.

Language Code Mapping in Dynamic Translation

Dynamic Translation enables you to add mapping between the ServiceNow® language codes and the language codes used by your third-party translation service provider.

- You can create a language code to map the ServiceNow® language code.
- You can view the default language code mapping records in the Language Code Mapping [sn_trans_commons_language_code_mapping] table.
- You can associate the language code mapping to a translator configuration record. For more information, see Create a custom translator configuration.

> **Note:** By default, language code mappings are included in the records of Microsoft Azure Translator Service and Google Cloud Translator Service. These preconfigured records for third-party providers are available in the Translator Configurations [sn_dt_translator_configuration] table.

To add a new language code mapping, see Create a language code mapping.

Create a language code mapping

Create a language code mapping to map the ServiceNow® language codes with the language codes of the translation service providers.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Dynamic Translation** > **Language Code Mappings**.
2. Click **New**.
3. On the form, fill in the fields.

Language Code Mapping form fields

Field	Description
Language code	Language for which a ServiceNow® language code mapping record is being created.
Mapped language code	Translation service provider's language code with which the ServiceNow® language code is being mapped.
Name	Identifier for the language and the mapping code. The name is auto-filled using the language code and the mapped language code in the "language code -> mapped language code" format. For example, fq -> fr-CA. Users can edit the fields if required.

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4. Click **Submit**.

> **Note:** After creating the language code mapping, associate it with a corresponding translator configuration to map the existing ServiceNow® language code.

Reference for Dynamic Translation

Get details about Dynamic Translation domain separation, properties, actions, limitations, and error messages.

Domain separation and Dynamic Translation

Domain separation is supported in Dynamic Translation and is configured to apply to translator configurations and Exclusion Framework. 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.

Activation information

You should activate the Domain Support - Domain Extensions Installer plugin (com.glide.domain.msp_extensions.installer). For information on how you can request for the plugin activation, see Request for domain separation in Dynamic Translation.

How domain separation works in Dynamic Translation

A service provider with domain separated instances can implement the Dynamic Translation framework so that users can use the translation service providers configured in the translator configurations specific to their domain. Translator configurations are process-separated in Dynamic Translation. All translation service providers configured in the translator configurations of the parent domain are available in child domains.

A translator configuration in the global domain is visible in all other domains. In any domain, a user can only view the translator configurations configured in the following domains:

- Current domain
- Parent domains
- Global domain

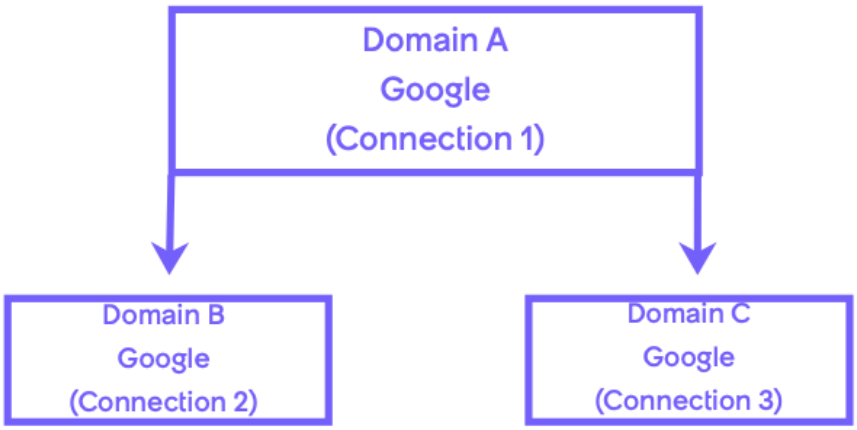
> **Note:** If there are multiple translator configurations in a domain for the same translation service provider, the translator configuration of the current domain or the closest parent domain is considered for dynamic translation.

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Also, different connections can be configured for the same connection and credential alias of a translation service provider in multiple domains. However, Credentials and Connections are data-separated. So, a connection configured in a child domain is visible in parent domains. For information on domain separation for Connections and Credentials, see Domain separation for Credentials and Connections.

For example, consider the following scenario:

Connections for a translation service provider in multiple domains



Different connections are configured for the same connection and credential alias of Google in multiple domains. When in Domain A, all the following connections are visible:

- Connection1
- Connection2
- Connection3

Note: When multiple active connections are visible for the same connection and credential alias in a domain, the connection with the highest order is given priority when the **Support Multiple Active Connections** check box is selected.

Domain-separated table

Translator Configuration [sn_dt_translator_configuration].

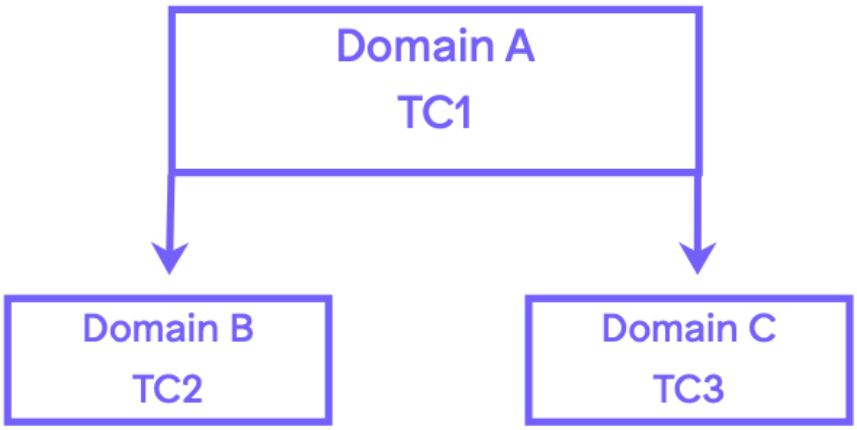
Default translator configuration for a domain

The default translator configuration of the current domain is always considered for dynamic translation. If the current domain does not have any default translator configuration, then the available default translator configuration of the nearest parent is considered.

A domain can have multiple default translator configurations. In this case also, the default translator configuration of the current domain is considered for dynamic translation. For example, let us consider the following scenario:

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Domain separation in Dynamic Translation



In Domain B, both TC1 and TC2 are visible. From Domain B, TC2 is first set as the default translator configuration. From Domain A, TC1 is then overridden and set as the default translator configuration. This results in multiple default translator configurations in Domain B. In this case, when in Domain B, TC2 is used as the default translator configuration for dynamic translation.

Overriding a translator configuration

In any domain, you can override the translator configuration of that domain or the parent domain. The overridden translator configuration of a parent domain is also visible in child domains. However, the overridden translator configuration of a child domain is not visible in the parent domain.

After you override a translator configuration of the same domain, only the overridden translator configuration is visible in that domain.

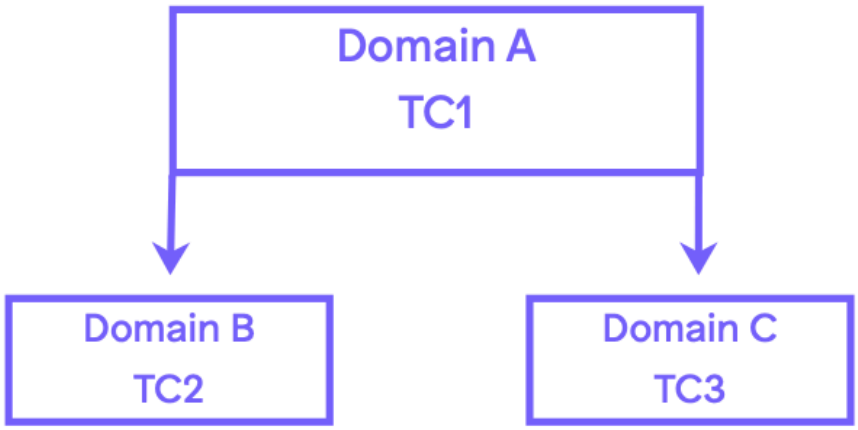
After you override a translator configuration of a parent domain, the following scenarios happen:

- Only the overridden translator configuration is visible in the child domain.
- The **Overrides** field of overridden translator configuration refers to the original translator configuration of the parent domain.

For example, consider the following scenario:

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Domain separation in Dynamic Translation



You can override a translator configuration TC1 from Domain B. After overriding, only the overridden configuration TC1 is available in Domain B and the **Overrides** field of TC1 refers to **TC1** of the parent domain.

Domain separation in Exclusion Framework

The Exclusion Framework module in Dynamic Translation supports domain separation. Each domain on an instance can have its own set of Exclusion Framework rules, so the rules are specific to one domain. Activation of Exclusion Framework on an instance applies to all domains on the instance. For more information see Exclusion Framework in Dynamic Translation.

Related topics

Domain separation for service providers

Dynamic Translation properties

Use the Dynamic Translation properties to customize, configure, and control the translation features.

Using the admin role, navigate to **Dynamic Translation** > **Properties** to view and edit these properties.

Note: Some properties, such as Virtual Agent properties, appear in this module only when related plugins are activated.

Dynamic Translation properties

Property	Description
Activity Stream	
Allow list tables sn.dt.activity_stream.allow_list	List of tables (comma-separated) f to translate the content is enabled streams (work notes and commen Example: `sn_hr_core_case,t`

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Dynamic Translation properties (continued)

Property	Description
	• Type: string • Default value: none
Block list tables sn.dt.activity_stream.block_list	List of tables (comma-separated) f to translate the content is inactive (work notes and comments). Example: `change_request,sn_hr_co` • Type: string • Default value: none
Exclusion Framework	
Exclusion Framework sn_dt.dynamic_framework.enable_exclusion_framework	Enables Exclusion Framework on t to enabled when Dynamic Transla On a domain-separated instance, to all of the domains. It is not poss Exclusion Framework on a per-dor
Virtual Agent	
Enables dynamic translation for html com.glide.cs.dynamic.translation.enable.html	Enables dynamic translation for ht Text controls that contain html, in V more information see Default inpu controls for a custom chat integrat Installed with the Dynamic Transla plugin (com.glide.cs.dynamic.trans For information see Language det machine translation in Virtual Age
Enables dynamic translation for messages that contain urls com.glide.cs.dynamic.translation.enable.translating.message.containing.urls	Enables dynamic translation for m URLs. Installed with the Dynamic Transla plugin (com.glide.cs.dynamic.trans For information see Language det machine translation in Virtual Age

Actions in Dynamic Translation spoke

Actions in the Dynamic Translation spoke are built to access the Dynamic Translation APIs from Workflow Studio.

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Dynamic Translation Spoke actions

Action	Description
Detect Language [detect_language]	Detects the language of the text using the configured translator.
Detect Languages [detect_languages]	Detects the languages of multiple texts using the configured translator.
Is Dynamic Translation Enabled [is_dynamic_translation_enabled]	Checks whether the Dynamic Translation plugin (com.glide.dynamic_translation) is installed and configured for a Translation Service Provider. • If the input is empty, checks whether a default Translation Service Provider is configured. • If a translator is provided, checks whether that Translation Service Provider is configured.
Translate Text [translate_text]	Translates text to multiple languages using the configured translation service provider. The action can translate a text string into multiple target languages.
Translate Texts [translate_texts]	Translate texts to multiple languages using the configured translation service provider. The action can translate an array of texts into multiple target languages.

Standard Error Codes

When an error occurs, error codes populate with the reason for the error. Refer to the following information for the standard error codes that appear while you work on the Dynamic Translation spoke actions corresponding to the Dynamic Translation APIs.

- Dynamic Translation - Scoped
- Dynamic Translation - Client

Limitations in Dynamic Translation

Learn about length and language support limitations when integrating with a machine translation service provider in Dynamic Translation.

Length limitations for machine translation service providers

The following are the length limitations for some translation service providers. If you use a different third-party provider, check that provider's documentation.

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- For Google, the recommended maximum length of each request is 5,000 characters. The maximum size of the input text can't exceed 30,000 code points. For more information, see the Google Documentation.
- For Microsoft, the input text for translation can't have more than 50,000 characters including spaces. The input text for detection also has a maximum of limit of 50,000 characters. For more information, see the Microsoft Documentation.

Language support limitations for translation service providers

Not all translation service providers support the same languages that ServiceNow AI Platform supports.

For information about languages supported by Google for translation, see the Google documentation.

For information about languages supported by Microsoft for translation, see the Microsoft documentation.

Error messages in Dynamic Translation

You must be aware of a few error scenarios while using Dynamic Translation.

Error messages on forms and activity streams

Error messages are displayed when the text cannot be dynamically translated on forms activity streams.

Forms and activity streams

Scenario	Error message
Field has no value. **Note:** This scenario is applicable only for fields on the form.	No text to translate.
Text to be translated is already in the logged-in user's preferred language.	This content is written in your preferred language. No need to translate.
Text cannot be translated to the user's preferred language by the default translation service provider.	Text cannot be translated to your preferred language.
Credentials configured for the translation service provider under **Connections & Credentials** are not valid.	Credentials are missing or invalid. Contact your administrator.
Text to be translated has exceeded the maximum length supported by the default translation service provider.	Text has exceeded the maximum length.
Error during translation. Possible reasons are:	Unable to translate.

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Forms and activity streams (continued)

Scenario	Error message
• Credentials configured for the translation service provider under the **Connections & Credentials** sub module are missing. • Translation got timed out. • Any other issue with the translation service provider. For example, the exhaustion of credentials for more transactions.	

Error messages on translator configuration

Translator configuration

Scenario	Error message
When there is no valid subflow associated with the translator configuration.	Either a detect or a translate subflow is required for a valid translator configuration.
When multiple language code mappings are selected for the same language code	Multiple language code mappings cannot be selected for the same language code(s): xx.

Localization Framework

The ServiceNow® Localization Framework application standardizes and enhances the translation process of artifacts across the platform through configurable workflows. Such artifacts include ServiceNow® Service Catalog items, Virtual Agent topics, Natural Language Understanding models, and Document Templates of ServiceNow® HR Service Delivery.

Get started

Explore Localization Framework



Learn how the Localization Framework handles translations and artifacts.

Configure Localization Framework



Set up and implement localization for your instance.

Request translations



Make requests for translations and localization.

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Create translation projects	Monitoring Localization Framework	Localization Framework reference
Manage and approve projects, and carry out translations for single or bundled localization tasks and artifacts.	Track Localization Framework performance and behavior.	Get familiar with specific terminology and other Localization Framework reference materials.

Troubleshoot and get help

- Localization in the ServiceNow Customer Success Center
- ServiceNow Community forums
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

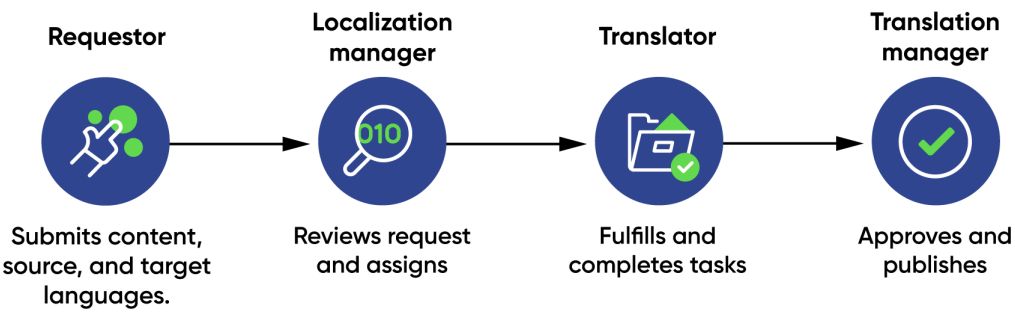
Explore Localization Framework

Learn more about the Localization Framework app that enables a systematic localization process, so you can provide a seamless user experience in multiple languages.

Localization Framework overview

The Localization Framework streamlines the process of adapting and translating ServiceNow instances to meet the needs of different regions and languages. With this application, users can create and manage translation projects, assign tasks to translators, and track progress. The Localization Framework also supports the creation of language packs, which contain translated content for specific languages. Organizations can ensure that their ServiceNow instances are accessible and user-friendly for users around the world by reducing the time and effort needed for localization.

The localization process



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Localization Framework benefits

Benefit	Feature	Users
Define and use custom language artifacts, in addition to installing artifact-specific product plugins.	Artifact configurations	Administrators
Tailor Localization Framework workflows and translation preferences	Localization Framework settings	Administrators
Request translations	Request translations	Administrators, editors,managers, and requestors
Manage translation projects	Create a localization project	Managers
Bundle translation projects together	Add localization requested items to a project	Managers
Perform translation projects	Fulfill a localization task	Fulfillers
Approve and publish localizations and translations	Approve a localization task	Fulfillers
Use artifacts in localization, with support for Virtual Agent and several other ServiceNow products.	Supported artifacts in Localization Framework	Administrators, managers, and users

Note: Localization Framework does not support Domain Separation.

Supported artifacts in Localization Framework

Localization Framework extends its framework capabilities to certain artifacts and translates the content of the artifact items.

With the activation of the Localization Framework Installer plugin (com.glide.localization_framework.installer), some artifacts are available by default. Some artifacts require the installation of the artifact-specific product plugins.

Artifacts available with Localization Framework installation

The following artifacts are available with the installation of Localization Framework:

- Catalog Item (Service Catalog)
- NLU Model (Natural Language Understanding Models)
- Surveys (Assessments and Surveys)

Artifacts available with artifact-specific plugins

The following artifacts are available with the installation of artifact-specific product plugins after the installation of Localization Framework.

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- Virtual Agent Topic - available with the activation of the Glide Virtual Agent Lite plugin (com.glide.cs.chatbot.lite).
- Document Template Block Content - available with the activation of the Human Resources Scoped App: Lifecycle Events for Enterprise plugin [com.sn_hr_lifecycle_ent].
- HTML Document Template - available with the activation of the Human Resources Scoped App: Lifecycle Events for Enterprise plugin [com.sn_hr_lifecycle_ent].
- Knowledge Base article - available with the activation of Knowledge Management Advanced plugin [com.snc.knowledge_advanced] and set *glide.knowman.translation.enable_lf_article_translation* property to true.
- Email notifications, email templates and email layout - available with the activation of Glide Notification Translation plugin (com.glide.notification.translation).

Localization Framework support for Service Catalog items

Localization Framework enables translation of Service Catalog items when a catalog item is requested for translation into a language and a localization requested item (LRITM) is created.

Localizing Service Catalog items

You can do the following tasks in Localization Framework for translating the Service Catalog items.

- Select multiple languages from the available languages in the instance to configure settings with the Catalog Item artifact. To configure localization settings, see Localization Framework settings.
- Create LRITM's by requesting translations into one or more languages.
- Translate the content of the Service Catalog items directly using the edit translations option.
- Read, edit, and machine translate the content, send the content to TMS, send the content via email, export, and import the content of the Service Catalog item.

  Note: Activate the Dynamic Translation plugin (com.glide.dynamic_translation) to use machine translation in Localization Framework.

- Approve and publish the translated content.
- Monitor the overall localization health of the Service Catalog items from the Localization Insights dashboard.

To request translations for a catalog item, see Request translations for Service Catalog items.

Localization Framework support for catalog builder in Service Catalog

Localization Framework enables translation of Service Catalog items directly from the catalog builder dashboard in Service Catalog.

You can do the following tasks on the Catalog Builder dashboard in Service Catalog when the Localization Framework installer plugin (*com.glide.localization_framework.installer*) is installed:

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- Use the **Translation status** tab that is displayed when a Service Catalog item is selected, to perform the following tasks:
  - View the list of all active languages.
  - Request the translation of the Service Catalog items directly using the **Request Translation** option if the *glide.sc.catalog_builder.localization.enable_request_translation_mode* property is set to true.

    Note: You can request translations for the items in the active languages only if the Localization Framework setting is available for the particular language.

  - View the translation status of the Service Catalog items.

    Note: The translation status of the Service Catalog items is based on the status and completion of the Localization Framework scheduler jobs.

  - Use the **Edit Translation** option in case the *glide.sc.catalog_builder.localization.enable_request_translation_mode* property is set to false, so that you can machine translate and publish the translations on the ad hoc UI.

    Note: Machine translate option is only available if the Localization Framework setting is available for that particular language.

- Request the translations of the Service Catalog items when creating the items.

For more information on the Localization Framework integration with catalog builder, see Localization Framework integration with Catalog Builder.

Virtual Agent Designer integration with Localization Framework

The integration of Virtual Agent Designer with Localization Framework enables you to translate Virtual Agent NLU topics using the translation modes supported by Localization Framework with or without a localization task.

Starting with the Brazil release, Virtual Agent for NLU is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Localizing Virtual Agent NLU topics

The integration of Virtual Agent Designer with Localization Framework enables you to do the following tasks.

- Select multiple languages from the available languages in the instance to configure settings with the Virtual Agent artifact. To configure localization settings, see Localization Framework settings.
- Translate the content directly from the Virtual Agent Designer using the edit option.
- Read, edit, machine translate, export, and import the content of the Virtual Agent topic from the Virtual Agent Designer if the Virtual Agent artifact is configured in the localization settings.

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Note:

- **Note:** You need the localization_editor role to edit the translated content from the comparison UI of the Virtual Agent Designer directly. For more information about the localization_editor role, see Localization Framework Roles.
- Activate the Dynamic Translation plugin (com.glide.dynamic_translation) to use machine translation in Localization Framework.

- Request translations from Virtual Agent Designer.

  Note: Requesting translations creates localization tasks. You need the localization_requester role to request translations.

- Approve and publish the translated content.
- Monitor the overall localization health of the Virtual Agent topics from the Localization Insights dashboard.

For more information about localizing the Virtual Agent topics in the Virtual Agent Designer, see Virtual Agent Localization.

Localization Framework support for Natural Language Understanding models

Localization Framework integrates with NLU Workbench to translate the Natural Language Understanding models along with their associated intents, utterances, and entities into multiple languages.

Localizing Natural Language Understanding models

The integration of Localization Framework with NLU Workbench enables you to do the following tasks.

- Auto-configure the NLU Model artifact in the Artifacts Configuration [sn_lf_config] table with the activation of the Localization Framework plugin (com.glide.localization_framework.installer).
- Select multiple languages from the available languages in the instance to configure settings with Natural Language Understanding models artifacts. To configure localization settings, see Localization Framework settings.
- Request translations for Natural Language Understanding Models and translate the content of the localization task using the translation modes.

  Note: Activate the Dynamic Translation plugin (com.glide.dynamic_translation) to use machine translation in Localization Framework.

- Translate the content of the Natural Language Understanding models directly from the NLU Workbench.

  Note: Only users with the localization_editor role can translate content on the comparison UI of the Natural Language Understanding model in the NLU Workbench. For more information about the localization_editor role, see Localization Framework Roles.

- Approve and publish the translated content.

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Note: The localization of Natural Language Understanding models requires mapping between the Natural Language Understanding models in one language and their counterpart in other languages to use the localization framework support.

For more information about localizing Natural Language Understanding models, see Translate NLU Models.

Localization Framework support for Surveys

Localization Framework enables the translation of surveys items when a translation request for a survey is created and when a localization requested item (LRITM) is created.

Localizing Surveys

The extension of the Localization Framework capabilities to surveys enables you to do the following tasks:

- Select multiple languages from the available languages in the instance to configure settings with the survey artifact. To configure localization settings, see Localization Framework settings.
- Create LRITMs by requesting translations into one or more languages.
- Translate the content of the surveys directly using the edit translations option.
- Read, edit, and machine translate the content. You can also send the content to TMS or via email. You can export and import the content of the survey elements.

  Note: Activate the Dynamic Translation plugin (com.glide.dynamic_translation) to use machine translation in Localization Framework. For more information, see Exploring Dynamic Translation.

- Approve and publish the translated content.
- Monitor the overall localization health of the surveys from the Localization Insights dashboard.

For more information on requesting and editing translation for surveys, see Request translations for surveys and Edit translations for surveys.

Localization Framework support for Knowledge Base

Localization Framework enables the translation of Knowledge Base (KB) articles when a KB article is requested for translation into a language and when a localization requested item (LRITM) is created.

Localizing Knowledge Base

The extension of the Localization Framework capabilities to KB articles enables you to do the following tasks:

- Select multiple languages from the available languages in the instance to configure settings with the knowledge base artifact. To configure localization settings, see Localization Framework settings.
- Create LRITMs by requesting translations into one or more languages.
- Translate the content of the KB articles directly using the request translations option.
- Read, edit, and machine translate the content. You can also send the content to TMS or via email. You can export and import the content of the KB articles.

  Note: Activate the Dynamic Translation plugin (com.glide.dynamic_translation) to use machine translation in Localization Framework.

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- Approve and publish the translated content.
- Translate Knowledge Base articles in bulk in multiple languages.

For more information on translating the KB articles, see Knowledge base article localization.

Localization Framework support for email notifications

Localization Framework enables the translation of emails (notification, template, and layout) when an email artifact is requested for translation into a language and when a localization requested item (LRITM) is created.

Localizing Email Notifications

The extension of the Localization Framework capabilities to email enables you to do the following tasks:

- Select multiple languages from the available languages in the instance to configure settings with the email notifications, email template and email layout artifacts. To configure localization settings, see Localization Framework settings.
- Create LRITMs by requesting translations into one or more languages.
- Translate the content of the email notification directly using the edit translations option.
- Read, edit, and machine translate the content. You can also send the content to TMS or via email. You can export and import the content of the email notification.

  Note: Activate the Dynamic Translation plugin (com.glide.dynamic_translation) to use machine translation in Localization Framework.

- Approve and publish the translated content.

For more information about localizing email notification, see Email notification localization.

Localization Framework support for HR Service Delivery

Localization Framework extends its framework capabilities to Document Templates and Document Template Block Contents in HR Service Delivery.

Localizing Document Templates

The extension of the Localization Framework capabilities to HR Service Delivery enables you to do the following tasks:

- Select multiple languages from the available languages in the instance to configure settings either with the Document Template Block Content or HTML Document Template artifacts. To configure localization settings, see Localization Framework settings.
- Translate the template content manually, through machine translation, or by using export and import.

  Note: Activate the Dynamic Translation plugin (com.glide.dynamic_translation) to use machine translation in Localization Framework.

- Publish the translation.

For more information about translating the Document Templates, see Use Localization Framework for Document Templates.

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Localization Framework Roles

Localization Framework uses different roles to manage different aspects of the application. The roles from Localization Framework are also used in Localization Workspace.

For more information about Localization Workspace, see Localization Workspace. To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

Localization administrator [localization_admin]

Manage the following aspects of the Localization Framework application. This role is also used in Localization Workspace.

- Configures the supported artifacts and custom artifacts for Localization Framework.
- Configures localization settings for the activated languages.
- Can request translations into multiple languages for Service Catalog items, Virtual Agent topics, or for any custom artifacts from their respective artifact tables.
- Can request translations for Service Catalog items, Virtual Agent topics, or for any custom artifact for a particular language from their respective artifact reports in the insights dashboard.
- Can configure RWS and XTM TMS and can create and configure a custom TMS by inheriting the following roles:
  - flow_designer: Can edit the TMS subflows and can create a new TMS configuration record.
  - connection_admin: Can access the connections and credentials tables and records.
- Owns the localization insights dashboard and reports. Can execute the scheduled jobs to display the reports on the dashboard.
- Views the localization health of the system.
- Inherits the localization_editor, localization_fulfiller, localization_manager, and localization_requestor roles.

Contains Roles

List of roles contained within the role.

- localization_editor
- localization_fulfiller
- localization_manager
- localization_requestor

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

When working in Localization Workspace, the role sn_cd.content_admin is required to see Content Publishing artifacts.

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Localization requester [localization_requestor]

Request translations for all the configured artifacts into one or more languages. This role is used in Localization Framework and Localization Workspace.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Localization requester can fulfill translations by inheriting the localization_fulfiller role.

When working in Localization Workspace, the role sn_cd.content_admin is required to see Content Publishing artifacts.

Localization fulfiller [localization_fulfiller]

Provide translations for the requested artifact items and approve and publish the translations. This role is used in Localization Framework and Localization Workspace.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Fulfillers can translate a localization task in the following ways:

- Manually translate in the Localization Task web page.
- Use machine translation by submitting the item to a third-party translator configured in Dynamic Translation.
- Export source files to a third-party translator and import the returned translations.
- Send the source files for translation via email and receive the translated files via email.
- Send translatable items to a translation management system (TMS).
- Verify and approve the translations.
- Publish the translations if the language workflow has no approval flow.

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Localization editor [localization_editor]

Localization editors can translate content without the need for a localization task. This role is used in Localization Framework and Localization Workspace.

Contains Roles

The Localization editor role contains the Localization Requester [localization_requestor] role.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Users assigned to this role can translate content from Virtual Agent Designer NLU Workbench, and Document Templates of HR Service Delivery.

A localization editor can translate the content using machine translation, and also by exporting and importing the content.

Localization manager [localization_manager]

Owns the localization projects and adds the localization requested items to the projects. Only a Localization manager has the authority to start the project. This role is used by Localization Framework and Localization Workspace.

Contains Roles

The Localization manager role contains the Localization fulfiller [localization_fulfiller] role.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

If the Localization Framework Hub and Spoke architecture is activated, the localization_manager role has access to the following tables on the hub instance:

- Localization Framework Hub Translation Request [sn_lf_hub_translation_request]
- Localization Framework Hub Translation Item [sn_lf_hub_translation_item]

For more information, see Localization Framework Hub and Spoke architecture.

Workflows in the Localization Framework

Workflows in the Settings table define the process for a localization task, including steps for approval and methods for translating and publishing.

Overview of workflows in the Settings table of Localization Framework

You can configure the path you want your localization task to follow, with available steps for approval, translation, and publishing. You can define these workflows for each language and artifact configured on your instance.

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For more information about navigating to the configuration web form for these workflows, see Configure the Localization Framework preferences.

Workflows in the Localization Framework

Workflows	Description
Translation → Publish	The localization task is translated manually or by using one of the translation modes. After translation, the content is published manually. Group needed: Assign the **Localization Fulfiller Group**.
Translation → Translation Approval → Auto Publish	The localization task is translated manually or by using one of the translation modes. After translation the task undergoes translation approval, then is auto-published. Groups needed: Assign the **Localization Fulfiller Group** and **Translation Approver Group**.
Auto Translation → Translation Approval → Auto Publish	The localization task undergoes auto-translation. After translation, the task undergoes translation approval, then is auto-published. Groups needed: Assign the **Localization Fulfiller Group**, **Auto Translation Mode**, and **Translation Approver Group**. Select an Auto Translation Mode.
Auto Translation → Publish	The localization task undergoes auto-translation and is published manually. Groups needed: Assign the **Localization Fulfiller Group** and **Auto Translation Mode**. Select an Auto Translation Mode.
Auto Translation → Auto Publish	The localization task undergoes auto-translation then is auto-published. Group needed: Assign the **Localization Fulfiller Group**. Select an Auto Translation Mode.
Business Approval → Translation → Publish	The localization task first requires business approval for localization. Next the content is translated manually or translated by using one of the translation modes. Finally the content is manually published.

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Workflows in the Localization Framework (continued)

Workflows	Description
	Groups needed: Assign the **Business Approver Group** and **Localization Fulfiller Group**.
Business Approval → Translation → Translation Approval → Auto Publish	The localization task first requires business approval for localization. Next the content is translated manually or by using one of the translation modes. After translation, the task undergoes translation approval then is auto-published. Groups needed: Assign the **Business Approver Group**,**Localization Fulfiller Group**, and **Translation Approver Group**.
Business Approval → Auto Translation → Translation Approval → Auto Publish	The localization task first requires business approval for localization. Next the content is auto-translated. After translation, the task undergoes translation approval then is auto-published. Groups needed: Assign the **Business Approver Group**,**Localization Fulfiller Group**, and **Translation Approver Group**. Select an Auto Translation Mode.
Business Approval → Auto Translation → Publish	The localization task first requires business approval for localization. Next the content is auto-translated but is manually published. Groups needed: Assign the **Business Approver Group** and **Localization Fulfiller Group**. Select an Auto Translation Mode.
Business Approval → Auto Translation → Auto Publish	The localization task first requires business approval for localization. The content is auto-translated then auto-published. Groups needed: Assign the **Business Approver Group** and **Localization Fulfiller Group**. Select an Auto Translation Mode.

Configure the Localization Framework

Plan and configure your Localization Framework implementation.

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Configuration overview

After activating Localization Framework, you can create custom artifacts and processing scripts, and adjust preferences for email, workflows, and other settings

Activating the Localization Framework

When you activate the Localization Framework Installer plugin (com.glide.localization_framework.installer), Localization Framework is available by default for the Service Catalog items and Virtual Agent topics, Natural Language Understanding models, and Document Templates for HR Service Delivery.

After you activate the Localization Framework Installer plugin (com.glide.localization_framework.installer), you can:

- Create configurations to onboard any other application to Localization Framework.
- Request translations of the artifacts into one or more languages.
- Translate content of the artifacts using manual translation or any of the supported translation modes.
- Approve translations by proofreading the translated content.
- Publish the translated content.
- Analyze the localization health of the system using the Localization Insights dashboard.
- Install optional plugins to set up Localization Framework Hub and Spoke architecture.

For more information on activating this plugin, see Activate Localization Framework.

Activate Localization Framework

You can activate the Localization Framework Installer plugin (com.glide.localization_framework.installer) for Localization Framework if you have the admin role. The application installs related plugins if they are not already installed. Optionally, you can activate plugins for the Localization Framework Hub and Spoke architecture on a set of instances.

Before you begin

Role required: admin

About this task

The Localization Framework Installer plugin (com.glide.localization_framework.installer) can be activated in two ways:

- Manual installation of the plugin.
- Auto-installation of the plugin.

  When a language plugin is installed, the Localization Framework Installer plugin (com.glide.localization_framework.installer) is automatically installed with the language plugin. For more information, see language plugins.

The following items are installed with Localization Framework :

- Plugins
- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Localization Framework.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Localization Framework Installer plugin (com.glide.localization_framework.installer) 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.

What to do next

Optionally, next you can install plugins for the Localization Framework Hub and Spoke architecture. This enables you to designate one instance as a hub to fulfill localization requests, and one or more instances as spokes that submit requests to the hub.

Decide which instance should function as the hub. On that instance, follow the above procedure to search for and install the Localization Framework Hub plugin [com.sn.localization_framework.hub].

Decide which instance(s) should function as spokes. On each of those instances, follow the above procedure to search for and install the Localization Framework Spoke plugin [com.sn.localization_framework.spoke].

Components installed with Localization Framework

The Localization Framework Installer plugin (com.glide.localization_framework.installer) activates several related plugins that are not already active. With installation of the core plugins, optional plugins for the Localization Framework Hub and Spoke architecture are available.

Plugins available with Localization Framework Installer plugin (com.glide.localization_framework.installer)

Plugin	Description
Localization Framework [com.glide.localization_framework]	Manage localization workflows across the platform and products.
Localization Framework for Service Catalog [com.glide.localization_framework.service_catalog]	Enables translation of Service Catalog items using Localization Framework.
Localization Framework for Virtual Agent Topic [com.glide.localization_framework.va]	Enables translation of Virtual Agent topics using Localization Framework.
RWS Translation Management System Spoke for Localization Framework [com.glide.localization_framework.sdl_spoke]	Integrates Localization Framework with the RWS Translation Management System.

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Plugins available with Localization Framework Installer plugin (com.glide.localization_framework.installer) (continued)

Plugin	Description
XTM Translation Management System Spoke for Localization Framework [com.glide.localization_framework.xtm_spoke]	Integrates Localization Framework with the XTM Translation Management System.

Optional plugins for the Localization Framework Hub and Spoke architecture

Localization Framework Hub [com.sn.localization_framework.hub] Scope: sn_lf_hub	It's a framework that enables to fulfill the translation requests received from Localization Framework Spoke. After installation and configuration, the hub instance manages incoming translation requests. For more information, see Localization Framework Hub and Spoke architecture.
Localization Framework Spoke [com.sn.localization_framework.spoke] Scope: sn_lf_spoke	It's a framework that enables to fulfill the translation requests using Localization Framework Hub. After installation and configuration, the spoke instance submits its translation requests to the hub.

Tables installed with Localization Framework

Table label	Table name
Settings	sn_lf_setting
Artifact Configurations (Sn Lf Config)	sn_lf_config
Localization Insight (Sn Lf Insight)	sn_lf_insight
Localization Project (Sn Lf Project)	sn_lf_project
Loclization Requested Item (Sn Lf Requested Item)	sn_lf_requested_item
Localization Task (Sn Lf Task)	sn_lf_task
TMS Configuration (Sn Lf Tms Config)	sn_lf_tms_config

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Tables installed with the optional Localization Framework Hub and Spoke architecture

The application scope for the following tables: Localization Framework Hub. For more information, see Localization Framework Hub and Spoke architecture.

Table label	Table name
Localization Framework Spoke Configuration (Sn Lf Hub Spoke Configuration)	sn_lf_hub_spoke_configuration
Localization Framework Hub Translation Item (Sn Lf Hub Translation Item)	sn_lf_hub_translation_item
Localization Framework Hub Spoke Settings (Sn Lf Hub Spoke Setting)	sn_lf_hub_spoke_setting
Localization Framework Hub Translation Request (Sn Lf Hub Translation Request)	sn_lf_hub_translation_request

Related topics

Find components installed with an application

Artifact configurations

You can configure the required artifacts and use the Localization Framework to fulfill the translation requests.

Any artifact configured in the Localization Framework application has its own record in the artifact configurations [sn_lf_config] table.

With the activation of the Localization Framework Installer plugin (com.glide.localization_framework.installer), a record for Service Catalog item and Natural Language Understanding Model are automatically created and configured in Localization Framework.

A record for the Virtual Agent topic is also created and configured in the framework, since Virtual Agent is automatically enabled with the base system. For more information, see Virtual Agent Lite.

Records for Document Template Block Content and HTML Document Template are created in the artifact configurations [sn_lf_config] table when you activate the Human Resources Scoped App: Lifecycle Events for Enterprise plugin [com.sn_hr_lifecycle_ent]. For more information about activating this plugin, see Activate Lifecycle Events for Enterprise.

You can also create and configure an artifact of your choice and a record for the same is created in the artifact configurations [sn_lf_config] table. For more information, see Create and configure a custom artifact.

Create and configure a custom artifact

Create and configure custom artifacts of your choice to use the Localization Framework functionality.

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Before you begin
Ensure that you are in the application scope that you want for your custom artifact.

Role required: localization_admin and script_include_admin.

About this task
From the Zurich release, your custom artifacts can be made available in Localization Workspace. For information about making custom artifacts selectable in Localization Workspace translation requests, see Dynamic artifact detection in Localization Workspace.

Procedure
1. Ensure that you are in the application scope that you want for your custom artifact, and navigate to **All** > **Localization Framework** > **Artifact Configurations** [sn_lf_config].
2. Select **New**.
3. In the Artifact Configuration form, fill in the fields.

Artifact Configuration form fields

Field	Description
Name	Identifier of the artifact record.
Internal name	An internal name for the artifact.
Table name	Identifier of the table where information of the artifact is stored. For example, Catalog Items [sc_cat_item] table.
Processor script	Extracts the translatable content associated with the translation request and saves the translations into the database.You can select a script include using the search icon, or you can create a new script include. The processor script contains the following functions: ○ getTranslatableContent: Extracts the translatable content. ○ saveTranslatedContent: Saves the translated content back to the system. For more information, see Processor script functions.To create a new processor script for the artifact, see Create a processor script. **Note:** Under **Related Links** on an existing artifact record, you can switch to **Legacy View** for script editing.
Application	Application scope. The value is the current application selected for the logged-in user session. For more information, see Select an application from the application picker.
Active	Option to activate the configuration record.
Generate insights	Option to turn on or turn off the localization insights for the artifact. For more information, see Localization Insights dashboard.

4. Select **Submit**.

What to do next
For examples of Localization Framework artifacts that you can set up, see the LF Artifact blog posts list on https://www.servicenow.com/community/international-localization/need-to-

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translate-a-par-dashboard-check-this/ta-p/2839751 in the ServiceNow Community. These examples include Processor scripts.

Create a processor script

You can create a processor script to include in your custom artifact configuration to extract the translatable content and save the translated content.

Before you begin

Role required: localization_admin and script_include_admin

Procedure

1. Navigate to **All** > **Localization Framework** > **Artifact Configurations**.
2. Click **New** or open an artifact that you want to update the processor script for.
3. Click the **Create Processor Script** related link.
4. In the **Script include name** field, provide the script include name to integrate the artifact with Localization Framework.
5. Click **Submit**.

Processor script functions

The processor script contains functions that help you extract the translatable content and save the translated content which is included when you configure an artifact.

getTranslatedContent(params)

This function is responsible for extracting the translatable content for the Localization Framework to use and consume that content and contains the following parameters:

getTranslatedContent(params)

Name	Type	Description
tableName	String	The table name of the artifact record.
sysId	String	The sys_id of the artifact record.
language	String	The language into which the artifact has to be translated (target language).

Note: This script function is available by default when you configure the processor script. This script function requires that you configure its parameters to build the LFDocumentContent object.

saveTranslatedContent(documentContent)

This function is responsible for saving the translations back to the system and has a parameter which is an object of LFDocumentContent.

All the processor scripts extend LFArtifactProcessorSNC which defines the default implementation of this function, that is, saving the translations to standard tables. Defining this function in the processor script overrides the default behavior.

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Note: This script function is commented by default when a new processor script is created. For more information, see Read script helper functions for LFDocumentContentBuilder.

Create a UI action for the custom artifact

Create a UI action to request translations for the custom artifact.

Before you begin

Role required: localization_admin

Procedure

1. Navigate to the custom artifact table.
   Find the table using its table name. For example, **[sys_cs_topic]** is the table name for Virtual Agent topics.
2. Click the hamburger icon ( ) at any of the columns and navigate to **Configure UI Actions**.
3. Click **New**.
4. In the UI Actions form, fill in the fields.

UI Action form fields

Field	Description
Name	Name for the UI action. For example, **Request Translations**.
Client	Option to execute the script in the user's browser. When enabled, the **Onclick** field appears above the Condition field.
Condition	Condition to decide when to show this UI action.
Onclick	Provide the JavaScript function name as: `renderLanguagePickerModal();`
Script	Option to execute the script to run the request translations function. The script varies for **Form button** and **List choice**. ○ Form Button `function renderLanguagePickerModal() { var dlg = new GlideModal("sn_lf_language_picker"); dlg.setTitle(getMessage("Request Translations"));`

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Field	Description

	dlg.setPreference("sys_id", g_form.getUniqueValue());
	
	dlg.setPreference("artifact_config_internal_name", "catalog_item");
	
	dlg.setPreference("request_type", "form");
	
	dlg.setPreference("focusTrap", true);
	dlg.render();
	}
	
	○ List choice
	
	function renderLanguagePickerModal() {
	var sys_ids = g_list.getChecked();
	if (!sys_ids || sys_ids.length == 0)
	return;
	var dlg = new GlideModal("sn_lf_language_picker");
	
	dlg.setTitle(getMessage("Request Translations"));
	
	dlg.setPreference("sys_id", sys_ids);
	
	dlg.setPreference("artifact_config_internal_name", "catalog_item");
	
	dlg.setPreference("request_type", "list");
	
	dlg.setPreference("focusTrap", true);
	dlg.render();
	}

Form button	Option to enable the UI action as a form button.
List choice	Option to enable the UI action in the choice list.

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Note: Configure the form to see all the fields. For more information, see Create a UI action.

5. Click **Submit**.

Read script helper functions for LFDocumentContentBuilder

The `LFDocumentContentBuilder` provides utility functions to build document content. Use these functions to write the logic to extract the translatable content from any artifacts regardless of them using standard tables or not for translations.

initialize (version, targetLanguage, sys_id, tableName)

Use this function as a constructor for `LFDocumentContentBuilder` and includes the following parameters:

Name	Type	Description
Version	String	The version type of the document content to be generated. For Brazil, this value is v1.
targetLanguage	String	The target language of the localization task document content. The target language is the same as the language available from the read script function argument.
Sys_id	String	The sys_id of the artifact record.
tableName	String	The table name of the artifact record.

processString (string, groupName, label)

Use this function to add the LFDocumentContentElement in the document content for the given string and includes the following parameters.

Name	Type	Description
string	String	The value for which a document content entry is created.
groupName	String	The name of the group to which element should belong.
label	String	The unique label identifier for the created element.

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processStringArray (stringArray, groupName, label)

Use this function to add elements (object of LFDocumentContentElement) in the document content for the given strings and includes the following parameters.

Name	Type	Description
stringArray	List of Strings	The list of values for which document content entry is created.
groupName	String	The name of the group these strings belongs to.
label	String	The unique label identifier for these strings.

processScript (scriptContent, groupName, label)

Use this function to add an element in the document content for the strings present as input of getMessage, gs.getMessage, or gs.getMessageLang in the provided Script. It has the following parameters:

Name	Type	Description
scriptContent	String	The Script to be processed to get the strings present as input of getMessage, gs.getMessage, or gs.getMessageLang.
groupName	String	The name of the group for this input.
label	String	The unique label identifier for this input.

For example,

```
var documentContentBuilder = new LFDocumentContentBuilder("v1",
 language, sysId, tableName);
Var name = "name";
documentContentBuilder .processScript("gs.getMessage('Hello {0},
 How are you', name)", "Script_Group", "Script_Label");
```

processTranslatableFieldsForSingleRecord (glideRecord, groupName)

Use this function to create elements for the given glideRecord object, in document content for all its translatable fields. These translatable fields can be of translated_field, translated_text or translated_html types. It includes the following parameters:

Name	Type	Description
glideRecord	GlideRecord	The GlideRecord object to be processed for translatable fields. The GlideRecord

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Name	Type	Description
		should be pointing to the valid table record.
groupName	String	The name of the group for this input.

processTranslatableFieldsForMultipleRecords (tableName, encodedQuery, groupName)

Use this function to fetch all the qualified records for the given tableName and encodedQuery and adds elements (object of LFDocumentContentElement) in the document content for all the translatable fields. It includes the following parameters:

Name	Type	Description
tableName	String	The table to fetch records.
encodedQuery	String	The encoded query for filtering records from the processTranslatableFieldsForSingleRecord table.
groupName	String	The name of the group for this input.

processElement()

Use this function to add an element (object of LFDocumentContentElement) to LFDocumentContent object.

element	LFDocumentContentElement	Element to be added to the document content.

build()

Returns the LFDocumentContent object.

Note: The getFinalJSON function has been deprecated in the Brazil release and it is recommended to use the *build()* function.

A sample script to build the document content.

```
getTranslatableContent: function(params) {
    var tableName = params.tableName;
    var sysId = params.sysId;
    var language = params.language;
    var lfDocumentContentBuilder = new
 global.LFDocumentContentBuilder("v1", language, sysId,
 tableName);
    // This will create a new object of LFDocumentContent and
 stores it internally

 lfDocumentContentBuilder.processTranslatableFieldsForSingleReco
rd(gr, "Basic Info");
```

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```
    var field =
 LFDocumentContentHelper.createField(originalValue,
 translatedValue);
    field.setTextType(LFDocumentContentHelper.PLAIN_TEXT_TYPE);
    // All the other relevant attributes can be set
    var element =
 LFDocumentContentHelper.createElement(groupName, label);
    element.addField(field);
    lfDocumentContentBuilder.processElement(element); // Adds
 element to the LFDocumentContent object
    return lfDocumentContentBuilder.build(); // return the
 LFDocumentContent object
}
```

Sample script to extract data from the LFDocumentContent

```
saveTranslatedContent: function(documentContent) {
    // LFDocumentContent object is passed as an argument to the
 saveTranslatedContent
    var targetLanguage = documentContent.getLanguage();
    var version = documentContent.getVersion();
    var elements = documentContent.getElements(); // Array of
 LFDocumentContentElement objects
    for (var idx = 0; idx < elements.length; idx++) {
        var element = elements[idx];
        var groupName = element.getGroupName();
        var fields = element.getFields(); // Array of
 LFDocumentContentField objects
        for (var fieldIdx = 0; fieldIdx < fields.length;
 fieldIdx++) {
            var field = fields[fieldIdx];
            var originalValue = field.getOriginalValue();
            var translatedValue = field.getTranslatedValue();
            // Get all the other required members and process
 them appropriately
        }
    }
}
```

Localization Framework settings

You can define translation and workflow preferences for one or more languages and for one or all the available artifacts with Localization Framework settings.

Before you define the translation and workflow preferences, ensure that you have the required artifacts to define the localization settings. For more information, see Artifact configurations.

Note: Languages with no localization settings can't be selected for translation requests.

You can enable one or more of the following translation modes to define the translation preferences. For more information, see Translation modes.

- Activate the required translator if you want to use machine translation.

  Note: Machine translation in the Localization Framework application is powered by Dynamic Translation. Therefore, activating the Dynamic Translation plugin (com.glide.dynamic_translation) enables you to use the machine translation capability in Localization Framework

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.

- Configure a TMS service of your choice if you want to send the content to a translation management system for translation. For more information, see Translation Management System configurations.
- Configure an email subflow if you want to use a subflow other than the default subflow for sending the translatable content file for translation via email. For more information, see Create a custom email subflow.

Create a custom email subflow

Create an email subflow according to your requirements. You can then select this subflow to define translation preferences for a language.

Before you begin

Roles required: localization_admin and flow_designer

About this task

The Localization Framework provides a default email subflow that you can customize.

Copy the existing email subflow configured for the Localization Framework and then customize it. Publish the customized subflow so that it is available for selection when setting up the translation preference for a language. For more information, see Create a subflow.

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. In the Workflow Studio window, click **Subflows**.
3. Click **Send LF Email for Translation** subflow.
   The Send LF Email for Translation subflow opens in the Workflow Studio in read-only format. The inputs in this subflow are described in the following table:

Send LF Email for Translation input parameters

Name	Description	Type
lftask_record	Associated Localization Framework task record.	Reference.Localization Task [sn_lf_insight]
attachment_record	Contains a file related to the LFTASK that can be sent via Email for translation.	Reference.Attachment
send_to	Contains email addresses of the recipients to send the LF task file.	String
source_language	Language from which the localization task was created.	String
target_language	Language into which the content of the localization task gets translated into.	String

4. In the subflow header, click the more actions icon  and select **Copy subflow.**
5. In the **New subflow name** field, enter the name of the new subflow.

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6. To limit the application scope of the subflow, in the **Application** field, select the required application, otherwise select **Global**.
7. Click **Copy**.

   The new subflow is created and opens in the subflow designer editor. The inputs from the copied subflow appear.

   Note: Inputs are fixed and cannot be edited.

8. In the Actions section, click **Send Email**.
   This expands the Send Email section. The fields in the Send Email section are described below:

Send Email fields

Field name	Description
Action	Name of the action. Default: **Send Email**.
Target Record	Associated Localization Framework task record
Table	Name of the table where the localization task resides.
Include Watermark	Adds a watermark in the file associated with the localization task.
To	Contains email addresses of the recipients who should be addressed directly.
CC	Contains email addresses of the recipients who should see the list of recipients directly addressed in the email.
BCC	Contains email addresses of the recipients who are copied on the email but not displayed in the email.
Subject	The text about the email that its recipients can see.
Body	The text message about the localization task being sent for translation.

9. Click **Done**, when you have modified the fields as per your requirement.
10. Click **Copy Attachment**.
    The Copy Attachment action expands. The fields in the Copy Attachment section are described below:

Copy Attachment fields

Field name	Description
Action	Name of the action.

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Field name	Description
	Copy Attachment is displayed by default.
Source Attachment Record [Attachment]	Translatable content file of the localization task.
Target Record	Represents the target record in the email.
Table	Represents the email table.

11. Click **Save**, to save the subflow in draft status.
12. Click **Publish**.

Result

Use the published subflow to define the translation preference for a language.

Translation Management System configurations

The Localization Framework supports integration with a translation management system to localize the content.

The TMS configuration table lists all the TMS services configured in the instance.

RWS and XTM TMS services are automatically enabled in Localization Framework with the activation of the Localization Framework Installer plugin (com.glide.localization_framework.installer) and appear in the TMS configuration [sn_lf_tms_config] table.

To use the RWS TMS service for localization of the artifacts, you must configure the connection and credentials. For more information about configuring RWS TMS, see RWS Translation Management System spoke.

To use the XTM TMS service for localization of the artifacts, you must configure the connection and credentials. For more information about configuring XTM TMS, see XTM Translation Management System spoke.

You can also sign up and create an account with a TMS service of your choice. To create and configure a custom TMS, see Create a custom translation management system.

RWS Translation Management System spoke

The RWS Translation Management System spoke provides subflows and actions to localize the artifacts using the RWS translation management system service.

Activate the Localization Framework Installer plugin (com.glide.localization_framework.installer) to activate the RWS Translation Management System Spoke for Localization Framework (com.glide.localization_framework.rws_spoke).

Subscription

The RWS TMS spoke requires any ServiceNow subscription that is Standard or above and includes the Localization Framework.

Supported versions

Version v1.

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Spoke Subflows

The spoke provides subflows in the Published state to integrate with the RWS TMS service. These subflows can be used as part of other subflows and flows.

Spoke subflows

Subflow	Description
Request Translations [request_translations]	Contains set of inputs and outputs to request translations of the artifacts.
Retrieve Translations [retrieve_translations]	Contains set of inputs and outputs to retrieve translations of the translated artifacts.

Spoke actions

The spoke provides actions to integrate with the RWS TMS service.

Spoke actions

Action	Description
Create Project [create_project_on_sdl]	Creates a project on RWS for translation.
Get Project Details [get_sdl_project_details]	Fetches the project's details for the translation request.
Get Translated File [get_translated_file_from_sdl]	Fetches the translated file from RWS TMS after translations.
Mark File As Complete [complete_file_on_sdl]	Marks the file as complete, after getting the translated content.
Upload File [upload_file_on_sdl_tms]	Sends a file to RWS for translations.

RWS Translation Management System account requirements

Ensure that you are registered with RWS TMS and obtain the credential information. For more information on RWS Managed Translation API, see RWS documentation.

Connection and Credential alias requirements

The IntegrationHub uses aliases to manage connection and credential information. Using an alias eliminates the need to configure multiple credentials and connection information profiles when using multiple environments. If the connection or credential information changes, you do not need to update any actions that use the connection. For more information, see Connections and Credentials Information.

To use the spoke connection aliases, use an associated connection record and a credential record created with the RWS spoke installation.

This spoke uses the RWS TMS alias (sn_sdl_spoke.SDL_TMS) to authorize actions.

The following are the connection alias requirements.

- Connection type: HTTP
- Connection URL: For example, `https://languagecloud.sdl.com`. This is a sample URL. Users can have a different URL based on their geographical preference.

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See Configure RWS TMS in the Localization Framework to connect to the RWS TMS services and use them to localize the artifacts.

Configure RWS TMS in the Localization Framework

Configure RWS TMS to use the RWS TMS service in the Localization Framework.

Before you begin

Roles required: connection_admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.
   A credential record for RWS TMS is created when the RWS TMS spoke is installed with the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation.
2. Open the RWS TMS credential record.
3. In the Connections related list, open the RWS connection record.
   A connection record for RWS is created when the RWS TMS spoke is installed with the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation.

   All the form fields are populated with the information that is fetched through the RWS spoke installation during the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation.
4. In the Attributes section of the HTTP/HTTPS Connection form, provide the *project_option_id* connection attribute, and save the form.
   RWS provides an option to create automated or reviewed projects and provides the respective option IDs during RWS account creation.
5. In the **Credential** field, click the information icon ( ) and open the record.
   A record for OAuth 2.0 credentials is created when the RWS TMS spoke is installed with the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation.
6. In the **OAuth Entity Profile** field, click the information icon ( ) and open the record.
   An OAuth Entity profile is created when the RWS TMS spoke is installed with the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation.
7. In the **OAuth provider** field, click the information icon ( ) and open the record.
   An Application Registries record is created when the RWS TMS spoke is installed with the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation.
8. Provide the Client ID and Client Secret provided by RWS at the time of account creation, and save the form.
9. Open the OAuth 2.0 Credentials form again, and click the **Get OAuth Token** related link.
10. Provide the user name and password.
    RWS supports resource owner password credentials as the grant type. Provide these credentials to generate the token for the first time.

    Note: The user name and password do not persist in the ServiceNow instance.
11. Click **Get OAuth Token**.
    Once the OAuth token is created, the ServiceNow® platform regenerates the token until the refresh token expires.

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XTM Translation Management System spoke

The XTM Translation Management System spoke provides subflows and actions to localize the artifacts using the XTM translation management system service.

Activate the Localization Framework Installer plugin (com.glide.localization_framework.installer) to activate the XTM Translation Management System Spoke for localization Framework (com.glide.localization_framework.xtm_spoke).

Subscription

The XTM TMS spoke requires any ServiceNow subscription that is Standard or above and includes the Localization Framework.

Supported versions

Version v1.

Spoke Subflows

The spoke provides subflows in the Published state to integrate with the XTM TMS service. These subflows can be used as part of other subflows and flows.

Spoke subflows

Subflow	Description
Request Translations [request_translations]	Contains set of inputs and outputs to request translations of the artifacts.
Retrieve Translations [retrieve_translations]	Contains set of inputs and outputs to retrieve translations of the translated artifacts.

Spoke actions

The spoke provides actions to integrate with the XTM TMS service.

Spoke actions

Action	Description
Create Project [create_project]	Creates a project on XTM for translation.
Get Project Details [get_xtm_tms_project_details]	Fetches the project's details for the translation request.
Get Translated File [get_translated_file_from_xtm_tms]	Fetches the translated file from XTM TMS after translations.

XTM Translation Management System account requirements

Ensure that you are registered with XTM TMS and obtain the credential information. For more information, see XTM documentation.

Connection and Credential alias requirements

The IntegrationHub uses aliases to manage connection and credential information. Using an alias eliminates the need to configure multiple credentials and connection information profiles when using multiple environments. If the connection or credential information changes, you do

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not need to update any actions that use the connection. For more information, see Connections and Credentials Information.

To use the spoke connection aliases, use an associated connection record and a credential record created with the XTM TMS spoke installation.

This spoke uses the XTM TMS alias (sn_xtm_spoke.XTM_TMS) to authorize actions.

The following are the connection alias requirements.

- Connection type: HTTP
- Connection URL: For example, `https://languagecloud.sdl.com`. This is a sample URL. Users can have a different URL based on their geographical preference.

See Configure XTM TMS in the Localization Framework to connect to the XTM TMS services and use them to localize the artifacts.

Configure XTM TMS in the Localization Framework

Configure XTM TMS to use the XTM TMS service in the Localization Framework.

Before you begin

Roles required: connection_admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.
   A credential record for XTM TMS is created when the XTM TMS spoke is installed with the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation.
2. Open the **XTM TMS** (ID = sn_xtm_spoke.XTM_TMS) credential record.
3. In the Connection Attributes tab of the form, provide the *`template_id`* and *`customer_id`* attributes, and save the form.
4. In the Connections tab, open the XTM connection record by selecting the information icon ( ).
   A connection record for XTM is created when the XTM TMS spoke is installed with the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation. All the form fields are populated with the information fetched through the XTM spoke installation.

   Note: In the **Connection URL** field, enter the URL of the XTM connection.

5. In the **Credential** column, select the value **XTM**to open the **OAuth 2.0 Credentials** [oauth_2_0_credentials] record.
   A record for OAuth 2.0 credentials is created when the XTM TMS spoke is installed with the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation.
6. In the **OAuth Entity Profile** field, select the information icon ( ) to open the record.
   An OAuth Entity Profile is created when the XTM TMS spoke is installed with the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation.
7. In the **OAuth provider** field, select the information icon ( ) to open the **Application Registries** [oauth_entity] record.
   An Application Registries record is created when the XTM TMS spoke is installed with the Localization Framework Installer plugin (com.glide.localization_framework.installer) activation.
8. Provide the Client ID and Client Secret provided by XTM at the time of account creation, and save the form.

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9. Open the OAuth 2.0 Credentials form again, and select the **Get OAuth Token** related link.
10. Provide the username and password.
    XTM supports resource owner password credentials as the grant type. Provide these credentials to generate the token for the first time.

    Note: The username and password do not persist in the ServiceNow instance.

11. Select **Get OAuth Token**.
    Once the OAuth token is created, the ServiceNow® platform regenerates the token until the refresh token expires.

Integrate with a translation management system

Integrate with any translation management system of your choice to localize the artifacts requested for translations.

Before you begin

Role required: localization_admin

Procedure

1. Create subflows to request translations and to retrieve the translated content using Integration Hub subflows, actions, and connections and credentials.

   a. Ensure that the error messages and codes from the TMS provider are mapped correctly with the error messages and codes supported the ServiceNow platform.

   #### Standard error codes and messages

Error code	Error message
40510	Error while requesting translations.
40520	Error while retrieving translations.
40500	Authentication failed.

   b. Ensure that the input and output fields are in the following format for the subflows:

   #### Request translation subflow

Field Name	Description	Type
Inputs		
lftask_number	Associated localization task number.	String
xliff_1_2_content	Content of an artifact which must be translated in XLIFF 1.2 format. For example, `'csv', 'xliff 1.2'`	String
source_language	Language code of the source text.	String

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Field Name	Description	Type
Inputs		
	For example, `'en'`	
target_language	Language code of the target text. For example, `'fr', 'it'`	String
Outputs		
project_info	The ID for the project created for an artifact configuration.	Object
status	Status of the request. For example, Success or Failure.	Choice
error_message	The reason for the error that populates when an error occurs.	String
error_code	The error code that populates when an error occurs.	String

Retrieve translation subflow

Field Name	Description	Type
Inputs		
lftask_number	Associated localization task number.	String
project_info	The ID for the project created for an artifact configuration.	Object
Outputs		
translated_xliff_1_2	Translated XLIFF file received from the TMS.	String
status	Status of the request. For example, Success or Failure.	Choice
error_message	The reason for the error that populates when an error occurs.	String
error_code	The error code that populates when an error occurs.	String

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2. Create and configure a custom translation management system and activate it.

   See Create a custom translation management system.

   Note: Localization Framework depends on Integration Hub to build integrations with third-party systems.

Create a custom translation management system

Configure Localization Framework with a third-party translation management system of your choice to localize an artifact.

Before you begin

Roles required: localization_admin and flow_designer

Ensure that the Localization Framework Installer plugin (com.glide.localization_framework.installer) is activated.

Procedure

1. Navigate to **All** > **Localization Framework** > **TMS Configuration**.

   Note: By default, RWS, and XTM translation management system configurations are available.

2. Click **New**.
3. In the TMS Configuration form, fill in the fields.

TMS Configuration form fields

Field	Description
Name	Identifier of the TMS configuration.
Request translation subflow	IntegrationHub subflow that interacts with the third-party translation management system to request translations.
Retrieve translation subflow	IntegrationHub subflow that interacts with the third-party translation management system to retrieve translated content.
Application	The scope of the application. The default value is Global.
Version	Version of the contract used in subflows. The default value is **v1.**
Enable auto retrieval	Option to retrieve the translated content automatically. When selected, the translations are retrieved as per the scheduled jobs which run daily.

4. Click **Submit**.

Configure the Localization Framework preferences

Configure the preferences to request the translation in the activated languages.

Before you begin

Role required: localization_admin or localization_manager

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Procedure

1. Navigate to **All** > **Localization Framework** > **Settings**.
2. Select **New**.
3. On the form, fill in the fields.

Settings form

Field	Description
Name	Identifier of the translation setting.
Artifact	Artifact for the settings being defined. You can select either **All Artifacts** or an artifact of your choice, such as **catalog_item** or **nlu_model**. **Note:** To select Virtual Agent topics, Document Templates, Document Template Block Content, HTML Document Template, Knowledge Base or Email notification artifacts, you must activate specific plugins. For more information, see Supported artifacts in Localization Framework.
Languages	Target records of the languages available in the instance. All the available languages are populated based on the artifact selected.

4. Select the **Translation Preferences** tab.
5. On the form, fill in the fields.

Translation Preferences form

Field	Description
Machine Translation	
Enable machine translate	Option to enable the machine translation service for selected languages. **Note:** Dynamic Translation must be installed to use machine translation. For more information, see Activate Dynamic Translation.
Translator	List of the available translator services for machine translation. **Note:** Ensure that at least one third-party translator configuration record is integrated and active. For more information, see Integration with other translation services.
Translation Management System	
Enable TMS	Option to enable Translation Management System (TMS) for selected languages.
TMS	List of all the TMS services available for machine translation. By default, the **RWS** and the **XTM** TMS are available. You can also choose a configured custom TMS. For more information, see Translation Management System configurations.

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Field	Description
	If you are configuring a spoke instance per the Localization Framework Hub and Spoke architecture, select `Localization Framework Hub` in this field. For more information, see Localization Framework Hub and Spoke architecture.
Send via Email	
Enable send via email	Option to enable email service for content localization for selected languages.
Email subflow	Available subflows for your email. Automatically, a subflow exists. To choose another subflow, create a subflow before setting up the translation preference.
Default file format	Option to select a file format to send and receive the content. By default, XLIFF 1.2 and CSV file formats are supported.
Default recipient(s) list	List of recipient email addresses through which the content is sent to the translator for translation.
Export/Import	
Enable export/ import	Option to enable the export and import of content for the translation of selected languages.
Default file format	Available options of file formats to send and receive the content. By default, XLIFF 1.2 and CSV file formats are supported.

6. Select the **Workflow Preferences** tab.
7. On the form, fill in the fields.

Workflow Preferences form

Field	Description
Workflow	List of all the workflows available for the translation process. For more information on the available workflows, see Workflows in the Localization Framework.
Business approver group	List of all the available business approver groups. This field appears only when a workflow that requires business approvals is selected from the **Workflow** field. **Note:** Ensure that the business approver group contains the localization_fulfiller role.
Localization fulfiller group	List of all the available localization fulfiller groups. **Note:** Ensure that the localization fulfiller group contains the localization_fulfiller role.

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Field	Description
Auto translation mode	Option to select the auto-translation mode. The available options are as follows: ○ **Machine Translate** ○ **Send to TMS**. If the instance has been set up as a spoke in the Localization Framework Hub and Spoke architecture, this setting will submit the translation request to the hub. ○ **Send via Email** For more information, see Translation Modes **Note:** Ensure that you have configured the Translation Preferences for the selected auto translation mode.
Translation approver group	List of all the available translation approver groups. This field appears only when a workflow that requires translation approvals is selected from the **Workflow** field. **Note:** Ensure that the translation approver group contains the localization_fulfiller role.

8. Select the **Project Preferences** tab.
9. On the form, fill in the fields.

Project Preferences form

Field	Description
Enable projects	Option to enable the creation of the localization projects. **Note:** If you are using Localization Workspace, select this option (set this option to on). In Localization Workspace you don't need to add items to the project manually. For Localization Framework: If this option is enabled, the localization requested items (LRITMs) are created upon request for translation of the artifact. You can then create a project and add the corresponding requested items to start the translation. You must have localization_manager role to create a project. This option helps in the bulk translation of the artifacts to be done at the same time by adding them to a project. Then, the translation progress of the LRITMs is monitored at the project level.
Enable auto creation	Option to enable the auto creation of the localization projects in Localization Framework. This option appears only when the Enable projects option is selected. **Note:** If you are using Localization Workspace, clear this option (do not set this option). For Localization Framework: When this option is enabled, translation requests for artifact items are created as follows:

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Field	Description
	○ A localization project is auto created. The corresponding localization requested items (LRITMs) are created, bundled, and added to the localization project. ○ The project starts automatically based on the Localization Framework settings.
Localization manager group	List of all the available user groups. **Note:** Ensure that the localization manager group contains the localization_manager role.

10. Select **Submit**.

Localization Framework Properties: Update Set Strategies

Use update sets to migrate your translations to another instance. Configure properties for update sets according to your business requirements.

Update sets enable you to transfer your artifact translations to other instances. For background information on update sets, see System update sets.

For localization tasks, previously the default was to create a dedicated update set per task in the scope of the artifact. Alternatively, with sys properties you can specify your update set strategy: bundle translations into one update set, or distribute into granular update sets.

The settings for update set strategies vary according to the type of translation, defined as follows:

localization tasks

Part of workflows that often include approval processes. These are based on tasks.

Property name: com.glide.sn_lf.update_set.strategy.request_translations.

adhoc

Edited and published directly by the localization editor, from the artifact record (such as a catalog item). The **Edit translation** button is visible to the editor, and it opens a UI page for translation. Adhoc translations are processed in the user context.

Property name: com.glide.sn_lf.update_set.strategy.edit_translations.

Update set strategy to use when translations are published from localization task

Save translation in update set created for each localization task	The system will create a dedicated update set for each task, using the task name. This strategy is most appropriate when there are a limited number of tasks.
Save translations in 'LF: Translations' update set	Granular update sets are not created. Instead, the system creates or reuses one update set named 'LF: Translations', and saves all tasks to it.

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Update set strategy to use when translations are published from localization task (continued)

	This strategy can be more convenient when there are many localization tasks.

Update set strategy to use when translations are published in adhoc way

Save translations in user preferred update set	The translations are written to the update set that the user has specified for a scope, because the processing happens in the user's context. When artifacts are in an application scope, their translations are saved to the user's preferred update set for that scope.
Save translations in 'LF: Translations' update set	The system creates or reuses one update set named 'LF: Translations', and all adhoc translations are written to it.

To set these properties, navigate to **Localization Framework** > **Properties**. Choose the appropriate strategy and select **Save**.

Localization Framework Hub and Spoke architecture

Enable one central instance to fulfill translation requests submitted from other instances using the Localization Framework Hub and Spoke architecture. Install optional Localization Framework plugins to configure one of your instances as a hub and other instances as spokes.

By default, translations are requested and fulfilled on the same instance. Alternatively, there is an available hub-spoke model for translation requests and fulfillment. With this architecture translation requests are a two-step process:

1. The spoke instance submits a translation request to the hub instance.
2. The hub instance manages the fulfillment of the request, such as by sending the content to a translation management system (TMS). The hub returns the translated contents to the spoke instance.

Consider the Localization Framework Hub and Spoke architecture when you want to limit fulfillers' access to one instance only.

To set up this architecture, use the admin role to install the following plugins:

- Localization Framework Hub [com.sn.localization_framework.hub]. Install this plugin on the instance you designate as a hub.
- Localization Framework Spoke [com.sn.localization_framework.spoke]. Install this plugin on the instances you designate as spokes.

For more information on installation, see Activate Localization Framework.

When both plugins are installed, use the admin or localization_admin role to configure the connection between hub and spoke instances. On the hub instance:

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1. Navigate to **Localization Framework** > **Hub** > **Spoke Settings.**
2. In the **Name** field, enter a unique name for each entry.
3. In the tab for **Translation Preferences**, find the **Translation Management System** (TMS) section. Enter the TMS service your organization uses.
4. In the tab **Workflow Preferences**, configure according to your requirements. Depending on the workflow you choose, different subfields are populated.
5. The tab **Project Preferences** is optional. If no project is entered, any request for translations into more than one target language is broken into separate tasks, one for each language.

Note: If Dynamic Translation is not installed, the option for machine translation is not available.

On a spoke instance:

1. Navigate to the **Settings All Artifacts** table [sn_lf_setting].
2. In the tab **Translation Preferences**, find the **Translation Management System** (TMS) section.
   - **Enable TMS**: select.
   - **TMS**: Set to `Localization Framework Hub`.
   - **TMS Additional Info**: for **spokeSettingsName**, enter the name of the connection setting that has been configured on the hub.
3. Navigate to the **Connection & Credential Aliases** table. Find and open the record named *`Localization Framework`* **Hub TMS**.
4. Add the connection to the hub in the **Connections** tab. You can enter the URL to your hub in the **Connection URL** field. Set authentication and other attributes appropriate to your environment.

From the perspective of the spoke instance, the hub acts as a TMS. The application scope for the Hub and Spoke architecture is Localization Framework Hub.

Request translations

The Localization Framework provides the means to select one or more activated languages while requesting translations for artifacts from English into different languages.

Request translations in the Localization Framework

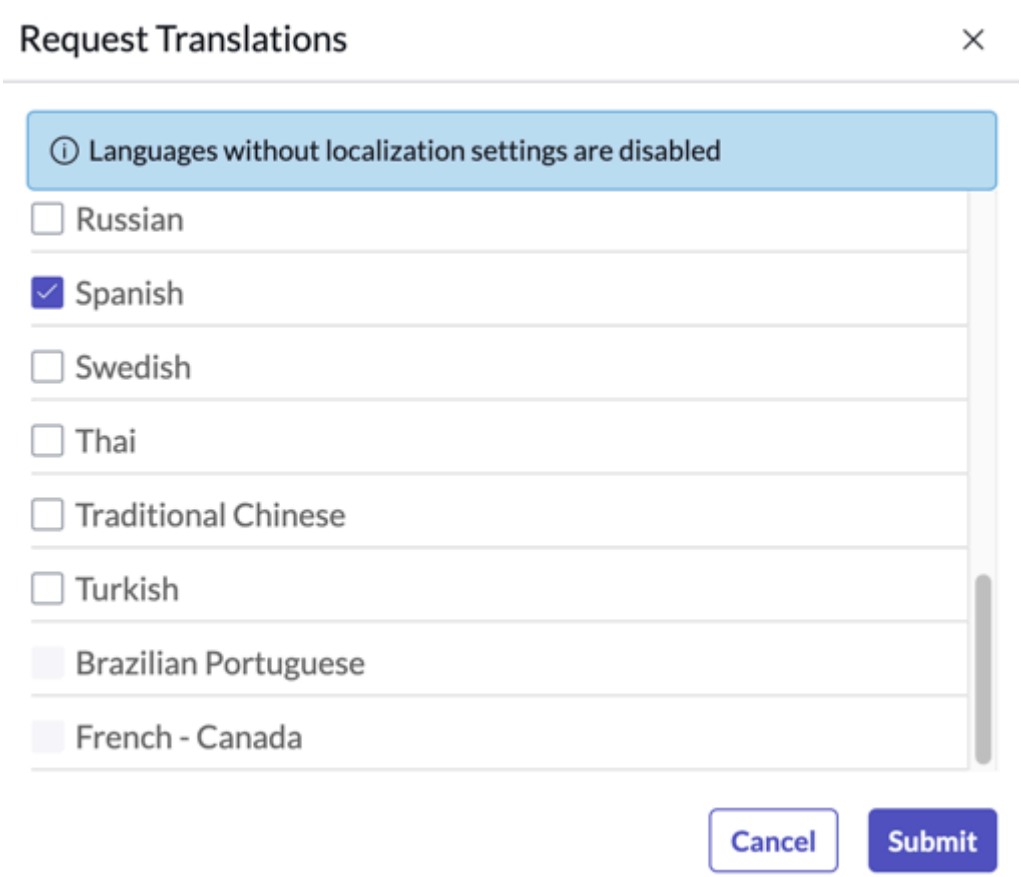
- Define localization preferences for the languages available in the instance to request translations.
- Lists only the activated languages in the instance to choose for localization of the content.

  Note: Before you request for translations, ensure to activate all the required languages in the instance. For more information, see Activate a language.

- Displays the translation status for each activated language only if translations have been requested for insights in those languages. The translation status is updated when the insights dashboard is generated.
- Enables you to request translations from English into the selected language from the localization dashboard for the selected insights records.
- Enables you to request translations for insights from English into one or more activated languages from their respective tables.

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Request translations from an artifact table



Note: Languages without localization settings are disabled for selection while requesting translations.

Request translations

The Localization Framework enables you to select one or more activated languages while requesting translations for artifacts.

Request translations in the Localization Framework

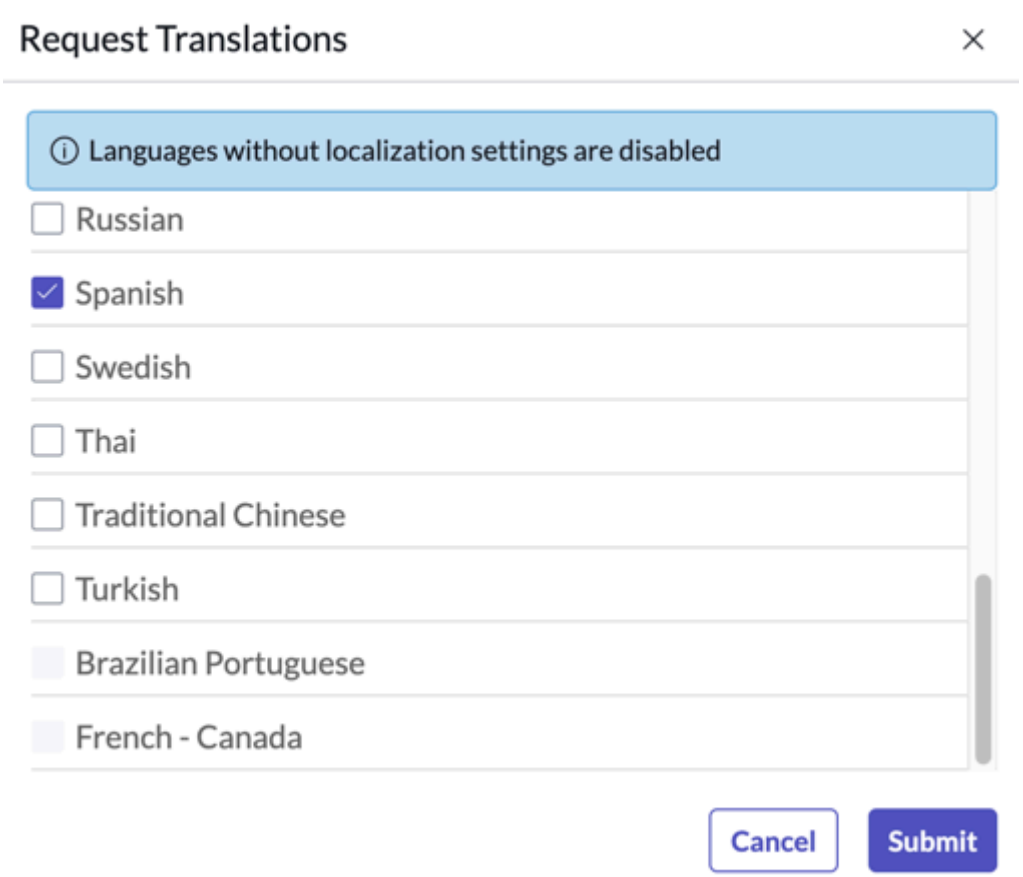
- Define localization preferences for the languages available in the instance to request translations.
- Lists only the activated languages in the instance to choose for localization of the content.

  Note: Before you request for translations, ensure to activate all the required languages in the instance. For more information, see Activate a language.

- Displays the translation status for each activated language only if translations have been requested for insights in those languages. The translation status is updated when the insights dashboard is generated.
- Enables you to request translations in the selected language from the localization dashboard for the selected insights records.
- Enables you to request translations for insights into one or more activated languages from their respective tables.

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Request translations from an artifact table



Note: Languages without localization settings are disabled for selection while requesting translations.

Related topics

Fulfill a localization task

Approve a localization task

Request translations for Service Catalog items

Request translations for multiple Service Catalog items to localize them from English into one or more languages.

Before you begin

Roles required:

- localization_requestor: To request translations
- catalog_admin: To access the Service Catalog items [sc_cat_item] table.
- catalog_editor (or catalog_manager) if you are the editor or manager of the item that is being translated: To access the Service Catalog items [sc_cat_item] table.

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Items**.
2. Select single or multiple items from the list or select the **Select All** check box.
3. From the **Actions on selected rows** drop-down list, select **Request Translations**.

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4. In the **Request Translations** dialog box, select the languages.
5. Select **Submit**.
   Localization requested items (LRITMs) are created for the selected items in all the selected languages. A success message with a link to the list of requested items is displayed. Click the link to see the list of requested items.

Request adhoc translation for Service Catalog items

Request adhoc translations for Service Catalog items to localize them from English into one or more languages using the edit translations option. After you make the changes, you can publish the translations.

Before you begin

The Localization Framework for Service Catalog plugin [com.glide.localization_framework.service_catalog] must be installed for the Edit Translations button to appear on the service catalog form.

Roles required:

- localization_editor: To request translations
- catalog_admin: To access the Service Catalog items [sc_cat_item] table.
- catalog_editor (or catalog_manager) if you are the editor or manager of the item that is being translated: To access the Service Catalog items [sc_cat_item] table.

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Items**.
2. Select the item for which you want to request adhoc translations.
3. Click **Edit Translations**.
   The adhoc comparison UI of Localization Framework is displayed.
4. On the adhoc comparison UI of Localization Framework, you can use the followings options.

Option	Description
Machine Translations	Translate the catalog items using machine translations. You must configure machine translations in Localization Framework set tings to use this option. For more information about machine translation, see Create a trans lator configuration.
Export Source File	Option to export files for translation. To export files, click **Export Source File**, choose the file type, and then click **Export File**.
Import Source File	Option to import translated files to update the translation. To import files, from the **Ex port Source File** list, select **Import Translat ed File**.

Note:

The options displayed on the adhoc comparison UI of Localization Framework are based on the Localization Framework **Settings**.

5. After your changes are completed, click **Publish Translations**.

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Create translation projects

The Localization Framework provides the means to assemble, manage, and complete localization and translation tasks, from single item assignments to large batch projects.

The **Localization Projects** feature enable users to bundle multiple localization request items (LRITMs) under one project. This allows bulk translation of requested items, thereby increasing the efficiency of the process. To work with Localization Projects, the feature needs to be enabled in Localization settings. A user with localization_manager role can enable the feature in Localization settings.

Localization tasks are not created automatically. The localization manager adds the requested items to a project and starts the project. All the requested items are then bundled under the localization tasks.

You can also automatically create a localization projects by enabling the **Enable auto creation** option in the Localization Framework settings. A localization project is auto created and the corresponding LRITMs are created, bundled, and added to the localization project. For more information, see Configure the Localization Framework preferences.

Each localization task has one or more requested items and is grouped in the following sequence:

1. Localization Framework **settings**: All the requested items are first grouped based on LF settings.
2. Source language: After the requested items are grouped according to the settings, then same source languages are bundled under one localization task.
3. Group of 150 requested items: If the number of requested items for a source language is more than 150, then for every group of 150 requested items, one localization task is created.

Create a localization project

Create localization projects to bundle multiple requested items under one localization task.

Before you begin

Enable Localization Projects in Localization Framework settings.

Role required: localization_manager

Procedure

1. Navigate to **All** > **Localization Framework** > **My Projects**.
2. Select **New**.
3. On the form, fill in the fields.

Localization Project

Field	Description
Number	Unique project number.
State	Current state of the project. Automatically it is set to **Draft**.
Assigned to	Person to whom this project is assigned to.
Assignment group	Group of the assigned person.
Short Description	Brief description of the project.

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Field	Description
Work Notes	Notes regarding the project.
Additional comments (Customer Visible)	Notes that are visible to the customer.

4. Select **Submit**.

Add localization requested items to a project

Add multiple localization requested items (LRITMs) to a localization project so fulfillers can translate the items in bulk.

Before you begin

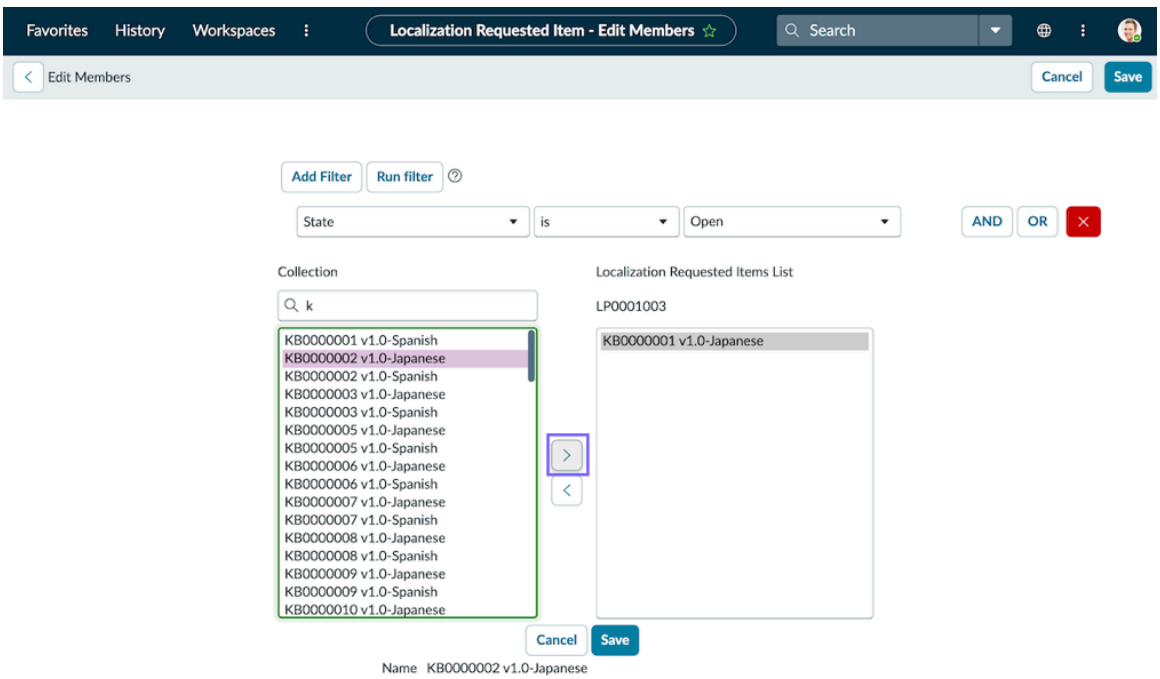
- Confirm that your localization project [sn_lf_project] is in the Draft state.
- Check the availability of your localization requested items by confirming that they are in the Open state. You can check by navigating to the table Localization Requested Items [sn_lf_requested_item]. Also, any items currently attached to another project might not be available for this procedure.
- Role required: localization_manager.

Procedure

1. Navigate to **All** > **Localization Framework** > **My Projects** [sn_lf_project].
2. Open the localization project to which you want to add requested items.
3. On the Localization Project record, select the **Localization Requested Items** tab from the related list.
4. Select **Edit**.

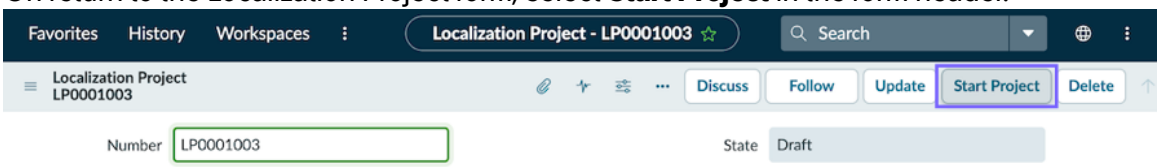
   Note: The Edit button is visible only when a project is in the **Draft** state.

5. **Optional:** Adjust the filter conditions for retrieving localization requested items, then select **Run filter**.



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6. Search for and select localization requested items under **Collection**.
7. Add the selected items to **Localization Requested Items List** using the right arrow icon.
8. Select **Save**.
9. On return to the Localization Project form, select **Start Project** in the form header.



The state of the project is changed to **In progress** and one or more Localization tasks are created based on settings and requested items.

After you start the project, you can't add more items to it.

Fulfill a localization task

Fulfill a localization task created for each selected language in the translation request.

Before you begin

Role required: localization_fulfiller

Procedure

1. Navigate to **All** > **Localization Framework** > **My Tasks**.
2. Select a localization task in the Open state.
3. On the Localization Task page, select **Translate** in the form header.

   Note: The **Translate** UI action is visible in all states except Awaiting Business Approval, Close Complete, and Incomplete.

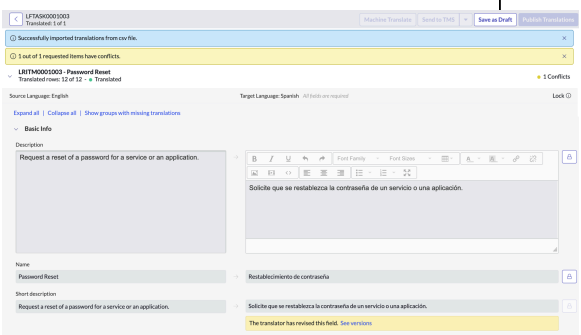
   A two-column comparison UI page opens with the Source Language column on the left and the Target Language column on the right.

   Each Localization requested item has the following options:

   - **Expand all**: Expand all the groups on the comparison UI.
   - **Collapse all**: Collapse all the groups on the comparison UI.
   - **Show groups with missing translations**: See only the groups that have missing translations when the content is translated.
4. Translate the content manually or select one of the following translation modes from the task header.

Translation mode	Description
Machine Translate	Translates content using the translation service provider configured in the translation preferences. If there is more than one LRITM, then the operation is asynchronous.
Send to TMS	Sends the artifact to the translation management system configured in translation preferences for translation. If there are more than is LRITM, then the operation is asynchronous.

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Translation mode	Description
Export Source File	Exports the source file for translation in the file format configured in the translation preferences or as per the selected file format in the comparison UI.
Import Translated File	Imports the translated file in the file format configured in the translation preferences from the third-party translator. A merge conflict occurs when you have certain fields pre-populated with translations, but those fields get updated when you import the translated file. These conflicts are shown right below the fields updated with the latest translations.  To resolve the merge conflict, do the following: **a.** Click **See versions**. **b.** Choose a version that you want to retain. **c.** Click **Save**.
Send Source File via Email	Sends the source file to the email addresses configured in translation preferences for translation. If there is more than one LRITM, then the operation is asynchronous.

Note: When any translation mode is selected to translate the content, the content is saved as a draft to retain changes done by the user and then the translation process is initiated.

5. **Optional:** If you want to make any changes to the verified translations, click the lock icon ( ) beside the field with verified translations.
   Verified translations are pre-existing translations available in the database for the given text. The framework automatically fetches the existing translations and locks the fields.
6. **Optional:** Save the translated content by clicking **Save as Draft**.
   You can later revisit the content or send the content for translation approval.

   (Optional) This option moves the task state to Translation in Progress.
7. Click **Submit for Approval**.

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Note: This option is available only for tasks where the workflow configured for the target language needs translation approval.

The task is sent for translation approval.

8. Click **Publish Translations**.

Note: This option is available only for tasks where the workflow configured for the target language has the **Publish** option.

Result

The translations of the localization task are published and the task is updated with the Closed Complete state.

You can move translation records across instances by using update sets. The translation-related XML files are saved to the update set specified in the settings. For more information, see Localization Framework Properties: Update Set Strategies.

Approve a localization task

Proofread the translated content and approve a localization task.

Before you begin

Role required: localization_fulfiller

Procedure

1. Navigate to **All** > **Localization Framework** > **My Tasks**.
2. Select a localization task in the **Open**state.
3. Select **Translate**.
   A list of all the requested items with the translation status is displayed. You can expand each requested item to see the details.
4. Select **Submit For Approval**.
   The state of the localization task is changed to **Under Review**. An approval localization task is created and assigned to an approver according to the approver group assigned in localization settings.
5. Select to open the approval localization task record.
   The state of the approval localization task is set to **Requested**.
6. From the form header, select **Verify Translations**.
   A list of all the requested items is displayed. Each requested expands to display the comparison UI.
7. On the form header, select **Approve**.
   All the translations are published and the states of the requested items, localization task, and the localization project is changed to **Closed Complete**.
8. On the form header, select **Request Changes** if you want to reject the translations.
   The approval localization task state is changed to **Rejected**. The requester needs to create another approval task and assign to the approval group.

Monitor the Localization Framework

Track localization performance and request translations with Localization Framework Dashboards.

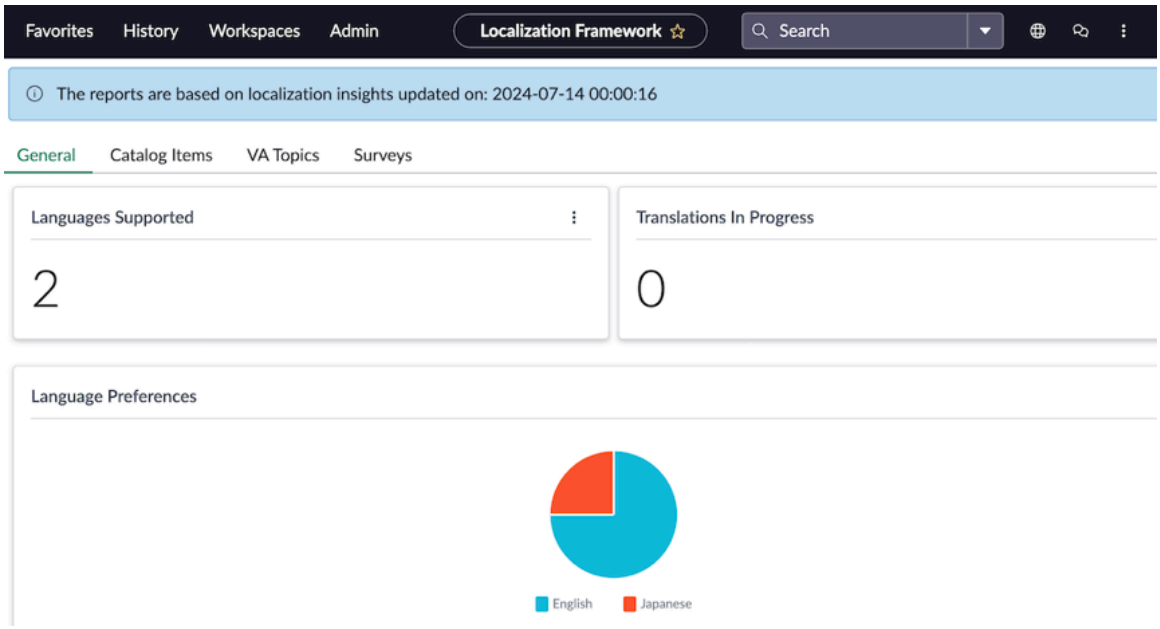
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Localization Insights dashboard

The Localization Insights dashboard provides reports on translations, grouped into tabs by artifact type. The reports are generated by scheduled jobs based on Localization Insights records.

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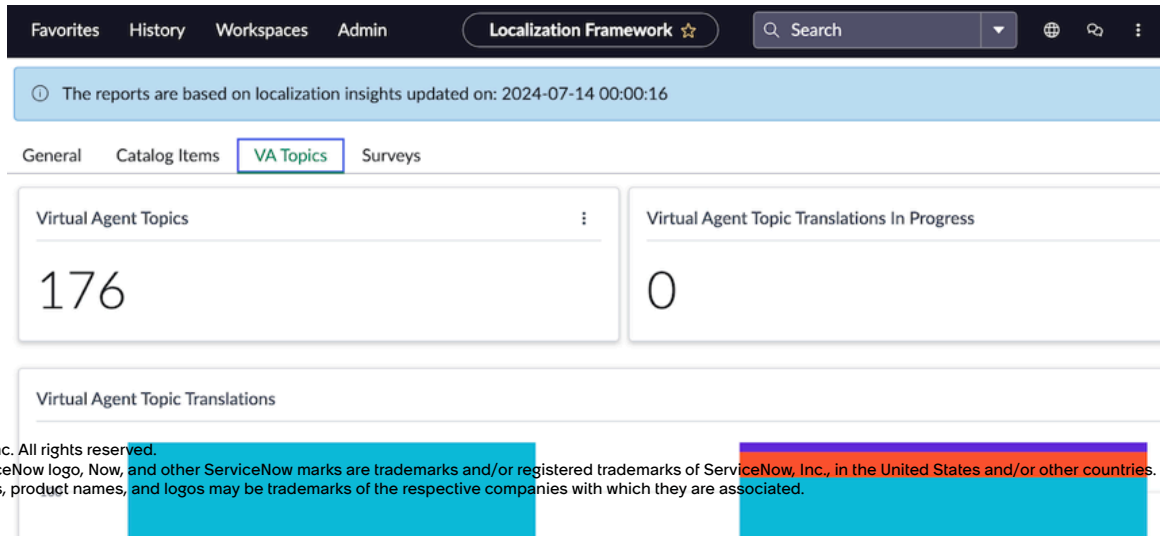
Localization Insights dashboard



- Access the dashboard by navigating to **All** > **Localization Framework** > **Insights Dashboard**.

> **Note:** In the Xanadu release, the Localization Insights dashboard is migrated to the Next Experience UI. Customers with existing dashboards who want to access the Core UI version can use this URL: `https://<instance name>.service-now.com/$pa_dashboard.do?sysparm_dashboard=6c7634c2732310103951 08b24ff6a7f6`.

- A banner on the Localization Insights dashboard shows the most recent update time of the reports.
- In Scheduled Jobs, you can configure the report update schedule (sn_lf_GenerateLocalizationInsightsRecords) by selecting **Configure Job Definition** under Related Links.
- The dashboard organizes artifact types into the following tabs:
  - General: Displays general translation information.
  - Catalog Items: Displays translation information related to Service Catalog items.
  - VA Topics: Displays translation information related to Virtual Agent (VA) topics.
  - Surveys: Displays translation information related to Surveys.



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Required ServiceNow AI Platform role

You need the localization_admin or localization_requestor role to access the Localization Insights (sn_lf_insight) records for executing the scheduled jobs to generate the Localization Insights dashboard.

Use case

User	Dashboard use
Users with the localization_requester or localization_admin roles	View the status of localization requests. Make translation requests for your artifacts from the Localization Insights dashboard. For more information see Request translations from Insights Dashboard.

Data visualizations

Title	Type	Source table	Description
Languages Supported	Single Score	sys_language	The total number of activated languages in the instance.
Translations In Progress	Single Score	sn_lf_insight	The total number of translations in progress in the instance.
Language Preferences	Horizontal Bar	localization_insights_view	Provides information about the preferred languages of logged-in users.
Catalog Items	Single Score	sn_lf_insight	The total number of Service Catalog items in the instance.
Catalog Items Translation In Progress	Single Score	sn_lf_insight	The total number of Service Catalog items translations in progress in the instance.
Catalog Item Translations	Vertical Bar	sn_lf_insight	The total number of Service Catalog items requested for translations per language. It also indicates the following translation statuses with defined color legends:

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Title	Type	Source table	Description
			• **Completely Translated** • **Translation in Progress** • **Partially Translated** • **Not Translated**
Virtual Agent Topics	Single Score	sn_lf_insight	The total number of published Virtual Agent topics in the instance.
Virtual Agent Topic Translation In Progress	Single Score	sn_lf_insight	The total number of Virtual Agent topic translations in progress in the instance.
Virtual Agent Topic Translations	Vertical Bar	sn_lf_insight	The total number of published Virtual Agent topics requested for translations per language. It also indicates the following translation statuses with defined color legends: • **Completely Translated** • **Translation in Progress** • **Partially Translated** • **Not Translated**
Surveys	Single Score		The total number of surveys in the instance.
Surveys Translation In Progress	Single Score		The total number of survey translations in progress in the instance.
Survey Translations	Vertical Bar		The total number of surveys requested for translations per language. It also indicates the following translation statuses with defined color legends:

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Title	Type	Source table	Description
			• **Completely Translated** • **Translation in Progress** • **Partially Translated** • **Not Translated**

Request translations from Insights Dashboard

Request translations for Service Catalog items or Virtual Agent topics from the insights dashboard to localize them into the selected language based on their translation status.

Before you begin

Role required: localization_admin or localization_requestor

Procedure

1. Navigate to **All** > **Localization Framework** > **Insights Dashboard**.

   The dashboard provides **Catalog Items Translations** report and **Virtual Agent Topic Translations** report by default using which you can request translations.

   If you have created a report for your custom artifact to display in the dashboard, you can also request translations for the custom artifacts. For more information, see Create a report for custom artifact.

2. In the **Catalog Items Translations** report or **Virtual Agent Topic Translations** report, click the vertical bar of the language into which you want to request translations.
   For example:
   - Select a language from the **Catalog Items Translations** report to request translations for the Service Catalog items in that language.
   - Select a language from the **Virtual Agent Topic Translations** report to request translations for the Virtual Agent topics in that language.
   - If you have a custom report created for an artifact, select a language from that report to request translations into the selected language.
3. Select one or more documents from the localization insights list.
   - You can click the **Select All** check box to request translations for all the items in the list.
4. From the **Actions on selected rows** list, select **Request Translations**.
5. Click **OK** in the Confirmation dialog box to submit the request.

Localization Framework reference

Reference topics provide information on components and technical aspects of the Localization Framework.

Translation modes

Localization Framework offers several translation modes for completing localization tasks. As a localization admin, you can select one or more of these modes when configuring the procedures for localization tasks.

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Overview of translation modes in Localization Framework

Translation modes available to localization tasks include machine translation, translation management systems (TMS), send via email, and export/import. These modes apply to localization tasks that are not fulfilled manually, so they are described as Auto Translation.

As a localization admin, you can configure these modes when configuring localization tasks in the Settings [sn_lf_setting] table's web form. The modes that you enable and configure in the **Translation Preferences** tab become options for selection in the **Workflow Preferences** tab, under **Auto translation mode**.

- Before starting configuration of Translation Preferences in Settings, finish any applicable prerequisites such as setting up a machine translator service or TMS, enabling file formats for email, and so forth.
- Complete Translation Preferences in Settings before configuring the next tab, **Workflow Preferences**.

These translation modes also constrain the methods available to translation requests in Localization Workspace. Translation modes must be enabled in Localization Framework before they are available in the translation request wizard of Localization Workspace.

Machine Translation

Machine translation in Localization Framework is powered by Dynamic Translation.

Activate the required translation service provider in the instance to machine translate the content. For information, see Integration with other translation services.

Translation Management System

Localization Framework integrates with third-party Translation Management Systems (TMS) to localize the content.

RWS and XTM Translation Management Systems are supported by default and require configuration. For more information see, Configure RWS TMS in the Localization Framework and Configure XTM TMS in the Localization Framework.

Alternatively, you can configure a custom TMS of your choice. For more information, see Create a custom translation management system.

When the Localization Framework Hub and Spoke architecture is installed, the TMS must be configured accordingly. For more information, see Localization Framework Hub and Spoke architecture.

Zip attachments must be supported on the instance. For details on attachment configuration, see Configure system attachment properties.

Send via Email

Localization Framework provides **Send via Email** as a translation mode that can be used to send content for translation.

If you have more than one requested item in a task, then the requested CSV or XLIFF items are compressed into one ZIP file and attached to the email. Either the CSV or XLIFF attachment format must be supported on the instance. For details on attachment configuration, see Configure system attachment properties.

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Export/Import

Localization Framework supports the following translation modes:

- **Export**: Export the translatable content for translation to a TMS service. If you have more than one requested item in a task, the individual CSV or XLIFF files are compressed and downloaded as one zip file.
- **Import**: Import the translated content from a TMS service. If you have more than one requested item in the task, you can import individual CSV or XLIFF files or in a ZIP format. Any files unrelated to the task are skipped.

Either the CSV or the XLIFF attachment format must be supported on the instance. For details on attachment configuration, see Configure system attachment properties.

Related topics

Requesting translations in Localization Workspace

Translation Management System configurations

States of Localization Framework projects and tasks

In Localization Framework, the state of a localization project or of a task defines the status of the localization request. The states of the localization tasks change based on the workflow that is configured for translations.

Localization Framework Project States

State	Definition
Draft	Initial state when the localization project is created.
In progress	State when the localization project starts.
Closed Complete	State when all the tasks are closed complete.
Closed Incomplete	State when at least one of the tasks is closed incomplete.

Localization Framework Task States

State	Definition
Awaiting Business Approval	Localization task is awaiting business approval.
Error in Translation	Localization task has encountered an error while translating the content.
Closed Complete	Localization task has been fulfilled and the translations are published.
Closed Incomplete	Localization task has been closed without fulfilling the request.
Open	Localization tasks are not sent for translation.
In Progress	Translation of localization tasks is in progress.
Under Review	Approver is reviewing the translations.

Related topics

Localization Workspace Home and translation job status

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Error messages in the Localization Framework

Error messages are displayed when the appropriate settings are not configured for the translation and workflow preferences.

Error messages in Artifact Configurations

Error message	Scenario
Internal name cannot be modified for the existing record.	When someone tries to modify the internal name of the existing artifact record.
Either a Processor script or a Read script is required for an active artifact configuration	When there is no processor script or read script available for the artifact configuration record.
A configuration record exists for the table: {table_name}	When you provide a table name for an artifact configuration record that exists for another artifact.
A configuration record exists with internal name: {internal_name}	When you provide an internal name for an artifact configuration record that exists for another artifact.

Error messages in Settings

Error message	Scenario
Contains invalid Email Address(es): {comma-separated email addresses}.	When some of the email addresses fail the validation.
Selected Localization Fulfiller group does not have localization_fulfiller role.	When the selected user group does not have the localization_fulfiller role.
Selected Business Approver group does not have localization_fulfiller role.	When the selected user group doesn't have the localization_fulfiller role.
Selected Translation Approver group does not have localization_fulfiller role.	When the selected user group does not have the localization_fulfiller role.
Ensure that the corresponding translation preference for your auto translation option is enabled.	When auto translate is selected in the workflow preference.
{Translator_name} translator is not of version v3.	When the corresponding translator version is not v3.
{Translator_name} translator has no translate subflow configured.	When the corresponding translator's translate subflow is empty.
Selected translator is not active.	When the corresponding translator configuration is inactive.
There are no languages available for the selected artifact. All the possible languages were configured in other localization setting records.	A warning message when there are no languages available for the selected artifact.
A setting record exists for the artifact - language pair(s): {pair of artifact and language}. Resolve the conflict(s) to proceed.	When a user tries to add a language or artifact in settings and that record exists in another record.
The Default recipient(s) list contains invalid email address(es): {comma_separated_email_adddresses}.	When the provided email addresses of the recipients are invalid.

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Error messages in Settings (continued)

Error message	Scenario
{0} translator is not active.	When the translator is not active.

Error messages in Request Translations

Error message	Scenario
Your request for translations failed. Please reinitiate the request.	When there is an error in submitting the translation request.
Error in requesting translations for the following artifact item and language pair(s): {pair of artifact and language}. Reinitiate the request for the listed pairs.	Error is seen only on the list view when there is an error requesting translations for certain language pair(s): {pair of artifact and language}.

Error messages in the Comparison UI

Error message	Scenario
Machine Translate	
Failed to machine translate using {translator name}. {Reason for failure}. **Note:** The reason is fetched from Dynamic Translation.	This message appears in two scenarios: • Error message shown in the comparison UI for machine translation. • Message logged in the activity stream when failed to machine translate the content.
Failed to machine translate using {translator name}. Translations for one or more fields have failed.	This message appears in two scenarios: • Error message shown in the comparison UI when translations for one or more fields fail. • Message logged in the activity stream when translations for one or more fields fail.
Failed to machine translate.	Error message shown in the comparison UI in case the call for machine translate fails.
Error while saving the draft. Contact your system administrator.	Error message shown in the comparison UI when content that is requested for translation, is not saved as a draft message successfully. For any translation mode selected to translate the content, the content is saved as a draft to retain changes done by user and then the translation process is initiated.
Send via Email	
Failed to send source file via email to: {email addresses}.	Message logged in the activity stream when sending source file via email fails.
Failed to send email.	This error message appears in two scenarios:

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Error messages in the Comparison UI (continued)

Error message	Scenario
Machine Translate	
	• Error message persisted and shown in the comparison UI when sending the source file via email fails. • Error message shown in the comparison UI in case the call for sending email fails.
Following are the invalid email addresses: {comma separated invalid email addresses}, please try again.	When one of the email addresses provided are incorrect while sending via email.
Send to TMS	
Error while sending the task to {tms name} TMS for translation. {Reason for failure}.	This error message appears in two scenarios: • Message logged in the activity stream when sending translatable content to TMS fails. • Error message persisted and shown in the comparison UI when sending translatable content to TMS fails.
Failed to send to TMS.	Error message shown in the comparison UI in case the call for sending translatable content to TMS fails.
A record related to {0} exists.	when you try to create another TMS with the same name.
Retrieval from TMS	
Failed to retrieve translations from {tms name} TMS. {Reason for failure}.	This error appears in two scenarios: • Message logged in the activity stream when retrieving translations from XTM TMS fails. • Error message persisted and shown in the comparison UI when retrieving translations from XTM TMS fails.
Failed to retrieve translations from {tms name} TMS.	Error message shown in the comparison UI in case the call for retrieving translations from XTM TMS fails.
Export Source File	
Failed to export the {CSV/XLIFF} file. {Reason for failure}.	This error message appears in two scenarios: • Error message persisted and shown in the comparison UI when exporting the source file for translations fails. • Message logged in the activity stream when exporting the source file for translations fails.
Failed to export file.	Error message shown in the comparison UI in case the call for exporting the source file for translation fails.
Import Translated File	

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Error messages in the Comparison UI (continued)

Error message	Scenario
Machine Translate	
Failed to import translations from {CSV/XLIFF} file. {Reason for failure}.	This message appears in two scenarios: • Message logged in the activity stream when importing the translated file fails. • Error message persisted and shown in the comparison UI when importing the translated file fails.
Import failed.	Error message shown in the comparison UI in case the call for importing the translated file fails.
Failed to publish translations.	When failed to publish the translations.
Save as Draft	
Error while creating the draft.	When there is an error after clicking Save as draft.
Approve Translations	
Error while requesting for changes.	When an error occurs while an approver requests changes for the translations.
Publish Translations	
Error in publishing the translations.	When attempting to translate content that has already been translated.
Error while submitting the translations.	When publishing translations or when sending translations for approval.

Error messages in Insights

Error message	Scenario
Insights generation job is already running, please try again later	When you try to generate the insights record multiple times.
Your request for translations failed for the selected insights. Click here to see the list of insights for failed requests and reinitiate the request.	Lists the insights records for which it failed to request translations.
Localization setting does not exist for the following table and language pair(s): {pair of table name and language}. Uncheck the record(s) of the mentioned pair(s) and resubmit.	Lists the language pair(s): {pair of table name and language} for which a settings record does not exist.

Localization Workspace

Localization Workspace is a targeted translation management experience for content owners and translation requesters. With Localization Workspace you can manage and deliver multilingual content at scale.

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Get started

Explore  Explore Localization Workspace	Configure  Configure Localization Workspace
Use  Learn how to use Localization Workspace to request translations.	Reference  Get details about Localization Workspace such as Domain Separation support and what types of content can be localized.

Helpful resources

Some ServiceNow resources that can provide you with helpful information are:

ServiceNow Community

- Localization Workspace
- Getting started with Localization Workspace
- Internationalization and Localization
- Language Support Guide
- Localization Workspace updates

Exploring Localization Workspace

Localization Workspace is a targeted translation management experience for content owners and translation requesters. With Localization Workspace you can manage and deliver multilingual content at scale.

Localization Workspace overview

Localization Workspace contains all the components and data a Localization manager needs to understand and manage which content types and activities are required to complete translations. It streamlines and automates task creation and translation workflows.

In the initial release, Localization Workspace supports translation requests when the sources are English and the targets are non-English languages. Translation requests for non-English texts (into any language including English) are not currently supported.

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After configuration, translation requests follow a translation workflow through a Translation Management System (TMS) or a machine translation (MT) service. Localization Workspace leverages the project bundling capabilities of Localization Framework.

Localization Workspace is available for on-premise (self-hosted) customers. It has not been certified for regulated markets.

Localization Workspace users

Users

User	Description
Localization administrator	localization_admin
Localization editor	localization_editor
Localization fulfiller	localization_fulfiller
Localization manager	localization_manager
Localization requester	localization_requestor
Localization Workspace user	sn_lw.user
Terminology Manager	sn_lw.terminology_manager

For more information see Localization Workspace Roles.

Localization Workspace benefits

Localization Workspace benefits

Benefit	Feature	Users
Submit and manage translation requests from a single interface.	Localization Workspace enables you to request translations into multiple languages, using multiple different providers.	Localization Workspace user.
Select multiple types of content for translation.	When you select types of content to translate, Localization Workspace automatically identifies and collects all untranslated or partially translated content in scope.	Localization Workspace user.
Generate an informational cost estimate.	Informational cost estimates enable you to plan and control your localization budget.	Localization Workspace user.

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What to explore next

To learn more about setting up and using Localization Workspace, see:

- Configuring Localization Workspace
- Requesting translations in Localization Workspace
- Localization Workspace reference

Localization Workspace Home and translation job status

Start a translation request and monitor the current status of your translation requests from the Localization Workspace Home screen.

Overview of Localization Workspace Home

The Home screen of Localization Workspace is where you can launch a new translation request using the **Request translation** button.

Also you can track and manage the progress of translation requests in the Home screen's **My Requests** list.

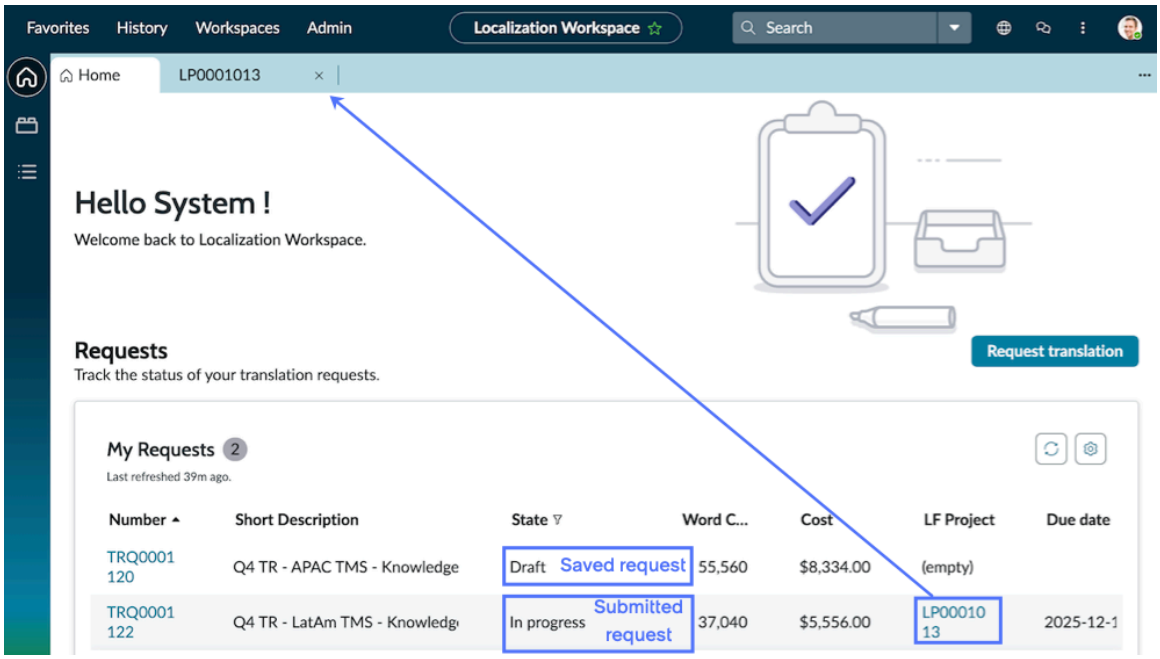
- Get an overview of a request, including due date and status, at a glance.
- Open the Translation Request Details window from the request's Number.
- Archive a closed request, delete a draft request, or cancel an in-progress request from the **Action** column.

Guided Tours available from Help Center on Home

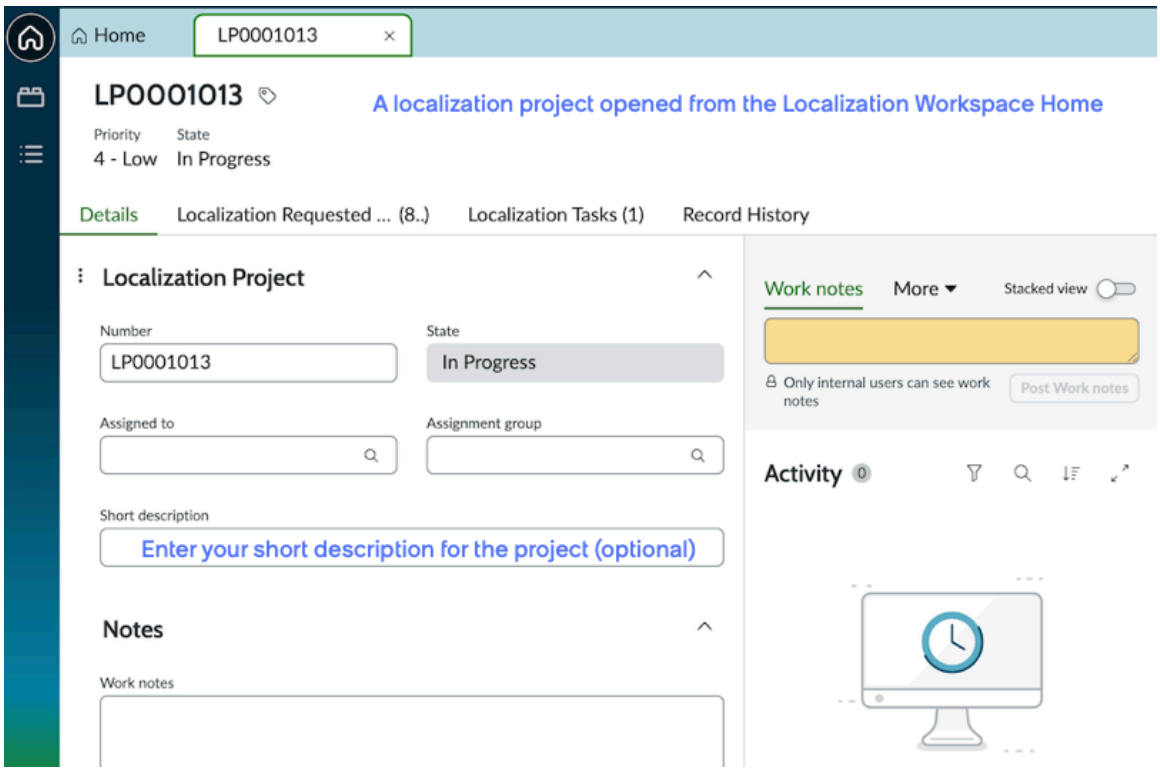
From version 3.0.0, two guided tours are available. One guided tour assists with configuring a language provider, and is accessible to users with the Localization administrator role (localization_admin). The other guided tour assists with configuring language groups, and is accessible to the Localization admin (localization_admin) and Localization requester (localization_requestor) roles. Find the guided tours by selecting the Help Center icon on the Home screen.

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Projects



Localization Workspace extends and builds on projects in Localization Framework. When you create a translation request, the system creates a project in Localization Framework for you. You can open a tab for the translation request's project by selecting the **LF Project** number from the Requests list.



In the Localization Project tab you can drill down into project components such as Localization Tasks. You can fulfill a localization task using the **Translate** button in a Localization Task tab, when the project state is In Progress.

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Any update you make here in Localization Workspace is saved to the underlying Localization Framework tables. Completed and archived projects can't be updated. For more information, see Fulfill a localization task in the Localization Framework documentation.

Translation request states

The **State** column of **My Requests** is where you can find the status of your translation requests. States in Localization Workspace correspond to Localization Framework projects as follows.

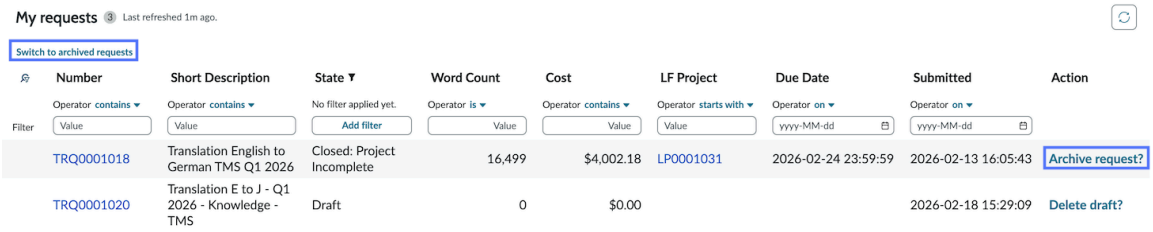
Translation request states in Localization Workspace

State	Description
Draft	The translation request is saved but not submitted. The **Save** button is available in each step of the translation request wizard. Draft requests can be re-opened and updated from My Requests by selecting the value in the Number column. **Action** column: The available action is **Delete draft**. From version 3.0.0. **Note:** Draft requests are not subject to the scheduled job Remove discarded Translation Requests. Corresponding Localization Framework status: Draft.
Submitted	The translation request has been moved to Localization Framework, where the project and its tasks are being created. Corresponding Localization Framework status: (N/A).
In progress	The translation project and its tasks have been successfully created in Localization Framework and sent to the selected translation provider. **Action** column: The available action is **Cancel request**. From version 3.0.0. Corresponding Localization Framework status: In Progress.
Complete	The translation project is complete and all tasks within the project are complete and closed. **Action** column: The available action is **Archive request**. From version 3.0.0. Corresponding Localization Framework status: Closed Complete.
Closed: Project Incomplete	The translation project is incomplete when at least one of the tasks within the project has been marked as closed but isn't complete.From version 3.0.0, when you select Cancel for a translation request, its status displays as Closed: Project Incomplete. **Action** column: The available action is **Archive request**. From version 3.0.0. Corresponding Localization Framework status: Closed Incomplete.

Archiving translation requests

From version 3.0.0 you can optionally archive your translation requests by selecting **Archive request** in the **Action** column. This is a table view of translation requests, so it isn't a status.

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Select the **Switch to archived requests** link to view the list of archived requests. You can return to My Requests by selecting the link **Switch to my requests**.

- Only requests in a state of Complete or Closed: Incomplete can be archived.
- Archived requests are maintained indefinitely. They are not subject to the scheduled job Remove discarded Translation Requests.
- **Action** column: After archiving, selecting **Unarchive request** moves the row back to My Requests.
- Archived requests are read-only, so they can't be reopened or edited.

Translation request details

You can open a modal window displaying details about your translation request by selecting the value in the **Number** column. From version 3.0.0, the details window displays the request's translation method. Possible values are TMS, MT (machine translation), or Mixed.

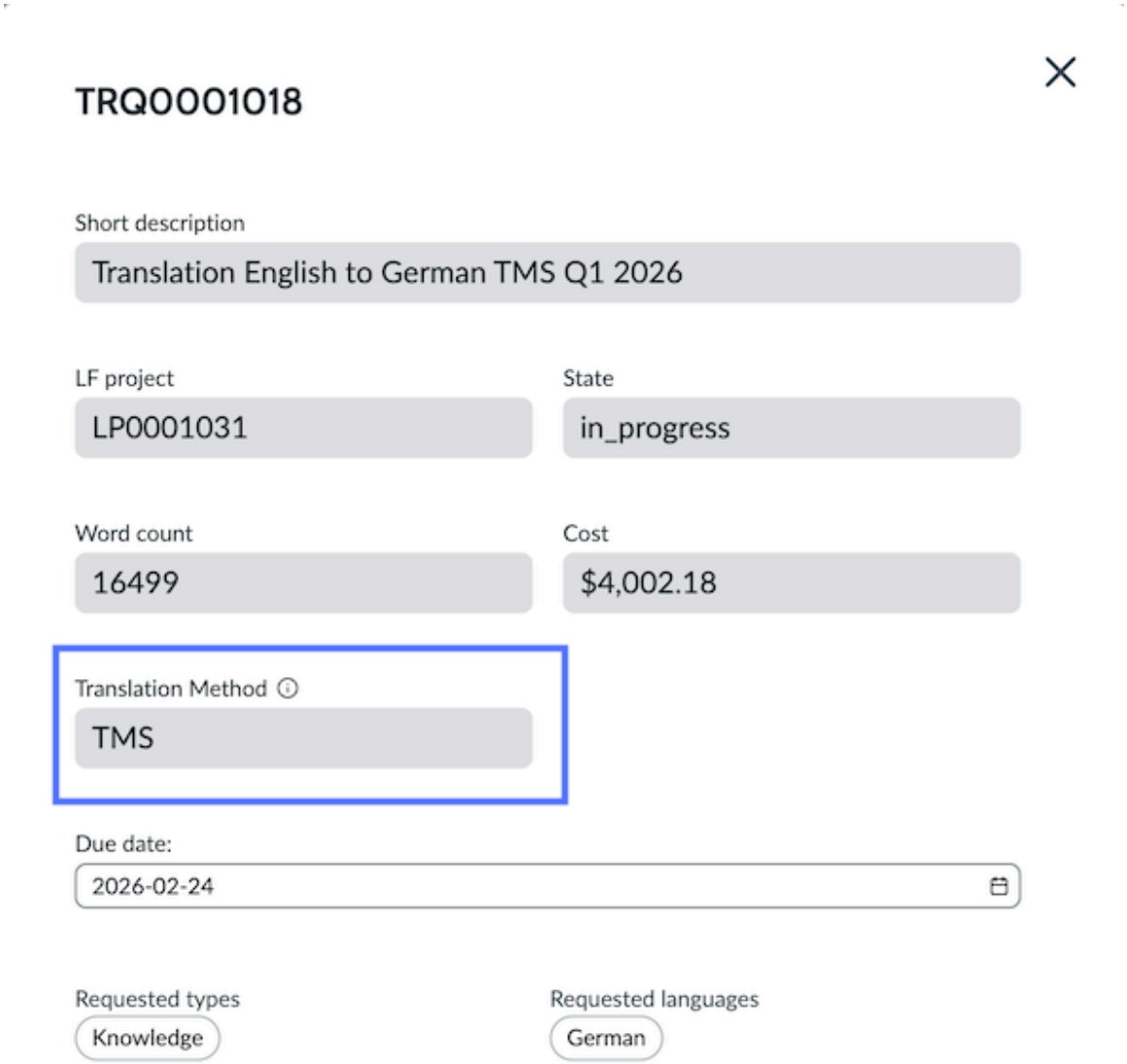
Also in the details window you can modify the Due date for requests that are handled by a TMS. Select the Due date field to open a calendar picker.

- The Due date field is available after the translation request's project is fully created.
- Due dates can be postponed to a later date, but can't be moved to an earlier date.

After modifying the date, select Update to save the new date, or Cancel to abandon the modification.

Note: Notify your third-party providers directly regarding any changes to due dates.

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The display of Cost in the My Requests list

When displayed in the Requests list, the Cost uses a rate rounded up to the decimal place that is set in your Display Value Currency field. However, the base calculation of the informational cost estimate uses the actual rate that you have configured in Localization Workspace. The base calculation does not use the currency's display value. For more information, see Identify the FX Currency field and its display parameters.

Related topics

- States of Localization Framework projects and tasks
- Requesting translations in Localization Workspace

Dynamic artifact detection in Localization Workspace

With Dynamic artifact detection, Localization Workspace identifies all translatable content, including your custom artifacts.

When you create translation requests, your custom artifacts can be selected in the content type stage. All untranslated or partially translated documents in the artifact's table are retrieved and displayed to you.

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To make custom artifacts (content types) available for selection, you must configure them as follows.

- Create your translation artifact in the Artifact Configurations [sn_lf_config] table. For details see Create and configure a custom artifact.
- You must set Cross-scope privileges for your artifact's table and processor script. For information, see Cross-scope privileges for Localization Workspace.
- You may also need to set Restricted Caller Access for artifact resources. For information, see Restricted Caller Access for Localization Workspace.

Some preconfigured artifact types are already available when you install Localization Workspace. For information about translation artifacts that are available by default, see Types of Localizable content in Localization Workspace.

For examples of Localization Framework artifacts that you can set up, see the LF Artifact blog posts list on https://www.servicenow.com/community/international-localization/need-to-translate-a-par-dashboard-check-this/ta-p/2839751 in the ServiceNow Community. These examples include Processor scripts.

Configuring Localization Workspace

Before using Localization Workspace, configure prerequisites, dependencies, and translation service providers.

Configuration overview

Localization Workspace builds on the functionality of other ServiceNow AI Platform applications related to localization. These applications are activated with Localization Workspace if they are not already installed. You must complete the configuration of these applications before configuring Localization Workspace.

Note: From version 2.0.2, the Localization Workspace interface provides two Guided Setups to lead admins through the process of configuration, as follows.

- With the admin role, navigate to *Localization Workspace* > *Localization Framework Guided Setup* for the prerequisite application.
- Next, navigate to *Localization Workspace* > *Localization Workspace Guided Setup*.

After the initial setup, admins can make adjustments to configurations by using the Configuration Hub in Localization Workspace.

1. Install Localization Workspace.

   You can install the application (sn_lw) if you have the admin role. The application installs related applications and plugins if they are not already installed. Check your entitlements to determine whether you have access to Localization Workspace.

2. Configure prerequisites as needed.

   From the Zurich release, access to the Settings table [sn_lf_setting] is configured by default. However, in the Yokohama release, you must confirm access to the Settings table [sn_lf_setting]. The admin role is required for this step. See Confirm access to Settings table.

3. Configure dependencies.

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- Internationalization (i18n) and language plugins: Install language plugins as part of System Localization. Choose your instance's languages according to your business requirements.
- Localization Framework: Configure Localization Framework as follows.

  Assign roles. Localization Workspace uses roles from Localization Framework, along with roles specific to Localization Workspace.

  a. Add Localization Framework roles as needed. See Localization Framework Roles.

  b. Add the Localization Workspace user role sn_lw.user. This role is required for all users in Localization Workspace.

  c. Add the Terminology Manager (sn_lw.terminology) role for working with glossaries in Language Asset Management.

  Create at least one group in the Groups [sys_user_group] table and add roles to the group, then assign your localization users to the appropriate group.

  Configure artifacts. See Artifact configurations.

  > **Note:** The role sn_cd.content_admin is required to see Content Publishing items from Localization Workspace. If your users need to request translations for Content Publishing material, add sn_cd.content_admin to the appropriate group.
  >
  > The sn_cd.content_admin role is different from the content_admin role. From version 3.0.0, the sn_lw.user role contains the content_admin role.

  Configure settings, including for the workflows of translation tasks. See Localization Framework settings. Also on the Localization Framework settings table (sn_lf_settings), in the **Project Preferences** tab, ensure that check boxes are set as follows.

  - **Enable projects**: Selected.
  - **Enable auto creation**: Cleared (unselected).

  Configure a Translation Management System if your organization uses one. See Translation Management System configurations.

- Dynamic Translation: If you use machine translation to fulfill translation requests, configure Dynamic Translation, including setting up a translator configuration. See Integration with other translation services.

4. Configure custom artifacts, if you plan to use your own artifacts in Localization Workspace. See Create and configure a custom artifact.

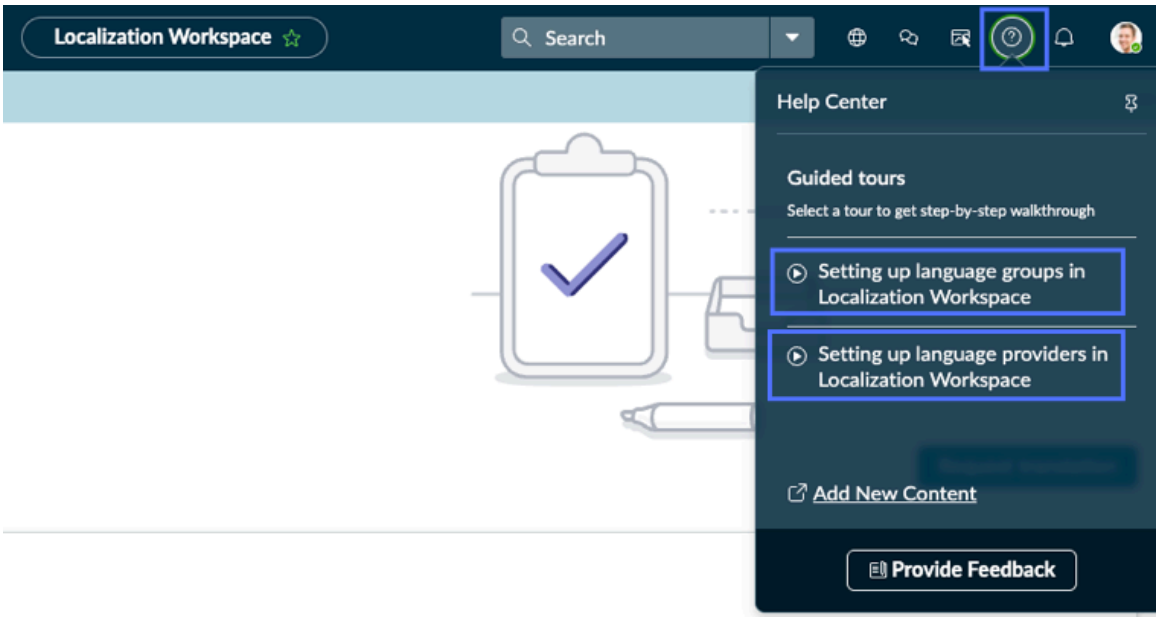
   Set cross-scope access privileges for your artifacts. For more information see Cross-scope privileges for Localization Workspace.

   Set Restricted Caller Access for Localization Workspace to enable access to artifact resources, if needed. The admin role is required for this step. See Restricted Caller Access for Localization Workspace.

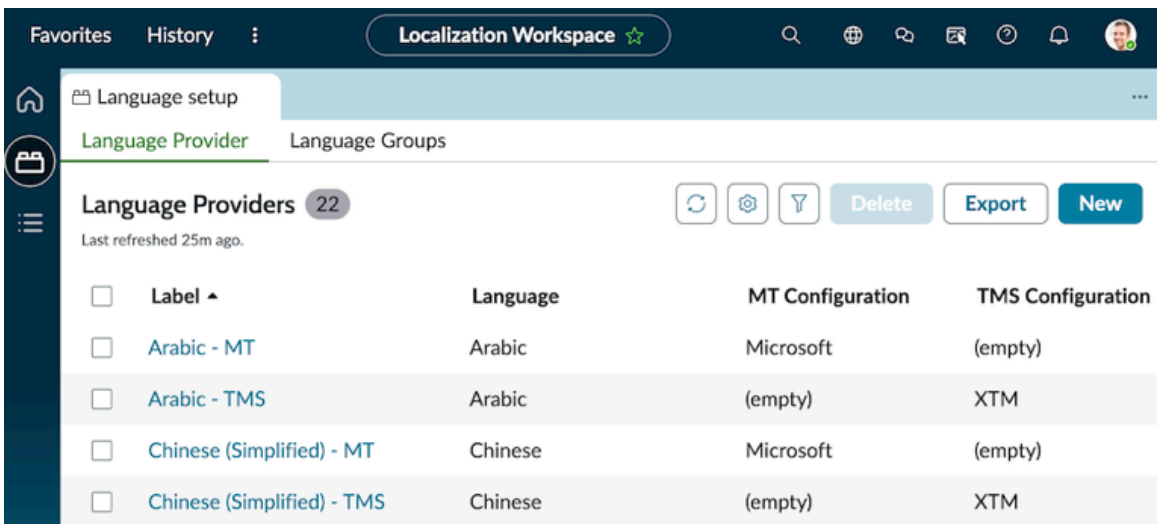
5. Configure languages in Localization Workspace. Language providers in Localization Workspace are different from translator configurations in Dynamic Translation.

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Note: From version 3.0.0, two guided tours are available. One guided tour assists with configuring a language provider, accessible to users with the Localization administrator role (localization_admin). The other guided tour assists with configuring language groups, and is accessible to the Localization administrator role and the Localization requester role (localization_requestor). Find the guided tours by selecting the Help Center icon on the Localization Workspace Home screen.



6. Optionally provide glossaries in Language Asset Management.
7. Optionally activate the Generate Glossary skill if you intend to generate glossaries using AI. From version 4.0. See Globalization Terminology Agent.



Install Localization Workspace

You can install the Localization Workspace application (sn_lw) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed. Demo data isn't available.

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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 Localization Workspace application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Localization Workspace requires a Pro or Pro+ subscription.

Role required: admin

About this task

The following items are installed with Localization Workspace:

- Plugins
- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Localization Workspace.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Localization Workspace application (sn_lw) 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**.
6. **Optional:** For more information about investigating installed components, see Find components installed with an application.

What to do next

Configure the dependencies including Localization Framework, then configure Localization Workspace. For more information see Configuring Localization Workspace.

Confirm access to Settings table

As part of the configuration for Localization Workspace, confirm access to the Settings table of Localization Framework.

Before you begin

Localization Framework must be installed. It is included with Localization Workspace if not already installed.

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Role required: admin. The Localization admin role (localization_admin) can't complete this procedure.

About this task

Localization Workspace requires access to a Localization Framework table, Settings [sn_lf_setting]. The Settings table controls the ability to create and update translation projects. Confirm access using the following procedure.

Procedure

1. Navigate to **All** > **System Definitions** > **Tables**.
2. In the **Name** field, search for `sn_lf_setting`.
3. In the Table form, select the **Application Access** tab.
4. Select two check boxes: **Can read**, **Can update**.
5. Select **Update**.

Cross-scope privileges for Localization Workspace

After you create custom translation artifacts, set cross-scope privileges so that your artifacts can be accessed from Localization Workspace.

Before you begin

- Ensure that your custom artifact has a processor script which includes a method named getTranslatableContent.
- Confirm the name of the table where your custom artifact's records are stored. Also confirm the table's application scope. You can find this information in the artifact's record in [sn_lf_config]. Detailed table information can also be found in [sys_db_object].
- Set your application scope to Localization Workspace.
- Role required: admin. The localization_admin can't complete this procedure.

About this task

Your custom artifacts are located in different application scopes, so you must provide access to them from the Localization Workspace application scope. Completing this configuration makes your artifacts visible and selectable in translation requests.

For each artifact, set two entries in Cross scope privileges [sys_scope_privilege]:

1. A record for the artifact's table.
2. A record for the artifact's processor script.

The source scope for these records should be Localization Workspace.

Artifacts that are available by default don't need manual configuration of cross-scope privilege. For more information, see Types of Localizable content in Localization Workspace.

Procedure

1. Ensure that you are in the Localization Workspace application scope, and navigate to **All** > **System Applications** > **Application Cross-Scope Access**.
2. On the **Cross scope privileges** [sys_scope_privilege] list, select **New**.
   The Source Scope and Application fields are automatically set to Localization Workspace on the form.
3. On the form, fill in the fields to create a record for your artifact's table.

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Cross scope privilege: Table

Field	Description
Target Scope	Enter the name of the application scope associated to your artifact table.
Target Name	Enter the name of the table where your artifact is stored (such as [kb_knowledge]).
Target Type	Select `Table` from the list.
Operation	Select `Read`.
Status	Select `Allowed`.

4. Select **Submit** to complete the record for the artifact's table.
5. Create another record for your artifact's Processor script by selecting **New** on **Cross scope privileges** [sys_scope_privilege].
6. On the form, fill in the fields to create a record for your artifact's processor script.

Cross scope privilege: Processor script

Field	Description
Target Scope	Enter the name of the application scope associated to your artifact.
Target Name	Enter the name of the processor script.
Target Type	Select `Script Include`.
Operation	Select `Execute API`.
Status	Select `Allowed`.

7. Select `Submit` to complete the record for the artifact's Processor script.

What to do next

You may also need to set Restricted Caller Access privileges to make restricted resources available to Localization Workspace. For more information see Restricted Caller Access for Localization Workspace.

Related topics

- Types of Localizable content in Localization Workspace
- Create and configure a custom artifact
- Create a processor script

Restricted Caller Access for Localization Workspace

Give Localization Workspace access to your content by setting Restricted Caller Access privileges. Setting these privileges is required only when target tables or scripts are restricted.

Before you begin

Set your application scope to Global.

Role required: admin. The localization_admin role can't complete this procedure.

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About this task

Localization Workspace uses artifact records in the [sn_lf_config] table to make content types available for translation. If your target resources have Caller Restriction set, you must configure Restricted Caller Access to allow access from Localization Workspace.

Each artifact record contains two resources that might have Caller Access set to Caller Restriction:

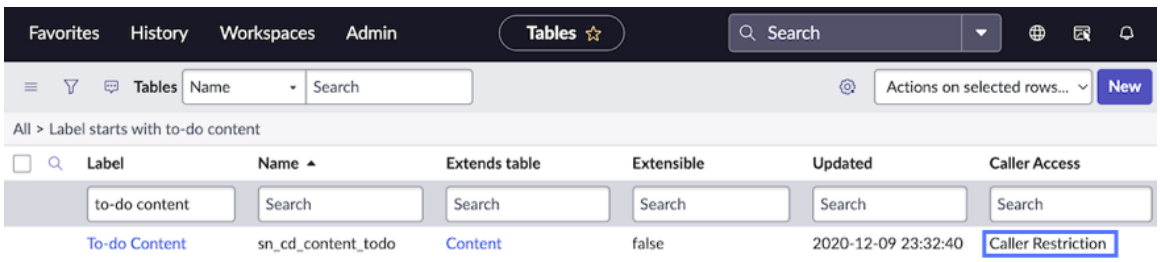
- a target table where translatable content is stored
- a Processor script which retrieves the translatable content

If you create a new (or custom) artifact but the target resource has Caller Restriction set, that artifact's content type is unavailable for selection in a Translation Request. Check whether Caller Restriction is set by querying the appropriate table, as follows.

Resource	Location to check
Artifact's table	Navigate to **System Definition** > **Tables**[sys_db_object] and search for your artifact table's name or label.
Artifact's processor script	Navigate to **System Definition** > **Script Includes**[sys_script_include] and search for the script's name.

In the list view of **Tables** or **Script Includes**:

The following procedure is needed only when the **Caller Access** column has a value of `Caller Restriction`.



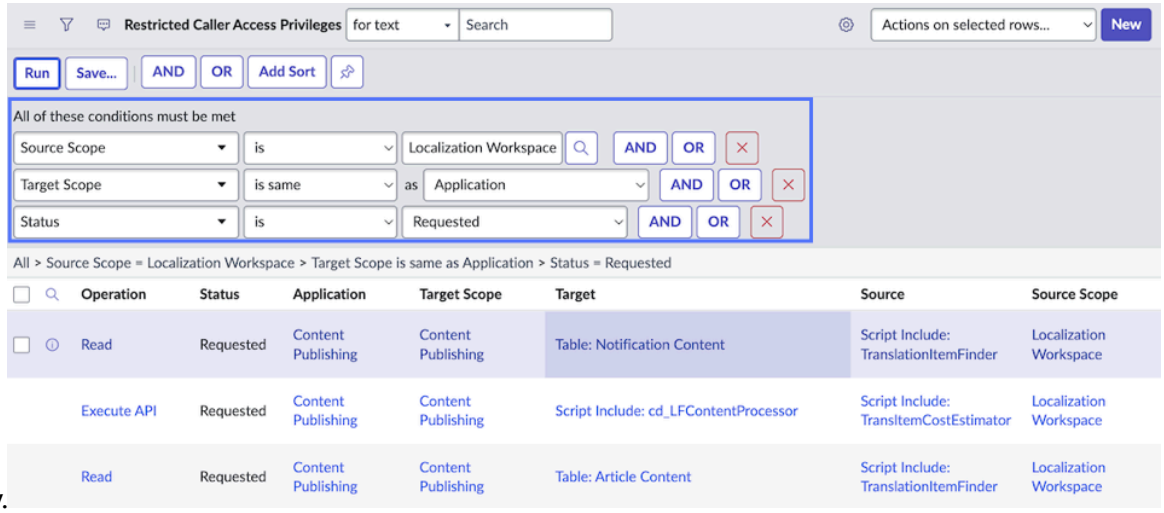
For further information see **Related Content** on this page.

Procedure

1. Set your application scope to Global, then navigate to **All** > **System Applications** > **Application Restricted Caller Access** [sys_restricted_caller_access].
2. In the list view of the **Restricted Caller Access Privileges** [sys_restricted_caller_access] table, open **Show/hide filter** using the icon .
3. Add the following conditions to the filter:
   - `Source Scope is` *`Localization Workspace`*
   - `Target Scope is same as Application`
   - `Status is Requested`

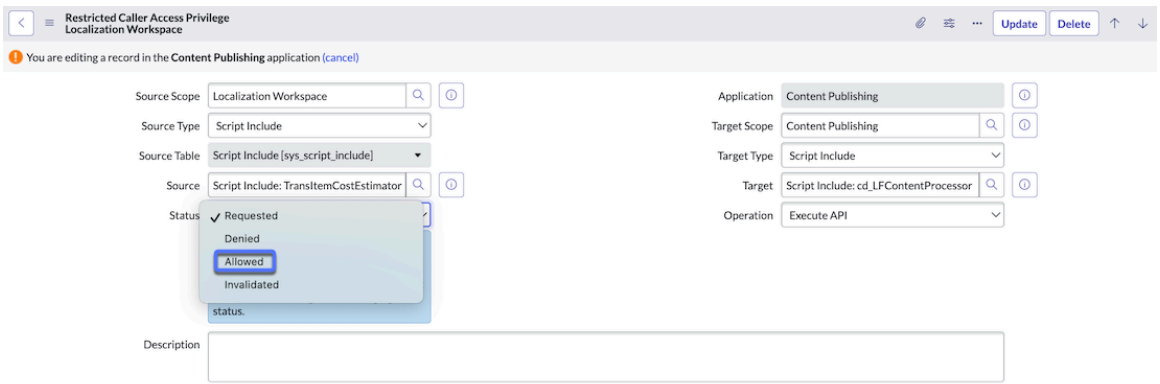
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4. Select **Run** to execute the query.



5. In the list of results, open any record by selecting the value in the first column (by default the first column is Operation).
6. In the record's form, change the **Status** field from `Requested` to `Allowed`, then select **Update**.

> **Note:** Because most records are not in the Global application scope, you must select the link in the banner **To edit this record click here**.



7. Repeat this procedure so that all records in the list of results have a status of `Allowed`.

What to do next

Continue with setup of Localization Workspace. See Configuring Localization Workspace.

Related topics

- Application scope
- Artifact configurations
- Restricted caller access privilege settings

Configuration Hub in Localization Workspace

Configuration Hub provides centralized access to the tables and properties often used by admins. You can update the tables and properties of dependent applications such as Localization Framework without leaving the Localization Workspace interface.

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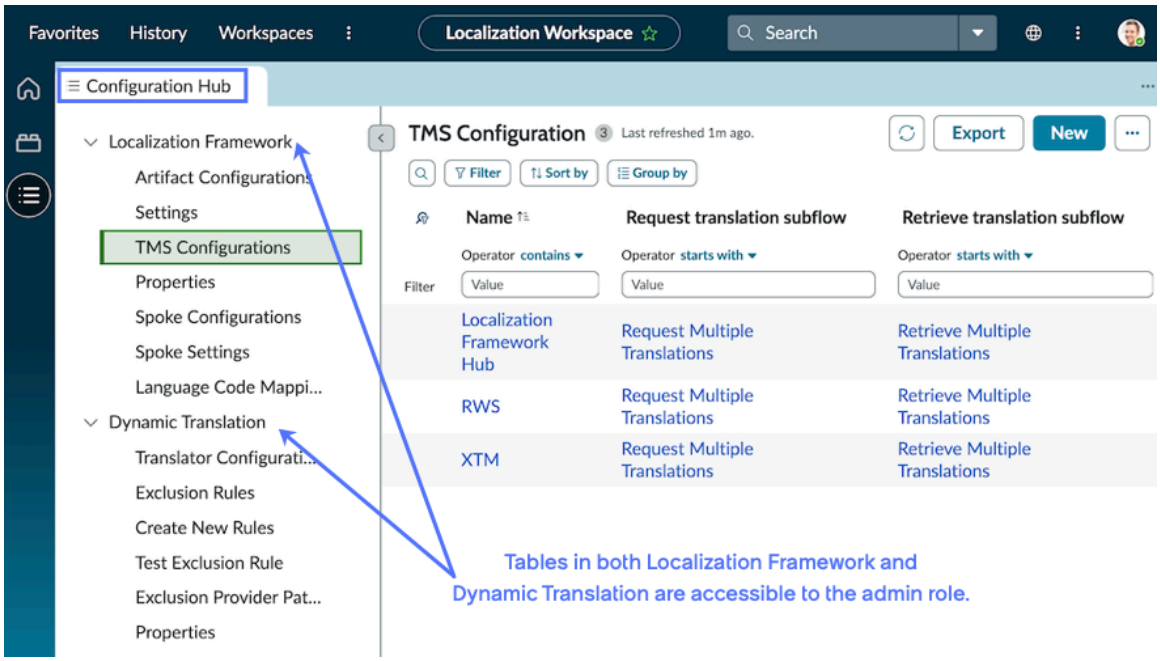
Overview of Configuration Hub

Localization Workspace extends other ServiceNow AI Platform applications related to localization. Configuring these dependent applications is a prerequisite to working with Localization Workspace. From version 2.0.2, Configuration Hub gives admins access to tables and properties in these applications from the Localization Workspace interface.

Note: Any updates you make in Configuration Hub are saved to tables in the target application.

To open Configuration Hub:

With the localization_admin or the admin role, navigate to **All** > *Localization Workspace* > **Configuration Hub**. Alternatively, you can select the hub's icon while in the workspace. The navigation pane within Configuration Hub lists applications and their components. Select the name of a component to open its table in a workspace pane.



Note: In Configuration Hub, Dynamic Translation is displayed to the admin role only. The localization_admin role can't view Dynamic Translation.

Localization Framework

The following components of Localization Framework are available to the localization_admin or admin role, from Localization Workspace.

- Artifact configurations (the content types in Localization Workspace are built upon artifacts).
- Settings.
- TMS Configurations (required only if you use a TMS as your translation service provider).
- Properties (visible to the admin role only).
- Spoke Configurations (used for the hub and spoke architecture).
- Spoke settings (used for the hub and spoke architecture).
- Language Code Mappings (may be required if you use a custom third-party translation service).

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Dynamic Translation

Dynamic Translation is required to use machine translation on your instance. The following components of Dynamic Translation are available to the admin role, from Localization Workspace.

- Translator Configurations.
- Exclusion Rules.
- Create New Rules.
- Test Exclusion Rule.
- Exclusion Provider Pattern.
- Properties.

Guided Setups are also available to the admin role, to outline the initial process of configuring Localization Workspace and its prerequisites. Navigate to **All** > *Localization Workspace* > *Localization Framework* **Guided Setup** or *Localization Workspace* **Guided Setup**.

Language Asset Management

Enhance localization in your instance with Language Asset Management in Localization Workspace. You can upload glossaries to Language Asset Management for editing and storage.

Glossaries in Language Asset Management

From version 3.0.0, the Language Asset Management area of Localization Workspace enables you to upload glossaries, which are lists of terms with translations that you provide. Each source term in a glossary can have translations into multiple languages. You can create multiple glossaries. In the Australia release, glossaries are available for storage and editing only.

From version 4.0, you can use an AI skill to generate a glossary of terms derived from Knowledge Base articles. For information see Globalization Terminology Agent.

When planning your glossary assets, consider the following points.

- You can have more than one glossary in Language Asset Management, so you can organize your glossaries according to business unit, function, or locale.
- Each glossary can be subdivided or filtered using the Product/Service category.
- One source term can be listed under different Product/Service or Part of Speech categories. A source term repeated in two different categories is considered to be two different records. Different translations can be assigned to each occurrence of the term per category. This enables a term to be translated differently depending on the context.
- Translations assigned to source terms can be provided for any language listed in the sys_language table, including self-localized languages.
- The included spreadsheet template (ServiceNow_Glossary_Template.xlsx) must be used with the upload method for creating glossaries. For details see Upload glossaries to Language Asset Management.
- Any editing or modification to the contents of existing glossaries can be done in the UI. For details see Edit a glossary in Language Asset Management.
- You can download your glossaries from version 3.1.0. For more information, see Export a glossary from Language Asset Management.
- There is no upper limit to the number of rows in a glossary, but the general guideline is for each glossary to have between 50 and 1500 rows.

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In the spreadsheet template for the upload method, columns are provided for all languages supported by ServiceNow AI Platform in the sys_language table. You don't need to provide translations for all languages. Clear out (leave blank) all values for any languages you don't plan to use. You can upload glossary translations for languages that are active = false in sys_language, but inactive languages are not available for translation workflows.

You can include self-localized languages when uploading glossaries with the spreadsheet template. Create additional columns in the spreadsheet template for self-localized languages. For the label in the header row of the spreadsheet, use codes from the ID column of the sys_language table for the corresponding languages.

Note: With the following supported languages, the import transform handles mapping of the spreadsheet's language code to the ID code in sys_language. Do not modify or update the header row of the spreadsheet template for these languages.

- Brazilian Portuguese
- French - Canada
- Traditional Chinese

To activate languages in sys_language, install language plugins. To self-localize an unsupported language, see Create a language record.

Globalization Terminology Agent

Generate a glossary of terms based on your English-language Knowledge Base articles. Use the glossary of terms to enhance language governance, quality, and consistency across the platform. Available from version 4.0 of Localization Workspace.

Overview of the Globalization Terminology Agent

The Globalization Terminology Agent uses the generate glossary skill to analyze your Knowledge Base content and create a suggested English glossary. The generate glossary skill identifies and extracts key terms, generates definitions for the terms, and enables you to edit or remove terms before approval.

After approval your glossary is published to the list of glossaries in the Language Asset Management section of Localization Workspace.

The generate glossary skill is located in the AI Admin Hub. It can also be accessed from AI Skill Kit.

Benefits of the Globalization Terminology Agent

The Globalization Terminology Agent offers these benefits.

- Save time and manual effort during glossary creation.
- Review, edit, and approve the terms and their definitions before publishing.
- Update the glossary in Language Asset Management after creation, including adding translations into non-English languages.
- Export the glossary to share with stakeholders.

Prerequisites and conditions

The following prerequisites and conditions apply.

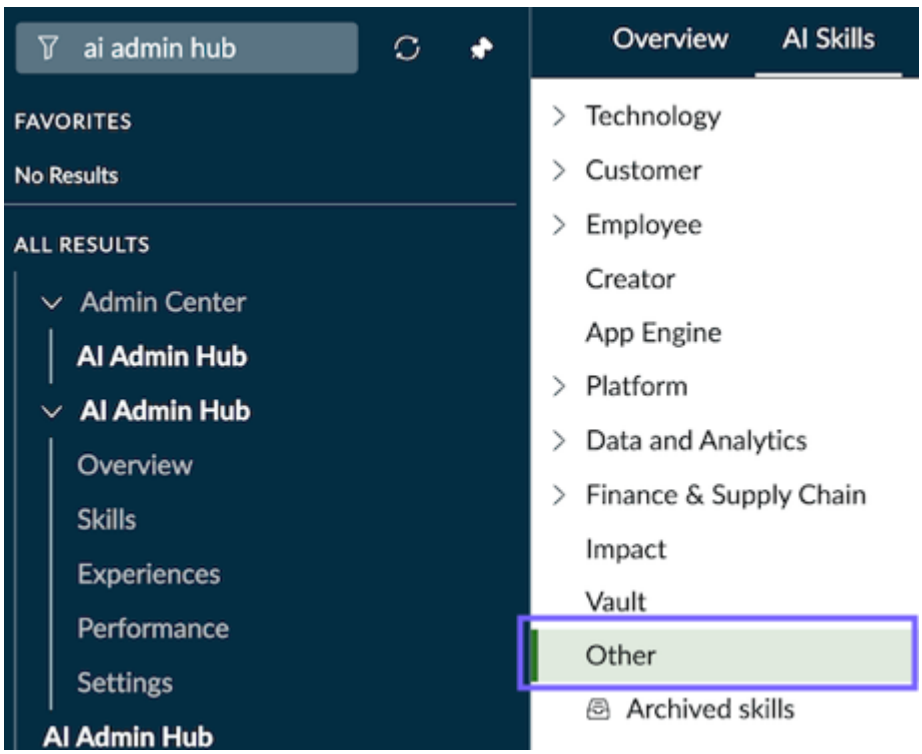
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- Only KB articles labeled as English in the Knowledge Base are included in the search. For information see Knowledge Center.
- Accessing and working with glossaries in Language Asset Management requires the Terminology Manager role (sn_lw.terminology_manager) with the Localization user role (sn_lw.user).
- The generate glossary skill must be activated in AI Admin Hub. After the skill is activated, the **Create Glossary** button becomes visible in Language Asset Management.

Other considerations

The maximum word count for scanning defaults to 25,000. The count of words does not map exactly to the number of tokens used. The wizard provides the option to limit retrieved articles by date range, minimum view count, and whether authored by the current user.

Activating the generate glossary skill



The generate glossary skill is included from version 4.0 of Localization Workspace, but it must be activated. The general procedure for activation of this skill is as follows.

1. Navigate to AI Admin Hub > Skills.
2. In the navigation panel of the AI Skills tab, select the category **Other**.
3. Select the **Available** tab and locate the **Generate Glossary** skill name.
4. Select **Activate skill** to turn on this skill.

For further information see AI Admin Hub and Activate an AI skill. Some configurations can be made to the skill in AI Skill Kit.

Create a glossary using AI

In Language Asset Management, generate a glossary containing terms extracted from Knowledge Base articles. The Globalization Terminology Agent uses an AI skill to scan your article content and create a list of suggested terms and definitions.

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Before you begin

Activate the generate glossary skill. For information, see Activate an AI skill.

Confirm the articles you want included in the scan. Articles must be labeled as English language and published in the Knowledge Base. For information see Knowledge Center.

Role required: sn_lw.terminology_manager (default)

About this task

The following procedure is divided into two broad stages:

- First, a search retrieves a list of possible knowledge articles. You can select articles from this list.
- Next, the generate glossary skill analyzes your selected articles to extract suggested terms and definitions. You can review and edit the suggestions.

Both stages may take some time, depending on the count of articles and words. When each stage finishes the system sends an email to let you know that the results are ready for your review.

Procedure

1. Navigate to **All** > *Localization Workspace* > **Language Asset Management**.
2. With the Glossaries tab open, select **Create glossary**.

   Note: This button is available only when the generate glossary skill has been activated.

3. In the **Create AI-powered Glossary** modal window, enter a unique name for your glossary and (optionally) a description.

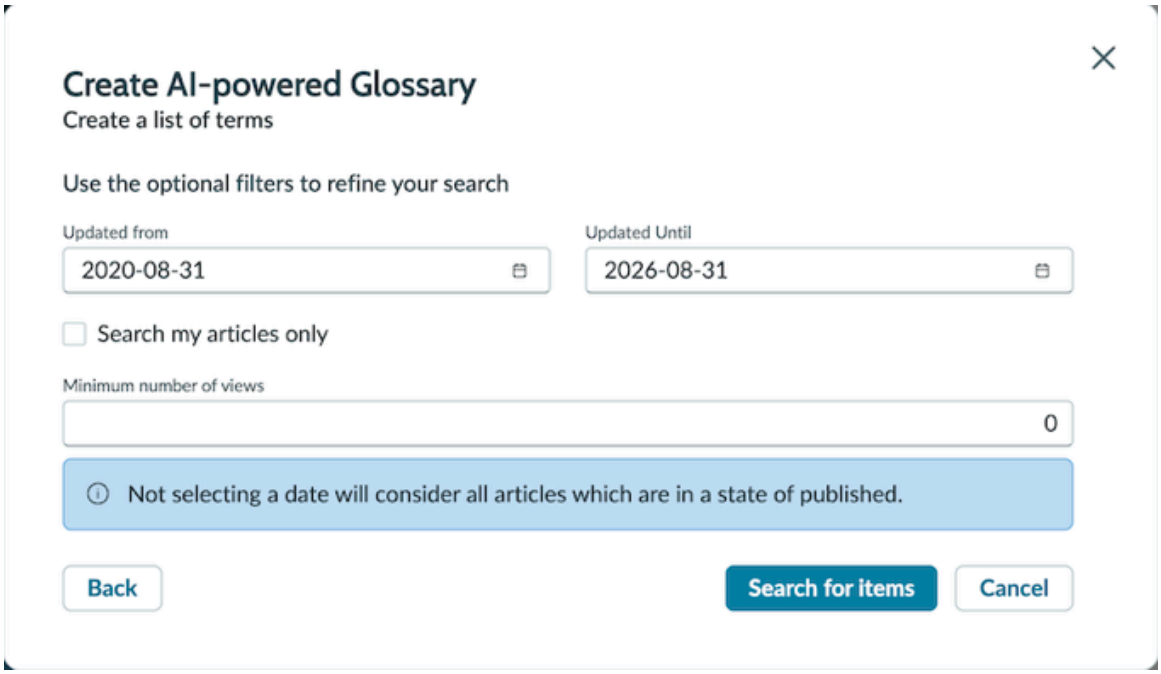


4. Select **Next**.
5. **Optional:** In the **Use the optional filters to refine your search** step, you can adjust the following filters to limit the KB articles retrieved.

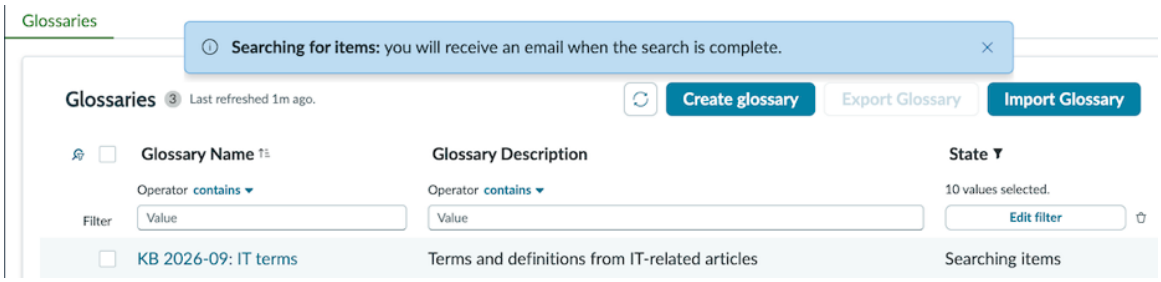
Option	Description
Updated from	You can choose a date range using the calen dar picker or by entering specific dates. ○ This limits the articles by the Updated date in the Knowledge [kb_knowledge] table. ○ If you don't apply a date filter, all published articles are candidates.

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Option	Description
Search my articles only	When the check box is selected (checked), the search retrieves only articles authored by the current user.
Minimum number of views	You can enter a view count number. The search retrieves only articles with a view count greater than or equal to this number. (Optional) The default of 0 (zero) means that the search also retrieves articles that have never been viewed.



6. Select **Search for items** to retrieve KB articles.



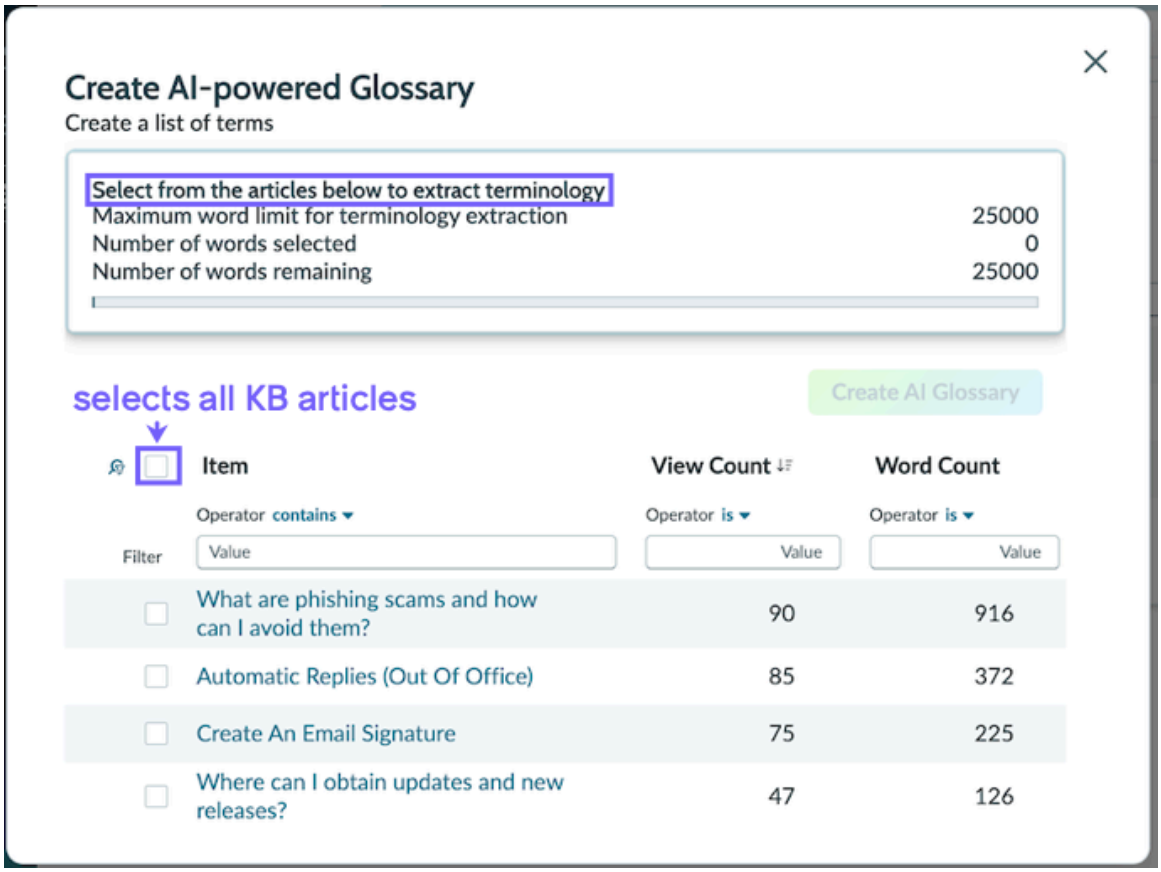
The **Create AI-powered Glossary** modal window closes during the retrieval of KB articles. The search may take some time, so the system sends you an email when finished.

- In the list of Glossaries, the State of your glossary displays as **Searching items** while searching.
- The State changes to **Items available for selection** when the search is finished and the list of KB articles is ready.

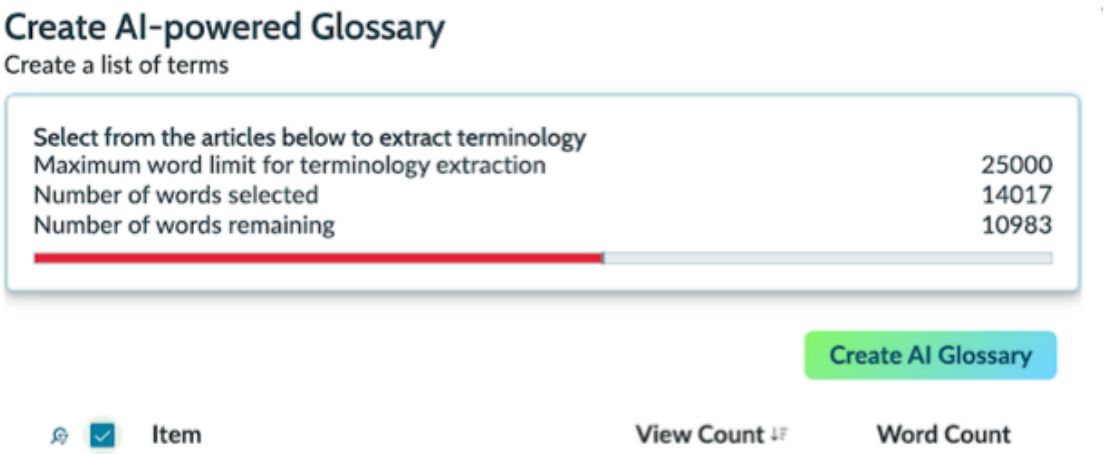
7. Select the name of your glossary from the list when its State has changed to **Items available for selection**.
8. In the **Create AI-powered Glossary** modal window, choose articles for scanning by selecting their check boxes in the Filter column.

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Tip: You can bulk select all articles with the **Select all rows** check box in the header. You can also filter articles by terms in the article title, by view count, or by word count, using the column filter row.



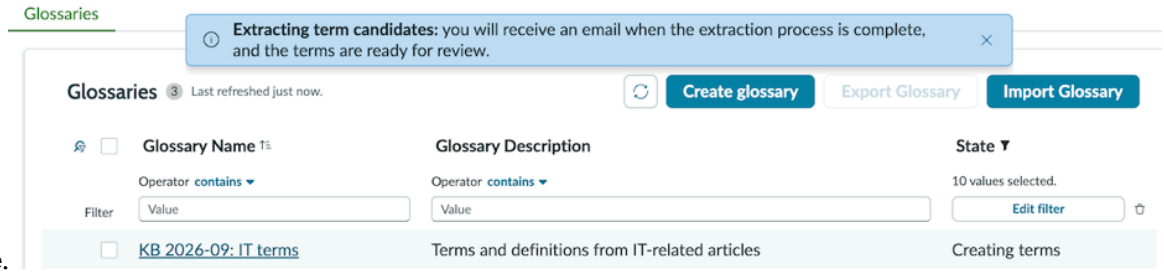
9. **Optional:** Adjust the articles you select according to the maximum word limit for terminology extraction.
   The default maximum word limit for scanning is 25,000. The modal window provides a running total of words based on the articles you have selected, and also the remaining balance.



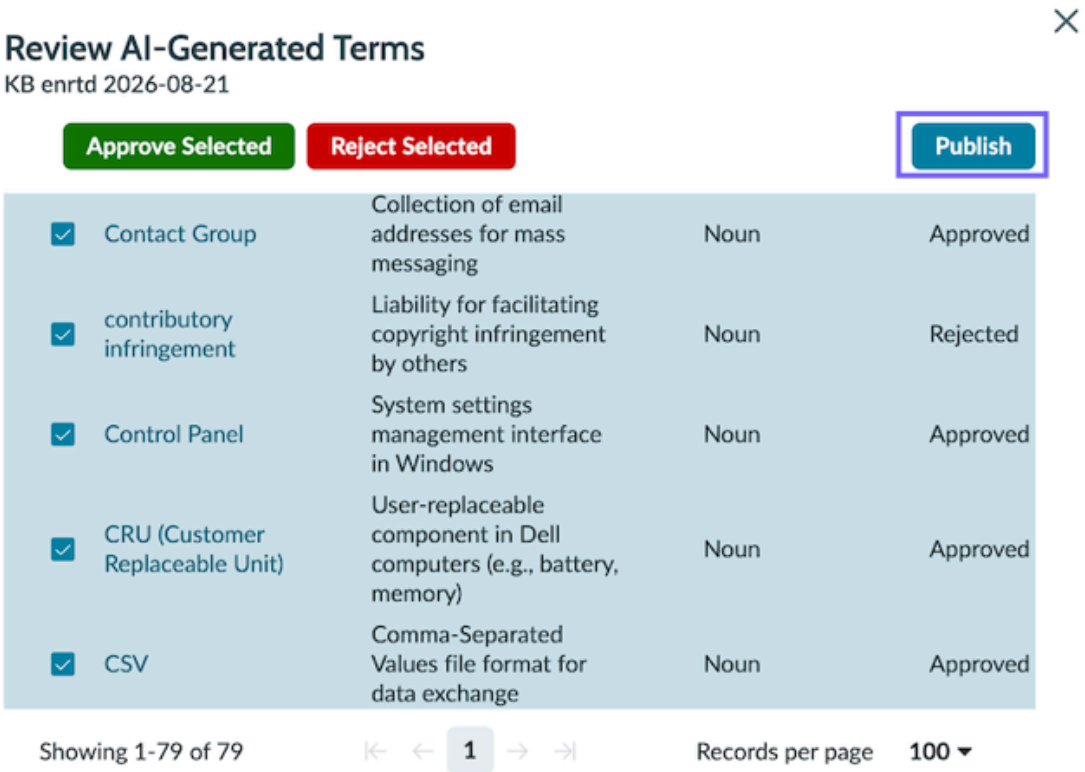
10. Select **Create AI Glossary**.
    The Create AI-powered Glossary modal window closes during the process of analysis. The State of your glossary displays as **Creating terms** in the Glossaries

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list. A banner informs you that you will receive an email when the process is complete.



11. When the email arrives and the State of your glossary changes to **Terms available for approval**, select the Glossary Name to open the **Review AI-Generated Terms** modal window. Initially all terms display **Pending Review** in the Status column.
12. **Optional:** Edit values in the Term, Definition, or Part of Speech columns by double clicking the text, modifying, then selecting **Apply**.
13. **Optional:** Reject rows by selecting their check boxes, then selecting **Reject Selected**. The Status changes to `Rejected`. Rejected rows aren't included in the final glossary. If all rows are rejected, the **Publish** button disappears.
14. Approve rows by selecting their check boxes, then selecting **Approve Selected**. Only approved rows are included in the published glossary. The Publish button appears when at least one row is approved.
15. Select **Publish** to finalize.



The Status of your glossary changes to **Completed**.

Result

Your published glossary is listed in the Glossaries table in Language Asset Management. You can access the list of terms from the Glossary Sources tab.

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What to do next

You can modify your glossary, including adding translations to the terms. For information see Edit a glossary in Language Asset Management.

You can export your glossary for review by stakeholders. For information see Export a glossary from Language Asset Management.

Related topics

Activate an AI skill

Knowledge Center

Upload glossaries to Language Asset Management

Upload glossaries to the Language Asset Management area of Localization Workspace. Create a glossary by entering source terms and translations in the provided spreadsheet template, then uploading the completed spreadsheet to Language Asset Management.

Before you begin

- Confirm that the Languages [sys_language] table in your instance contains an ID for every language that you plan to include in your glossary. Language IDs should be compliant with BCP 47. For more information and links see Language Asset Management.
- You must be able to work with and save files in the Excel Workbook (.xlsx) file format. This file format supports the UTF-8 encoding that is needed for special characters and non-alphabetic writing systems.
- Role required: sn_lw.user. From version 3.1.0, both the sn_lw.user and the sn_lw.terminology_manager roles are required.

About this task

From version 3.0.0, the Language Asset Management area of Localization Workspace enables you to upload glossaries for editing and storage.

- Glossaries consist of source terms and their translations. Each source term can have translations into one or more languages.
- After you initially create a glossary by uploading a spreadsheet, you can make updates or add new terms in the product UI. See Edit a glossary in Language Asset Management.
- The same source term can be listed in multiple glossaries. A source term repeated in two different glossaries is considered to be two different records, with different translations possible.

  Similarly, a source term can be repeated in one glossary if assigned to different categories within that glossary (Product/Service or Part of Speech). Repeated source terms are considered to be two different records, with different translations possible.

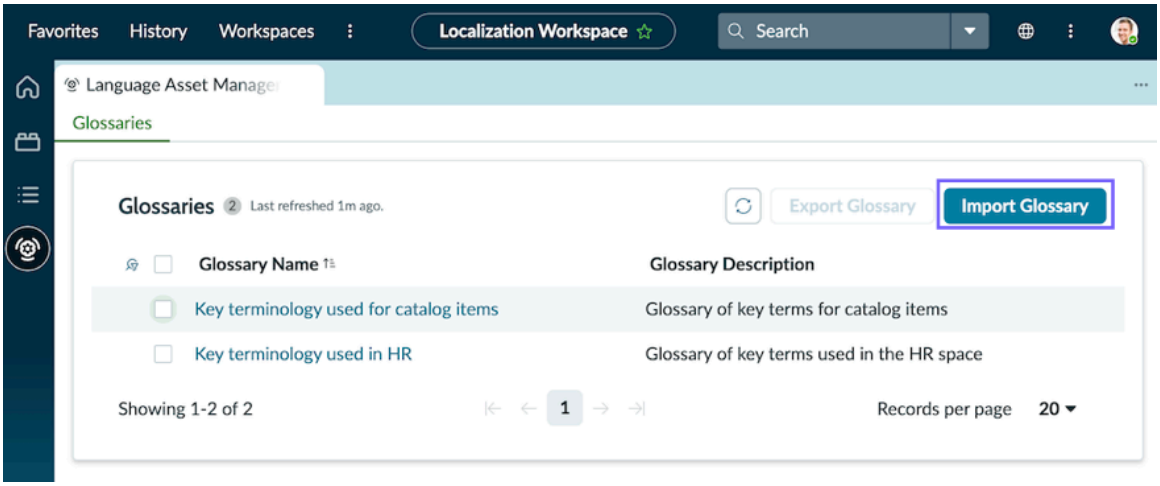
For information about using an AI skill to generate a glossary, see Globalization Terminology Agent (from version 4.0).

The following procedure involves downloading an Excel Workbook (.xlsx) spreadsheet template, filling it out, and uploading the completed file to your instance. Some of the columns have drop-down selections, as noted in the table in the procedure. For these columns, you must choose a value from the drop-down selection.

Procedure

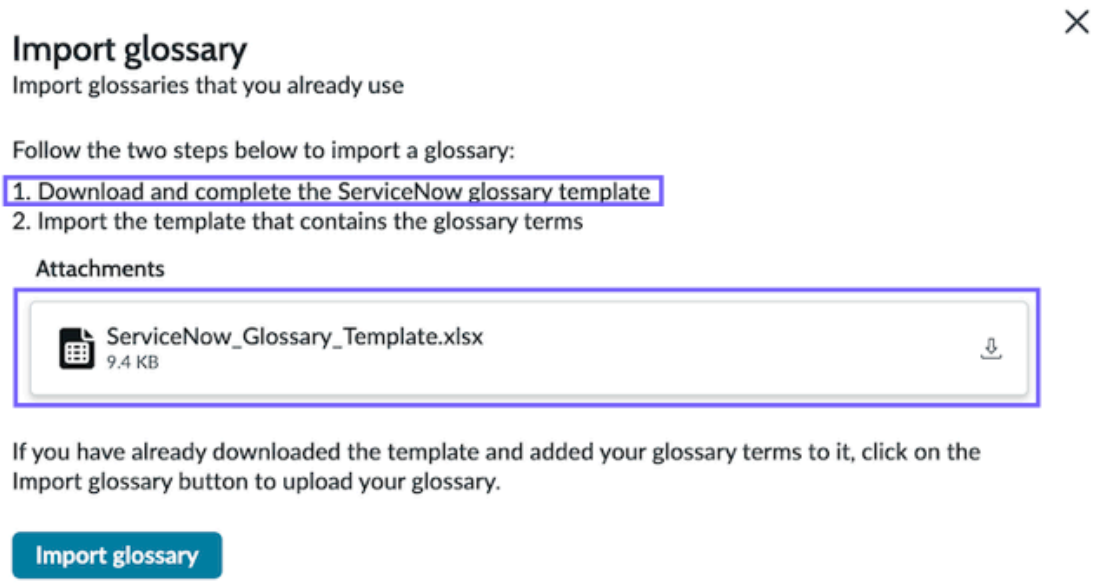
1. Navigate to **All** > *Localization Workspace* > **Language Asset Management**.
2. Select **Import Glossary**.

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Note: If you have a completed spreadsheet ready to upload, skip to the next **Import glossary** step in this procedure.

3. In the **Import glossary** modal window, select the **ServiceNow_Glossary_template.xlsx** attachment and download it.



4. Using one row for a source term and its translations, and using drop-down selections where applicable, fill in the spreadsheet according to the following guidance.

Column	Value
glossary_name	This is displayed as **Glossary Name** in the UI. Each row should have a value in the glossary_name column.
glossary_description	(Optional). Enter a description of the glossary. This value is displayed as **Glossary Description** in the UI.
product_service	This is displayed as **Product/Service** in the UI, and is a way to filter or subdivide a glossary. Use this if a source term has different translations depending on the Product/Service.

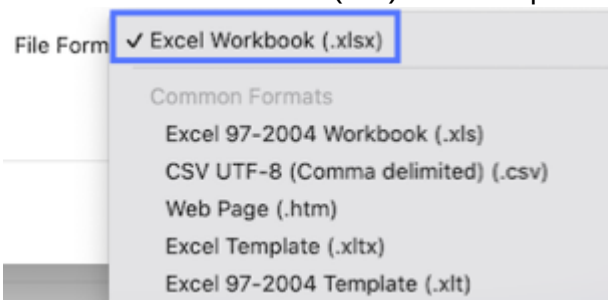
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Column	Value
	Note: The same source term can be listed multiple times in one glossary when associated to different product_service values.
term	Enter the source term (the original word or phrase). Terms can contain spaces, special characters, and punctuation marks. Source terms can be written in languages other than English. However, translation requests in Localization Workspace must be from English to non-English languages. You can enter the same source term multiple times, but each variation must be assigned to either a different Part of Speech or a different Product/Service category.
definition	The definition for the source term.
part_of_speech	This is a drop-down selection in the template. Choose from noun, verb, and so forth. **Note:** The same source term can be listed multiple times in one glossary when associated to different part_of_speech values.
do_not_translate	This is a boolean drop-down selection in the template. Choose TRUE when terms shouldn't be translated.
source_language	This is a drop-down selection in the template. Choose the language ID of the source term.
(language ID codes)	Enter the translations in the same row as the source term. The template contains columns for each language supported in the platform. The column headers are BCP 47 language ID codes. ○ You can enter non-alphabetic terms and special characters. ○ You can leave values blank. ○ Clear the cell contents for any values you don't want applied to your glossary. This includes placeholder values such as "Translation1". You can add you own columns for self-localized languages. If you create a column, use

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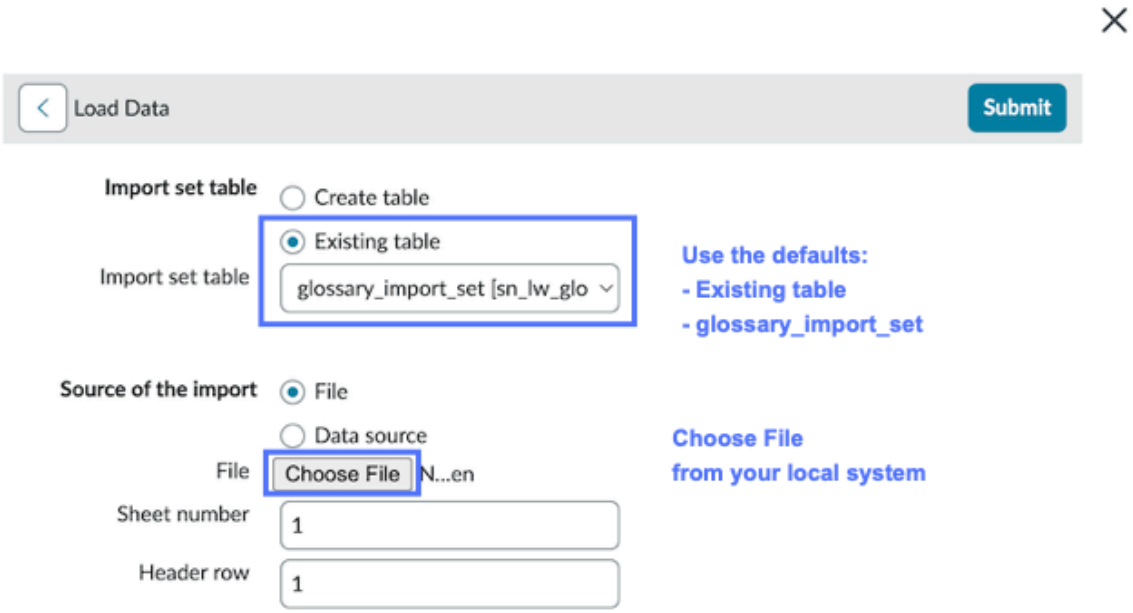
Column	Value
	only language ID codes that exist in your sys_language table as the column headers.

5. Save your completed spreadsheet in the Excel Workbook (.xlsx) format only, not other formats such as Comma delimited (.csv) or Strict OpenXML Spreadsheet (.xlsx) format.



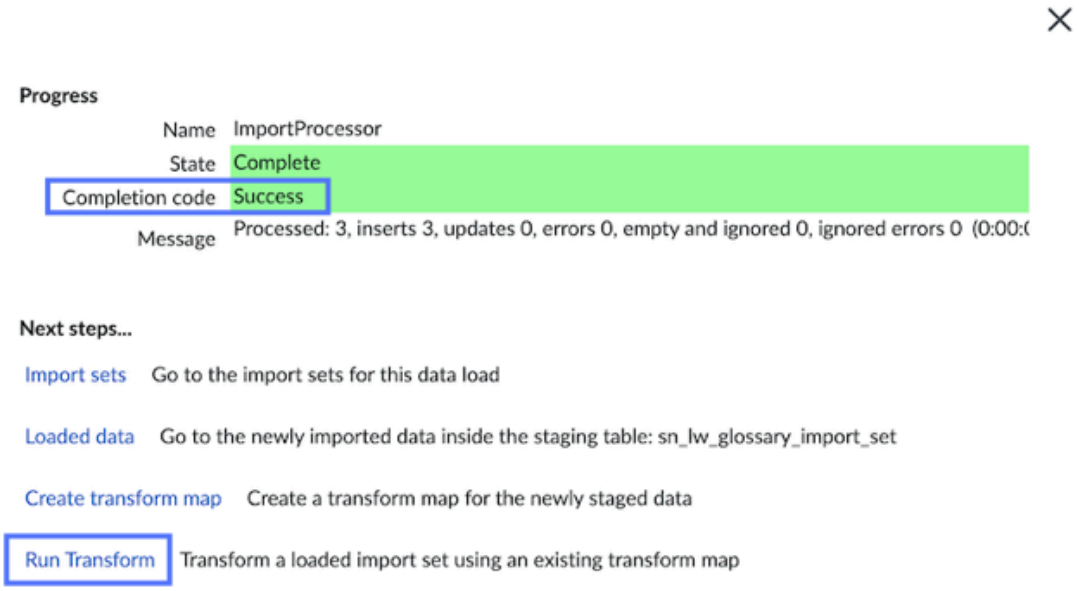
Because the value in the glossary_name column is used to label and organize your glossary in Language Asset Management, the spreadsheet's filename is unimportant.

6. In Language Asset Management, select **Import Glossary** to open the modal window.
7. On the modal window, select **Import Glossary** again.
8. On the **Load Data** window: use the default settings (Existing table = glossary_import_set and Source of the import = File), and select **Choose File**.

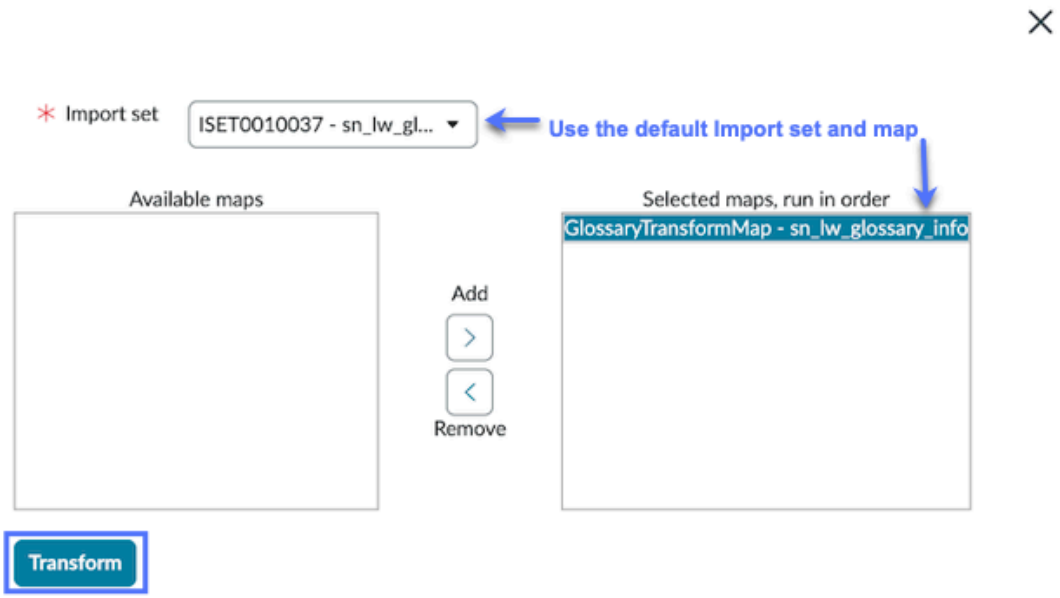


9. After choosing the completed spreadsheet file, select **Submit**.
10. When the **Progress** window displays Completion code: Success, select the **Run Transform** link.

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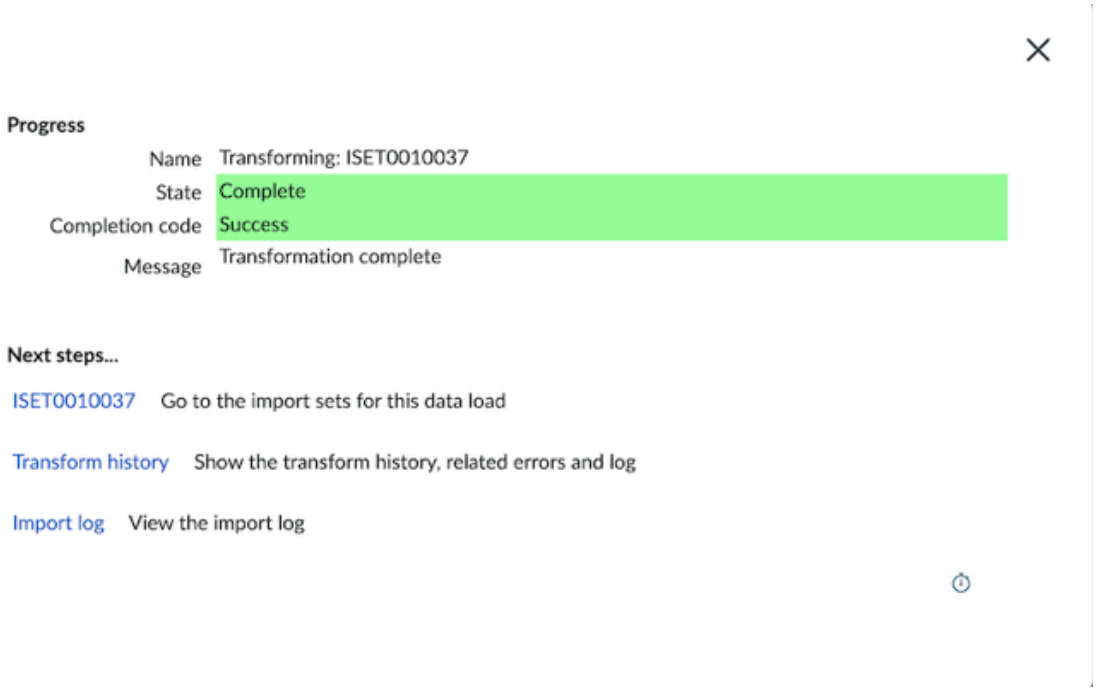


11. At the **Specify Import set and Transform map** window, keep the default Import set and selected map (GlossaryTransformMap), then scroll down to select the **Transform** button.



12. **Optional:** You can view the import set, Transform history, or Import log by selecting the appropriate link.

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Your new glossary appears in the list on the Glossaries tab of Language Asset Management.

What to do next

To add or edit source terms, or make any modifications after the initial upload, see Edit a glossary in Language Asset Management.

To download glossaries in a CSV or spreadsheet format, see Export a glossary from Language Asset Management.

Edit a glossary in Language Asset Management

Edit the contents of your glossary in Language Asset Management. Modify existing terms and translations or add more.

Before you begin

- First, create a glossary. You can use the upload method with the spreadsheet template provided in Language Asset Management. See Upload glossaries to Language Asset Management. Alternatively, you can Create a glossary using AI (from version 4.0).
- Role required: sn_lw.user. From version 3.1.0, both the sn_lw.user and the sn_lw.terminology_manager roles are required.

About this task

Initially you create a glossary in Language Asset Management by uploading a spreadsheet template or by generating with AI. After glossary creation, you can make the following modifications directly in the UI, using the procedure on this page:

- Add or edit source terms, including details (example: Part of Speech category).
- Add or edit translations of source terms.

Note: The same source term may be repeated in a glossary if assigned to different Part of Speech or Product/Service categories. A source term repeated in two different categories is considered to be two different records. Any changes you make to a source term in one category aren't propagated to the same source term in other categories.

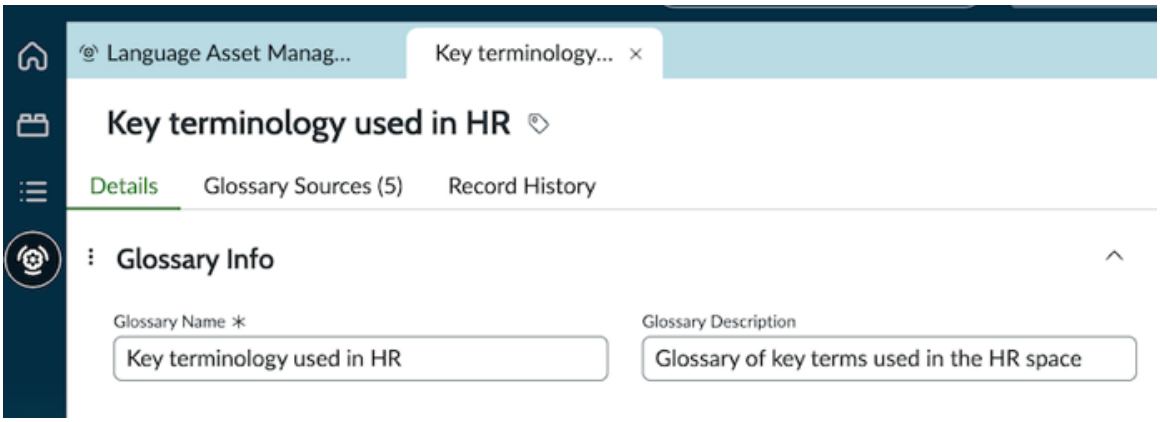
The following video demonstrates how to add a translation to a source term.

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https://player.vimeo.com/video/1209754159?h=f53334e9c1&badge=0&autopause=0&player_id=0&app_id=58479

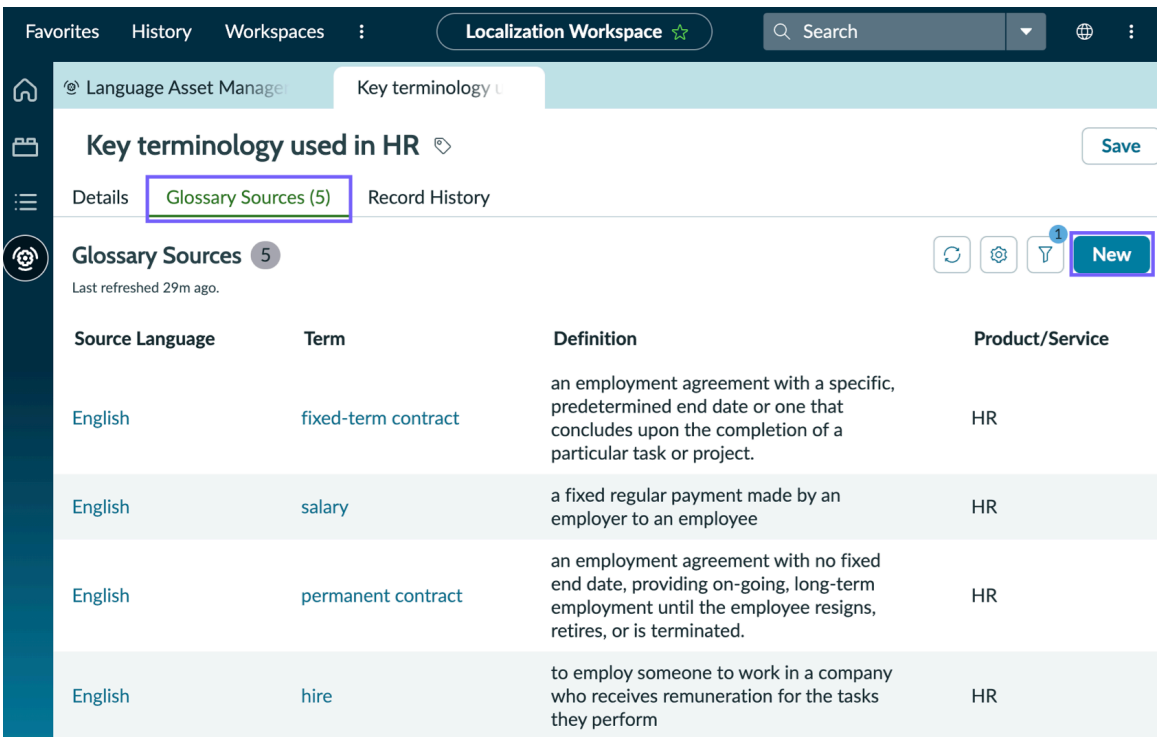
Procedure

1. Navigate to **All** > *Localization Workspace* > **Language Asset Management.**.
2. On the Glossaries tab, select your glossary from the values in the **Glossary Name** column.
3. From your glossary's default tab (**Details**), select the **Glossary Sources** tab to open a list of source terms.



4. To open information about a particular source term, select its value in the **Term** column.

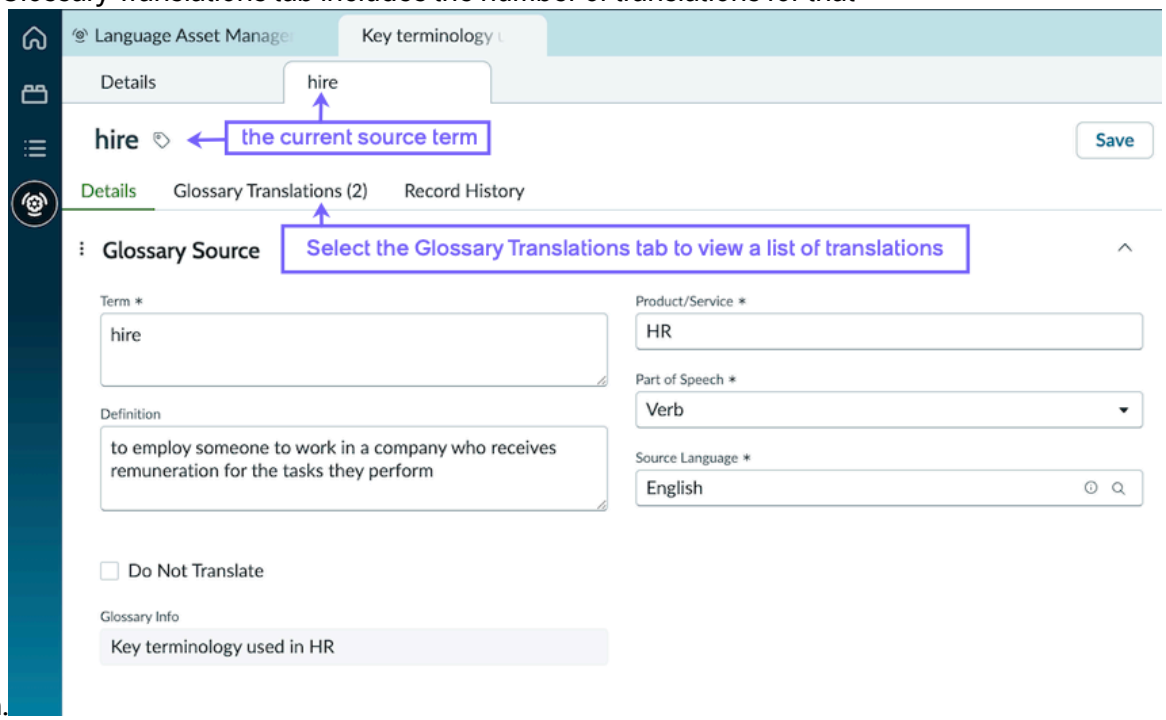
> **Note:** Because it's possible to have the same source term in different Part of Speech or Product/Service categories, be sure to select the desired source term.



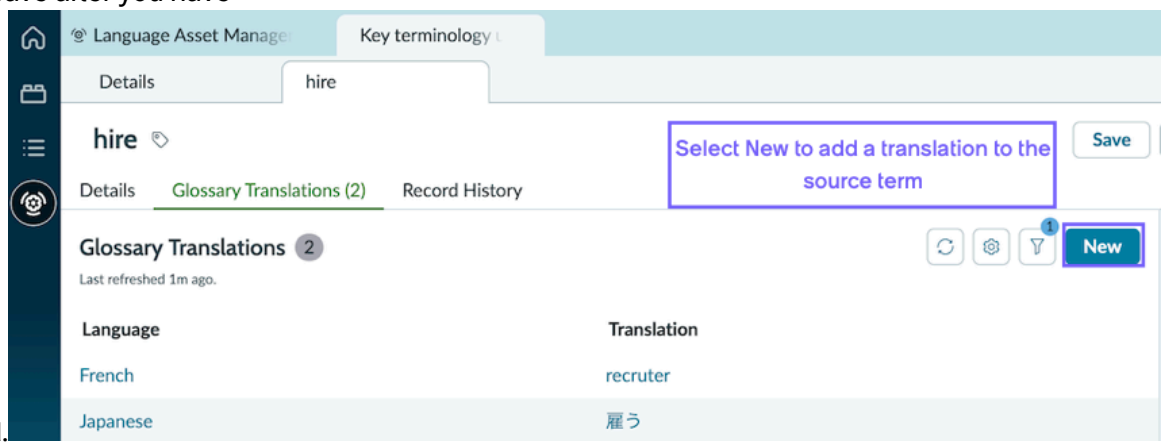
5. **Optional:** On the source term's Details tab, modify any values (such as Definition, Product/Service, Part of Speech, or Source Language) then select Save.
6. Select the **Glossary Translations** tab to open a list of all translations for your source term.

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The Glossary Translations tab includes the number of translations for that term.

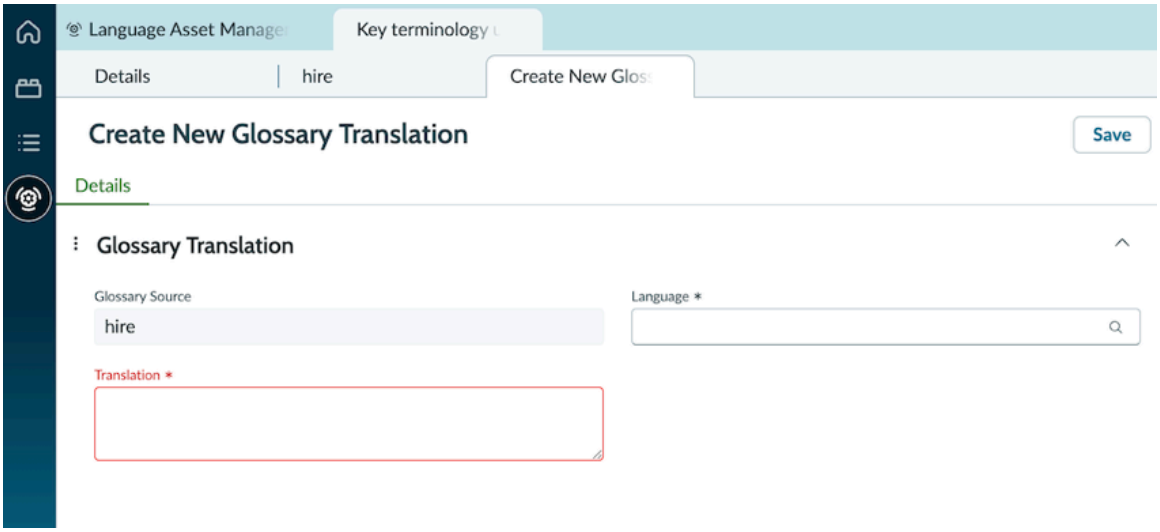


7. **Optional:** If you want to modify a translation: on the Glosssary Translations list, select the value in the Translation column to open a tab for the individual translation.
   Select Save after you have finished.



8. **Optional:** To add another translation for your source term, select New on the Glossary Translations list.

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9. **Optional:** To add a source term to an existing glossary, select New on the Details tab of the glossary.

Adding a Source Term to your existing glossary

Field	Value
Term	Enter the source term (the original word or phrase). Terms can contain spaces, special characters, and punctuation marks. (Optional) Source terms can be written in languages other than English. However, translation requests in Localization Workspace must be from English to non-English languages. You can enter the same source term multiple times in a glossary. However, each variation must be assigned to either a different Part of Speech or a different Product/Service category.
Definition	The definition for the source term.
Product/ Service	You can filter or subdivide your glossary using this category. **Note:** The same source term can be listed multiple times in one glossary when associated to different Product/Service values. A source term repeated in two different Product/Service categories is considered to be two different records, with different translations possible.
Part of Speech	This is a drop-down selection. Choose from noun, verb, and so forth. **Note:** The same source term can be listed multiple times in one glossary when associated to different Part of Speech values. A source term repeated in two different Part of Speech categories is considered to be two different records, with different translations possible.
Source Language	This is a drop-down selection. Choose from among the languages installed on your instance.
Do Not Translate	This is a Boolean check box. The default is unchecked (cleared). Select this check box when the term shouldn't be translated.
Glossary Info	This read-only field confirms the name of the current glossary.

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Field	Value
	Note: The same source term can be listed in more than one glossary. A source term repeated in two different glossaries is considered to be two different records, with different translations possible. To create a separate glossary, see Upload glossaries to Language Asset Management or Create a glossary using AI.

What to do next

You can delete a source term and its translations by selecting Delete from More Options ooo on the source term's Details tab.

You can also delete a translation from a source term using Delete from More Options ooo on the translation's Details tab.

You can export your glossaries. For information, see Export a glossary from Language Asset Management.

Export a glossary from Language Asset Management

Download your glossary as a CSV or spreadsheet file to share with stakeholders, reviewers, or third-party translation service providers.

Before you begin

- Requires Localization Workspace version 3.1.0 or later.
- Roles required: both sn_lw.user and sn_lw.terminology_manager.

About this task

If you plan to export a glossary to a CSV (comma-separated values) file, confirm that your local settings support non-ASCII characters.

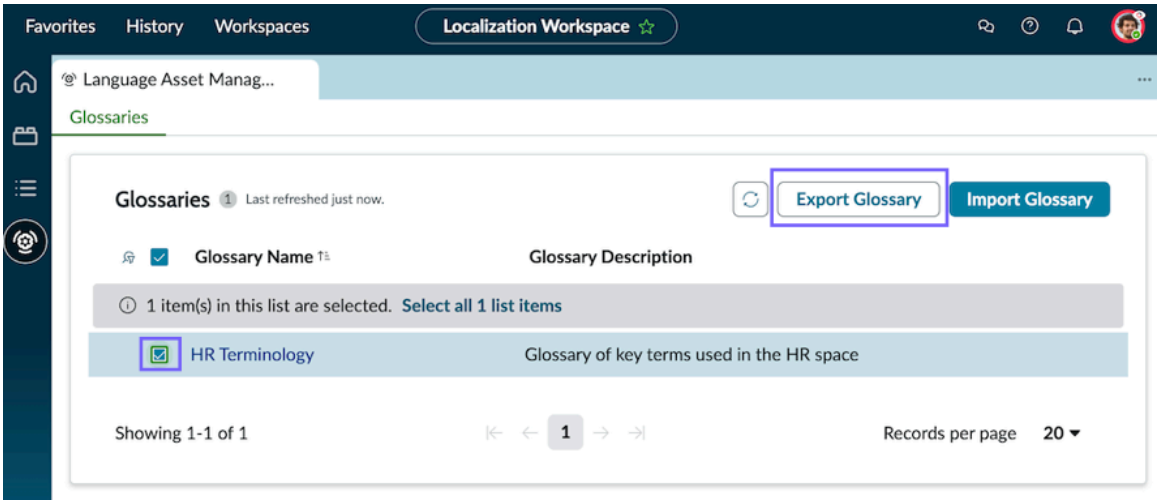
Translations into custom (self-localized) languages can't be exported. Only glossary translations into default supported languages can be exported using this method.

Glossaries can be exported regardless of source (upload method, or generated using AI).

Procedure

1. Navigate to **All** > *Localization Workspace* > **Language Asset Management**.
2. Select the **Glossaries** tab in Language Asset Management.
3. In the list view of Glossaries, select the check box of the glossary that you want to export.

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Tip: You can select all available glossaries using the check box in the header row at **Glossary Name**.

4. Select **Export Glossary** to open the Export modal window.
5. Select either CSV or Excel at the drop-down **File Type** field.



6. Select **Export**.

Related topics

- Create a glossary using AI
- Upload glossaries to Language Asset Management
- Edit a glossary in Language Asset Management

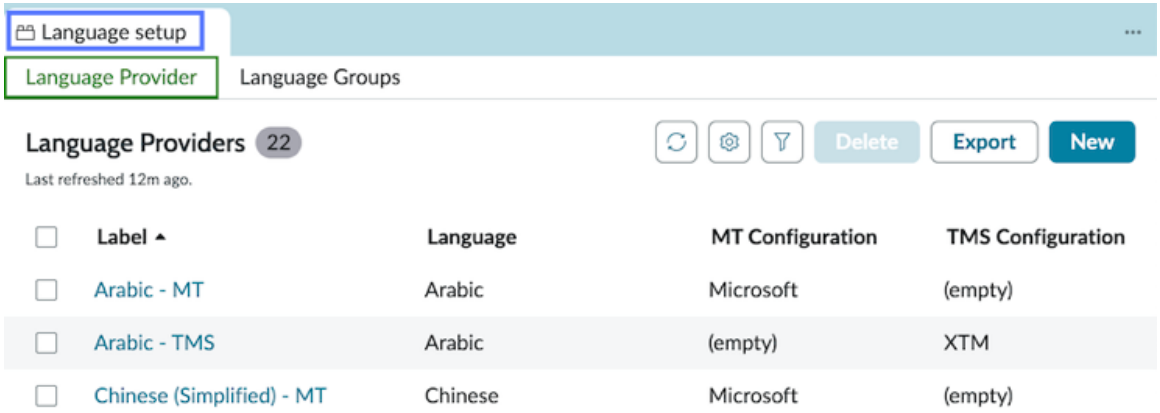
Language setup in Localization Workspace

Language setup enables you to flexibly configure target languages and their third-party translation service providers. When your users create translation requests, they can select the languages and providers you have configured.

Note: From version 3.0.0, two guided tours are available. One guided tour assists with configuring a language provider, and is accessible to users with the Localization administrator role (localization_admin). The other guided tour assists with configuring language groups, and is accessible to the Localization administrator and the Localization requester role (localization_requestor). Find the guided tours by selecting the Help Center icon on the Localization Workspace Home screen.

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Navigate to **All** > **Localization Workspace** > **Language setup**. The **Language Provider** tab opens by default, or you can select the **Language Groups** tab.



Roles in Language setup:

- The localization_admin role is required to create or edit a Language Provider.
- The sn_lw.user role can view Language Provider records, but can't create or edit them.
- The sn_lw.user role can create Language Groups by selecting from existing Language Providers.

Configure a language provider

Set up language providers as part of configuring Localization Workspace. For each target language you can configure multiple providers with their pricing.

Before you begin

- Install at least one target non-English language on your instance.
- Configure at least one Translation Management System (TMS) in Localization Framework, or one machine translator configuration in Dynamic Translation. From version 2.0.2, you can access these tables in Configuration Hub in Localization Workspace
- Role required: localization_admin. The sn_lw.user role can view the language providers but can't create any.

About this task

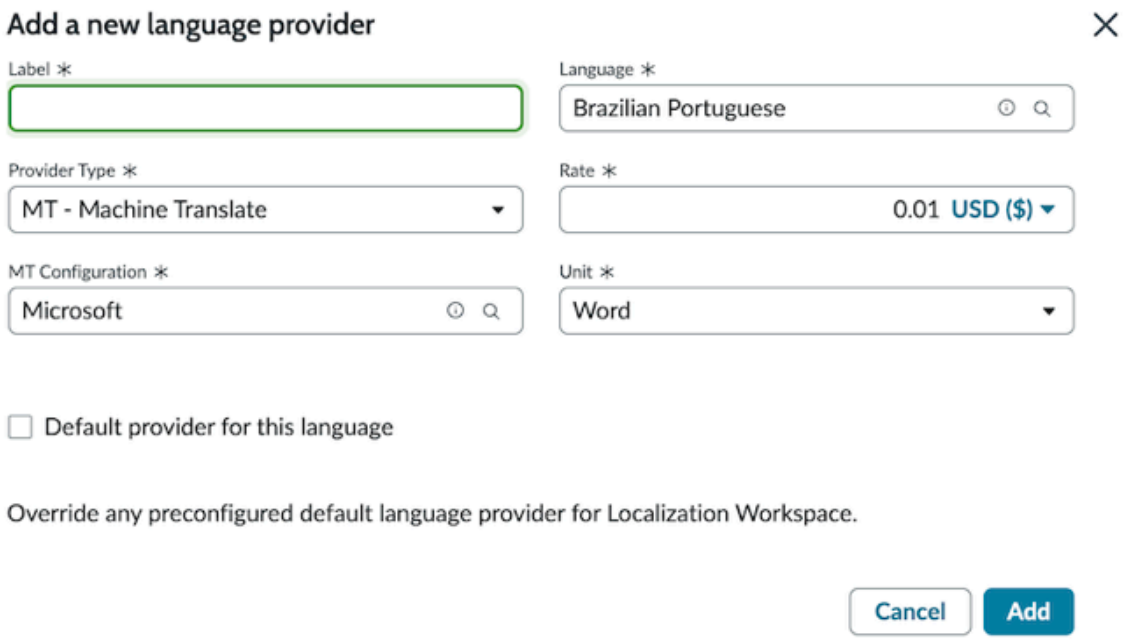
In Localization Workspace, a language provider is a record that combines:

- a third-party service provider (such as a TMS or machine translation API)
- a target language
- a rate per unit (the price your third-party service provider charges per word or character translated)

The language provider record provides granular control over the execution of each task in your translation project, and supports the possibility of more than one service provider per target language.

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This record also enables the calculation of the informational cost



estimate.

Note: From version 3.0.0, a Guided Tour is available to assist localization admins with the setup of a language provider. Access the guided tour by selecting the Help Center icon on the Home screen.

Procedure

1. Navigate to **All** > *Localization Workspace* > **Language setup** > **Language Provider**.
2. Select **New**.
3. In the **Add a new language provider** window, enter the following information.

Field	Value
Label	Enter a descriptive name. This label is dis played in the **Language Providers** list.
Language	Enter a language. You can search from among the languages you have configured on the in stance.
Provider Type	From the list, choose TMS (Translation Man agement System) or MT (Machine Transla tion). These provider types are available after you preconfigure them on your instance.
Rate	Enter the base rate charged by your third-par ty service provider per word or character, with out any volume discounts or overages. For more information see Request translations in Localization Workspace: Estimate and Due Date. You can choose a currency that is not in your user preferences. However, the informational cost estimate is displayed in the currency of the translation requester's user session.

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Field	Value
	This rate is used to calculate the informational cost estimate. **Note:** When displayed on the Home page of Localization Workspace, the **Cost** uses a rate that is rounded up to the decimal place that is set in your **Display Value Currency** field. However, the calculation of the informational cost estimate for a translation request uses the actual rate that you have configured in Localization Workspace. The calculation does not use the currency's display value. For more information, see Identify the FX Currency field and its display parameters.
TMS (or MT) Configuration	This field is dependent on your selection for **Provider Type**. Select from available providers that you have configured. For example, if you selected TMS as the Provider Type, and you have configured the XTM third-party provider, then **XTM** is available in the list.
Unit	The Unit count multiplied by the Rate equals the informational cost estimate. Choose from **Word** or **Character**, according to the billing policy of your third-party service provider. The term Character in Localization Workspace corresponds to Unicode code point, which is the unit commonly used by machine translation service providers. Check your service provider's documentation to confirm the unit used for pricing. For details about the pricing of Google Cloud Translator Service, see https://cloud.google.com/translate. For details about Microsoft Azure Translator, see https://azure.microsoft.com/en-us/pricing/details/cognitive-services/.
Default provider for this language	(Optional) Select this check box to set this provider as the default for this language in Localization Workspace. **Note:** The default provider in Localization Workspace is not related to the default translator in Dynamic Translation.

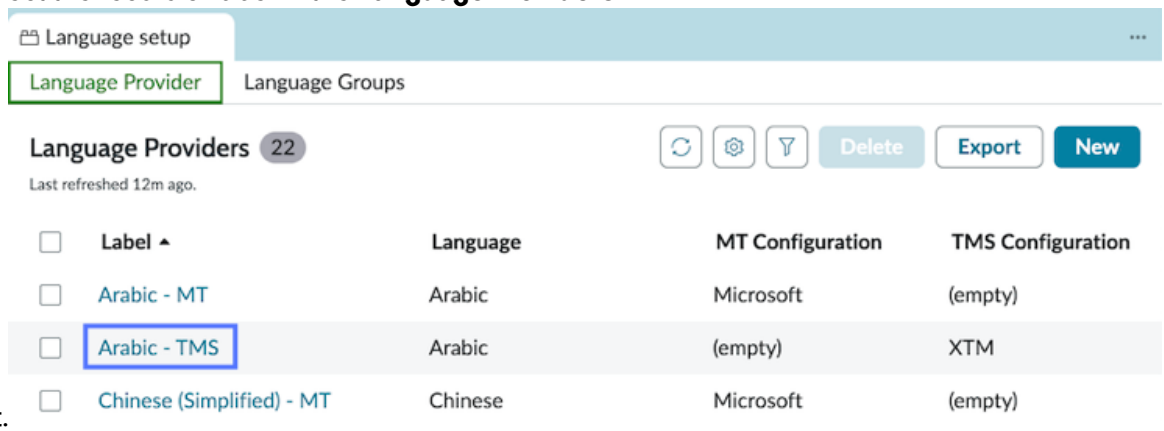
4. Select **Add**.

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What to do next

With the localization_admin role, edit an existing record as follows (the sn_lw.user role can view a record but not edit).

1. Navigate to **All** > *Localization Workspace* > **Language setup** > **Language Provider** tab.
2. Select the record's Label in the **Language Providers** list.



3. The **Edit language provider** window opens. Modify any values.
4. Save the record by selecting **Update**.

To delete a provider, select the check box next to its label, then select the **Delete** button.

Note: Updates to a provider are not applied to any translation requests currently in progress.

After you have configured individual language providers, you can optionally define Language Groups. Your users save time when creating translation requests by selecting a group rather than adding each language individually. For more information see Configure language groups.

Configure language groups

After setting up individual language providers, you can define one or more language groups. Configuring language groups is an optional way to streamline the creation of translation requests.

Before you begin

- Configure all individual language providers. The localization_admin role is required to create a language provider. See Configure a language provider.
- Role required: sn_lw.user. The sn_lw.user role can create a language group by selecting from existing language providers.

About this task

From version 2.0.2: When your users create translation requests, they can select configured language groups rather than adding each language individually to the request.

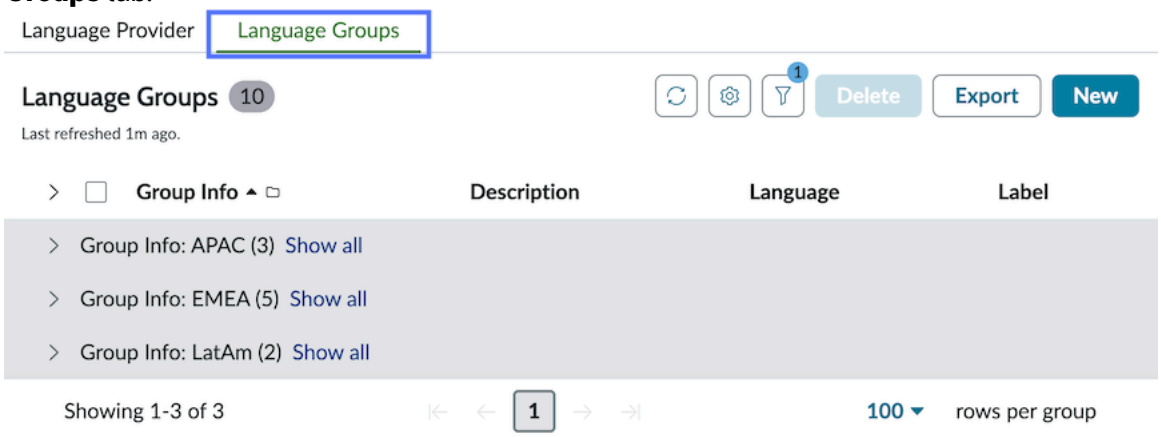
Individual languages may be included in more than one language group. If a language is included multiple times in one translation request, Localization Workspace clears out the preconfigured value for translation service provider. Then the translation requester must manually select the desired translation service provider.

Note: From version 3.0.0, a Guided Tour is available to assist localization admins and localization requesters (localization_admin and localization_requestor) with the setup of a language group. Access the guided tour by selecting the Help Center icon on the Home screen.

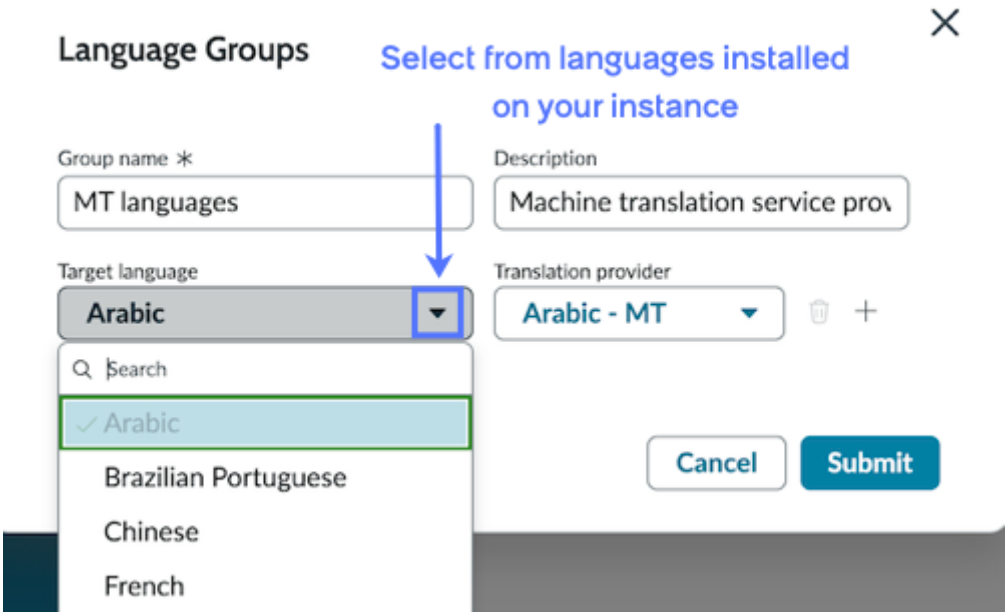
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Procedure

1. Navigate to **All** > *Localization Workspace* > **Language setup**, then select the **Language Groups** tab.



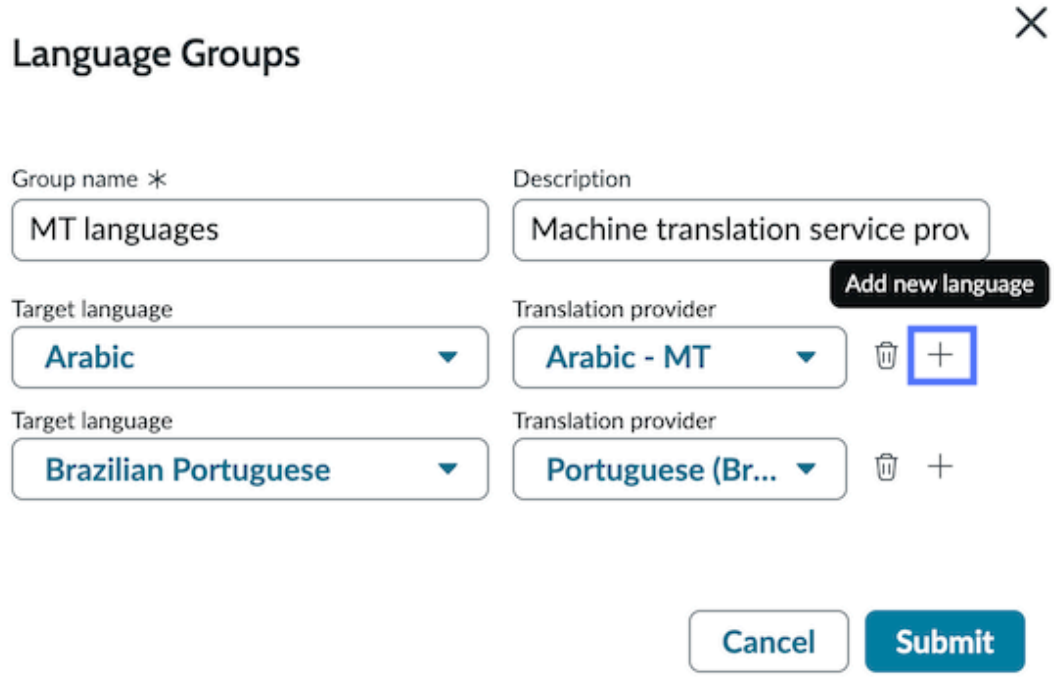
2. Select the **New** button to open the **Language Groups** modal window.
3. In the modal window, enter a name for your group and an optional description.
4. Select a Target language and its Translation provider.



5. Select the **Add new language** icon + to add another row.

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Language groups must have a minimum of at least two

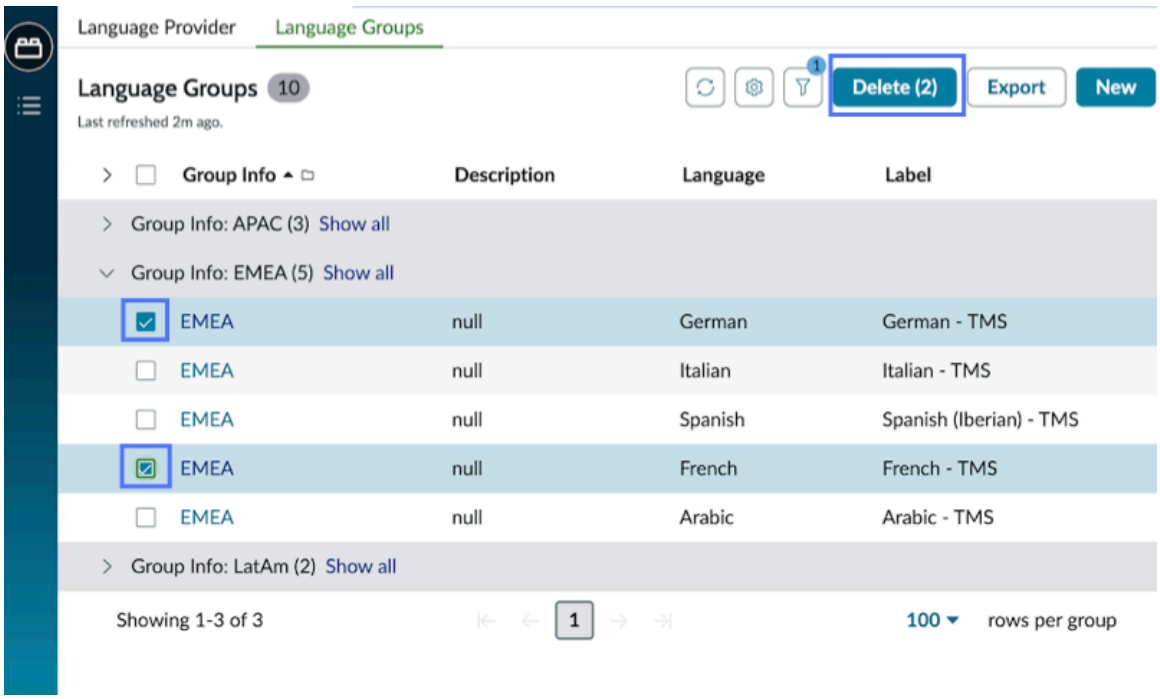


members.

6. Select **Submit** when you have finished adding all rows you want to include in the group.
7. **Optional:** You can export the list of language groups into your choice of file formats (Excel, CSV, JSON, PDF) by selecting **Export** on the list view of Language Groups.
   The exported list can either be downloaded as a file or attached to an email. Select **Delivery Type** in the Export modal window to switch from file download (default) to the email attachment option.

What to do next

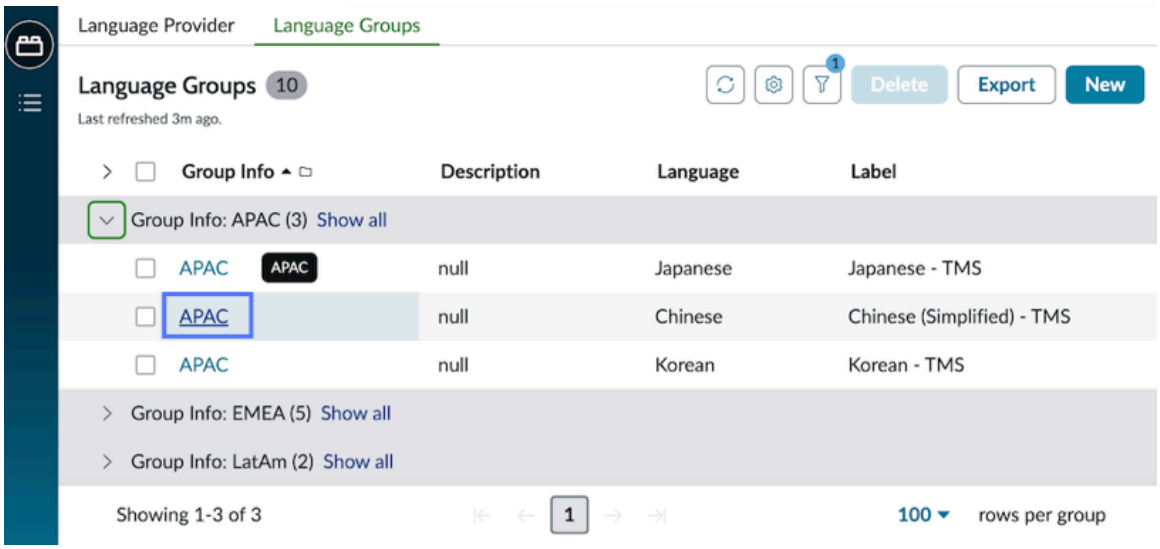
You can delete rows (individual languages) from Language Groups as follows.



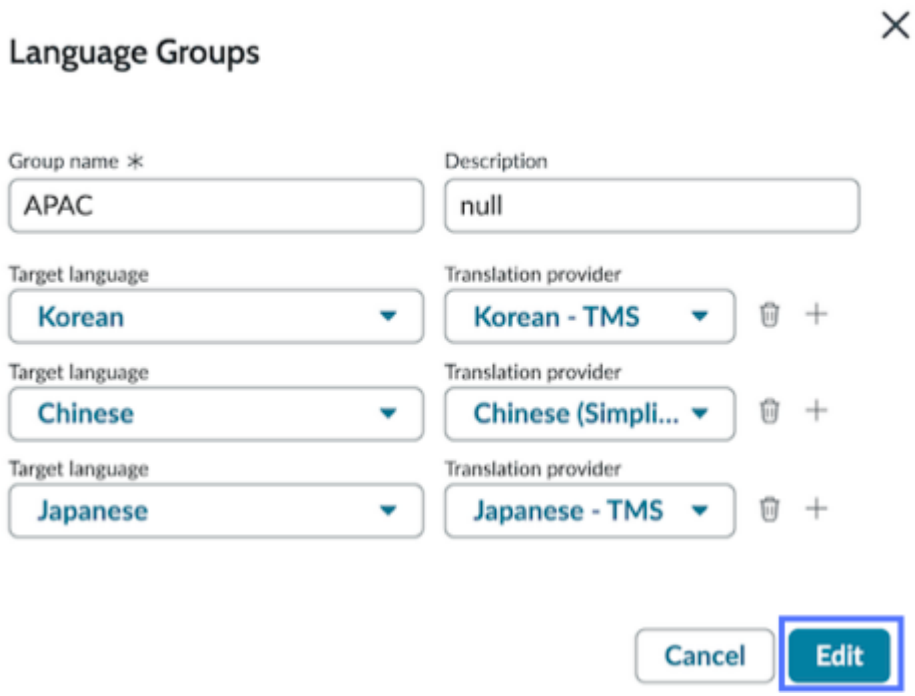
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1. In the list of language groups, expand a group to display its rows.
2. Select the check box of the row you want to delete.
3. Select the **Delete** button. This button displays the count of rows you have selected.
4. (Optional) You can delete the entire language group by selecting and deleting all of its rows. If you delete only one language, the rest of the group remains.

You can edit a group as follows.



1. In the list of language groups, expand a group to display its rows.
2. Select the name of the group in any one row. The group opens in a modal window.
3. Select new values from drop-down lists. Use icons to add (+) or delete (🗑) rows.
4. Select **Edit** to save your updates.



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Creating email notifications for Localization Workspace

As an admin, you can set up email notifications for events in Localization Workspace.

Keep your requestors and fulfillers informed by configuring email notifications in the system. Emails can be triggered by events or dates.

Related topics

- Create an email notification
- Create notification categories
- Preview email notifications

Create email notifications for completed translation jobs

Configure email notifications so you can be informed when Localization Workspace translation jobs are completed.

Before you begin

Create your own notification category to identify and group your notifications related to Localization Workspace translation projects. For instructions see Create notification categories.

Role required: admin.

About this task

From Zurich Patch 1, along with tracking the progress of translation jobs in Localization Workspace, you can set up email notifications to be alerted upon completion of translation jobs.

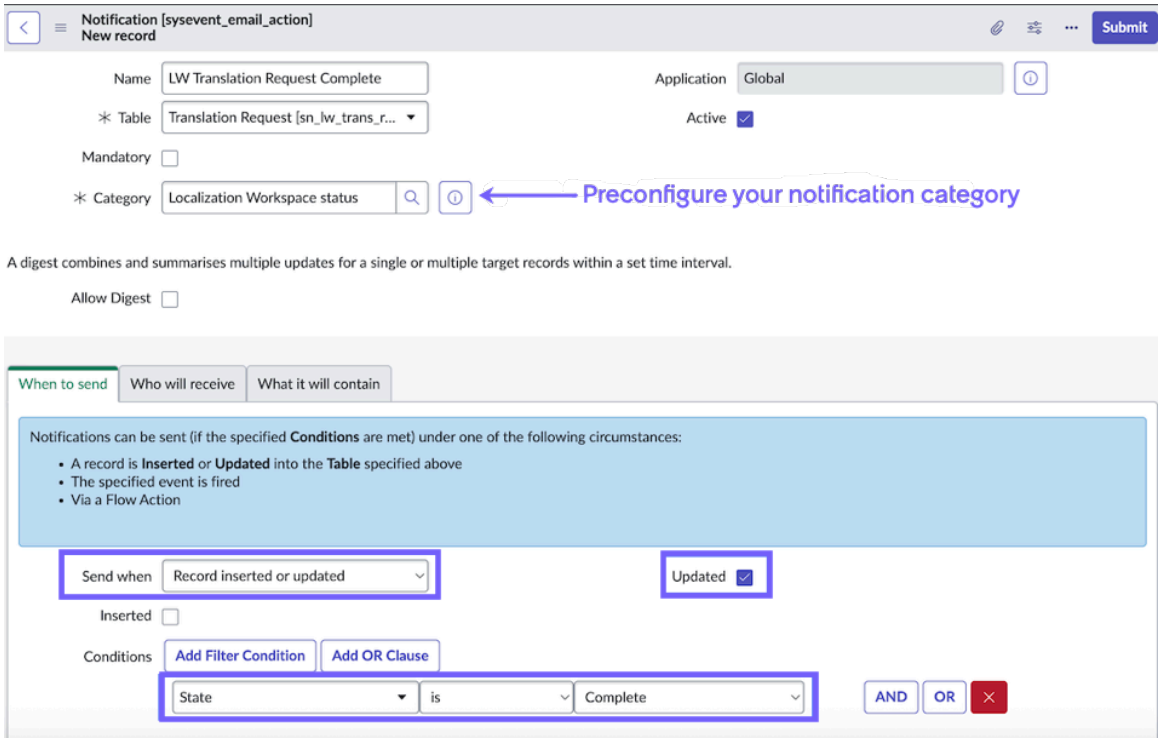
For detailed information about configuring email notifications, see Create an email notification. The following procedure is specific to notifications for Localization Workspace jobs.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Select **New**.
3. Fill in the fields according to the following guidance.

Field	Description
Name	Enter a unique, descriptive name for these no tifications.
Table	Select the Translation Request [sn_lw_trans_ request] table from the list of tables.
Category	If you have already set up your own category for these notifications, you can select it from the drop-down list. For information see Create notification categories.

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4. On the **When to send** tab, fill in the fields.

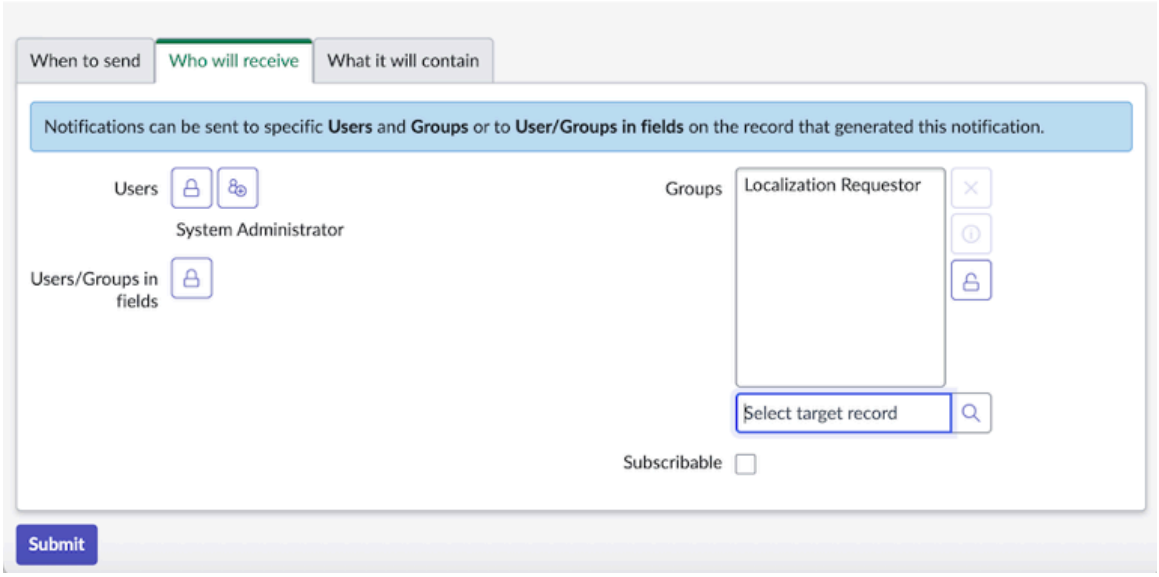
Field	Description
Send when	Select `Record inserted or updated`.
Updated	Select this check box.
Inserted	Clear this check box.
Conditions	Set one row to `State is Complete`.

5. On the **Who will receive** tab, fill in the fields according to your organizational requirements.

Field	Description
Users	Select the lock icon to add an individual user from the User [sys_user] table.
Users/Groups in Fields	Select the lock icon to add recipients from fields in the Translation Request [sn_lw_trans_request] table.
Groups	Select the lock icon to add a group of users, such as Localization Requestor, from the Group [sys_user_group] table.
Subscribable	Option to enable all users to subscribe to the notification.

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Field	Description
	Note: Recipients can receive email about records that they can't normally access from the user interface, so con sider the sensitivity of the information before selecting this option.



6. On the **What it will contain** tab, fill in the fields according to your organizational requirements.

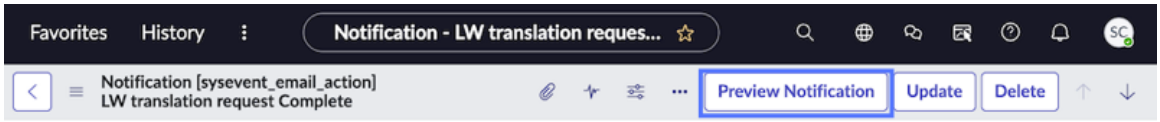
Field	Description
Email template	You can search for an existing template.
Subject	You can use variables from the Translation Re quest [sn_lw_trans_request] table, available under **Select variables**.
Message HTML	You can use variables from the Translation Re quest [sn_lw_trans_request] table, available under **Select variables**. Example variables from this table: ○ `${lf_project.number}` is the corre sponding number from Localization Frame work. ○ `${sys_created_by}` is the person who submitted the translation request.

7. Select **Submit** (or **Update** if you are editing) to finish the record.

What to do next

After creating a new notification, you can review its record in the Notifications [sysevent_email_action] table. From that finished record you can select **Preview Notification** to open an example of the email notification. Use this function to confirm how the notification appears to recipients.

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For more information, see Preview email notifications.

Create email notifications for translation request due dates

As an admin, you can create email notifications triggered by translation request due dates.

Before you begin

Create your own notification category to identify and group your notifications related to Localization Workspace translation projects. For instructions see Create notification categories.

Role required: admin

About this task

From version 2.0.2, your users may set a due date when requesting translations in Localization Workspace. You can reference these due dates to send email notifications.

For more information see Request translations in Localization Workspace: Estimate and Due Date. For background information about configuring email notifications, see Create an email notification.

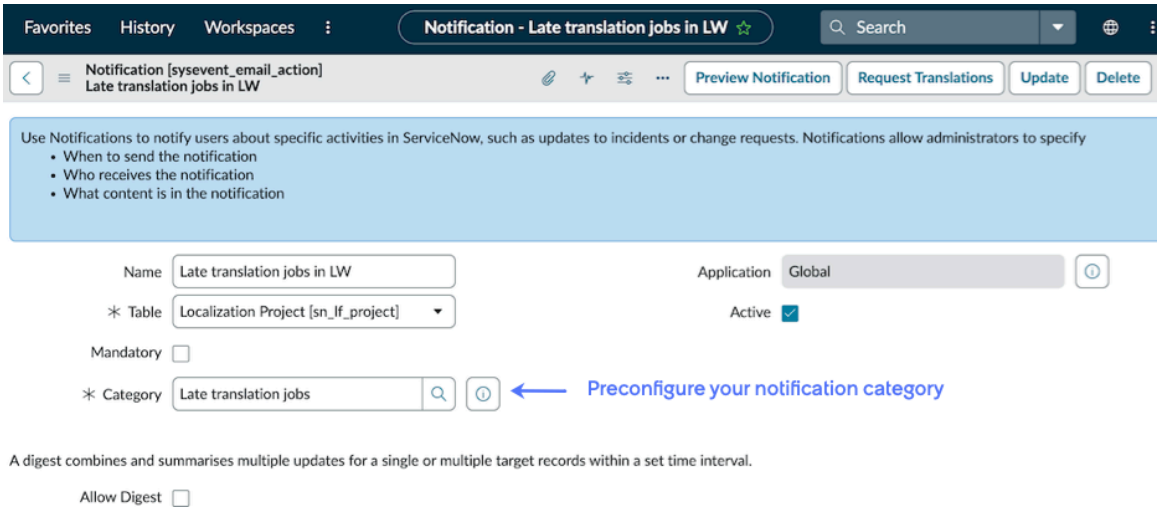
The following procedure is specific to notifications for Localization Workspace translation request due dates. In the example scenario, a notification is sent when a translation request is past due (the request is still in progress after its due date).

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Select **New**.
3. Fill in the fields according to the following guidance.

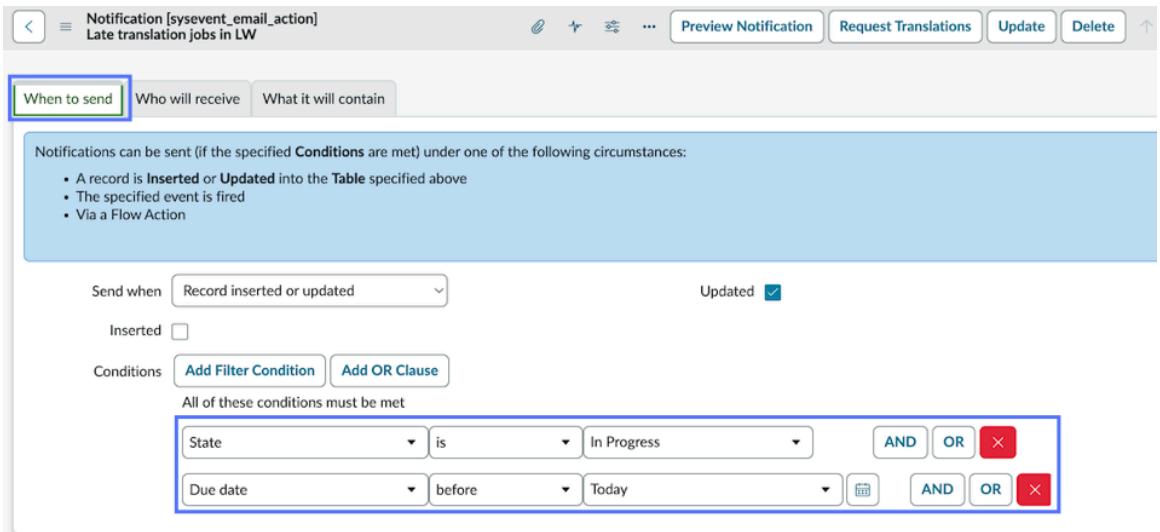
Field	Description
Name	Enter a unique, descriptive name for these no tifications.
Table	Select the Localization Project [sn_lf_project] table from the list of tables.
Category	If you have already set up your own category for these notifications, you can select it from the drop-down list. For information see Create notification categories.

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4. On the **When to send** tab, fill in the fields.

Field	Description
Send when	Select `Record inserted or updated`.
Updated	Select this check box.
Inserted	Clear this check box.
Conditions	In the example, two conditions are set: **a.** `State is In Progress` **b.** `Due date before Today`



5. On the **Who will receive** tab, fill in the fields according to your organizational requirements.

Field	Description
Users	Select the lock icon to add an individual user from the User [sys_user] table.

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Field	Description
Users/Groups in Fields	Select the lock icon to add recipients from fields in the Localization Project [sn_lf_project] table.
Groups	Select the lock icon to add a group of users, such as Localization Requestor, from the Group [sys_user_group] table.
Subscribable	Option to enable all users to subscribe to the notification. **Note:** Recipients can receive email about records that they can't normally access from the user interface, so con sider the sensitivity of the information before selecting this option.

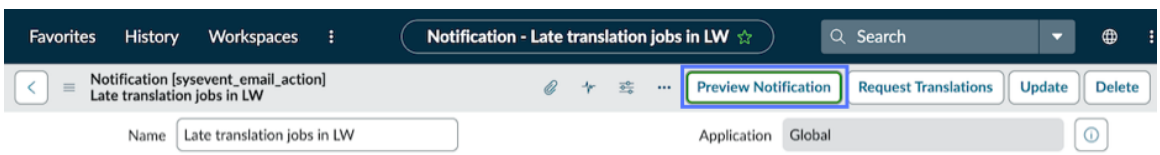
6. On the **What it will contain** tab, fill in the fields according to your organizational requirements.

Field	Description
Email template	You can search for an existing template.
Subject	You can use variables from the Localization Project [sn_lf_project] table, available under **Select variables**.
Message HTML	You can use variables from the Localization Project [sn_lf_project] table, available under **Select variables**. Example variables from this table: ○ `${short_description}` for Short De scription ○ `${due_date}` for due date ○ `${made_sla}` for Made SLA

7. Select **Submit** (or **Update** if you are editing) to finish the record.

What to do next

After creating or updating a notification, review its record in the Notifications [sysevent_email_action] table. You can select **Preview Notification** to open an example of the email notification. Use this function to confirm how the notification appears to recipients.



For more information, see Preview email notifications.

Requesting translations in Localization Workspace

Create and submit translation requests in Localization Workspace. Generate informational cost estimates for review and set a due date before submitting the request.

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Overview of creating translation requests

As a localization requester, you can create translation requests for multiple content types into multiple languages, all in one interface.

You can save or modify a translation request before submitting it. When you submit the translation request, Localization Workspace creates and packages a project in Localization Framework. Creating the project might take several minutes depending on the number of documents. When the project is ready, Localization Workspace sends the translation request to your third-party service provider.

Note: From version 3.0.0, you can cancel a TMS translation request after submitting it. However, Localization Workspace does not contact your service provider. You should notify your provider directly regarding any cancellations.

On the Localization Workspace home page, the **Request Translation** button opens a wizard displaying a four-step process.

1. Request translations in Localization Workspace: Languages

   Start a translation request by selecting available target languages or language groups.

2. Request translations in Localization Workspace: Types

   Add content types to a translation request. You can select multiple types of documents from tables across your instance. The system retrieves all available translatable documents for each selected content type.

3. Request translations in Localization Workspace: Scope

   Select or deselect specific documents from the retrieved list of content. Different documents can be selected for each language in the request.

4. Request translations in Localization Workspace: Estimate and Due Date

   Generate an informational cost estimate as the last step in the Request Translation wizard. Review the estimate to plan and control your localization budget. Optionally add a due date for the request.

Tracking translation requests

When you save or submit a translation request, its record is displayed on the Home screen of Localization Workspace in the **My Requests** list. You can edit, archive, or cancel a translation request from My Requests. For more information, see Localization Workspace Home and translation job status.

Translation request due dates

In the Estimate step of a translation request, the system suggests due dates based on the type of service provider. You can optionally accept the suggested due date, or you can use the calendar picker to choose another date. You can't choose a date that is earlier than the suggested date, however.

From version 3.0.0, intelligent due dates are offered when requests are submitted through a TMS. Localization Workspace suggests a due date based on the target language's word or character count, using the following industry-standard formula.

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Due Date formula

Target language type	Formula used
Words	Divide the total word count by 1500. Then add 2. The result is the expected number of days to complete the translation. Add that number to the current date.
Characters	Divide the total character count by 15,000. Then add 2. The result is the expected number of days to complete the translation. Add that number to the current date.

Note: The Estimate step of a translation request displays Word counts, not Character counts, even when the target language has been configured as character-based. However, the intelligent due date suggestion uses the Characters formula for languages configured as character-based.

When using a TMS to translate into multiple target languages in one request, the formula assumes that the languages are processed concurrently, not sequentially. This means that the language with the highest word or character count is used to calculate the due date suggestion.

For machine translation service providers, the default due date is the current date. Due dates in Localization Workspace correspond to the Localization Framework Project due dates.

Example: Due date calculation for a TMS request

The following example illustrates the due date calculation when the word count is 62,453.

1. Divide the word count by 1500.

   62453 / 1500 = 41.6.

2. Truncate (round down or take the floor) to the nearest whole integer.

   41.6 becomes 41.

3. Add 2 days.

   41 + 2 = 43.

4. Add the number of days to the current date.

   The suggested due date is 43 days from the current date.

Request translations in Localization Workspace: Languages

Add target languages to a translation request in Localization Workspace.

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Before you begin

- Ensure that the languages you intend to add to your translation request have been installed on your instance.
- Ensure that the language providers that you intend to use have been configured. See Configure a language provider.
- Role required: sn_lw.user

About this task

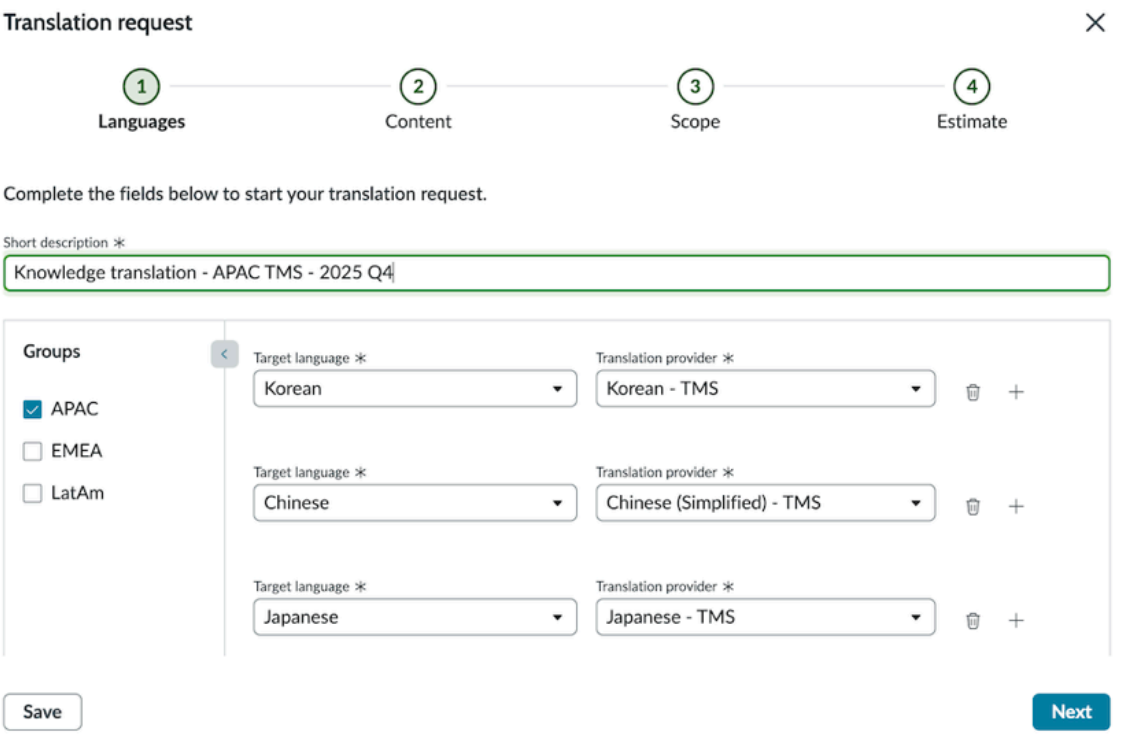
Your translation request can bundle multiple target languages and multiple content types. Each language in the request can include different target documents.

Note: In the Brazil release, only requests from English into non-English target languages are supported. Requests from non-English source languages are not supported.

The following procedure covers step one of four steps in the Translation Request wizard.

Procedure

1. Navigate to **All** > *Localization Workspace* > **Home**.
2. Select **Request Translation** to open the



wizard.
The **Translation request** wizard opens at the first step, **Languages**.

3. In the **Short Description** field, enter a name for the translation request.
The Short Description is displayed in the **My Requests** list on the Home screen, so you can find and monitor your request later. For information see Localization Workspace Home and translation job status.
4. Select target languages or language groups according to the following guidance.

Option	Description
Language	To select an individual language:

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Option	Description
	a. In the **Target language** field, select an available language from the drop-down list. **b.** In the **Translation provider** field, select a name from the list of providers available for the language you chose. You can add more than one language to a request.
Groups	When you select a check box for a language group, the Target language and Translation provider fields auto-populate. ○ You can add more than one language group to a translation request. ○ After you add a language group to request, you can manually delete individual languages from it. Deletion in the wizard applies only to this request; the definition of the language group doesn't change. ○ You can include a mix of language groups and individual languages in one request. ○ If a language is included multiple times in one request, Localization Workspace clears the value of the Translation provider field. You must then manually select the desired Translation provider for that language.

5. **Optional:** Add another language by selecting the plus icon +, or add another language group by selecting its check box.
6. **Optional:** Select **Save**.
   A saved translation request has a status of `Draft` in the **My Requests** list on the Home screen.
7. Select the **Next** button to proceed to the Types step of translation request creation.

What to do next

Advance to the next step in the wizard, **Types**, to select content for translation.

Request translations in Localization Workspace: Types

Add content types to a translation request in Localization Workspace. Your translation request can include multiple types of documents from tables across your instance.

Before you begin

- Content types correspond to tables. For details about making your content available to Localization Workspace, see Types of Localizable content in Localization Workspace.
- Complete the first step in the Translation Request wizard, then proceed to this step. See Request translations in Localization Workspace: Languages.
- Role required: sn_lw.user

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About this task

When you choose content types to include in your request, Localization Workspace retrieves all untranslated or partially translated documents from the tables. Then in the next step of the wizard (Scope), the retrieved list is displayed so that you can select or deselect specific documents.

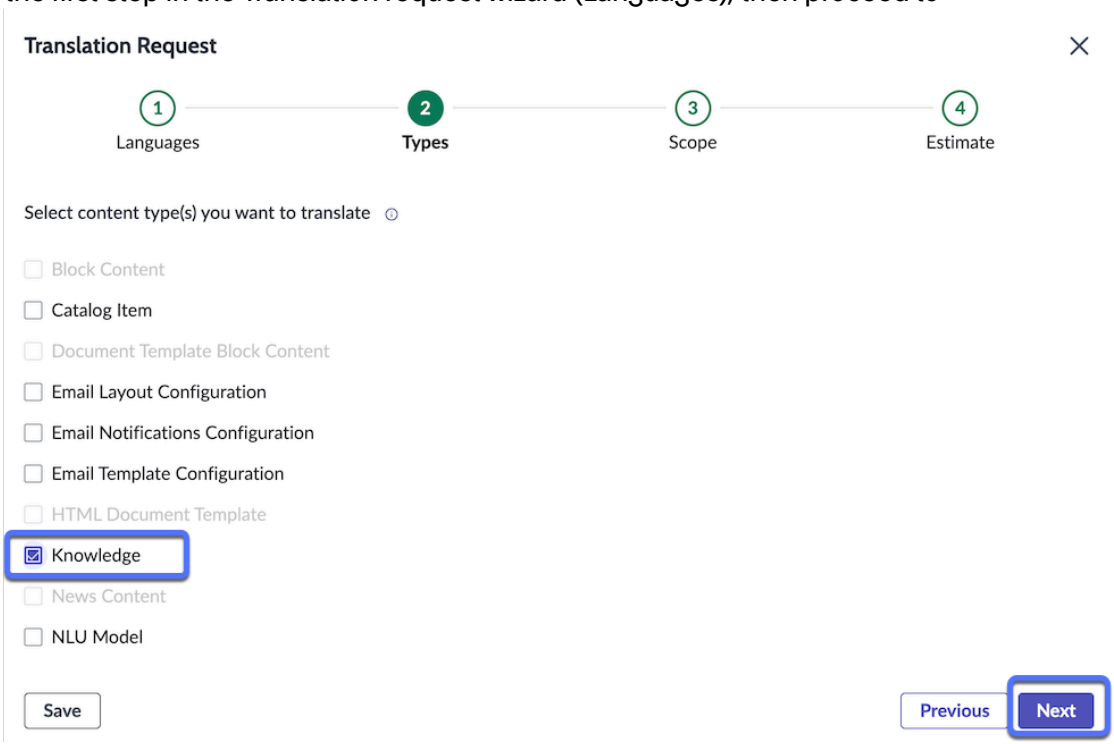
A document may be considered partially translated when its original is updated after it was translated. In such cases it may be possible to synchronize the translated versions to the English original by translating only the new portion of the text.

Items currently in the translation process can't be selected or resubmitted until the current translation finishes.

The following procedure covers step number two in the Translation Request wizard.

Procedure

1. Complete the first step in the Translation request wizard (Languages), then proceed to **Types**.



2. Choose the content types you want to translate by selecting the appropriate check boxes.

   Note: Content types that are not selectable may require table or role permissions. Ask your administrator to enable access. For more information see Types of Localizable content in Localization Workspace.

3. **Optional:** Select **Save**.
   A saved translation request has a status of `Draft` in the **My Requests** list on the Home screen.
4. Select the **Next** button to advance to the Scope step of translation request creation.

What to do next

Advance to the third step in the wizard, **Scope**, where you can select specific documents for inclusion.

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Request translations in Localization Workspace: Scope

Select specific documents to add to a translation request in Localization Workspace.

Before you begin

Role required: sn_lw.user

About this task

In the Scope step of a translation request, you can drill down to select or deselect specific documents from the list of translatable items collected by the Types step.

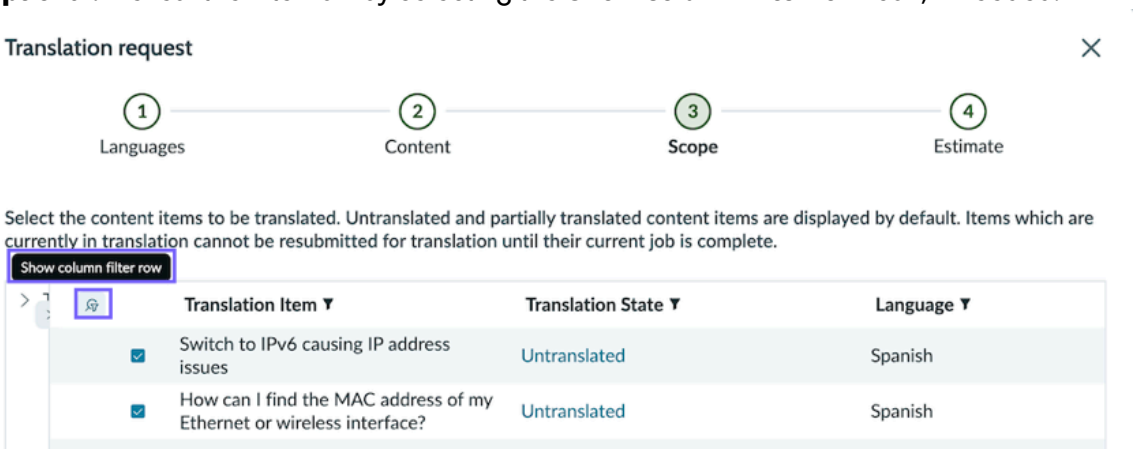
- When the Scope screen first opens, all of the retrieved items are selected by default.
- Items that are currently in the translation process aren't retrieved.
- If you don't want an item to be included in the translation request, deselect that item by clearing its check box.
- It's possible to select a document for one target language, and deselect the same document for a different target language.
- From version 2.0.2, you can use a text filter in the column filter row. Filter operators are the same as other tables in your instance (such as **starts with**, **contains**, and so forth).
- If you search for a term in the filter under the Translation Item column, the system searches for that term only in the titles of documents, not in contents.
- From version 2.0.2, a bulk select/deselect check box is available in the Filter row.

> **Note:** Bulk selection/deselection applies only to the set of items that you have selected in the Types pane. Review and confirm the items in a translation request before submitting.

The following procedure covers step three of four steps in the Translation Request wizard.

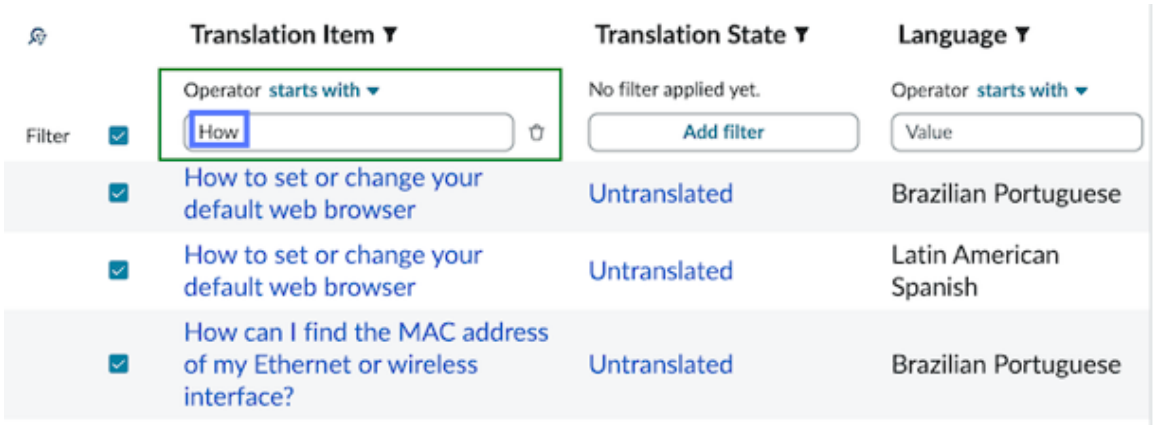
Procedure

1. Complete steps one and two in the Translation request wizard, then proceed to this one, **Scope**.
2. **Optional:** Reveal the filter row by selecting the **Show column filter row** icon, if needed.

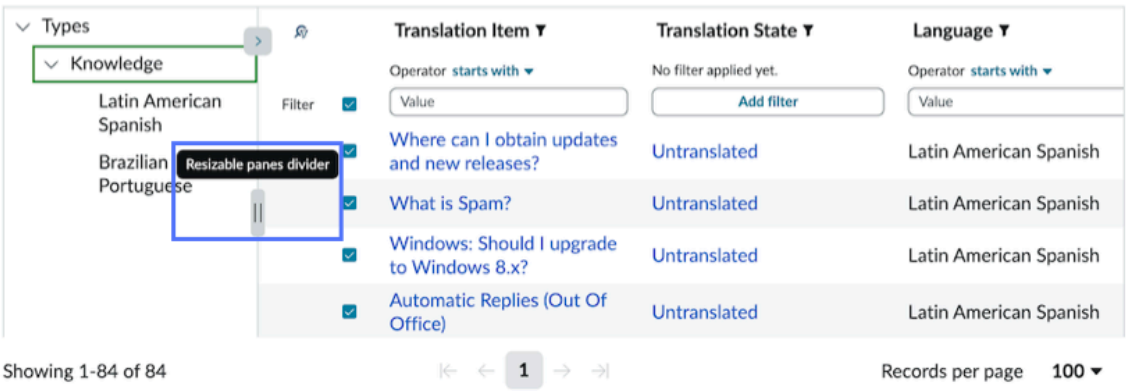


3. **Optional:** Filter the list according to terms in the document titles (Translation Item), or by Translation State or Language.

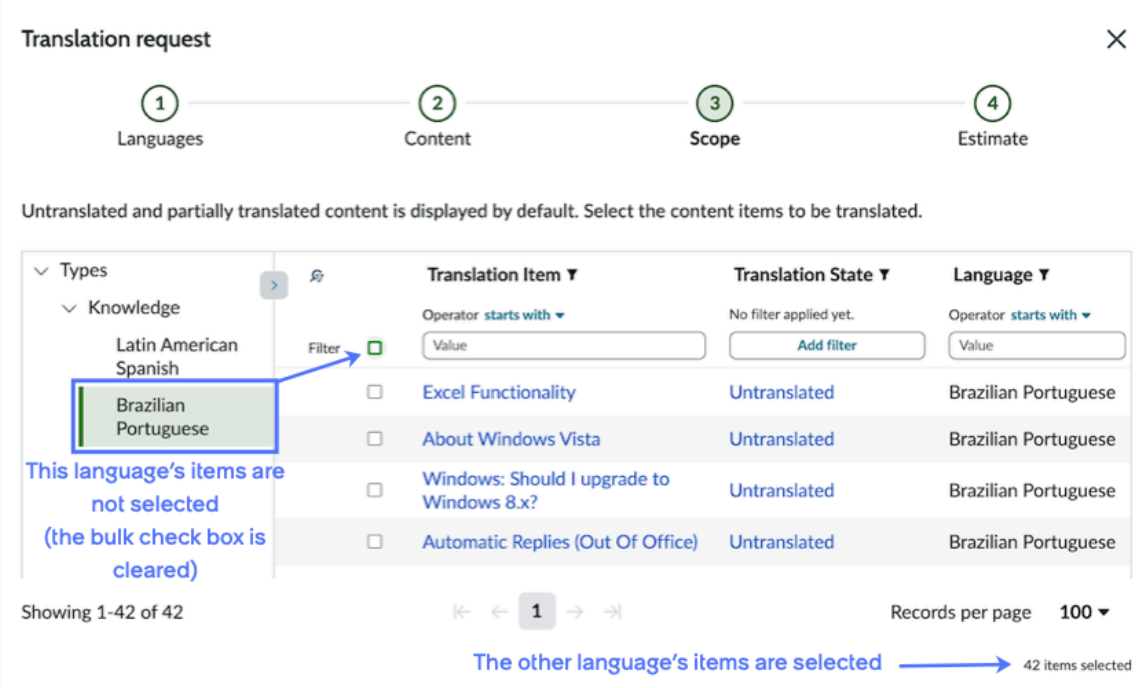
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4. Reveal the Types pane by opening the **Resizable panes divider**, then expand Types by selecting the caret icon.



5. **Optional:** Deselect any retrieved documents that you don't want to include in your request by clearing the item's check box.
   You can use the bulk select/deselect check box in the Filter row to select (or clear) a set of items. If anything is highlighted in the Types pane, bulk selection/deselection applies only to the highlighted type or language.



6. **Optional:** Select **Save**.

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A saved translation request has a status of `Draft` in the **My Requests** list on the Home screen.

7. Confirm the items you have included or excluded, then select **Next** to proceed to the **Estimate** step of the Translation Request wizard.

What to do next

Advance to the next step in the Translation Request wizard, **Estimate**, where you can review projected costs and set a due date for the translation request.

Request translations in Localization Workspace: Estimate and Due Date

As the final step in creating a translation request, you can review an informational cost estimate and optionally set a due date. The due date can be used to trigger email notifications.

Before you begin

- If you want to use the optional due date field to trigger an email notification, confirm that your admin has configured notifications. For more information see Creating email notifications for Localization Workspace.
- Role required: sn_lw.user

About this task

Important:

Cost estimates are informational only. ServiceNow makes no representations or warranties as to the accuracy of this estimate. You are solely responsible for properly configuring the translation cost settings and validating the actual costs with the translation provider.

The informational cost estimate is calculated by multiplying the total number of words (or characters) by the cost per word (or character). The following conditions apply.

- Your third-party translation service provider charges you directly for translation services provided. ServiceNow has no involvement with billing or payment.
- Each translation service provider has its own definition of how to count words for billing purposes. Your provider's word count might be different from ServiceNow's estimated word count.
- You must input and maintain accurate costs per word in the Language Provider record in Localization Workspace.
- This estimate is not generated by a call to the API of your translation service.
- The term character in the Localization Workspace interface corresponds to a Unicode code point.
- The **Estimated total** value is rounded down to a whole number, so decimal places are not included.
- The informational cost estimate is calculated and displayed in the currency of the translation requester's user session.
- When you input the cost per word from your translation service provider, use the base rate before any volume discount is achieved. Localization Workspace is not able to calculate volume discounts or overages, so the informational cost estimate displayed in this wizard might be different from actual charges.

Consult your provider's documentation. For details about the pricing of Google Cloud Translator Service, see https://cloud.google.com/translate/pricing. For details about Microsoft Azure Translator, see https://azure.microsoft.com/en-us/pricing/details/cognitive-services/translator/.

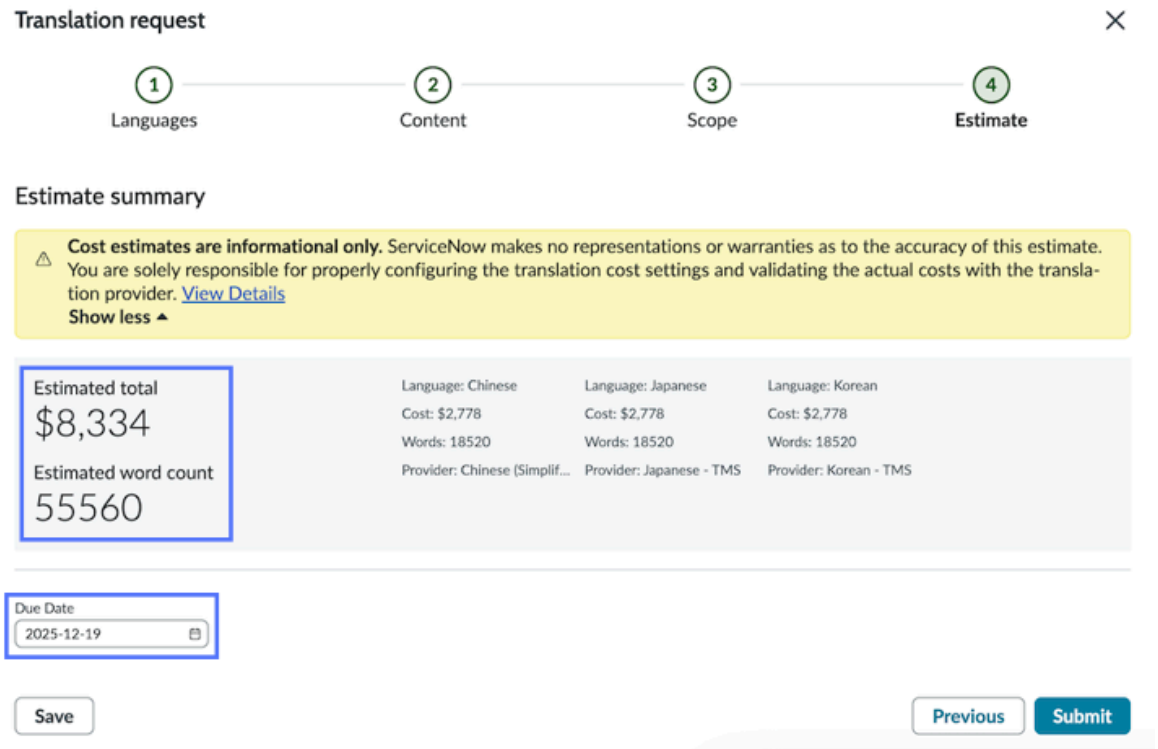
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From version 2.0.2, an optional due date field is available in the Estimate step. It can be used to trigger email notifications. (Notifications require configuration by an admin).

- The due date corresponds to the Localization Framework Project due date.
- From version 3.0.0: when submitting to a TMS, the system suggests a due date based on the word count. For details about intelligent due dates see Requesting translations in Localization Workspace.
- For machine translation service providers, the default due date is the current date.
- You can use the calendar picker to choose a date that is later than the default or suggested due date, but you can't choose an earlier date.

Procedure

1. Complete the first three steps (Languages, Types, and Scope) in the Translation request wizard, then select **Next** to proceed to **Estimate**.
   Larger translation requests take longer to generate informational cost estimates.



2. Review the generated informational cost estimate.
   The estimate includes total cost and word count for the entire translation request. Also included is a breakdown of the cost and word count per language.

   Note: The UI displays Word counts, not Character counts, even when the target language has been configured as character-based. However, any underlying calculations (such as intelligent due date suggestions) use the actual character count for character-based languages.

3. **Optional:** Enter a due date for the project by selecting the Due Date field.
   Selecting this field opens a calendar date picker. You can choose a date that is later than the suggested (or default) due date, but you can't choose a date that is earlier.
4. **Optional:** Use the **Previous** button to modify the estimate by returning to earlier steps and removing documents from your request.
5. **Optional:** Select **Save**.

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A saved translation request has a status of `Draft` in the **My Requests** list on the Home screen.

6. Select **Submit** to create the bundled translation request and send to your translation service providers.

Note:

- When you submit a translation request, the system first creates a Localization Framework project. During the creation of the project, the Due Date field doesn't contain any value. The due date is available after project creation.
- The larger the translation request, the longer it takes to create its project. The process may take several minutes for very large requests.
- When the translation request's project is finished, the system sends the packaged documents to your third-party service provider. You can cancel a translation request after submitting, but Localization Workspace does not contact your service provider. You should notify your provider directly regarding any cancellations.

What to do next

You can view translation request records in list format on the Home page of Localization Workspace.

Note: When displayed in the Requests list on the Home page, the **Cost** is rounded up to the decimal place that is set in your **Display Value Currency** field. However, the calculation of the informational cost estimate for a translation request does not use the currency's display value. The calculation uses the actual rate that you have configured in Localization Workspace. For more information, see Identify the FX Currency field and its display parameters.

Localization Workspace reference

Reference topics provide additional information you can use to configure and administer Localization Workspace.

Components installed with Localization Workspace

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

Components from Localization Framework used in Localization Workspace

Localization Workspace builds on functionality from Localization Framework, including tables and roles. Installing Localization Workspace also installs Localization Framework if it isn't already activated. For detailed information see Components installed with Localization Framework.

Roles installed

For detailed information about roles installed see Localization Workspace Roles.

Scheduled jobs installed

Scheduled job	Description
Remove discarded Translation Requests	Runs daily to delete any abandoned translation requests (translation requests which have been initiated but not updated for 10 days).

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Scheduled job	Description
	Archived or saved translation requests aren't removed. (Saved requests display the Draft state in the My Requests list on the Home screen.)

Tables installed

Table label	Table name
LW Artifact Configuration	[sn_lw_artifact_config]
Glossary Source (from version 3.0.0)	[sn_lw_glossary_source]
LW Glossary Export Data (from version 3.1.0)	[sn_lw_glossary_export_data]
Sn Lw Glossary Import Set (from version 3.0.0)	[sn_lw_glossary_import_set]
Glossary Info (from version 3.0.0)	[sn_lw_glossary_info]
Glossary Items (from version 4.0)	[sn_lw_glossary_item]
Glossary Translation (from version 3.0.0)	[sn_lw_glossary_translation]
KB Cache (from version 4.0)	[sn_lw_kb_cache]
Progress Tracker	[sn_lw_progress_tracker]
Rate Change	[sn_lw_rate_change]
Translation Item	[sn_lw_trans_item]
Translation Item Language	[sn_lw_trans_item_language]
Translation Provider	[sn_lw_trans_provider]
Translation Request	[sn_lw_trans_request]
Translation Target	[sn_lw_trans_target]
Translation Target Group (from version 2.0.2)	[sn_lw_target_group]
Translation Target Group Info (from version 2.0.2)	[sn_lw_target_group_info]

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Related topics

Find components installed with an application

Localization Workspace Domain Separation

Domain separation is unsupported for Localization Workspace. 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.

Types of Localizable content in Localization Workspace

Localization Workspace collects available translatable content from across your instance when you create a translation request. You can make your content available by configuring permissions and creating an artifact record.

Prerequisites for availability

The availability of a content type is subject to its table and application scope permissions. Localization Workspace retrieves untranslated or partially translated documents when the following prerequisites are fulfilled.

- If you have created a custom artifact, set cross-scope privileges to ensure that the corresponding content type can be selected in Localization Workspace. For more information see Cross-scope privileges for Localization Workspace.
- If the target tables are restricted, set Restricted Caller Access privileges to ensure that a content type can be selected in Localization Workspace. For more information see Restricted Caller Access for Localization Workspace
- For Content Publishing material, add the role sn_cd.content_admin to your Localization Workspace group in the sys_user_group table. This role is needed to access Content Publishing items from Localization Workspace.

Translatable content

A document may be considered partially translated when its original is updated after translations were produced. In such cases it may be possible to synchronize the translated versions to the updated original by translating only the new portion of the text.

Content available by default

The following table lists the content types that are available by default when you install Localization Workspace. These are preconfigured with artifact records and cross-scope permissions.

You can also configure your own custom artifacts. For more information, see Create and configure a custom artifact.

In this table the **Filter** column shows the query used to retrieve untranslated or partially translated content.

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Localizable content available by default

Content type	Table	Filter
Block Content	sn_cd_block	(No filter. All records.)
Catalog Item	sc_cat_item	active=true^state=published^ORstate=
Document Template Block Content	sn_doc_template_block_content	active=true
Email Layout Configuration	sys_email_layout	(No filter. All records.)
Email Notification Configuration	sysevent_email_action	active=true
Email Template Configuration	sysevent_email_template	(No filter. All records.)
HTML Document Template	sn_doc_html_template	active=true
Knowledge	kb_knowledge	workflow_state=published^ORworkflow_state=scheduled_pub
News Content	sn_cd_content_news	active=true
Notification Content	sn_cd_content_notification	active=true
Portal Content	sn_cd_content_portal	active=true
To-do Content	sn_cd_content_todo	active=true
NLU Model	sys_nlu_model	state=Published^language=en
Survey	asmt_metric_type	active=true **Note:** Surveys are an available content type for Localizati
VA Topic	sys_cs_topic	active=true

Related topics

- Dynamic artifact detection in Localization Workspace
- Supported artifacts in Localization Framework

Localization Workspace Roles

Localization Workspace is installed with these roles.

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Localization Framework roles used in Localization Workspace

Many roles used in Localization Workspace are inherited from Localization Framework. For detailed information about the following, see Localization Framework Roles.

Roles from Localization Framework

User	Name
Localization administrator	localization_admin
Localization editor	localization_editor
Localization fulfiller	localization_fulfiller
Localization manager	localization_manager
Localization requester	localization_requestor

Terminology Manager (sn_lw.terminology_manager)

Upload, review, and manage glossaries in the Language Asset Management area of Localization Workspace.

Contains Roles

List of roles contained within the role.

- *import_transformer*
- *content_admin*
- *import_set_loader*

Groups

List of groups this role is assigned to by default.

None.

Special considerations

The sn_lw.terminology_manager role is available from version 3.1.0 of Localization Workspace. With version 3.1.0, the following roles that had previously been contained in sn_lw.user are transferred to sn_lw.terminology_manager: import_transformer, content_admin, import_set_loader.

This role does not contain the sn_lw.user role. Be sure to also assign sn_lw.user to any user working in Localization Workspace.

Localization Workspace user (sn_lw.user)

Assign this role to any user working in Localization Workspace.

Contains Roles

List of roles contained within the role, before version 3.1.0.

- *import_transformer*
- *content_admin (from version 3.0.0)*

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- *import_set_loader*
- *canvas_user (from version 2.0.0)*

From version 3.1.0, the roles contained within this role:

canvas_user

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: From version 3.1.0, the following contained roles are transferred from sn_lw.user to sn_lw.terminology_manager: import_transformer, content_admin, import_set_loader.

The sn_cd.content_admin role is required to see Content Publishing items from Localization Workspace. The sn_cd.content_admin role is different from the content_admin role. For more information about sn_cd.content_admin, see Types of Localizable content in Localization Workspace.

System Localization

Localization allows administrators to accommodate users from a variety of different countries, using different languages and currencies, within the same instance.

Get started

Explore  Learn about localizing an instance for different users.	Configure  Configure languages, locales, regions, and locations for an instance.
Translate custom content  Translate content created or modified on an instance.	Translate to a new language  Translate an instance to a language without a language plugin.

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Reference



Get details about properties, tables, and more.

Troubleshoot and get help

- Localization in the ServiceNow Customer Success Center
- Localization Expert Series in ServiceNow University
- Digital guidebook for localization on the ServiceNow® Developer Site: ServiceNow Application Localization
- Internationalization & Localization in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring System Localization

Learn about support for localizing ServiceNow instances as part of your globalization strategy.

System Localization overview

Localization is the process of making an instance specific to a given region or locale without impacting functionality.

System localization includes the language and locale settings for an instance and is a ServiceNow AI Platform feature that is active by default (com.glide.i18n.core). Translations for several languages are available through additional internationalization (I18N) language plugins (for example, com.snc.i18n.spanish). These language plugins install the I18N: Internationalization plugin (com.glide.i18n), which provides the elements necessary for translating an instance.

Languages and translation

The I18N language plugins contain translations of the UI string content that ServiceNow provides by default in your instance. Whenever you have customized UI strings that you want to translate, you have to identify and translate these strings manually. In addition, you can create translations for languages for which ServiceNow doesn't provide a plugin.

> **Note:** Using the Localization Framework application is recommend for translating to an unsupported language or translating large amounts of custom UI string content in a supported language.

Locales, locations, and regions

Locale settings support displaying dates, times, and currencies properly based on your location. In addition, you can configure locations to identify users, assets, incidents, and more on the instance. Configure regions to organize languages in language selectors.

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System Localization benefits

Benefit	Feature	Users
Display translations of base system UI string content.	• Language internationalization support • Activate a language	Administrators
Display dates, times, and currencies in an instance based on users' locations.	Configuring locales	
Translate UI string content that you create or modify.	Translating custom content	

Related applications

Localization Framework

Using the Localization Framework application is recommend for translating to an unsupported language or translating large amounts of custom UI string content in a supported language. Localization Framework also supports using Dynamic Translation for live translation of form fields, translating knowledge articles, and integrating with third-party translation services.

Localization Workspace

Localization Workspace is a targeted translation management experience for content owners and translation fulfillers. With Localization Workspace you can manage and deliver multilingual content at scale.

Translation management for Knowledge Management

Knowledge article translation uses a separate system that relies on the I18N: Knowledge Management Internationalization plugin. If this plugin isn't activated, knowledge article translation falls back on System Localization, with translations kept in the Translated Text [sys_translated_text] table.

Language internationalization support

The ServiceNow platform supports multiple languages.

Language support is available when at least one language plugin has been activated, as described in Activate a language.

When a user logs in, the language for the instance session is determined by the following logic:

1. If the language selection at login is enabled, that language is used.
2. If not, the language preference selected using the language picker in the header bar is used.
3. If not, the language setting in the User [sys_user] table is used.
4. If none of the above are true, the system default language is used.

You can also enable a fallback language to use if a translation isn't available in the preferred language, as described in Set a fallback language.

Some parts of the system aren't translated and remain in the language used to create them:

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- Journal fields
- Report titles
- Any field that stores free-form text

Additionally, plugin names and spoke names aren't translated. The English version of plugins and spoke names is always kept, even when they're used in other contexts. Feature names are translated, however.

Beginning in the Washington DC release, new product and application names are localized in all supported languages. Existing product and application names are being localized incrementally.

FAQ

Question	Answer
Will fields that I created or edited myself be translated?	The ServiceNow AI Platform does not perform translations. ServiceNow only provides translations of strings that the company itself has created. When you create a field, a message, or other textual UI content, translate this content manually.
I am not seeing journal fields translated.	Translation tables are not provided for user-defined string fields, such as short description, additional comments, and report titles. These fields can appear only in the language they were created in.

Related topics

Locating translatable UI strings

User specific language

The user has several choices for identifying the language to be used for the instance, as described here.

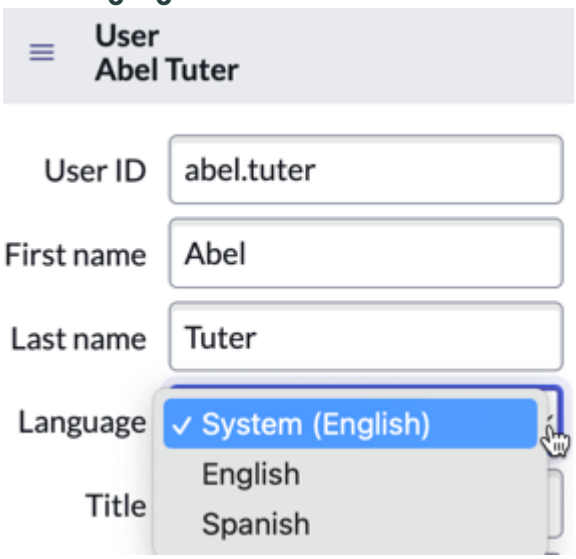
To enable user-specific languages, first activate the I18N Translation plugins for the desired languages.

- *Language picker at login:* If user-specific language is enabled, users see a choice list on the login page to select their language. To control display of the choice list on the login page, navigate to **All** > **System Properties** > **UI Properties** and use the property *Show the language select box on the login page to allow the user to specify the language they would like to be logged in with*.
- *Language picker in the user menu (Next Experience UI):* Users can select their language from the user menu by navigating to **Preferences** > **Language & Region**. The user menu is located in the Next Experience Unified Navigation.
- *Language picker in the System Settings window (Core UI):* Users can select their language in the General tab of the System settings window. Access this window by clicking the gear icon on the right edge of the banner.
- *Language setting on the user table:* If you have users that require a different language in addition to the global language, you can specify a language for them in **All** > **User Administration** > **Users**. If the **Language** field isn't already on the form, you can configure the form and add it.

The **Language** field in the User [sys_user] table overrides the default global language for that user's sessions.

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User language



Note: Setting the language for the system guest user sets the language for both the login page and all users without a user role.

Localizing currency and price fields

You can localize currencies for item prices and options.

Standard currency fields display the same price in different currencies based on the user's language. A price field is similar to a currency field, but with special features for conversion and display.

The system has the concept of a reference currency based on the instance locale. All currency values are automatically converted to the reference currency before aggregation or conversion. Do not change the global locale setting after you have data in the system. Changing the global locale setting after adding data to the system can cause aggregations to calculate and display incorrectly. For information about configuring the instance locale, see Configuring locales.

Related topics

- Currency administration
- Price fields
- Default currency values in scripts

Translating the knowledge base

The knowledge base has its own Translation Management system. However, when this is disabled, knowledge base articles use translated_html fields for translated content.

When any of the internationalization (I18N) plugins are enabled, the Knowledge Management Internationalization plugin is enabled. This plugin allows knowledge article authors to create language-specific articles and to translate and access articles. For more information about Knowledge Management internationalization, see Translation Management in the Knowledge Management documentation.

If the Knowledge Management Internationalization plugin is disabled, knowledge base articles use translated_html fields for article content. This type of field displays the translation based on the language of the user, if multiple translations are stored. To learn about using translated_html fields, see Translating text fields.

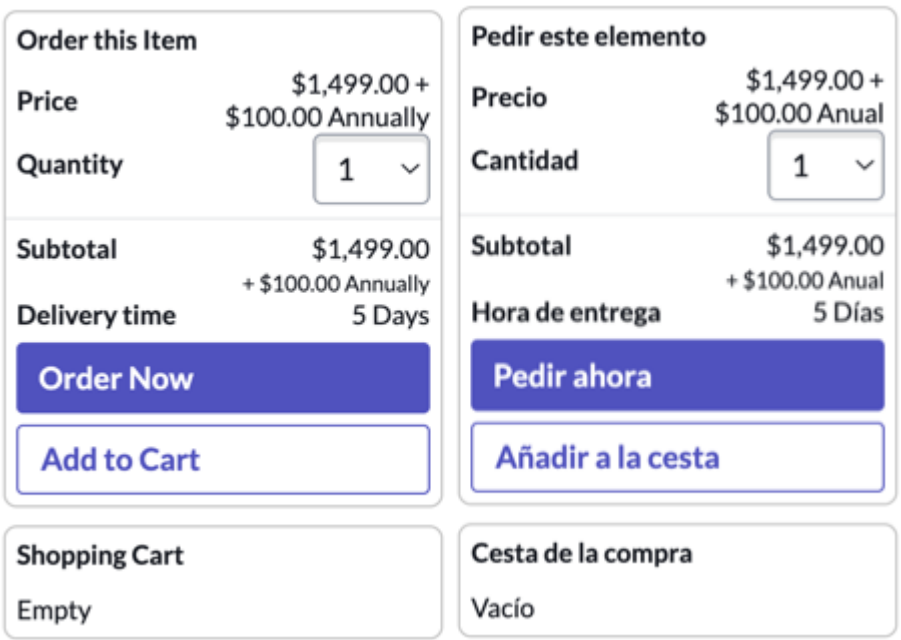
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Translating Service Catalog cart labels

You can specify language-specific labels in these Service Catalog screens: Cart, Edit Cart, and Check Out (including workflows and approvals).

The text for the labels is stored on the Messages [sys_ui_message] table. Localized Message records for these labels are included in the I18N Internationalization language plugins. The application is Global. You can add a record for an unsupported language, or edit an existing record. If you edit an existing record, export the record to another application, edit it in that application, and re-import it. Otherwise, your edits may be overwritten when your instance is zbooted or updated. For more information about exporting translation records, see Export and edit translation records.

Service catalog cart labels



Configuring System Localization

Configure the locales, languages, regions, and locations needed to accommodate your users.

Configuration overview

The following list is a high-level overview of the workflow to get started localizing an instance. However, there may be use cases where performing these steps in a different order is preferred.

1. Set the instance locale

   By default, the instance locale is the United States (en.US). You should set the instance locale before a system has gone into production and not change it after.

2. Activate a language

   Activate any of the ServiceNow® internationalization (I18N) language plugins to get translations of base system UI strings in the languages your users need. American English is the default language and doesn't need to be activated.

3. Set the default language for an instance

   Select a default language for an instance if it should be a language other than American English.

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4. Set a fallback language

   Specify the fallback language for another language so that if UI text isn't translated in a language, the text displays in the fallback language instead. By default, if a UI string isn't translated in the preferred language of an instance session, it displays in English.

5. Set up locations

   Configure the locations that your organization supports to help identify users, assets, incidents, and more by location.

6. Create regions for language selection in portals

   Map languages to regions to organize the language selector for guest users.

7. Ensure that translated choices appear for applications added by plugins

   If you activate other application plugins after having activated language plugins, translated choices in lists might not appear for the applications or features installed by their plugins. Ensure that translated choices appear for those applications by activating translated choice records after corresponding English choice records have been added by plugins.

After you configure your instance using the localization options and supported languages, you might need to translate custom content or translate the instance to an unsupported language. For more information, see Translating custom content and Translating to an unsupported language.

Configuring locales

Specify a locale for an instance so information such as dates, times, and currencies display properly based on your location.

By default, the base system uses US standard formatting. For example, the currency default is the US dollar sign ($) displayed with two decimal places: $100.00. By customizing your locale, you can make things such as currency appear as you expect. For example, in France, you may want to see 100,00 € instead of $100.00.

Set the instance locale

Set the instance locale using a locale code.

Before you begin
Role required: admin

About this task
You should set the instance locale before a system has gone into production and not change it after it goes into production. If a user's locale must be changed, update the **Country code** field on the user record.

> **Important:** The value of this property determines the system's default currency, or reference currency, into which all prices are automatically converted before other sums or conversions are performed. Changing this property after any price or currency fields have been given a value (for Service Catalog items, Assets, Project Tasks, etc.) may result in improper conversion or prices that sum incorrectly.

Procedure

1. Navigate to **All** > **System Properties** > **System Localization**.
2. Enter the locale code to use under **Locale code to use for localization**.

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Format is [language code].[country code] (e.g. en.GB for Britain fr.FR for France, de.DE for Germany, or ja.JP for Japan).

Common locales

Country	Locale code
United States	en.US
Great Britain	en.GB
France	fr.FR
Germany	de.DE
Japan	ja.JP

3. Select **Save**.

Activate a language

By default, the language supported by the platform is American English. You can activate plugins for other supported languages if you have the admin role.

Before you begin

Role required: admin

About this task

The following plugins are currently available:

- I18N: Arabic Translations
- I18N: Brazilian Portuguese Translations
- I18N: Czech Translations
- I18N: Dutch Translations
- I18N: Finnish Translations
- I18N: French Canada Translations
- I18N: French Translations
- I18N: German Translations
- I18N: Hebrew Translations
- I18N: Hungarian Translations
- I18N: Italian Translations
- I18N: Japanese Translations
- I18N: Korean Translations
- I18N: Latin American Spanish Translations
- I18N: Norwegian Translations
- I18N: Polish Translations
- I18N: Portuguese Translations
- I18N: Russian Translations
- I18N: Simplified Chinese Translations
- I18N: Spanish Translations

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- I18N: Swedish Translations
- I18N: Thai Translations
- I18N: Traditional Chinese Translations
- I18N: Turkish Translations

In addition, the I18N: Internationalization plugin (com.glide.i18n) provides the elements necessary for localizing an instance without any language translation preloaded. This plugin is useful for localizing an instance to a language other than those listed above. For more information on using the I18N: Internationalization plugin to translate an instance into a custom language, see Translating to an unsupported language.

Note:

- Activating internationalization plugins for any of the available languages automatically activates the I18N: Knowledge Management Internationalization Plugin v2 plugin (com.glideapp.knowledge.i18n2).
- Product and Application Names are kept in English in localization plugins. Feature names are translated.
- After installation, localization plugins can't be uninstalled.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

Set the default language for an instance

Change the language that appears by default for an instance.

Before you begin

Activate the languages that your users need. For more information, see Activate a language for supported languages or Translating to an unsupported language for custom translations.

Role required: admin

About this task

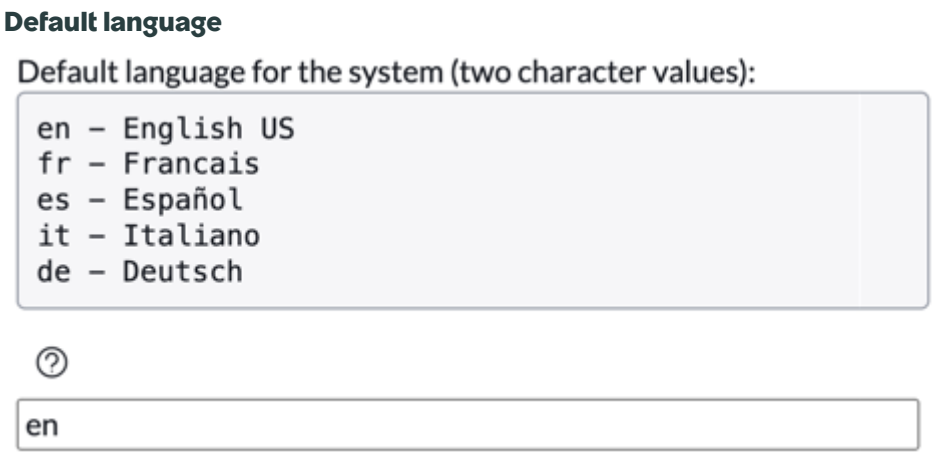
This property defines the language that users with a role see if a language is not specified in their user record. Users without a role see the default guest language, as described in User specific language.

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Procedure

1. Navigate to **All** > **System Properties** > **System Localization**.
2. In the **Default language for the system (two character values)** field, enter a two-character language code.

   You can set the default language to any language that is active on the instance. The following language codes and languages are examples of possible values.



3. Select **Save**.

Set a fallback language

Set a fallback language to be used when user interface text is not translated in the user's preferred language to accommodate the language needs of your users.

Before you begin

Activate the languages that your users need. For more information, see Activate a language for supported languages or Translating to an unsupported language for custom translations.

Role required: admin

About this task

By default, if a UI string is not translated in the preferred language of an instance session, it displays in English. Setting fallback languages creates a three-level hierarchy in which an intermediate language is used before defaulting to English. Setting a fallback language also means you don't need to add custom translations for UI strings that are suitable in the fallback language and users get UI strings in the languages most appropriate for them.

For example, you could set the fallback language for Mexican Spanish to Spanish. If a UI string is not translated in Mexican Spanish, it displays in Spanish instead. If a Spanish translation is not available either, the UI string displays in English. As an admin, you would need to provide custom translations of UI strings in Mexican Spanish only when the translation differs from the Spanish translation.

Note: To turn off fallback languages and always fall back to English, add the *glide_i18n.language_fallback_enabled* property to the System Properties [sys_properties] table and set the value to `false`.

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Procedure

1. Navigate to **All** > **System Localization** > **Languages**.
2. In the Languages [sys_language] table, select the name of an active language.
3. In the **Fallback** field of the language record, select the name of the fallback language.
   You can select only an active language as the fallback language. You cannot set English as the fallback language because it is the default fallback language.
4. Select **Update**.

Set up locations

If your organization supports more than one distinct location, you can configure these locations in the platform to help further identify users, assets, and incidents.

Before you begin
Role required: admin

Procedure

1. In the application navigator, navigate to **All** > **User Administration** > **Locations**.
2. Select **New**.
3. On the Location form, enter the location name, address, contact, and other location details.
4. Select **Submit**.

Result
The new location is available as a reference anywhere you can specify one.

Create regions for language selection in portals

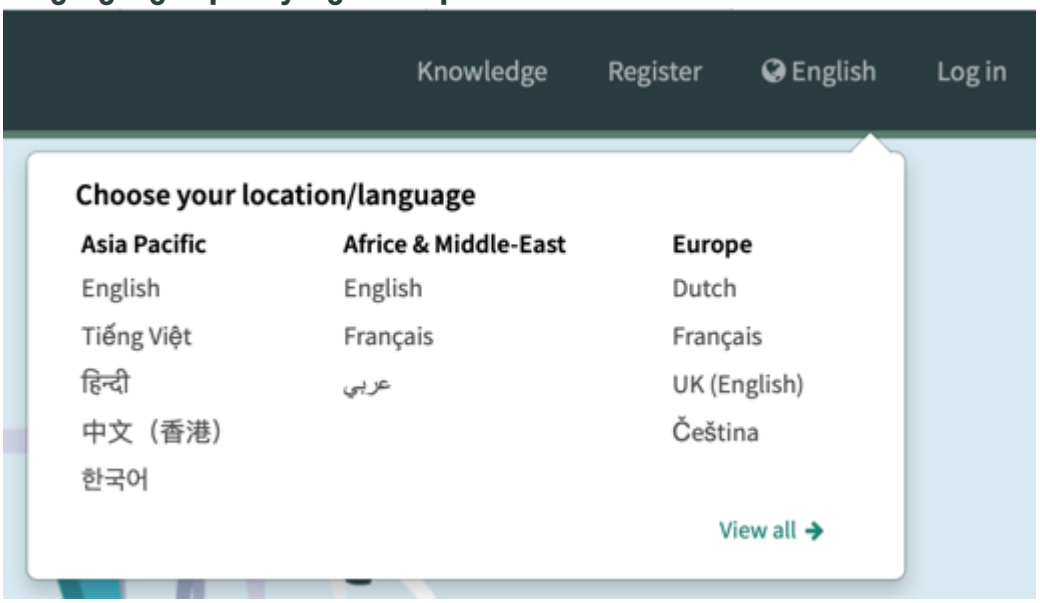
Create regions to group languages in the language selector in portal headers.

Before you begin
Role required: admin

About this task
In portal headers, the language selector displays the current language selection of the user and a menu of languages that the user can choose from. If languages are assigned to regions, languages display according to the configured region groups.

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Languages grouped by region in a portal header



For more information about the language selector in portal headers, see Enable a language selector in portal headers.

Procedure

1. Create regions.
   a. Navigate to **System Localization** > **Regions**.
   b. Select **New**.
   c. In the **Region** field, add a name for the region.
   d. In the **Order** field, assign a numerical value in multiples of hundred for the region. The order controls where the regions appear in the language selector, with the lowest ordered region on the left and the highest ordered region on the right.
   e. Select **Submit**.
   f. Repeat these steps to create additional regions.
2. Assign languages to regions.
   a. Navigate to **System Localization** > **Language Regions**.
   b. Select **New**.
   c. In the **Region** field, select a region from the list.
   d. In the **Language** field, select a language to assign to the region from the list.
   e. Select **Submit**.
   f. Repeat these steps to assign additional languages to regions.

Activate country choices for users

Select from additional countries in the Next Experience language and region preferences or a user record.

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Before you begin
Role required: admin

About this task
By default, you can select from only a limited list of countries in the Next Experience language and region preferences or in a User record. To allow users to select from additional countries, administrators can activate choices for the Country code [country] field on the User [sys_user] table. For more information about the Country user preference, see Configure Next Experience language and region preferences.

Procedure
1. In the navigation filter, enter `sys_choice.list`.
2. From the Choices list, use the condition builder to enter the following condition statement: **[Table] [is] [sys_user] AND [Element] [is] [country] AND [Inactive] [is] [true]**.
3. Select **Run**.
4. Select the Choice record for the country that you want to activate.
5. From the Choice record, clear the **Inactive** option.
6. Select **Update**.

Related topics
- Choice table
- User administration

Create country choices

Create additional country choices to select from in the Next Experience language and region preferences or a user record.

Before you begin
Role required: admin

About this task
By default, you can select from only a limited list of countries in the Next Experience language and region preferences or in a User record. Beginning with the Australia release, administrators can activate additional choices for the Country code [country] field on the User [sys_user] table. However, if the base system country choices were previously customized, the additional choices aren't available to activate after upgrading. Follow this procedure to create additional choices for countries that aren't available.

Procedure
1. In the navigation filter, enter `sys_choice.list`.
2. Select **New**.
3. On the form, fill in the fields.

Choice form

Field	Value
Table	User [sys_user]
Element	country

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Field	Value
Language	Enter a BCP 47 language identifier. This field can contain a language code or a language code followed by a country or region code. For example, tr for Turkish or es-MX for Mexican Spanish.
Label	Enter the name of the country in the specified language as you want it to appear in choice lists.
Value	Enter the two-letter ISO 3166-1 alpha-2 code for the country. For example, BR for Brazil.
Sequence	Enter a number to determine what order the option appears in the list if you don't want to list choices alphabetically.
Inactive	Leave cleared for the country choice to appear in the Next Experience language and region preferences or in a User record.

For more information about this table, see Choice table.

Example
The following choice lets users select Canada as their country when the user or instance language is English.

- **Table**: User [sys_user]
- **Element**: country
- **Language**: en
- **Label**: Canada
- **Value**: CA

4. Select **Submit**.

Ensure that translated choices appear for applications added by plugins

Ensure that translated choices appear for applications by activating translated choice records after corresponding English choice records have been added by plugins.

Before you begin
You must have activated a language and then activated a plugin that includes the corresponding English choice records. For more information, see Activate a language and Activate a plugin.

Role required: admin

About this task
When you activate plugins after having activated languages, translated choices in lists might not appear for applications or features installed by the plugins. Translated choice records installed by a language plugin that don’t already have corresponding English records in the Choices [sys_choice] table are set to **Inactive** by default. If you activate plugins that include those corresponding English choice records later, you need to make these records active to display translated choices for any applications or features installed with the plugin.

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Procedure

1. Navigate to **All** > **System Localization** > **Languages**.
2. In the Languages [sys_language] table, select the name of any active language.

   You can select any language because this process updates choice records for all languages.
3. In the Related Links section, select **Repair non-english sys_choice records**.
4. In the Repair Non-English Choices? dialog box, select **Yes**.
   A job that makes the **Inactive** field for all translated choice records match their corresponding English choice records runs 15 minutes after you make this choice.

Result

Translations for all choices with corresponding English choice records appear for applications or features installed with plugins.

Set case and accent sensitivity on a per-column basis

Set locale text match to provide case and accent sensitivity when searching the text of table columns. The default behavior for text searching in table columns is insensitive to case and accent (diacritic) variations, but you can enforce sensitivity using locale text match.

Overview of locale text match

By default, text searching in table columns is insensitive to case (example: A vs. a) and accent or diacritic (example: A vs. Å).

As an admin, you can modify this behavior for the fields you specify by setting the column attribute **i18n_locale_text_match** and a sys property **com.glide.db.ui_i18n_locale_text_match**. When set to true, text search on the column retrieves only exact matches for case and accent.

Locale text match is available from Zurich Patch 9 and Australia Patch 2.

Consider the following points when using the locale text match feature.

- Setting locale text match overrides the collation of SQL queries for the specific column.
- You can't set the **i18n_locale_text_match** column attribute when the following attribute is set on the same column: **i18n_session_language_sortable** or if property **com.glide.db.session_language_collation_feature**=true. For more information see Sorting according to the session language.
- Test the case and accent sensitive behavior thoroughly. When the **i18n_locale_text_match** column attribute is set, the behavior is applied to all queries including ACLs, business rules, and so forth.

Setting the column attribute i18n_locale_text_match

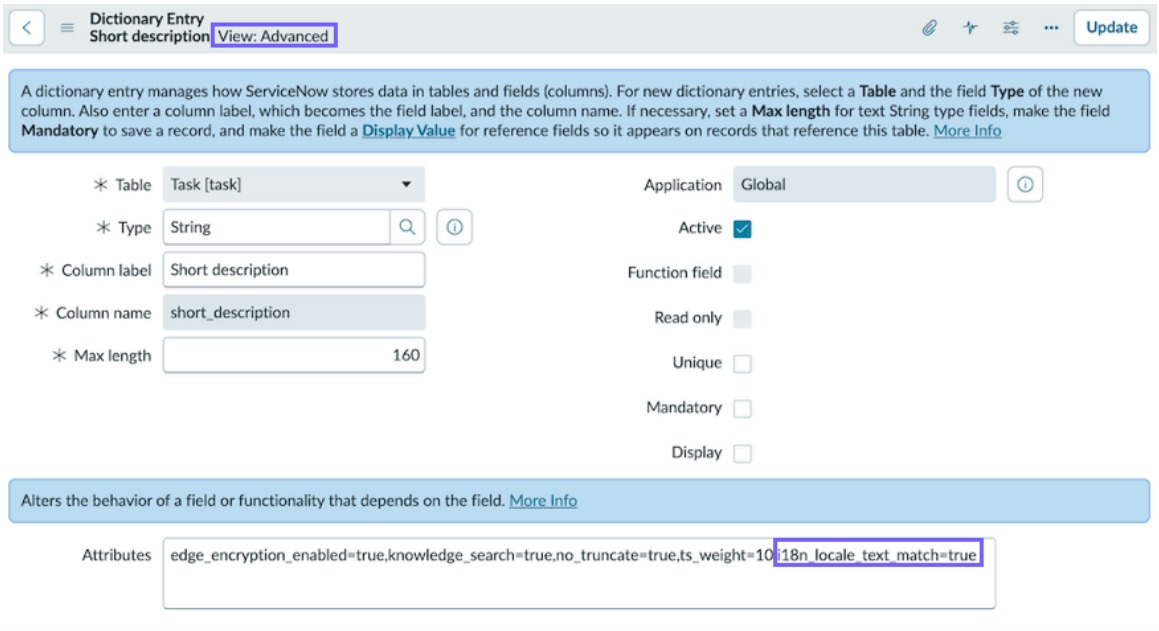
The default behavior is i18n_locale_text_match=false. Set the column attribute to true as follows.

Note: For text searches in tables in the product UI, both the column attribute and the sys property **com.glide.db.ui_i18n_locale_text_match** are required. See the Global property step in the Other methods for locale text match section of this page.

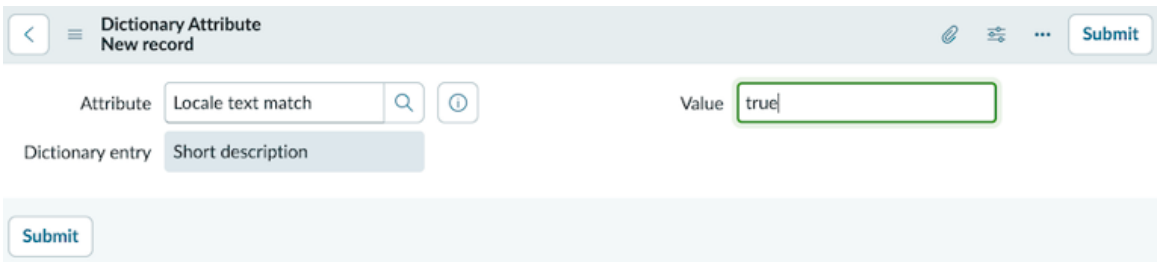
1. With the admin role, navigate to sys_dictionary.list.
2. Search for the name of your table and the name of the column to which you want to add this attribute.

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3. Open the dictionary entry, and confirm the column's Type. This attribute can be added to **String**, **Translated Text**, or **Translated Field** types.
4. In the Attributes field of the column, add `i18n_locale_text_match=true`. Use a comma separator without spaces. (You might need to switch to the Advanced view of the record to see the Attributes field).



5. As an alternative to the previous step, open the Attributes tab in Related Links, then select New. In the Attributes field search for `locale text match`, then set the Value field to True.



6. Select Update or Submit.

Other methods for locale text match

There are several methods for controlling locale text matching in specific situations, as follows.

Note: These methods can be applied only to a field which has the column attribute i18n_locale_text_match set to true.

1. GlideRecord: setLocaleTextMatch (Boolean isLocaleTextMatch)
   - Where: Used in scripts, such as for background transactions.
   - Use case: Temporarily activate or deactivate locale text match (case and accent sensitivity) for a specific GlideRecord query
2. URL parameter: sysparm_locale_txt_match

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- Where:
  - Add `sysparm_locale_txt_match=true` or `sysparm_locale_txt_match=false` as an extra parameter in a URL.
  - Table API. For information see Explore the REST API for a table.
- Use case: When the parameter is added, activate or deactivate locale text match (case and accent sensitivity) for queries that display data in platform lists.

3. Global property: com.glide.db.ui_i18n_locale_text_match
   - Where: Create a property in sys_properties, if it doesn't exist already.

     Name: com.glide.db.ui_i18n_locale_text_match.

     Type: true | false.

     Value: either true or false according to your business requirements. For text searches in tables in the product UI, both this property and the column attribute should be set to true.
   - Default: false
   - Use case: Activate or deactivate locale text match (case and accent sensitivity) for queries that display data in the platform lists.

The following order determines how locale text match settings are applied. Higher priority settings override lower ones.

1. URL parameter: sysparm_locale_txt_match (highest priority).
2. Global property: com.glide.db.ui_i18n_locale_text_match (lowest priority).

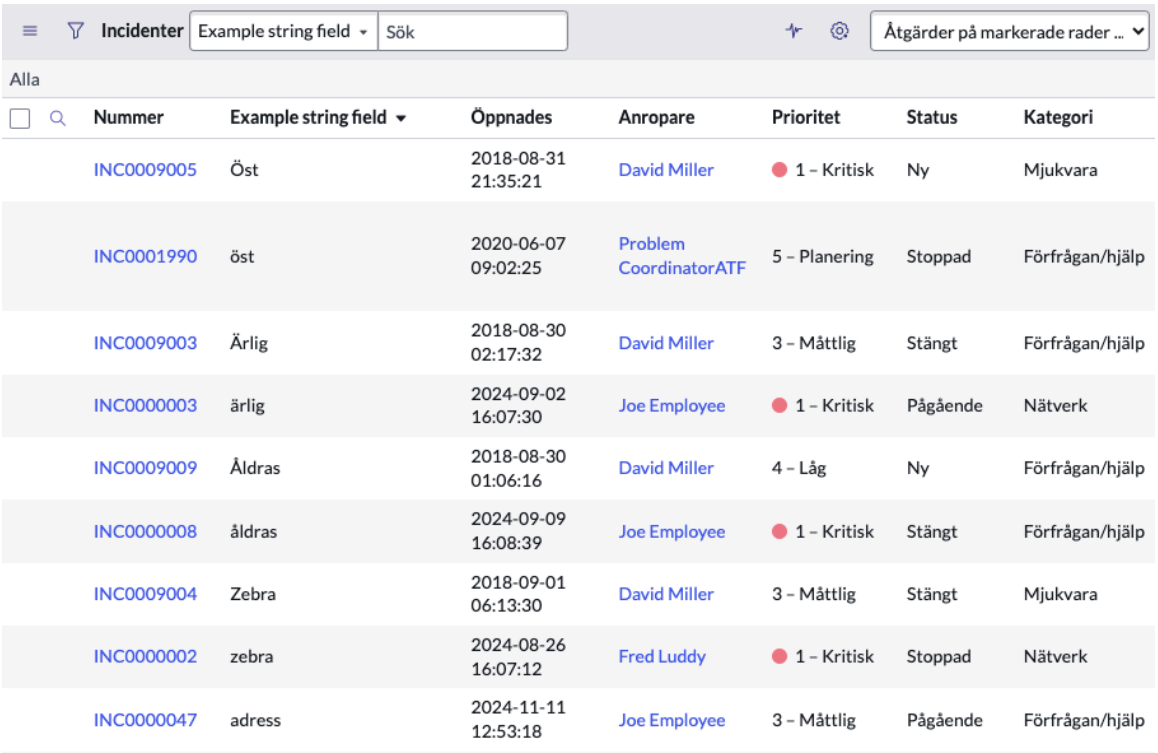
Sorting according to the session language

Order string values according to the user's session language when sorting a column in a list.

By default, when sorting columns in lists, string values are ordered according to the English alphabet. To support sorting a column according to the user's session language, you can configure the instance behavior and the behavior of individual columns.

In the following example, the user's session language is Swedish. The Example string field column is sorted in descending order with the values ordered from Ö to A according to the Swedish alphabet.

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Nummer	Example string field	Öppnades	Anropare	Prioritet	Status	Kategori
INC0009005	Öst	2018-08-31 21:35:21	David Miller	1 – Kritisk	Ny	Mjukvara
INC0001990	öst	2020-06-07 09:02:25	Problem CoordinatorATF	5 – Planering	Stoppad	Förfrågan/hjälp
INC0009003	Ärlig	2018-08-30 02:17:32	David Miller	3 – Måttlig	Stängt	Förfrågan/hjälp
INC0000003	ärlig	2024-09-02 16:07:30	Joe Employee	1 – Kritisk	Pågående	Nätverk
INC0009009	Åldras	2018-08-30 01:06:16	David Miller	4 – Låg	Ny	Förfrågan/hjälp
INC0000008	åldras	2024-09-09 16:08:39	Joe Employee	1 – Kritisk	Stängt	Förfrågan/hjälp
INC0009004	Zebra	2018-09-01 06:13:30	David Miller	3 – Måttlig	Stängt	Mjukvara
INC0000002	zebra	2024-08-26 16:07:12	Fred Luddy	1 – Kritisk	Stoppad	Nätverk
INC0000047	adress	2024-11-11 12:53:18	Joe Employee	3 – Måttlig	Pågående	Förfrågan/hjälp

Note: This column attribute can't be set to true when the following column attribute is also set to true: Locale text match. For more information see Set case and accent sensitivity on a per-column basis.

The availability of this functionality for a supported language depends on the availability of a collation in the underlying Relational Database Management System (RDBMS) used in the instance. For a list of available collations for each language and RDBMS, navigate to the DB Collation Info [sys_db_collation_info] table. To add a collation for an unsupported language, see Add collation information for an unsupported language.

Enable sorting according to the session language

Enable sorting string values in columns according to the user's session language.

Before you begin

Role required: admin

About this task

Note: Sorting lists when the user's session language isn't English might take longer than with English, particularly for tables with large amounts of records (100,000 or greater).

Procedure

1. Navigate to **All** > **System Properties** > **System Localization**.
2. Select the **Enable sorting (for lists) in the user's session language when the language is other than English** option.
3. Select **Save**.

Result

When sorting a column in a list, the string values are ordered according to the user's session language. If needed, you can turn off this behavior for individual columns.

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Configure sorting for a column

Configure whether the values in columns are sorted according to the user's session language.

Before you begin

Enable sorting according to the user's session language for the instance.

This column attribute can't be set to true with locale text match. For more information see Set case and accent sensitivity on a per-column basis.

Role required: admin

Procedure

1. Navigate to a field on a form, select and hold (or right-click) the field, and select **Configure Dictionary**.
   The field must be a string field.
2. From the Related Links, select **Advanced view**.
3. In the Attributes field, add the `i18n_session_language_sortable` attribute and specify a value of true or false.
   - Enter `i18n_session_language_sortable=false` to turn off sorting the column by the user's session language. The column is sorted according to the English alphabet instead.
   - Enter `i18n_session_language_sortable=true` to enable sorting the column by the user's session language. To turn off sorting according to the user's session language for all other columns, see the following step.
4. **Optional:** If you added the `i18n_session_language_sortable=true` attribute for one or more columns and want to change the default behavior of all other columns to sort according to the English alphabet, complete the following steps.

   a. In the navigation filter, enter `sys_properties.list`.

   b. Select **New**.

   c. On the form, fill in the fields.

Field	Value
Name	com.glide.db.i18n_session_language_sortable_default
Type	true|false
Value	false

   d. Select **Submit**.

What to do next

Configure the sorting behavior for any additional columns as needed.

Translating custom content

Translate content you create or modify to a supported language or add an unsupported language.

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Note: Using the Localization Framework application is recommend for translating to an unsupported language or translating large amounts of custom UI string content in a supported language. For more information, see Localization Framework.

ServiceNow provides translations of the base system UI strings in supported languages through the internationalization (I18N) language plugins. For applications you create and modifications you make to the ServiceNow AI Platform® content, you must provide your own translations. You can also provide any translations to unsupported languages that ServiceNow does not provide translations for. The ServiceNow AI Platform does not provide any automatic translation capability.

The translation method depends on the material that you are translating. Repeat the translation process whenever you edit or update content.

Translation methods and use cases

What needs translation	Approach to take	Resources
Field labels in a table for a customer-created application	1. Create English versions for all fields in the table. 2. Locate the records for the table in the application. 3. Open the Field Labels translation table. 4. Export the records, translate the appropriate fields, set the language field, and reimport through an import set.	• Export and edit translation records • Alternatively, follow the procedure for translating individual labels in Translate a field label.
HTML in a UI page in a customer-created application	1. Create the English version. When creating the HTML in the UI Page form, wrap any translatable text in `gs.getMessage` calls. 2. Create a Message [sys_ui_message] record for each English message with a corresponding key/value pair. 3. Create additional Message records for each message for each other language.	Translate a client script message

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Translation methods and use cases (continued)

What needs translation	Approach to take	Resources
Service Catalog items	1. Navigate to **All** > **System Properties** > **System Localization** and set **Display translation prefix on translatable strings** to **Yes**. 2. Create the item in English. 3. Change the preferred language to a different language. 4. Translate all the translatable items, now identified by translation prefix. 5. Save the record.	• To activate translation prefixes, see Debug translations. • For translatable text fields, which are common in Service Catalog items, see Translating text fields.
Service Portal widget	1. Create the English version. Externalize any translatable text by surrounding the text with `${}` wrappers. 2. Create a Message [sys_ui_message] record for each English translatable text with a corresponding key/value pair. 3. Create additional Message records for each piece of translatable text for each other language.	• Translate a client script message • Internationalize a widget in Service Portal documentation • For unofficial advice, see Building multi-lingual service portals
Playbooks	1. Activate any playbook that you want to translate. 2. Create translations for each translatable text in a playbook's process definition [sys_pd_process_definition].	Add translations for Playbooks
Edit a translation provided in a plugin	1. Export the records from the translation table. 2. Edit them outside the translation table and reimport them. Do not edit the records directly, because your	Export and edit translation records

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Translation methods and use cases (continued)

What needs translation	Approach to take	Resources
	changes could be overwritten when you upgrade or zBoot your instance.	
Translate an instance to an unsupported language	1. Create a Choice [sys_choice] record for that language. 2. Add other translation records through the Export and import set approach.	Translating to an unsupported language
Support Chat texts	Support Chat is mostly translated through the I18N language plugins. If you customize any Support Chat texts, follow the procedure for Service Portal widgets.	Internationalize a widget in Service Portal documentation
Notifications and surveys	System Localization does not cover platform notifications or surveys. The usual approach is to create a separate version of each survey or notification in each language and use business rules to send the right language version to the right end user.	—

Locating translatable UI strings

Locate individual untranslated strings to provide your own translation of customer-created and customer-edited strings, such as field names and messages.

The internationalization (I18N) language plugins contain only translations of the UI content that ServiceNow provides by default in your instance. If you have customized UI strings that you want to translate, you can identify and translate these strings manually. To perform these translations, you must first take the following actions:

- Identify the strings that need to be translated.
- Identify which translation tables contain the strings.

To identify strings that have not been translated into any language and their translation tables, see List untranslated items.

If you know where a string appears in the UI and only have a small amount of material to translate, consider using the debug functionality to identify which strings are translatable and their translation tables. This functionality consists of prefixes that appear before all translatable strings and identify the translation table that the strings are in. For more information, see Debug translations.

List untranslated items

Get a list of all custom UI strings that have not been translated into any language (English only) to provide your own translations.

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Before you begin
Role required: admin

About this task
This procedure activates modules corresponding to the following translation tables that list records with only an English version.

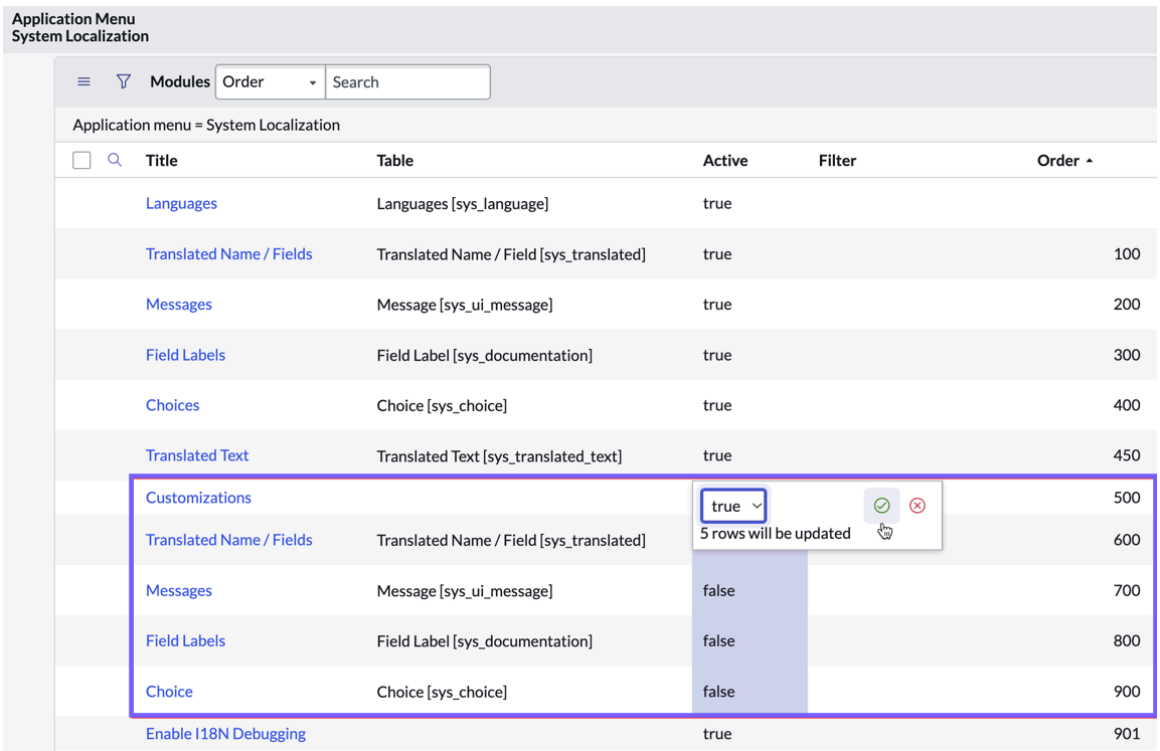
- Translated Name / Fields
- Messages
- Field Labels
- Choices

This method of listing untranslated items does not identify strings that have been translated into at least one non-English language but are missing translations in other languages.

Note: This process works best with a small number of untranslated items. For information about a workaround for large numbers of untranslated items, see the Inefficient load of customizations for System Localization -> Non-Translated Items [KB0813304] article in the Now Support Knowledge Base.

Procedure
1. Navigate to **All** > **System Definition** > **Application Menus**.
2. Select the **System Localization** application menu.
3. From the **Modules** list in the **System Localization** record, update the **Customizations**, **Translated Name/Fields**, **Messages**, **Field Labels**, and **Choice** modules to set the **Active** field to **True** using the list editor.

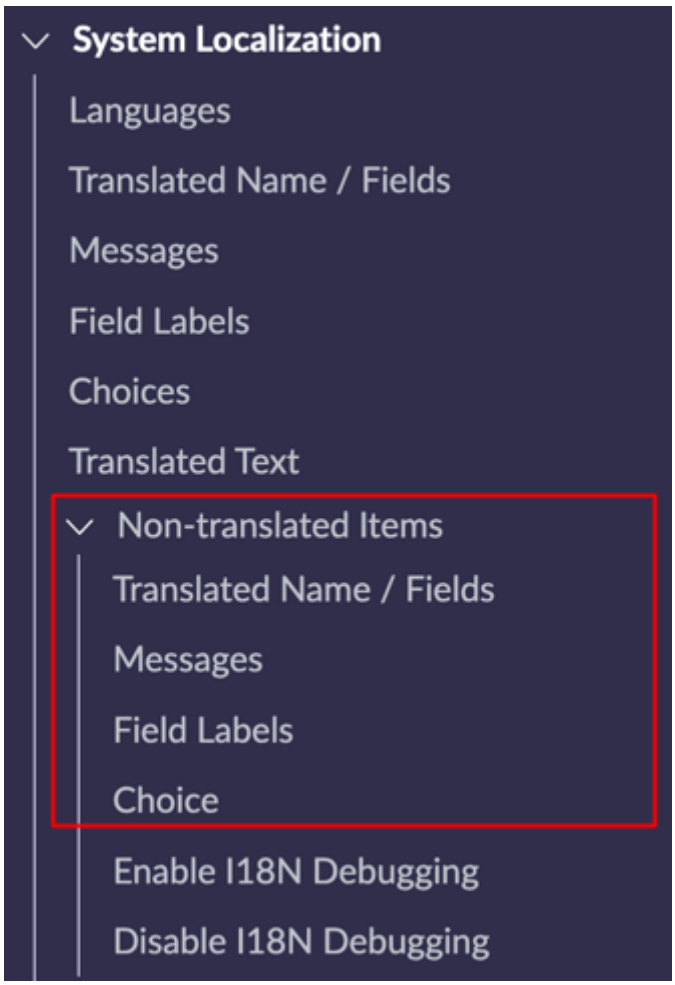
   When the list is sorted by **Order**, the modules appear in order from 500 to 900.



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Note: Instead of **Customizations**, your list might show a record titled **Non-translated Items**. When you activate the **Customizations** module, the title changes to **Non-translated Items**.

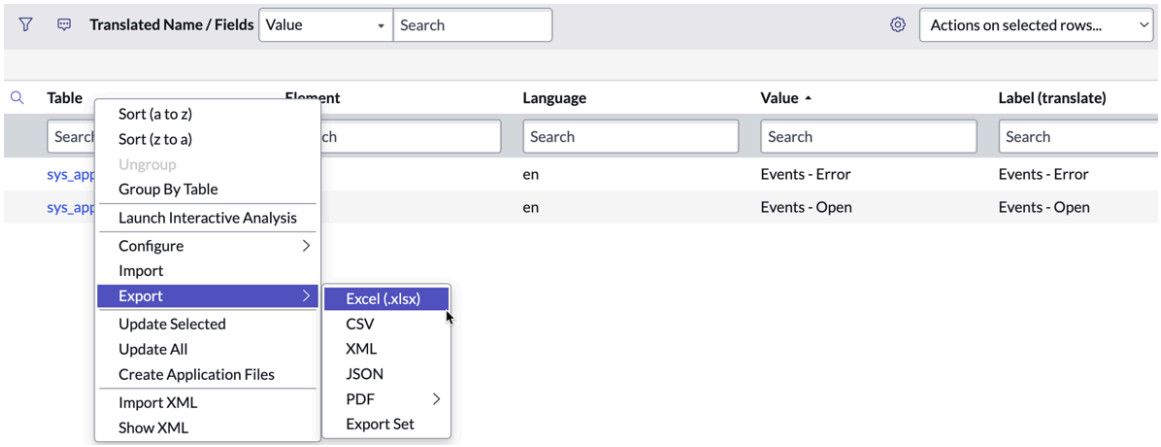
After the application navigator refreshes, the modules appear in the filter navigator beneath **Non-translated Items**.



4. From the application menu, open each module and export their lists to any supported format, such as Microsoft Excel.

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Example
For example, select **Non-translated Items** > **Translated Name/Fields**, right click any column, and export the list.



What to do next
You can translate the fields in an external application and reload the translations as an update set. For more information see, Export and edit translation records. If you have a small number of strings to translate, you can translate them individually. For more information, see Translating individual UI strings.

Debug translations

Show which UI strings are translatable and their translation table to debug translations.

Before you begin
Role required: admin

About this task
You can set translation prefixes to appear only in the current user session or to appear in all sessions.

Translation prefixes map to translation tables as follows.

Translation prefixes mapped to tables

Prefix	Table	Navigation
TRF	Translated Name / Fields [sys_translated]	**System Localization** > **Translated Names / Fields**
MSG	Messages [sys_ui_message]	**System Localization** > **Messages**
GMLD	Field Label [sys_documentation]	**System Localization** > **Field Labels**
TRT	Translated Text [sys_translated_text]	**System Localization** > **Translated Text**
CHC	Choice [sys_choice]	**System Localization** > **Choices**

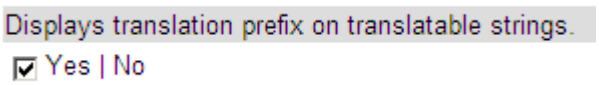
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Note: A few strings may not display translatable prefixes. In this case, the string is not stored on any of these tables. Examples of this behavior include:

- Text embedded in images, such as the buttons in the Service Catalog.
- Text defined by properties, such as the text which follows the banner.

Procedure

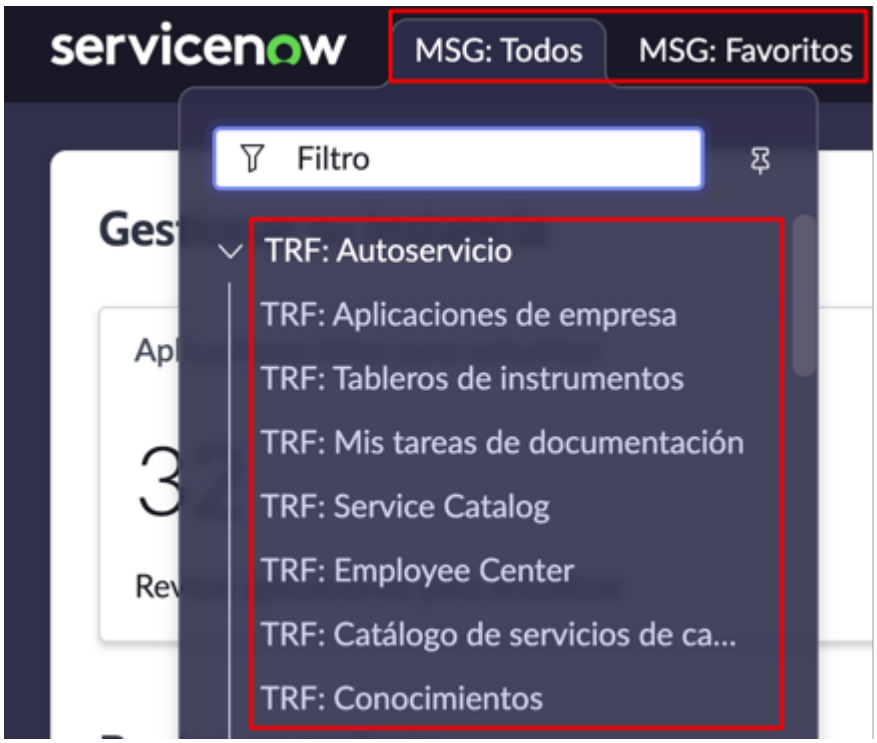
1. Enable translation prefixes on field labels.
   - To enable prefixes for the current user session, navigate to **All** > **System Localization** > **Enable I18N Debugging**.
   - To enable prefixes for all sessions, navigate to **All** > **System Properties** > **System Localization** and set **Display translation prefix on translatable strings** to **Yes**.



2. Refresh the page or change your user language to one of the non-English languages installed on your instance to see the prefixes.

Result

When enabled, translation prefixes appear before translatable UI strings.



What to do next

When you are done debugging, disable the translation prefixes.

- To disable prefixes for the current user session, either log out of the session or navigate to **All** > **System Localization** > **Disable I18N Debugging**.
- To disable prefixes for all sessions, navigate to **All** > **System Properties** > **System Localization** and set **Display translation prefix on translatable strings** to **No**.

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Translating individual UI strings

When translating just a few UI strings, such as when you add customizations to a translated instance, use the procedure that applies to the type of text being translated.

UI strings include field names and values, related list names, and messages.

Fields and related lists

Three types of fields support translated strings for fields and related list names:

Translated_field

Stores field labels, related list names, and certain field values. The value of the translated_field replaces the label, list name, or field value when the user selects the matching language. Translated_field values have a one-to-many relationship with their associated keys. As a result, multiple records can reference one translated_field value. For more information, see the following topics:

- Translate a field label
- Translate a related list name
- Translate a field value for the Classic Environment

Translated_text

Stores long text values in plain text. The value of the translated_text replaces the plain text when the user selects the matching language. Translated_text values have a one-to-one relationship with their associated keys. As a result, only one record can reference a translated_text value. For more information, see Translating text fields.

Translated_html

Stores long text values in HTML. The value of the translated_html replaces the HTML when the user selects the matching language. Translated_html values have a one-to-one relationship with their associated keys. As a result, only one record can reference a translated_html value. For more information, see Translating text fields.

The translated values are stored as separate records and display the proper value according to the end user's language. To determine the field type, right-click the field on the form, select **Configure Dictionary**, and check the **Type** field.

Messages

Informational messages, confirmation messages, error messages, and other types of system messages across the platform can be translated. Messages that support translation come from HTML in a UI page in a customer-created application or Service Portal widget messages when these texts are wrapped correctly. When a client script contains a getMessage call or a server script contains a `gs.getMessage` call, the system checks the Messages [sys_ui_message] table for a translation. Fore more information, see Translate a client script message.

Translate a field label

Field labels are the names that appear on forms and lists to describe the type of information the field contains.

Before you begin
Role required: admin

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About this task

The following procedure works best for translating individual field labels, such as those added with a customization. To translate large numbers of field labels, use the procedure described in Export and edit translation records.

Procedure

1. Navigate to the field on the form.
2. Right-click the field label and select **Configure Label**.
3. In the *Field Label* form, replace the English text with the text of the target language in the *Label*, *Plural*, and *Hint* fields.
4. Enter the BCP 47 code of the target language.
5. Right-click the header bar and select **Insert**.
   Selecting **Insert** creates a new record in the Field Label [sys_documentation] table for this field label in the selected language. For more information about this table, see Field Label table.

Translate a field value for the Classic Environment

Field values are the text entries that are used for fields with the type translated_field, such as the *Title* or *Hint* field in the Module [sys_app_module] table.

Before you begin

Role required: admin

About this task

The following procedure works best for translating values for individual fields, such as those added with a customization. To translate large numbers of field values, use the procedure described in Export and edit translation records.

Procedure

1. Use the language picker in the header bar to switch to the desired target language.
2. Navigate to the field on the form.
3. Update the field value with the text translated into the target language (Spanish).

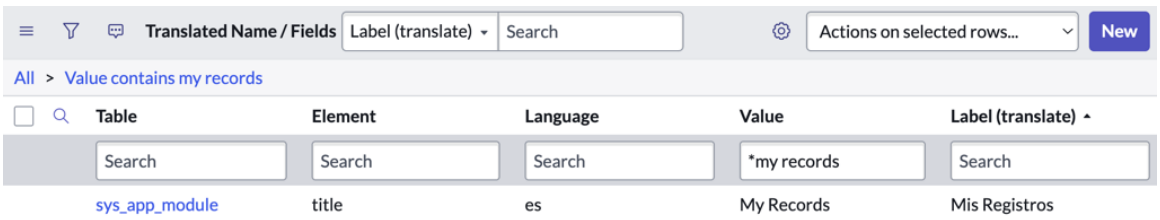


4. Select **Update**.

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This creates a new record in the Translated Name / Field [sys_translated] table for the selected language or updates the existing record if a translation already exists. For more information about this table, see Translated Name / Field table.

Translated field



Translate a choice label

Translate the labels of choices in a list.

Before you begin

Role required: admin

About this task

To translate a choice in a list, you must create a choice record for each language that you want to support in the Choice [sys_choice] table. For more information about this table, see Choice table.

Procedure

1. Navigate to **All** > **System Localization** > **Choices**.
2. Select **New**.
3. On the form, fill in the fields.

Choice form

Field	Description
Table	The name of the table that contains the choice.
Element	The column name for the field that contains the choice.
Language	The BCP 47 code of the language for the translated choice. The identifier can contain a language code or language code followed by a country or region code. For example, *tr* for Turkish or *es-MX* for Spanish Mexico.
Label	The label for the choice in the specified language.
Value	A key that is the same for the choice in each language. For example, you could use the English label or the sequence number as the value for all languages to map them to each other.
Sequence	A number that determines in what order the option appears in the list if you don't want to list choices alphabetically.

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Example
The following record translates the "Email" choice in the subcategory field on the Incident table into Spanish.

- **Table**: Incident [incident]
- **Element**: subcategory
- **Language**: es
- **Label**: Correo electrónico
- **Value**: email

4. Select **Submit**.
5. **Optional:** From the context menu, select **Insert and Stay** and update the form to translate the choice into another language.

Translating text fields

Translate long pieces of text into the language of the user.

Translated text fields allow the same field to display different content based on the language of the user.

There are two different translated text fields:

- Translated Text: Stores long text values in plain text.
- Translated HTML: Store long text values in HTML.

These fields operate the same as normal text and HTML fields respectively, except that they can store multiple inputs in multiple languages. The most frequent use of translated text fields is Service Catalog names, descriptions, or variables.

Note: There is a slight performance penalty associated with changing a normal HTML or text field into a translated HTML or text field. It is best only to use translated fields if the translated capability is required.

For translated text and HTML fields, the English language text is stored in the main table, but the values of other languages are stored in the Translated Text [sys_translated_text] table. Each translated field on every row has one or more entries in the Translated Text table: one per language for which ServiceNow provides a translation. For more information, see Translated text table.

Note: Knowledge article translation uses a separate system that relies on the I18N: Knowledge Management Internationalization Plugin. If this plugin is not activated, knowledge article translation falls back on the system described here, with translations kept in the Translated Text [sys_translated_text] table. For more information about Knowledge Management internationalization, see Translation management in the Knowledge Management documentation.

Translate long text content

Translate the content of translated text and HTML fields directly in the form where the content is specified.

Before you begin
Role required: admin

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About this task

Use the following procedure to translate the content for customer-created text fields. To edit existing text translations, export the records from the Translated Text table and follow the procedure in Export and edit translation records.

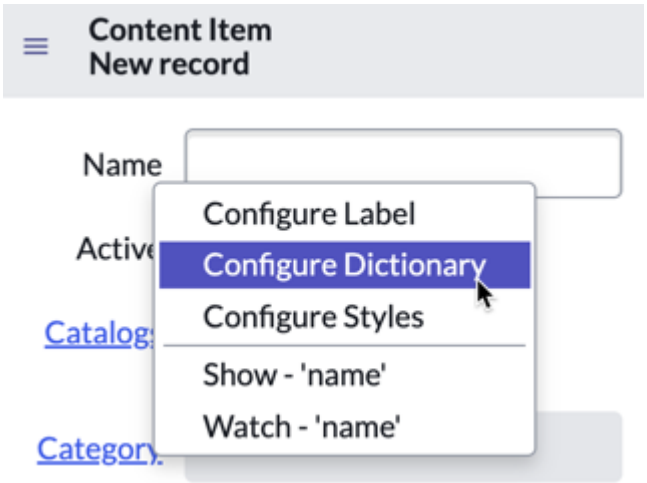
Procedure

1. Open the record with the field that you want to translate.
2. Verify that the field whose content you want to translate is a translated_text or translated_html field.
   The following steps are one possible way to verify a field type:

   a. Right-click the label of the field and select **Configure dictionary**.

   Example
   In this example, the context menu has been opened for the **Name** field for a record in the Record Producer [sc_cat_item_producer] table.

   Context menu for field

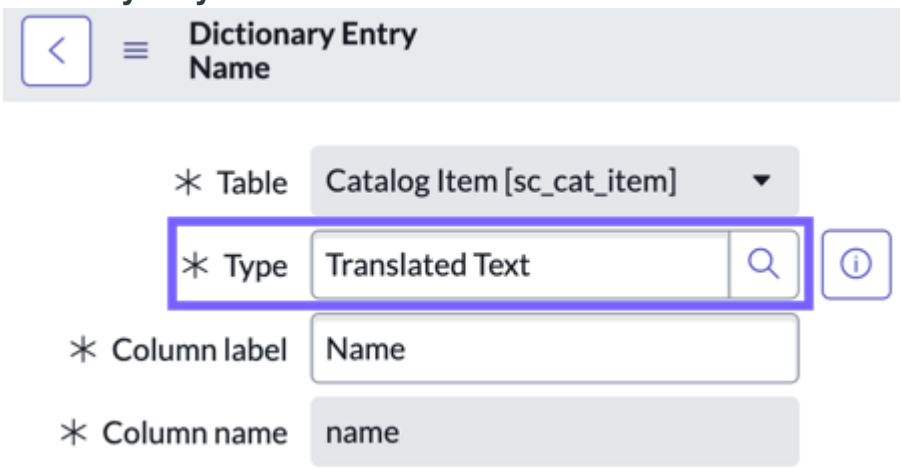
   

   b. In the **Dictionary Entry** record that opens, confirm that the **Type** field is **Translated Text** or **Translated HTML**.

   Example
   In this example, you see that the **Name** field is of the type **Translated Text**.

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Dictionary entry for field



c. Navigate back to the form.

3. Use the language picker to switch to the desired language.
4. In the relevant field, replace the English text with the text of the target language.
5. Select **Submit**.
   A new record in the Translated Text [sys_translated_text] table for the active language is added. For more information about this table, see Translated text table.

Translate a related list name

Related lists appear at the bottom of forms. You can translate a related list name by configuring the list control.

Before you begin

Role required: personalize_control

Procedure

1. Use the language picker to switch to the desired language.
2. Navigate to the related list on the form.
3. Open the list control for the related list by performing the appropriate action for the list version.

Version	Action
List v2	Right-click any column heading and select **Configure** > **List Control**.
List v3	Open the list title menu and select **List Control**.

4. On the List Control form, replace the existing *Label* with the text of the target language.
5. Select **Submit** or **Update**.
   The system creates a new entry in the Translated Name / Field [sys_translated] table or updates the existing entry for this language. For more information about this table, see Translated Name / Field table.

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Translate a client script message

Translate the messages used by client scripts.

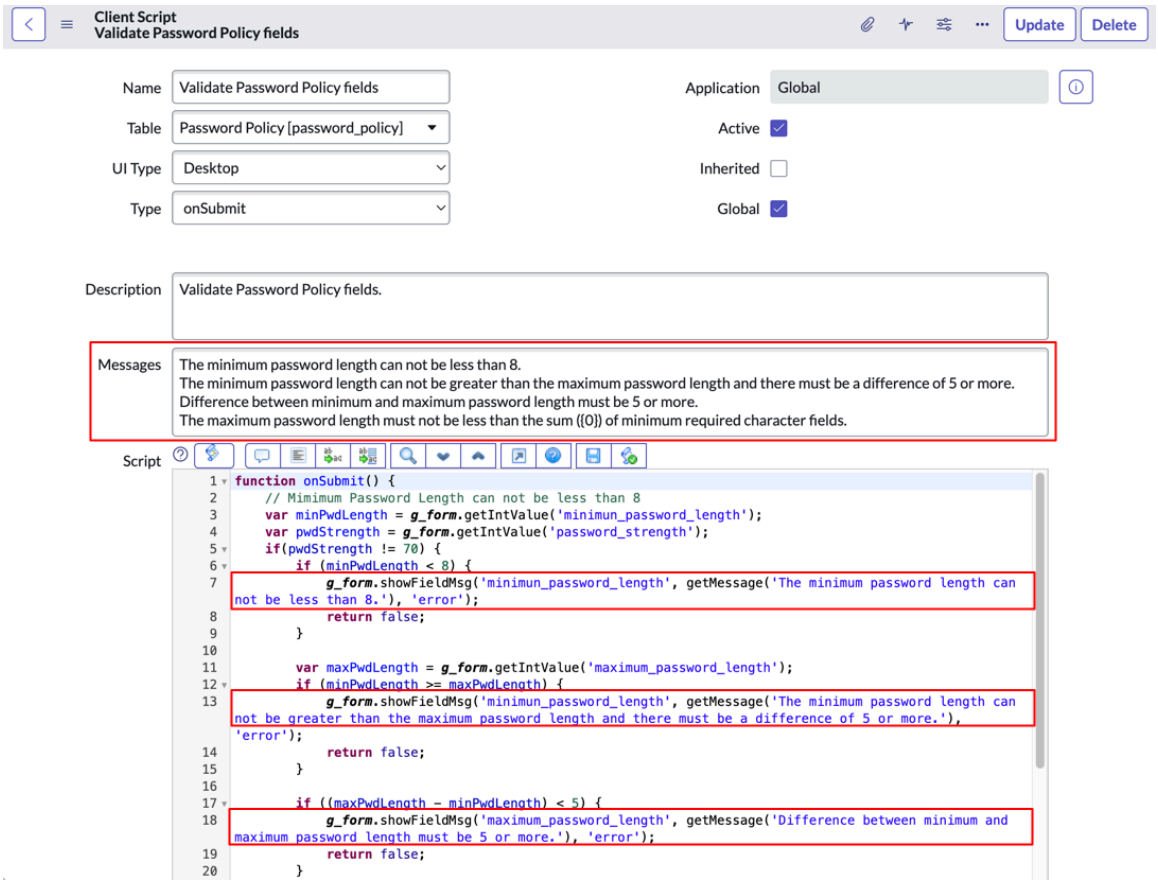
Before you begin

Create a client script that contains messages. For information about creating client scripts, see Client scripts.

Role required: admin

About this task

Client scripts include a multi-line *Messages* field, which is for message strings that the client script can use as a key to look up a localized message alternative from the Message [sys_ui_message] table. Each message key in a client script is on a separate line in the *Messages* field. The instance looks for a localized message string anytime the client script makes a getMessage(msg) call where the msg string matches a key in the *Messages* field in the client script.



For example, if you add the string `Please populate the Reason` field to the *Messages* field in the client script, then the instance will look for a localized string from the Message `[sys_ui_message]` table any time the client script calls:

```
getMessage("Please populate the Reason field")
```

Note: If you create a record in the Message [sys_ui_message] table that uses an existing key and the same language, the message for existing references using the key can change. For example, if a record exists with "Refresh" for the key, English for the language, and "Refresh" for the message, and you create another record with the same key and language but a different message of "Refresh the screen", existing UI strings using the "Refresh" key will display the new "Refresh the screen" message. Records in this table are created in the global scope and aren't scope-restricted.

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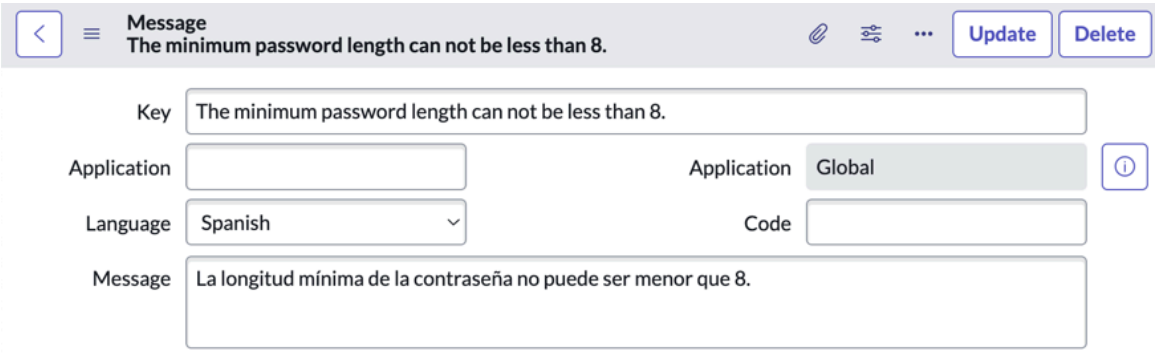
Procedure

1. Navigate to **All** > **System Localization** > **Messages**.
2. Select **New**.
3. On the form, fill in the required fields.

Message form

Field	Description
Key	The internal unique identifier for this message.
Language	The language the message is translated into.
Message	The translated text that users see.

Example



4. Select **Submit**.
   A new record is added to the Message [sys_ui_message] table for the localized message key string. For more information about this table, see Message table.

Add translations for Playbooks

Make Playbooks available in multiple languages during runtime, to support worldwide business processes.

Before you begin

- Role required: admin or playbook.admin
- To enable custom translations for playbooks, install the 27.1 app version or later.
- Activate any playbooks that you want to translate.
- To learn more about translating custom content in general, see Translating custom content.

About this task

UI Message records are used to translate the text in your playbooks to different languages at runtime, similar to the way system messages are translated on the platform. To learn more about the Message table [sys_ui_message] in general, see Message table.

The playbook text that you can create translations for are:

- Playbook Label
- Stage Label
- Activity Label

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- Activity Description
- HTML and string Activity UI Layout properties

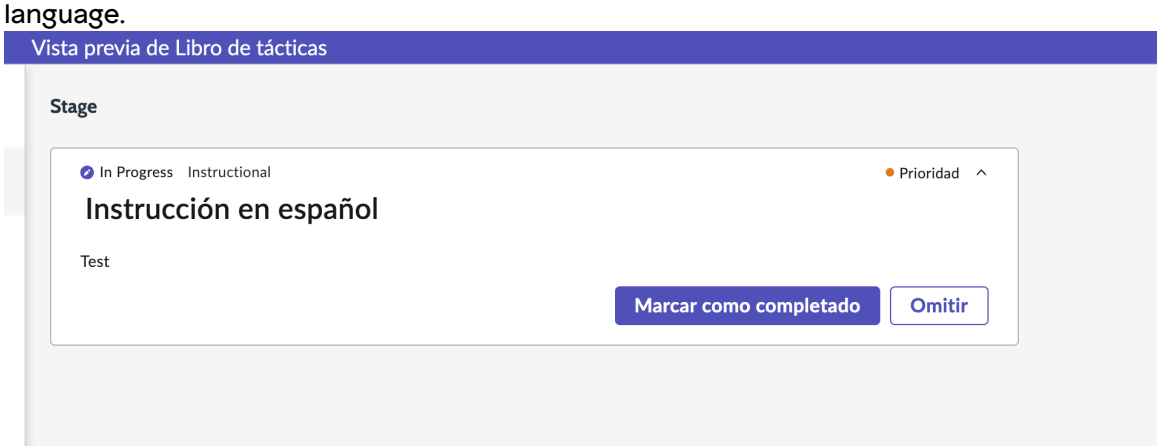
Note: Automation inputs such as text used to create emails or records are not translated. Only text that is shown at runtime within a Playbook Experience is translatable.

Procedure

1. Navigate to Workflow Studio, open playbook, activate playbook.
2. Open the **All** menu.
3. In the filter bar, type and enter **sys_pd_process_definition.list**.
4. Select the playbook that you want to add translations for.
5. Open the **Translated Messages** tab.
   All of your playbook text is listed here.
6. Open a piece of text that you want to translate.
7. From the **Language** drop-down, select the language that you want to translate to.
8. In the **Message** field, enter the translation.
9. Right-click on the form header to open the context menu, and select **Save**.
   Your translation is saved.
10. Repeat steps 1-8 to add more translations.

Result

When the playbook runs, the translated content appears for agents in their user session language.



Export and edit translation records

Export translation records to translate to additional languages in your preferred translation environment and import the new or edited translation records through import sets.

Before you begin

Note: Using the Localization Framework application is recommend for translating to an unsupported language or translating large amounts of custom UI string content in a supported language. For more information, see Localization Framework.

Role required: admin

About this task

In the following cases, translate strings in the UI outside of the ServiceNow AI Platform and import them through import sets:

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- You have a significant amount of customer-created UI components and you want to translate these components into other languages.
- You want to modify translations that ServiceNow provides in internationalization plugins.
- You want to translate an instance into a language that ServiceNow does not support with internationalization plugins. For more information, see Translating to an unsupported language.

All translatable UI strings items are stored in translation table records. The only time you would translate UI directly in translation records is when you have a small amount of customer-created UI components and you know exactly where they are. For more information about translation tables, see Translation tables and Translating individual UI strings.

Procedure

1. If you are translating customer-created UI components, locate the translatable strings.
   For more information, Locating translatable UI strings.
2. Export the relevant translation table records into a format (such as Excel) that can be easily manipulated.
   For more information about exporting a list of records, see Export data from a list.
3. Within the exported document, translate the following fields in each row, depending on the translation table:

Translation table	Fields to translate
Field Labels	Label, Plural, Hint
Translated Name/Field	Label (translate)
Message	Message
Choices	Label
Translated Text	Value

4. Within each row, change the "Language" column to the BCP 47 code of the new language. In Translated Text and Message records, type the full name of the language instead of the BCP 47 code.
5. Save your changes.

What to do next
Import the translated document back into the instance as an import set.

Import a translation from an Excel spreadsheet

The System Import Sets application contains import tables and corresponding transform maps to assist with importing translations from an Excel spreadsheet.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Import Sets** > **Load Data**.
2. Select **Use Existing** and the **Table name** that matches the type of data being imported, as follows.

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- For choices, select the `[u_sys_choice]` table.
- For field labels, select the `[u_sys_documentation]` table.
- For translated names and fields, select the `[u_sys_translated]` table.
- For messages, select the `[u_sys_ui_message]` table.
- For translated text, select the `[u_sys_translated_text]` table.

3. Select **Upload an Excel file**, and then click **Browse** to select the source Excel spreadsheet.
4. If appropriate, specify the *Work sheet* and *Header row number*.
5. Select **Go**.

   The translations are now available in the appropriate *Import Set Table*.

6. Navigate to **All** > **System Import Sets** > **Table Name** and review the imported information to verify that the import was successful.
7. To transform the imported data into the corresponding table, navigate to **All** > **System Import Sets** > **Run Transform**.
8. Select the appropriate transform map, as follows.

   Note: Make sure you choose a transform map that has the **Run Business Rule** option selected. If the transform map does not have this option selected, any customized translations you have may be overwritten during the next upgrade.

   - For choices, select the **Sys Choice Translation Map**.
   - For field labels, select the **Sys Documentation Translation Map**.
   - For translated names and fields, select the **Sys Translated Translation Map**.
   - For messages, select the **Sys UI Message Translation Map**.
   - For translated text, select the **Sys Translated Text Translation Map**.

9. Select **Transform**.

Translating to an unsupported language

Translate the interface of an instance to a language for which ServiceNow does not provide an internationalization (I18N) plugin.

Before you begin

You can download a file containing translatable strings from the Translate an unsupported language - File Containing strings in the English Language [KB0860203] article in the Now Support Knowledge Base.

Role required: admin

About this task

All interface items are stored as translatable strings in the translation tables. By default, these translation tables contain only English strings. To populate these tables with translated strings in an unsupported language, use the following workflow.

There is a very large number of translatable strings on the platform. Exporting all of them and translating them manually is probably not a realistic possibility. Consider exporting filtered subsets of the strings from each table and then translating them. To download a file of translatable strings, see KB0860203.

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You can use the Localization Framework application to translate to an unsupported language or to translate large amounts of custom UI string content in a supported language. For more information, see Localization Framework.

Procedure

1. Create a language record for the unsupported language.
2. Export and translate the strings that you want to translate, as described in Export and edit translation records.
3. Import the translated document back into the instance as an import set, as described in Import a translation from an Excel spreadsheet.
4. Create a language choice for users to select the new language.

Related topics

Translation tables

Create a language record

Add a record for a language not provided by an internationalization (I18N) plugin to associate new translations with.

Before you begin
Role required: admin

About this task
To translate the interface of an instance to a language for which ServiceNow does not provide an internationalization plugin, you must create a language record for a new translation in the Languages [sys_language] table. For more information about this table, see Languages table.

Procedure

1. Navigate to **All** > **System Localization** > **Languages**.
2. Select **New**.
3. Provide the language information.
   - **Name**: The name of the language, for example, Turkish.
   - **ID**: The BCP 47 code for the language, for example, tr.
   - **Text Direction**: The direction that the instance should use to display the language: Left-to-Right or Right-to-Left.
   - **Active**: Option to activate the language for the instance.
   - **Fallback**: The name of another active language to use as a fallback language. For more information about fallback languages, see Set a fallback language.
4. Select **Submit**.

Create a language choice for users

Allow users to select the language as a valid option in the language picker or a user record.

Before you begin
Role required: admin

About this task
You must create a choice record for a new translation in the Choice [sys_choice] table. For more information about this table, see Choice table.

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Procedure

1. Navigate to **All** > **System Localization** > **Choices**.
2. Select **New**.
3. Enter the following fields.

Choice record fields to select the new language

Field	What to enter
Table	`sys_user`
Element	`preferred_language`
Language	Enter an identifier that complies with BCP 47. The identifier can contain a language code or language code followed by a country or region code. For example, *tr* for Turkish or *es-MX* for Spanish Mexico.
Label	Enter the name of the new language selection as you want it to appear in the language picker. For example, Mongolian.
Value	Enter an identifier that complies with BCP 47. The identifier can contain a language code or language code followed by a country or region code. For example, *tr* for Turkish or *es-MX* for Spanish Mexico.
Sequence	Enter a number to determine what order the option appears in the choice list if you do not want to list choices alphabetically. For example, 5.

Example
The following record allows a user who is using the Dutch localization of their instance to change languages to Mongolian:

- **Table:** User [sys_user]
- **Element:** preferred_language
- **Language:** nl
- **Label:** Mongoolse
- **Value:** mn

4. Select **Submit**.

Configure a language as reading from right to left

Use the Text Direction field to configure a language that reads from right to left, such as Hebrew.

Before you begin
Activate the languages that your users need. For more information, see Activate a language.

Role required: admin

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About this task
Right-to-left language support is available only in the main user interface and on live feed. Other user interfaces and applications, such as the graphical Workflow Editor, reporting, CMS, chat, and the ServiceNow documentation sites, are not supported.

Procedure
1. Navigate to **All** > **System Localization** > **Languages**.
2. Select **New**.
3. Enter the **Name** of the language, such as Hebrew.
4. Enter the BCP 47 code for the language.

   Example
   For example, Hebrew is `he`.
5. In the Text Direction field, select **Right-to-Left**.
6. Select **Submit**.

Add collation information for an unsupported language

Add collation information for an unsupported language to enable sorting columns in lists according to the language.

Before you begin
Add a record for a language not provided by an internationalization (I18N) plugin to associate new translations with and translate content into that language. For more information, see Translating to an unsupported language.

Role required: admin

About this task
Collation information must come from the underlying Relational Database Management System (RDBMS) used by the instance: MariaDB, RaptorDB, or Oracle. To determine which RDBMS an instance uses, navigate to **All** > **System Diagnostics** > **Database** > **Information**. Refer to the documentation provided by the RDBMS to determine if the database includes a collation for a given language and the name of the collation.

Procedure
1. In the navigation filter, enter `sys_db_collation_info.list`.
2. Select **New**.
3. On the form, fill in the fields.

DB Collation Info form

Field	Description
Language	The BCP 47 code for the language.
Collation Name	The name of the collation provided by the Relational Database Management System (RDBMS).
Application	The application scope.

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Field	Description
Database	The Relational Database Management System (RDBMS) to which the collation applies: MariaDB, RaptorDB, or Oracle.

4. Select **Submit**.

Result

When sorting columns according to the session language is enabled, users can sort columns according to the collation of the unsupported language. For more information, see Sorting according to the session language.

System Localization reference

Reference topics provide additional information about configuration properties, tables, and more.

System Localization properties

System Localization properties configure translation, currency, and locale settings on the instance for users from multiple countries.

Some localization properties only appear after the I18N: Internationalization plugin is activated. Some properties are available on the System Localization properties page, but some lesser-used properties are available only from the System Properties [sys_properties] table.

Access the following properties by navigating to **All** > **System Properties** > **System Localization**.

Property	Description
Enable sorting (for lists) in the user's session language when the language is other than English *com.glide.db.session_language_collation_feature*	Enable sorting string values in a column according to the rules of the user's session language. If this option isn't selected, field values are sorted according to the English alphabet. • Options: Yes | No • Default value: No • When this property is set to Yes, and Locale Text Match is true, then the `i18n_session_language_sortable` column attribute must be set to false. See Set case and accent sensitivity on a per-column basis. • Learn more: Sorting according to the session language
Show the language select box on the login page so the user can specify the language they would like to be logged in with. *glide.ui.login.language.select*	Enables language selection upon login. • Options: Yes | No • Default value: Yes • Dependency: The I18N: Internationalization plugin must be active
Text Search stemming language.	Selects the language to match derived words in text search.

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Property	Description
glide.ts.stemming_language	• Options: English, German, and French • Default value: English • Dependency: The I18N: Internationalization plugin must be active • Learn more: Zing matches derived words with stemming
Displays translation prefix on translatable strings. *glide.ui.i18n_test*	Adds a translation prefix on translatable fields to indicate where to find the string for translation. • Options: Yes | No • Default value: No • Learn more: Debug translations
Use a single currency model. Display all currencies in the same currency code, regardless of a user's locale, country, or language code. *glide.i18n.single_currency*	Enable single currency mode. • Options: Yes | No • Default value: No • Learn more: Currency administration
Default language for the system (two character values) *glide.sys.language*	• Options: en, fr, es, it, de • Default value: en
If using the single currency model, display all currencies using this currency code. Currency codes use the ISO 4217 three letter format. *glide.i18n.single_currency.code*	• Options: ISO 4217 three-letter currency code • Default value: USD • Learn more: Currency administration
Locale code to use for localization. *glide.system.locale*	Determines the system's default currency into which all prices are automatically converted before other sums or conversions are performed. Changing this property after any price or currency fields have been given a value may result in improper conversion or prices that sum incorrectly. • Options: [language code].[country code] (for example, en.GB for Britain, fr.FR for France, de.DE for Germany, or ja.JP for Japan) • Default value: None • Learn more: Locale settings

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Property	Description
	Note: After you have set a value on this system property and your system has gone into production, do not change this value. If a user's locale must be changed, update the "Country code" field on the user record.
Determines whether the platform displays dates and times formatted according to the user's locale. *glide_i18n.date.default_to_locale*	Determines whether the platform displays dates and times formatted according to a user's locale when no date or time format has been selected in user preferences. If this option isn't enabled, dates and times are formatted using patterns set in the *glide.sys.date_format* and *glide.sys.time_format* properties. • Options: Yes | No • Default value: No • Learn more: Locale settings
For guest users, enables using their IP address to try to set the user's initial language. *glide_i18n.ip_geolocation*	Determines the platform's default language used from the country associated with the user's IP address if locale can't be determined from other settings. If this option isn't enabled, the platform language defaults to English for guest users whose locale can't be determined. • Options: Yes | No • Default value: No • Learn more: Locale settings
Spell checker dictionary to use for English users. *glide.spell.dictionary.en*	Sets the spell checker dictionary used in the system for English users. • Options: Brazilian Portuguese, Dutch, English US, English UK, French, German, Italian, Portuguese, Russian, Spanish, and Thai • Default value: English US • Learn more: Locale settings

Access the following properties by entering `sys_properties.list` in the navigation filter to open the System Properties [sys_properties] table.

Property	Description
com.glide.db.i18n_session_language_sortable_default	Option to set the default behavior of column sorting. If true, the default behavior of columns is to sort according to the user's session language. If false, the default behavior of

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Property	Description
	columns is to sort according to the English alphabet. • Type: true | false • Default value: true • Dependency: The *com.glide.db.session_language_collation_fe* property must be set to true. • Learn more: Sorting according to the session language
glide_i18n.language_fallback_enabled	Option to allow setting fallback languages for the instance. Setting fallback languages creates a three-level hierarchy in which an intermediate language is used before defaulting to English when user interface text is not translated in the user's preferred language. • Type: true | false • Default value: true • Learn more: Set a fallback language

Translation tables

ServiceNow stores translation information in these tables.

- Languages [sys_language]
- Translated Name / Field [sys_translated]
- Messages [sys_ui_message]
- Field label [sys_documentation]
- Choice [sys_choice]
- Translated Text [sys_translated_text]

To see which table contains a specific translated label, enable the display of translation prefixes. For more information, see Debug translations.

Note: The Languages table is available only after at least one I18N:Internationalization plugin has been activated.

Related topics

Activate a language

Languages table

The Languages [sys_language] table contains a list of the languages for which translated text is available.

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To enable translation to a new language, add a record to the Languages table. The main fields for this table are:

- Name: Language name
- ID: BCP 47 code for the language
- Text Direction: Direction of text in this language
- Active: Indicator that shows whether the language has been activated (true) for this instance or not (false)
- Fallback: Name of the language that the instance uses if a translation is not available

Choice table

The Choice [sys_choice] table contains translated text for options that appear in lists.

The main fields for this table are:

- Table: The name of the table this translation applies to.
- Element: The name of the field this translation is used for.
- Language: The BCP 47 code of the language for the translated choice.
- Value: A key that is the same for the choice in each language. For example, you could use the English label or the sequence number as the value for all languages to map them to each other.
- Label: The label for the choice in the specified language.
- Sequence: A number that determines in what order the option appears in the list if you don't want to list choices alphabetically.

Choice list

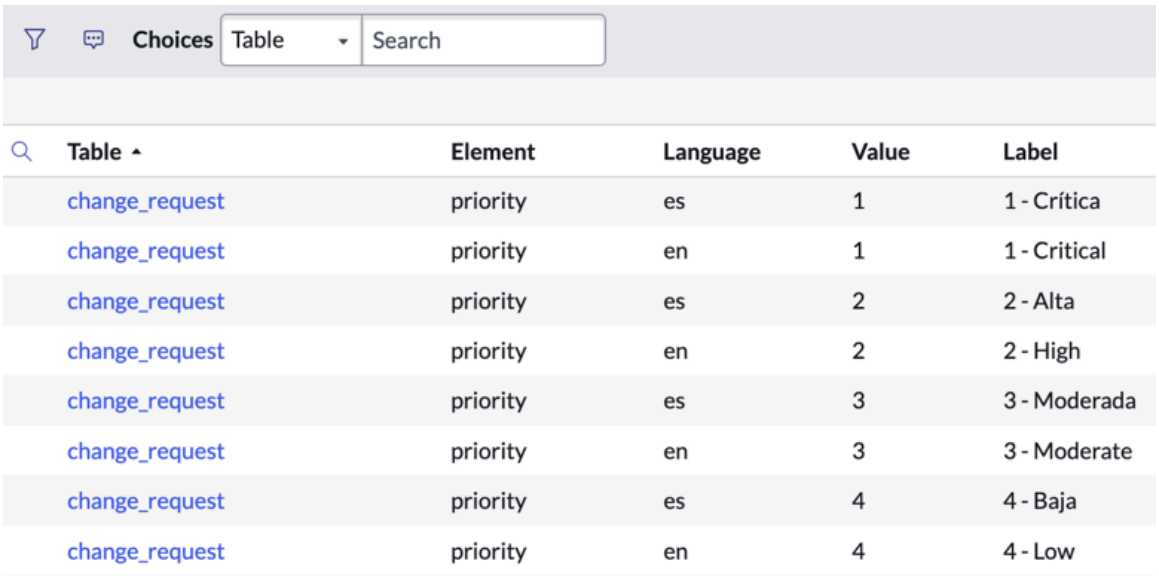
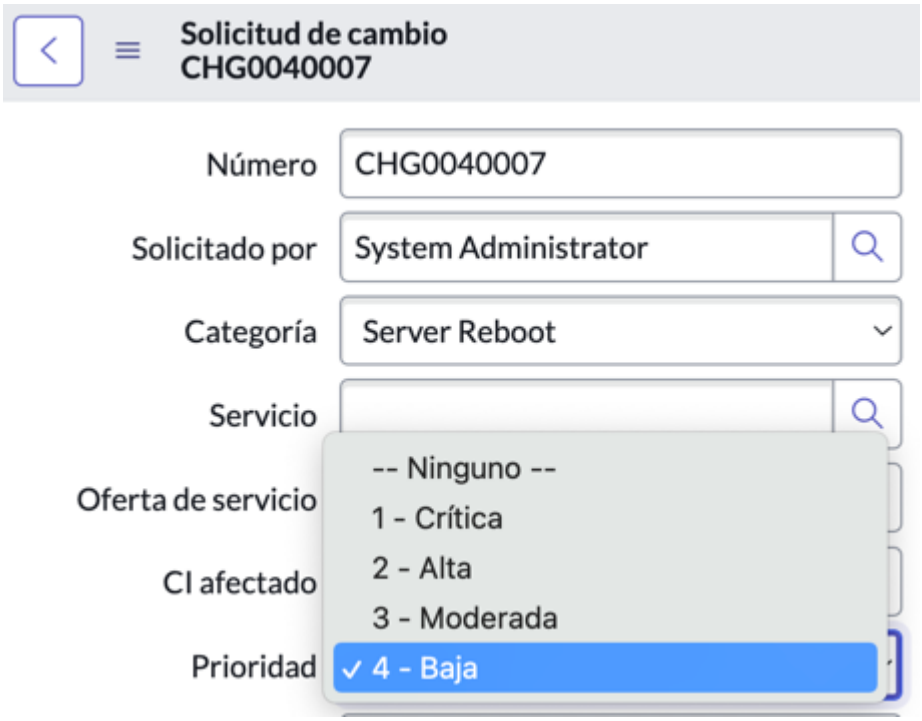


Table	Element	Language	Value	Label
change_request	priority	es	1	1 - Crítica
change_request	priority	en	1	1 - Critical
change_request	priority	es	2	2 - Alta
change_request	priority	en	2	2 - High
change_request	priority	es	3	3 - Moderada
change_request	priority	en	3	3 - Moderate
change_request	priority	es	4	4 - Baja
change_request	priority	en	4	4 - Low

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Translated choices



Translated Name / Field table

The Translated Name / Fields [sys_translated] table stores translated values for text fields where the field type is translated_field (see the dictionary entry).

This option is available for text fields up to 255 characters in length. Some examples are names, titles, and short descriptions. The main fields for this table are:

- Table: name of the table this translation applies to.
- Element: name of the field this translation applies to.
- Label (translate): translated text that users see on forms and lists.
- Language: BCP 47 code of the language for this translated text.
- Value: English value that causes this translated text to be displayed.

Translated Name/Fields table

Translated Name / Fields | Value | Search | Actions on selected rows...

Table	Element	Language	Value	Label (translate)
sys_collection	label	es	Access to	Acceso a
sys_app_module	title	es	Access Types	Tipos de acceso
sys_app_module	title	es	Accommodation Types	Tipos de adaptaciones
sys_app_module	title	es	Accommodations	Adaptaciones
sys_uib_toolbox_component	label	es	Accordion Item	Elemento del menú

Field Label table

The Field Label [sys_documentation] table stores the text of table names along with the singular and plural labels for each field in the table.

For each table name and field label, the Field Label table contains a record for each installed language. ServiceNow uses the table and field names from this table to display lists and forms in the proper language. The main fields for this table are:

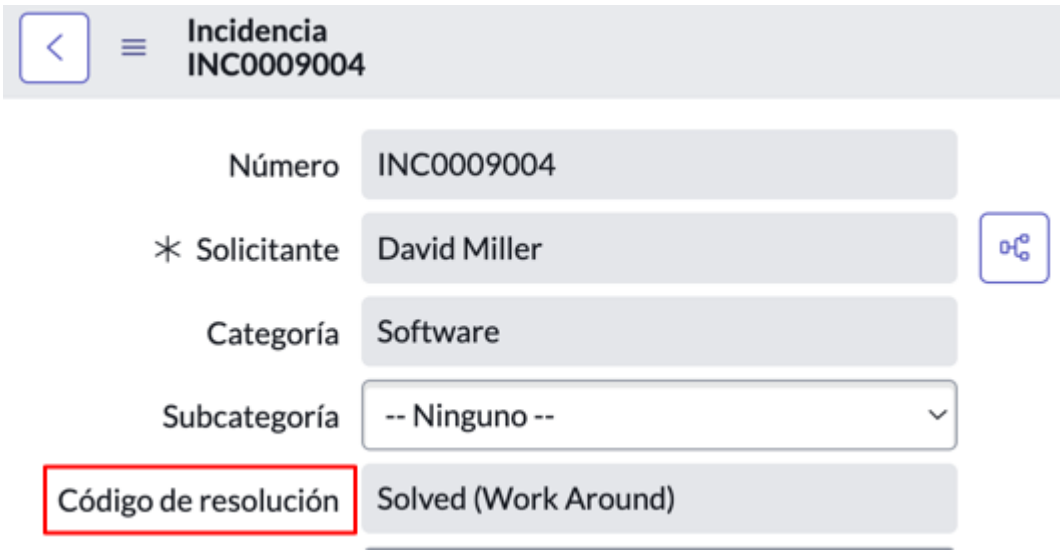
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- Table: name of the table this translation applies to.
- Element: name of the field this translation applies to.
- Language: BCP 47 code of the language for the translated text.
- Label: translated text that users see.
- Plural: plural of the label.
- Help: reserved for future use. A question mark (?) icon appears next to hint labels when accessibility mode is enabled.
- Hint: text that pops up when the cursor rests on the field.
- URL: URL for a web page that provides information about the field. When a URL is provided, the text appears blue and underlined to indicate the label is clickable.

Field label



Translated field



Translated text table

The Translated Text [sys_translated_text] table stores translations for fields with the field type translated_text or translated_html (see the dictionary entry).

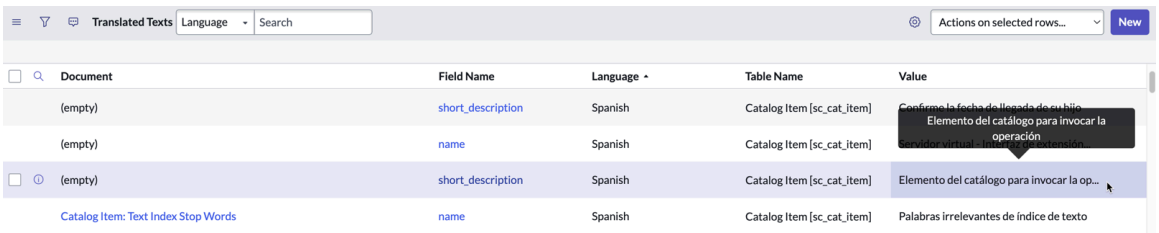
This field type is typically used for long text fields, up to 65,000 characters in length, such as survey name and introduction. The main fields for this table are:

- Document: internal identifier of the record this translation applies to.
- Field name: field this translated text appears in, for example, Close notes.
- Language: language the text is translated into.

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- Table Name: table this translation applies to.
- Value: translated text that the user sees.

Translated text list



Related topics

Translating text fields

Message table

The Message [sys_ui_message] table contains the translations for informational messages, confirmation messages, error messages, and other types of system messages across the platform.

The Message table contains custom translatable text from the following sources when these texts are wrapped correctly:

- HTML in a UI page in a customer-created application
- Service Portal widget messages (including in surveys)
- Playbook text:
  - Playbook Label
  - Stage Label
  - Activity Label
  - Activity Description
  - HTML and string Activity UI Layout properties

ServiceNow checks this table for translated text when a client script contains a getMessage call or a server script contains a `gs.getMessage` call. The main fields for this table are:

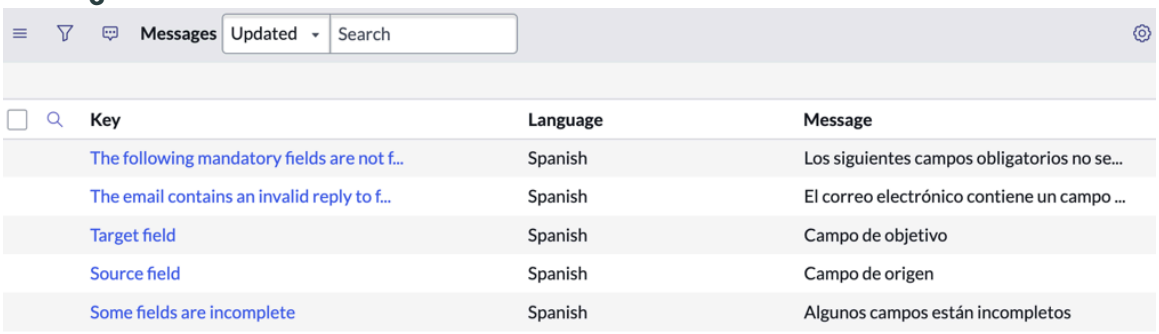
- Key: internal, case-insensitive, unique identifier of this message.
- Language: language the message is translated into.
- Message: translated text that users see.

Note: If you create a record in the Message [sys_ui_message] table that uses an existing key and the same language, the message for existing references using the key can change. For example, if a record exists with "Refresh" for the key, English for the language, and "Refresh" for the message, and you create another record with the same key and language but a different message of "Refresh the screen", existing UI strings using the "Refresh" key will display the new "Refresh the screen" message. Records in this table are created in the global scope and aren't scope-restricted.

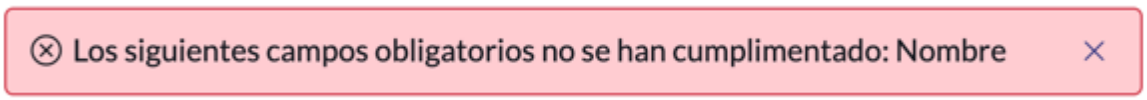
For more information about translatable custom content in the Message table, see Translating custom content.

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Message list



Translated message



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ServiceNow AI Platform integrations

Integrate third-party applications into the ServiceNow AI Platform.

Integration with third-party applications and data sources

Connect with external services and configure your enterprise perfectly through the ServiceNow AI Platform. ServiceNow systems integrate easily with third-party apps, using industry standard technologies such as SOAP, REST, WSDL, and API, as well as several others such as Web Services, JDBC, and more. Load external data using XML, CSV, XLS, and other file types, all through multiple data sources including HTTPS, FTPS, and SCP. Integration between instances is even easier, due to shared integration points on the platform.

Integration with third-party applications and data sources

ServiceNow integrates with many third party applications and data sources.

The most common integrations are with CMDB, Incident Management, Problem Management, Change Management, User Administration, and Single Sign-on. A variety of techniques can be used, most notably Web Services, JDBC, LDAP, Excel, CSV, and Email, as well as any industry standard technologies that use SOAP, REST, or WSDL. Additionally, API and command-line integrations can be done using a MID Server. ServiceNow has performed the following integrations with enterprise systems and platforms.

Technologies

The ServiceNow platform is based on service-oriented architecture (SOA), in which all data objects can use web services to access bi-directional data-level integration. The interface is also direct and dynamic because all modifications to existing objects and all new objects are automatically published as a Direct Web Service. A more indirect web service creation and usage can be achieved through Mapped Web Service where a transform map is used to gather incoming web service data into the final targeted tables. Finally, an advanced Scripted Web Service technique is available for defining process-based web services, where data is irrelevant, but serves more as a trigger for a process or a composite of actions that execute at the server.

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Additionally the platform offers a rich interface for loading external data using import sets. Using this feature, you can load from various data sources such as HTTPS, FTPS, and SCP using file formats such as XML, CSV, and Microsoft Excel XLS files. Information can also be pulled from a data source using a direct JDBC connection, provided the network connectivity allows.

Information can be pulled from the platform to an external platform using an ODBC driver.

Forms, lists, and reports on the platform can be accessed directly using a URL, which facilitates integration on the UI level between two or more web applications.

A handful of single sign-on technologies is identified and implemented out of the box to allow fast integration with your portal, however, the technique is customizable in a script to allow for flexibility in the different SSO environments our customers have.

Integration between ServiceNow Instances

There are times when you find you need to perform a specific integration between your instance and another ServiceNow instance. Instance-to-Instance integrations are a snap because all of the integration points exist between the two instances.

Integration options

Nearly all ServiceNow customers obtain additional value by integrating with third-party applications.

ServiceNow customers have the following options for integrating with third-party applications.

- Activate a ServiceNow provided integration.
- Install a certified integration from the ServiceNow Store.
- Install an integration from Share.
- Contact your sales representative for available custom-built integrations.
- Build your own custom integration using the platform's integration interfaces.

Note: Certified integrations have passed a set of interoperability, security, and performance test criteria defined by ServiceNow.

ServiceNow provided integrations

ServiceNow provides many integrations as part of the platform.

These integrations are considered part of the platform and are provided at no additional charge.

Provided Integrations

Integration	Type	Integration Point
Altiris (version 6.5)	MID Server	CMDB
Google Maps	Web services	Varies
Google Custom Search	Web services	Knowledge
Integration — IBM Watson Conversation Service	Web services	Varies
Microsoft SMS / SCCM	MID Server	CMDB
Verizon eBonding	Web services	Incident

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Set up Google Maps API

You enable the geolocation feature using the appropriate entries from a Google Maps API for Business license, or a Google Maps JavaScript API Key.

Before you begin

Role required: admin

About this task

You can generate maps using basic JavaScript, and they are flexible enough to display even the most complicated of queries. These maps use standard Google Maps API for Business or Google Maps JavaScript API Key mapping features, including various link types to records in your instance. Use of this feature requires installation of the Google Maps plugin.

Important: Starting May 2026, Google is deprecating the use of Client ID for authenticating requests to Google Maps. From this date onward, API keys will be the only supported authentication method. If your application continues to use client-id (for example, via the *google.maps.method property*), Google Maps requests will fail. For more information, see Client ID Migration Guide.

Update your configuration to authenticate using an API key only (that is, set *google.maps.method* to `key`). Refer to the descriptions of *google.maps.key* and *google.maps.key.geocoding* properties for more information on API key–based authentication.

Procedure

1. Google Maps APIs for Business licenses are no longer available from Google, so, depending on whether have an existing license, use one of the following procedures.

   Note: You are required to use your own Google Maps JavaScript API Key from Google and not use any ServiceNow AI Platform® generated key.

Existing Google Maps API for Business license available?	Tasks
Existing license available	**a.** In the **System Properties** > **Google Maps** property form: ▪ In the **google.maps.client** field,enter the Client ID for your organization. This ID is from Google and starts with `gme-`, such as `gme-mycompanyname`. ▪ In the **google.maps.client.key** field, enter the private key for Google Maps API for Business. An example of an encoded key is `vNIXE0xscrmjlyV-12Nj_BvUPaw=`. The ServiceNow AI Platform® requires this key to retrieve accurate driving time estimates from Google for some Geoloca tion features. ▪ Fill out the remaining values on the form. **b.** Configure your maps using the property def initions from the table.

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Existing Google Maps API for Business license available?	Tasks
	Important: The Google Maps Client ID–based configuration is being deprecated. Client ID authentication will not be supported starting May 2026, and configurations relying on it will no longer work.
No license available	**a.** Obtain a Google Maps JavaScript API Key from Google. **b.** In the **System Properties** > **Google Maps** property form, enter the API key into the **google.maps.key** field. Geolocation in the ServiceNow AI Platform® uses the API Key, which Google Maps also uses for Geolocation and map view billings. **c.** Fill out the remaining values on the form. **d.** Configure your maps using the property definitions from the table.

To learn more about Google Maps API for Business, and Google Maps JavaScript API Key, see https://developers.google.com/maps/gmp-get-started.

2. After you complete and save the configuration, create Map pages, or use the default pages included with the plugin.
Map pages define what data appears on the map, and the appearance of the links. For a tutorial on how to view all of the markers that link to your records, see the Display Map Markers on Google Maps blog post on the ServiceNow Community.

Property	Description
google.maps.method	Defines which method of authentication should be used for Google Maps. ○ Type: string ○ Default value: key ○ Location: **System Properties** > **Google Maps**
google.maps.auto_close	If true, automatically closes a map information window before opening a new one. ○ Type: true/false ○ Default value: true ○ Location: **System Properties** > **Google Maps**
google.maps.client	Client ID for Google Maps API for Business.

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Property	Description
	○ Type: string ○ Default value: gme-servicenow ○ Location: **System Properties** > **Google Maps**
google.maps.map_id	Map ID for Google Maps used for the cloud-based maps styling, vector maps, and advanced markers. To obtain your Map ID, see How to create map IDs. ○ Type: string ○ Default value: empty ○ Location: **System Properties** > **Google Maps**
google.maps.client.key	Private key for Google Maps API for Business. This key activates the geolocation feature, which locates users in the system precisely, using data from their mobile devices. ○ Type: string ○ Default value: empty ○ Location: **System Properties** > **Google Maps**
google.maps.version	Version number of the current installation of Google Maps API for Business. ○ Type: string ○ Default value: current version number ○ Location: **System Properties** > **Google Maps**
google.maps.key	Google Maps API for Business or Google Maps JavaScript API Key that ties to the URL of the server. This key authorizes development use of Google Maps API. ○ Type: string ○ Default value: empty ○ Location: **System Properties** > **Google Maps**
google.maps.key.geocoding	Google Maps API for business or Google Maps JavaScript API key that ties to the URL of the server. This key is used for making geocoding requests. ○ Type: string ○ Default value: empty ○ Location: **System Properties** > **Google Maps**
google.maps.latitude	Starting latitude of the map. This value determines the starting position displayed in Google Maps. ○ Type: string ○ Default value: 36.008522 ○ Location: **System Properties** > **Google Maps**
google.maps.longitude	Starting longitude of the map. This value determines the starting position displayed in Google Maps pages.

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Property	Description
	○ Type: string ○ Default value: -95.221764 ○ Location: **System Properties** > **Google Maps**
google.maps.max_items	Maximum number of items to display on the map. ○ Type: integer ○ Default value: 500 ○ Location: **System Properties** > **Google Maps**
google.maps.table	Table used by the map. The table needs the following fields: name, longitude, latitude. ○ Type: string ○ Default value: cmn_location ○ Location: **System Properties** > **Google Maps**
google.maps.zoom	Starting zoom level of the map (1 is the lowest) ○ Type: string ○ Default value: 4 ○ Location: **System Properties** > **Google Maps**

3. Perform these configurations:

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

   b. Set values for these system properties:

System property	Description
google.maps.refresh.latlong.duration	Number of days after which the location details are updated. **Note:** The maximum value is 30.
google.maps.refresh.latlong.record_count_per_table	Maximum number of records in a table that can be processed using the scheduled job in one refresh.

   c. Specify the tables that store the location details in the Map Coordinates Refresh Configuration [cmn_coordinate_refresh_config] table.

   d. If there are no fields to track when the coordinates are last retrieved in your tables:

      i. Create the **coordinates_retrieved_on** field of the type **Date/Time** in your tables.

      ii. Ensure that the value of the field that tracks time when the coordinates are last retrieved, is populated correctly in the Map Coordinates Refresh Configuration [cmn_coordinate_refresh_config] table. Refer to the sample fix script *`Update coordinates updated on field`* to update values in the **coordinates_retrieved_on** field.

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e. Navigate to **System Definition** > **Scheduled Jobs**.

f. Open the record, **Refresh Latitude Longitude info of Records**.

g. Select the **Active** check box.

h. Specify the frequency at which the location details should be refreshed by providing frequency details in **Run** and **Repeat Interval**.

Note: Ensure that you refresh the location details at least once every 30 days.

4. **Optional:** To access Google Maps from the ServiceNow instance based on your region, perform these configurations.

a. Navigate to **User Administration** > **Users**.

b. Select and assign the relevant **Country Code** for the required user.

Note: If the required **Country Code** isn't available, add the dictionary entry. Ensure that you use the ISO 3166-1 country codes. For example, the country code of Morocco is MA.

c. Navigate to **System Properties** > **Google Maps**.

d. Select the **Yes** check box for **Enable this property only when you want to alter the Google map's behavior based on a region. The region is populated from the current User's 'Country code' field value in sys_user record. The Country code value on the sys_user record should be consistent with the expectations from the Google Map's region code. Most Unicode region identifiers are identical to ISO 3166-1 codes, with some notable exceptions. Check the codes properly before making any changes.**

e. Click **Save**.

Microsoft SCCM integration

The Microsoft SCCM integration is a one direction import of SCCM data into the ServiceNow Configuration Management Database (CMDB).

Scheduled imports bring relevant SCCM data into the ServiceNow instance from an SQL Server database and map it to tables in the CMDB. You can configure either a full or incremental data import. The import is achieved using a JDBC connection via the MID Server. The integration keeps the ServiceNow CMDB synchronized with the SCCM SQLServer database, so that only relevant data is imported from the SCCM database to the CMDB. The SCCM database is considered an authoritative source and is not written to.

Supported versions

The Microsoft SCCM legacy plugin is deprecated and no longer supported or available for new activation. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base. Recommendation for all customers to migrate to the new Service Graph connector for Microsoft SCCM.

These are the plugins for the currently supported SCCM versions, all of which support Asset Intelligence and Incremental Software Reconciliation:

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- Microsoft SCCM 2007
- Microsoft SCCM 2012 v2
- Microsoft SCCM 2016

Note: If you upgrade your instance to a version of the Now Platform that does not provide support for your version of SCCM, you can continue to use that version. However, all new instances require the use of a supported SCCM version.

The Integration - Microsoft SCCM 2016 (com.snc.integration.sccm2016) plugin is compatible with SCCM versions 1606, 1906, 1910, and 2002.

Service Graph connector for Microsoft SCCM

To import SCCM data into the CMDB, you can use the Service Graph connector for Microsoft SCCM instead of using the legacy SCCM connector.

Using the Service Graph SCCM connector provides these advantages:

- Adherence to the Common Service Data Model (CSDM) data model.
- Use of Identification and Reconciliation engine (IRE) to avoid duplicate records.
- Support for removed software detection and delta detection.
- Use of the IntegrationHub ETL (2.2.1) which allows for easy data mapping and customizations.
- Higher performance during data processing.

For information on how to update from using the Microsoft SCCM connector plugin to using the Service Graph connector for Microsoft SCCM, see Update Microsoft SCCM 2016 plugin for Service Graph connector for Microsoft SCCM.

Available modules

- **Setup**:
  - Configure the data sources.
  - Specify database server settings and the MID Server.
  - Test the configuration.
- **Scheduled Import**: Schedule the import or execute the import immediately.
- **Data Sources**: A list of the pre-configured data sources defining the external CMDB database.
- **Progress**: The progress log for scheduled imports.
- **Transform History**: A log of transformations performed by scheduled imports.
- **CI Identification**: Identifiers used by SCCM to match import set data with the CMDB.
- **Import Set Data**: Tables that store imported SCCM data.
- **Web Services**: List of web services used to add or remove fields in the transform maps.

Asset intelligence

Asset Intelligence is an SCCM feature that can filter, normalize and clean up software records. When enabled, it populates normalized software data in a separate table within the SCCM database. You can target this separate table instead of the raw software data table. When you import software records into the CMDB with this feature enabled, you get a cleaner set of

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software data. To use this feature, you must Activate SCCM Asset Intelligence scheduled imports in the target ServiceNow instance, as well as in the source SCCM database.

Activate a supported Microsoft SCCM plugin

The SCCM plugins can be activated by an administrator and requires the Integration - JDBC and CI Identification plugins. These dependent plugins are activated automatically with SCCM activation.

Before you begin

For a complete listing of the plugins that need to be activated, see Activate SCCM Asset Intelligence scheduled imports.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

SCCM data import process and source tables

The Microsoft SCCM versions supported in the ServiceNow® platform offer identical features and the same imported data.

Data import process

1. A schedule called **SCCM System <version> Import** determines when the SCCM tables are imported into the ServiceNow® instance. Imports can be executed immediately or scheduled to run at defined intervals.
2. A MID Server retrieves the SCCM data and imports it into staging tables on the instance.
3. Transforms run on the data in the staging tables and map the SCCM data to existing fields in the CMDB.

SCCM data imported

This table shows the SCCM source tables, the corresponding import set staging tables in the ServiceNow® instance, and the target tables in the CMDB.

SCCM table	Staging table	CMDB table
• v_GS_Computer_System • v_GS_Workstation_Status	SCCM <version> Computer Identity [imp_sccm<version>_computer_id]	Computer [cmdb_ci_computer]

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SCCM table	Staging table	CMDB table
• v_GS_System • v_GS_PC_Bios • v_GS_Operating_System • v_GS_Computer_System_Product • v_GS_System_Enclosure • v_GS_Baseboard		
v_GS_Disk	SCCM <version> Disk [imp_sccm<version>_disk]	Disk [cmdb_ci_disk]
v_GS_Network_Adapter_Configuration	SCCM <version> Network [imp_sccm<version>_network]	Network Adapter [cmdb_ci_network_adapter]
v_GS_Operating_System	SCCM <version> Operating System [imp_sccm<version>_os]	Computer [cmdb_ci_computer]
v_GS_Processor	SCCM <version> Processor [imp_sccm<version>_processor]	Computer [cmdb_ci_computer]
• v_GS_Add_Remove_Programs • v_GS_Add_Remove_Programs_64	SCCM <version> Software [imp_sccm<version>_software]	• Software [cmdb_ci_spkg] • Software Installation [cmdb_sam_sw_install] (when Software Asset Management is enabled*)

*For more information about Software Asset Management and how to enable it, see Request Software Asset Management.

SCCM data sources

The ServiceNow® SCCM integration uses JDBC data sources to import software data from the SCCM database. Each data source contains the connection specifics for the SCCM database and names the MID Server the instance will use to import the data. The transforms that map the SCCM fields to the CMDB are defined in a related list in each data source record.

Transform maps

Transform maps are accessed from the **Transforms** related list in each data source record. The source fields in SCCM and the target fields in the CMDB are listed in the **Field Maps** related list in each Table Transform Map record. The SCCM integration uses the transform map utility provided with the ServiceNow® platform. For instructions on editing or creating a transform map, see Transform maps.

The SCCM integration provides two transform maps for incremental software imports. Only one transform map can be enabled (**Active**) at a time.

- **Incremental Import**: Enabled by default. This map should be configured as **Active** when ServiceNow® Software Asset Management is not enabled on the instance.
- **Incremental Import (SAM enabled)**: If the Software Asset Management plugin is activated, set this transform to **Active**

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Note: To force a one-time full import of all software data from the SCCM database, clear the value in the**Last run datetime** field on the data source. This operation can take a long time to execute, so the most efficient method is to use an incremental transform after the first full import.

Transforming the assigned user

The SCCM <version> Computer Identity transform script attempts to set the **Assigned to** field in the CMDB record by looking up the name of the user in the SCCM source table and comparing the value with the matching field in the ServiceNow sys_user table. If a match is found, that user is assigned to the record. If no match is found, the **Assigned to** field is left blank. The matching field is controlled by the *glide.discovery.assigned_user_match_field* system property, which is set to **user_name** by default.

Identifiers

The SCCM integration uses CI identification to update CIs created from data imported from SCCM with a resource ID. The Hardware Rule identifier returns the resource ID of a computer from SCCM and stores it in the Source [sys_object_source] table. When resource IDs are first imported, either from SCCM or Discovery, the [sys_object_source] table is populated with IDs for each CI it identifies. In subsequent imports, if an incoming ID matches that of an existing CI, IRE (Identification and Reconciliation Engine) updates the information for that CI in the CMDB. If the incoming resource ID does not match that of an existing CI, IRE creates a new CI and populates it with the resource ID.

For more information about CMDB Identification and Reconciliation and IRE, see CMDB Identification and Reconciliation.

Upgrades from pre-Geneva versions still preserve the legacy identifiers, but you can switch to the new identifiers using a property: `glide.discovery.use_cmdb_identifiers`. If you upgraded from a pre-Geneva version, you must manually add this property and set it to `true` to use the new identifiers. If you upgraded from Geneva, this property is available in the System Properties [sys_properties] table. To preserve functionality in custom legacy identifiers, convert them to the new CMDB identifier rules format before enabling this property. The system does not reconfigure your custom identifiers to the new framework automatically.

Scripts

Data population scripts populate the related data in the CMDB for each target CI discovered by the Hardware Rule identifier.

Software

The Microsoft SCCM integration reconciles the software package count in the records for a CI and removes a software instance from the Software Instance [cmdb_software_instance] table if the software package is uninstalled from the CI. For a full software import, the transform populates the Software [cmdb_ci_spkg] and Software Instance [cmdb_software_instance] tables. If the Software Asset Management plugin is enabled, the transform populates the Software Installation [cmdb_sam_sw_install] table.

Note: The table data imported from SCCM must contain complete data for the CI. The instance assumes that the import represents all relationships that exist and adjusts the CMDB accordingly. Partial data received from SCCM tables can cause the deletion of active relationships.

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Configure the SCCM integration and schedule an import

Importing data from Microsoft SCCM requires a connection to the SCCM database via a JDBC data source and a schedule that tells the MID Server when to fetch the data.

Before you begin

You must have sufficient credentials to query the SQL Server that contains the SCCM database. Create a SQL Server account in order to connect to the SCCM database on the MID Server to use the data sources.
Connect to your SCCM SQL Server and configure the following:

1. Create a new login user name and password for SQL Server authentication.
2. Choose the SCCM database that ServiceNow data sources will connect to.
3. Assign the 'db_datareader' role membership to the new user.

Role required: admin

About this task

The system uses the details of the database connection you create in this procedure to configure the default SCCM data sources automatically.

Note: If you want to configure the JDBC data source to authenticate on your SQL Server database using the Windows MID Server service user, select the **Use integrated authentication** box on each of the existing data sources.

Procedure

1. Navigate to **All** > **Integration - Microsoft SCCM <version>** > **Setup**.
2. Complete the required fields to configure connection to the SCCM SQL database, including a valid MID Server that has access to the SQL database server.
3. Under Related Links, click **Test data source connections** to test the connection to the SCCM database.
4. If the data source connects to the SCCM database, navigate to **Integration - Microsoft SCCM** > **Scheduled Import**.
   The Scheduled Data Import form appears for your version of the SCCM integration. The Computer Identity data source runs first. The other data sources listed on the form run in sequence, based on their default order.
5. Select a calendar interval (Day, Week, etc.) in the **Run** field and specify the time of day the import should run.
   Your selection displays additional fields required to complete the schedule.
6. Click **Update** to schedule the import or click **Execute Now** to perform the import immediately.

   After the instance imports data using the **SCCM <version> Computer Identity** data source, the other data sources run in the order configured to retrieve the remainder of the SCCM data.

Activate SCCM Asset Intelligence scheduled imports

To prevent duplicate software imports, activate either the Asset Intelligence (AI) or the non-AI scheduled import.

Before you begin

Role required: admin

About this task

Make sure to limit the software import frequency to be no greater than the frequency of the table cleanup that tracks deleted software in SCCM.
Asset Intelligence is supported in these SCCM plugins:

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- Integration - Microsoft SCCM 2007
- Integration - Microsoft SCCM 2012 v2
- Integration - Microsoft SCCM 2016

Important: To improve the performance of your initial SCCM import, you can prevent the system from checking against deleted software prior to the import date. Navigate to **Integration - Microsoft SCCM <version>** > **Data Sources** > **SCCM <version> Removed Software** and enter the current date in the **Last run datetime** field, using the format **yyyy-mm-dd 00:00:00.0**. This field is populated automatically for each subsequent run of the removed software data source, so it is not necessary to alter the value after the initial import.

Procedure

1. Navigate to the **System Import Sets** > **Administration** > **Scheduled Imports**.
2. Set **Active** to **false** for these data import schedules:
   - SCCM <version> Software
   - SCCM <version> Removed Software
3. Set **Active** to **true** for these data import schedules:
   - SCCM <version> Software (with AI)
   - SCCM <version> Removed Software (with AI)

Related topics

Configure the SCCM integration and schedule an import

Upgrade the SCCM integration version

If you're using an earlier version of an System Center Configuration Manager(SCCM) plugin, you can switch over to a later version to take advantage of new features.

Before you begin

Role required: admin

About this task

The ServiceNow SCCM integrations are self-contained and can exist independently. They each use their own import set tables, data sources and transform maps. However, all SCCM integrations will transform data into the same tables within the ServiceNow CMDB. To avoid the data being overwritten by another source:

- Use one SCCM integration and disable all other SCCM scheduled imports.
- Perform a full import to clear the cmdb_software_instance table, the cmdb_sam_sw_install table, and other tables of old SCCM data.

Note: It is possible to configure each plugin to integrate with SCCM 2007 or 2012 because the mechanism of the integration is actually the same, which is to leverage Java Database Connectivity (JDBC) imports. However, a data source must be modified if it is used for an SCCM version for which it was not written. Use the plugin version that corresponds to the SCCM version for which the data source is intended.

To change the SCCM integration:

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- Disable the current integration by deactivating the SCCM import schedule.
- Activate the new SCCM plugin.
- Reimport all the software records when you're switching to an integration that supports incremental imports of removed software.

To disable the SCCM import schedule:

Procedure

1. Navigate to **All** > **Integration - Microsoft SCCM 20xx** > **Scheduled Import**.
2. Clear the **Active** check box.
3. Select **Save** or **Update**.
4. To activate the new SCCM plugin, navigate to **All** > **Admin Center** > **Application Manager**.
5. Search for ***SCCM** to see all the available SCCM integrations plugins.
6. Activate the plugin.

Related topics

SCCM data import process and source tables

Migrate the Verizon eBonding Integration to a Production System

This topic outlines the tasks required for moving the Verizon eBonding integration from a Dev/Test environment to a Production environment.

This process requires coordination with your assigned Verizon implementation manager.

General Tasks

The following work can be performed any time:

- Obtain a production SOAP password from Verizon. Your Verizon SOAP user ID is the same as that used against the Verizon test broker.
- Create an integration user for Verizon in the ServiceNow Production instance. Use the same user name and password that was created for the development instance, so that the communication between Verizon and ServiceNow is properly authenticated.

Migrating to a Production Environment

Perform these tasks in order.

- Task 1: Request the Verizon eBonding plugin for the production instance. When the plugin is installed, the only immediate user interface change is an additional **Category** field named **VZ eBonding**. All of the triggers for the integration are dependent on the category being set to **VZ eBonding**. Enabling the plugin on the production instance should not affect your users. If you wish to take additional precautions, disable the **VZ eBonding** category from the list when the plugin is activated for the instance.
- Task 2: Set up the Verizon certificate and keystore. Copy these directly over from the Dev instance or regenerate them so that you have separate versions for the Dev and Production instances.
- Task 3: Configure the integration properties to work with the Production Verizon eBonding system. This is userID, password, and other properties provided by your Verizon representative.

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- Task 4: Change all the Verizon eBroker SOAP Message functions to use Verizon's production SOAP Endpoint. In most cases, the endpoint URL will be: https://pubwebsvc.vzbi.com:443/Trouble_Management_v3r0. Verify this URL with the Verizon implementation specialist.
  - In the **SOAP Message Functions** related list, click each function, clear the **Lock** check box, and enter the production endpoint.
  - Configure the **SOAP Message Functions** related list and add the **SOAP endpoint** column. In the **SOAP Message Functions** list view, unlock and update the endpoint for all records by Edit multiple records in a list using the list editor.
- Task 5: Apply any customizations. If customizations to the integration on the Dev system were captured in an update set, apply that update set to the Production system.
- Task 6: Provide Verizon with the production SOAP Endpoint. The SOAP endpoint should look something like this: https://yourproductioninstance.service-now.com/ETMSPublish.do?WSDL.
- Task 7: Coordinate a Production turn up with your Verizon representative to do basic testing.

Warning: Do not create test tickets against the production system without working with the Verizon team. Any tickets created are treated as real tickets.

Supported integration interfaces

ServiceNow provides a number of interfaces to be able to directly integrate with the platform. These interfaces are considered part of the platform and are provided at no additional charge.

Supported Integration Interfaces

Interface
Email
JDBC
JSONv2 Web Service
LDAP integration
SOAP web service
REST API
SAML
Digest token authentication
ODBC driver
Data Export
CTI
Syslog probe

Computer Telephony Integration

Computer Telephony Integration (CTI) is accomplished by the CTI client on the user machine sending a URL to the instance.

The URL must have the following components:

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1. The base URL. For example: `https://<instance name>.service-now.com/cti.do?` would get to the instance and ask for CTI processing. The URL is accessible to authenticated users only.
2. Parameters identify which parts of the incident form appear.
   - *sysparm_caller_name*=name where 'name' is the name for a user.
   - *sysparm_caller_phone*=phone where 'phone' is the user's phone number. Either a name or phone should be provided if you want to identify the user on the call. Other parameters may be supplied to identify the user as discussed later.
   - *sysparm_task_id*=taskID where 'taskID' identifies an existing issue that the caller is calling about.
   - *sysparm_view*=view where 'view' is the name of the view to be used to display the data.
   - *sysparm_xxxx*=value where 'xxxx' is the name of a field within the 'incident' record that you want to populate with the specified 'value'. For example sysparm_priority=1 would result in the priority field set to value of 1 when the new incident screen is shown.
   - *sysparm_cti_rule*=name where 'name' is the name of a function to be invoked for CTI processing rather than using the default script. The function must be defined in a sys_script entry marked client callable. If the function needs to insert, update, or delete any GlideRecord(s), it must call a separate non-client callable function to perform the update(s).

     Note: While the CTI Processing script has been changed to be client callable, the code implementing the task view has been commented out. You must implement a new non-client-callable function for the code that performs the *task.update()*.

     To make a script client-callable check the client-callable checkbox on the form that displays when the sys_script entry is displayed. The client-callable checkbox might not show by default. To show the client-callable checkbox, you may need to modify the fields that show on the form using the gear icon and slushbucket mechanism.

     Parameters on the URL are available to the business rule as global values. For example:

     ```
     var name = sysparm_caller_name;
     ```

     The business rule you specify must return the URL for the pop-up screen, and set the 'answer' global variable.

An example URL to open the screen for user Don Goodliffe would look like the following. `https://<instance name>.service-now.com/cti.do?sysparm_caller_name=Don%20Goodliffe` Multiple sysparm parameters can be used, separated by ampersands (&).

CTI Processing script

When the *sysparm_cti_rule* parameter is not specified, the system uses the CTI Processing script to provide the following functionality.

The CTI Processing script does the following:

1. Tries to identify the user by the *sysparm_caller_name* value if it was supplied.
2. If no user has been found, the script tries to identify the user by the *sysparm_caller_phone* value if it was supplied.
3. If a user has been identified then one of the following is done

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a. If the user has open incidents, the pop-up screen shows information about the current caller and all the user's open incidents.

b. If the user does not have any open incidents, the pop-up screen shows a new incident with information provided in the URL shown.

4. If a user was not identified and an existing taskID is given, then nothing happens. The code to handle this case is commented out. To show the pop-up screen with task details, modify the CTI Processing script. Put the functionality in a separate non-client-callable function.

Integrating ServiceNow with your Intranet

You can add a ServiceNow login link to your intranet.

To deliver ServiceNow content from a web page, see Service Portal.

JDBCProbe

A JDBC probe runs on the MID Server to query an external database via JDBC and returns results to ServiceNow.

Before you begin

Role required: admin

About this task

Probes interact with the MID Server through the ECC Queue. The JDBC probe response returns as an XML payload in an input ECC Queue record. By default, each response payload contains up to 200 rows. To change this limit, set the *jdbcprobe_result_set_rows* probe parameter to the desired number.

Contact Customer Service and Support to activate the **Integration - JDBC** (com.snc.integration.jdbc) plugin.

Procedure

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.

   If the plugin depends on other plugins, these plugins and their activation status are listed.

3. **Optional:** Select the **Load demo data** check box.

   (Optional) Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when first activating the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.

4. Select **Activate**.

Direct JDBC Probe

A direct JDBC probe specifies all the parameters necessary in the outbound ECC Queue XML payload.

It is a standalone probe that is decoupled from a JDBC Data Source and does not insert into an import set. The required field in the ECC Queue record for a direct JDBC probe is **Topic** and it must equal **JDBCProbe**. The **Source** field is reserved for the `sys_id` of the data source record in the case of a JDBC data source.

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Note: If you have ServiceNow Discovery enabled on your platform, add the *skip_sensor* parameter to the probe to avoid the discovery sensors from processing the probe and resulting in a "No sensors defined" error.

XML Structure

A direct JDBC probe has the following XML payload structure

```
<parameters><parameter name = "skip_sensor" value =
 "true" /><parameter name = "parameter_name" value =
 "parameter_value" />
  ...
  <parameter name = "work" ><select  ... >
      ...
    </select></parameter></parameters>
```

Related topics

JDBCProbe

JDBC Probes via Data Source

JDBC probes are executed via a JDBC data source when an import is running against the data source.

A JDBC data source JDBC probe is described by the JDBCProbe Topic and the `sys_id` of the data source in the Source field of the ECC Queue output record.

An ECC Queue output probe is created when you load from the data source.

Select * JDBC Probe short cut

Alternatively, you may specify a *table_name* parameter instead of a work element and the following query could be executed.

```
select * from <table_name>
```

For example, using the following XML payload

```
<?xml version= "1.0" encoding= "UTF-8" ?><parameters><parameter
 name = "jdbc_driver" value =
 "com.microsoft.sqlserver.jdbc.SQLServerDriver" /><parameter
 name = "connection_string" value =
 "jdbc:sqlserver://
xxx.service-now.com;databaseName=SMS_CRICKET;user=sms;password=s
ms" /><parameter name = "table_name" value =
 "System_DATA" /></parameters>
```

Counting Rows

To count the number of rows in a table, you can indicate a select count(*) type query by including the count_rows parameter with a value of true.

For example

```
<?xml version= "1.0" encoding= "UTF-8" ?><parameters><parameter
 name = "jdbc_driver" value =
 "com.microsoft.sqlserver.jdbc.SQLServerDriver" /><parameter
 name = "connection_string" value =
 "jdbc:sqlserver://
```

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```
xxx.service-now.com;databaseName=SMS;user=sms;password=sms" /
><parameter name = "count_rows" value = "true" /><parameter name
 = "table_name" value = "System_DATA" /></parameters>
```

The resulting response XML payload

```
<parameters>
  ...
  <result query = "SELECT count(*) as row_count
 FROM System_DATA" ><row id = "1" ><row_count class
 = "java.lang.Integer" length = "11" type = "4"
 >2312</row_count></row></result>
  ...
</parameters>
```

Related topics

JDBCProbe

Parameters

The following parameters are available in a direct JDBC probe.

Parameter	Description
jdbc_driver	Required. Java class name for the JDBC driver to use, the currently supported drivers are: • Oracle: `oracle.jdbc.OracleDriver` • Microsoft SQL Server: `com.microsoft.sqlserver.jdbc.SQLServerDriv` • MySQL: `com.mysql.jdbc.Driver`

Example

```
com.microsoft.sqlserver.jdbc.SQLServerDriver
```

Parameter	Description
connection_string	Required. The JDBC connection string/ URL for defining the connection usually contains information about the database server and name, the user ID, and password for connecting to the database. The syntax is vendor-specific. See the following links for reference:

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Parameter	Description
	• Oracle: `[jdbc:oracle:thin:<username/password>@<database>]` • Microsoft SQL Server: `[jdbc:sqlserver://localhost;user=MyUserName;password=*****;]` • MySQL - `[jdbc:mysql://localhost/database?user=username%26password=passwd]`

Example

```
jdbc:sqlserver://xxx.service-now.com;
databaseName=SMS;
user=sms_user;
password=sms_password;
```

Parameter	Description
work	Required if not using the *table_name* parameter short cut. Parent element of an XML fragment describing the SQL command to execute.

Example

```
...
  <parameter name= "work" ><select table = "System_DATA" where =
 "InstanceKey=692" ><MachineID /><SMSID0 /></select></parameter>
  ...
```

Parameter	Description
query_timeout	Optional during SELECT. Number of seconds the JDBC driver waits for a `query (SELECT)` to complete. Zero means no timeout. If timeout is exceeded, the integration considers the JDBC result inaccessible and places it in an error state.

Parameter	Description
table_name	Optional (except required during `count_rows == true`). Alternate way of executing a `select *` query; instead of using the *work* element. Equivalent to executing `select * from <table_name>`.

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Parameter	Description
count_rows	Optional. Indicates whether a `select count(*)` query should return the number of rows (true/false). The result of the count is returned as a *row_count* element in the *result* element.

Parameter	Description
query	Optional. Type of query. Possible choices are "All Rows from Table" or "Specific SQL." If "Specific SQL", the sql_statement will be required to specify the SQL statement.

Parameter	Description
sql_statement	Optional. Use a specific SQL query. The presence of this element executes a direct query specified in the value attribute.

Example

```
...
  select * from any_table where id = 123
  ...
```

Parameter	Description
skip_sensor	Optional. Determines if Discovery attempts to process the ECC input from the JDBCProbe. Default = true

For example, to query a table using a direct JDBC probe, requires the following parameters:

- JDBC driver class name
- JDBC connection string
  - Database server
  - Database name
  - User name
  - User password
- The table name

Using the Work Element

The work element encodes SQL statements to be executed by the probe.

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Note: This API can only be used by the following:

- Development users who have the rights to edit scripts to insert records to the ecc_queue.
- Admin users to insert records through the UI.

There's no backend sanitization of any SQL statements, table names, or column names. It's the development users' responsibility to sanitize them if non-trusted users can manipulate them to execute malicious queries.

The following are the valid work child elements.

- select
- update
- insert
- delete

SELECT

Retrieve rows from the specified table in the database specified by the JDBC connection string. The simplest select work just specifies the table name and will retrieve all fields in a row, for example:

```
...
 <parameter name= "work" ><select table =
"System_DATA" /></parameter>
 ...
```

To specify a search criteria, specify the where attribute on the select element, for example:

```
...
 <parameter name= "work" ><select table = "System_DATA" where =
"InstanceKey=692" /></parameter>
 ...
```

To specify the fields you want returned, embed the fields as child elements of the select element, for example:

```
 ...
 <parameter name= "work" ><select table = "System_DATA" where =
"InstanceKey=692" ><MachineID /><SMSID0 /></select></parameter>
 ...
```

To use a direct SQL statement, specify it in the **query** parameter

```
...
 <parameter name= "query" value= "Specific SQL" /><parameter
name = "sql_statement" value = "select * from any_table where
value='test'" />
 ...
```

UPDATE

An **update** SQL can be executed by specifying the **table**, optional where clause and required child elements for the fields and their values to update.

```
...
<parameter name= "work" ><update table =
 "alerts.status" where = "ServerName %= 'NCOMS'
```

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```
 AND ServerSerial=3935" ><Agent>ServiceNow -
 INC10020</Agent><URL>http://
Macintosh-9.local:8080/glide/incident.do?sys_id=17a31f380a0a0bae
0048ca875c8891d0</URL><Severity quoted = "false"
 >3</Severity><Acknowledged quoted = "false"
 >0</Acknowledged></update></parameter>
...
```

INSERT

An **insert** SQL can be executed by specifying the **table**, and required child elements for the fields and their values to insert.

```
...
<parameter name= "work" ><insert table
 = "alerts.status" ><Agent>ServiceNow -
 INC10020</Agent><URL>http://
Macintosh-9.local:8080/glide/incident.do?sys_id=17a31f380a0a0bae
0048ca875c8891d0</URL><Severity quoted = "false"
 >3</Severity><Acknowledged quoted = "false"
 >0</Acknowledged></insert></parameter>
...
```

DELETE

A delete SQL can be executed by specifying the table and optional where clause.

```
...
<parameter name= "work" ><delete table = "alerts.status" where =
 "ServerName %= 'NCOMS' AND ServerSerial=3935" /></parameter>
...
```

Related topics

JDBCProbe

Syslog probe

The ServiceNow Syslog probe uses the MID Server to deliver log messages from a ServiceNow instance to another machine, such as a dedicated log server, using the syslog protocol over an IP network.

How the Syslog probe works

The syslog probe is launched by a ServiceNow Script includes (called Syslog) that can be invoked from a Business rules, event, or Orchestration activity and is launched by a MID Server. A syslog server or any server that can receive messages using the syslog protocol must be installed on the recipient (target) machine. Typically, a dedicated log server in the network is configured to receive all internal syslog messages. Some products that accept syslog messages are:

- ArcSight
- Splunk
- LogLogic
- syslog-ng

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Example

The Acme Corporation wants to send a log message from their ServiceNow instance to an ArcSight syslog server inside their corporate firewall each time a user login fails. The system administrator uses the login.failed event to trigger a business rule that invokes the Syslog Script Include each time a login fails. Acme's MID Server checks the ECC Queue for work and picks up the syslog probe, which contains the log entry. The MID Server then sends the log message to the ArcSight server, which gathers log messages from all the machine in the internal network.

Code sample

The following code sample, included in an event or a business rule, directly calls the Syslog Script Include and sends a syslog message to a designated syslog server:

```
var sl = new Syslog('FQDN of your syslog server',
 'mid.server.Eclipse', 16);
sl.log('This is a sample log message', 6);
```

This code does the following:

- Sends the log message to facility **16**
- Sets the priority to **6** (informational)
- Sends the message to your syslog server
- Launches the probe via the MID Server named "Eclipse"

Managing integration sessions

Manage access to an instance by configuring how long integration sessions last before expiring.

Similar to user sessions, you can secure your instance by configuring when to time out an integration session after a period of inactivity and a maximum active session time. By default, integration session time out after five minutes of inactivity.

Configure a maximum active time for integration sessions

Secure your instance by enforcing a maximum time for sessions regardless of integration activity.

Before you begin

Role required: admin

About this task

By default, sessions expire only after a period of inactivity. Enforcing a maximum active session time ends sessions regardless of if an integration has been active recently. The active session timeout should be greater than the value configured for the inactive session timeout. For example, if sessions are configured to time out after 30 minutes of inactivity, the active session timeout should be greater than 30 minutes.

Note: Sharing a single service account across integrations and applications can prevent the system from enforcing maximum active session times. To resolve issues that keep sessions active, see the Resolving Extended Session Duration and Performance Issues with Shared Service Accounts [KB1770913] article in the Now Support Knowledge Base.

Procedure

1. In the navigation filter, enter `sys_properties.list`.
2. Select **New**.

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3. On the form, fill in the fields.

System Property form

Field	Description
Name	`glide.active.session.timeout.invalidate.ses`
Description	`Specifies whether integration sessions can be invalidated by configuring a maximum active session time.`
Type	**true | false**
Value	`true`

4. Select **Submit**.
5. From the System Property [sys_properties] list, open the *`glide.integrations.active.session.life_span`* property.
6. In the **Value** field, enter the number of minutes before integration sessions time out regardless of user activity.
   The value should be greater than the value of *`glide.integration.session_timeout`* for inactive integration session timeout. By default, the inactive session timeout for integration sessions is five minutes.
7. Select **Update**.

Result

Integrations are logged out of the instance after the time specified and their credentials must be entered again to access the instance. This setting helps secure an instance using integrations, such as the REST API.

Related topics

Configure a maximum active time for user sessions

Modify integration session timeout after inactivity

Specify when to time out integration sessions after a period of inactivity.

Before you begin

Role required: admin

About this task

By default, after one minute of inactivity, the platform ends an integration session and logs the user out automatically.

Procedure

1. In the navigation filter, enter `sys_properties.list`.
2. Select **New**.
3. On the form, fill in the fields.

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System Property form

Field	Description
Name	`glide.integration.session_timeout`
Description	`Sets the inactive session timeout for integration sessions, in minutes.`
Type	**string**
Value	Specify the number of minutes.

4. Select **Submit**.

Related topics

Modify user session timeout after inactivity

Domain separation in third-party application and data source integration

This is an overview of domain separation and integration of third-party applications and data sources. 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-Standard

The Basic-Standard level of domain separation is achieved through data visibility as well the integration design.

Basic

- There is business logic to ensure data goes into the proper domain for the application's service provider use cases.
- In the application, the user interface, cache keys, reporting, rollups, aggregations, and so on, all consider domain at run time.
- The owner of the instance needs to be able to set up the application to function normally across multiple tenants.

Standard

- Includes **Basic** level
- Business logic: Processes can be created or modified per customer by the service provider. The use cases reflect proper use of the application by multiple service provider customers in a single instance.
- The owner of the instance needs to be able to configure MVP business logic and data parameters per tenant as expected for the specific application.

Overview

Team should define a few examples with data-driven properties. There should be three different buckets with short description for each one

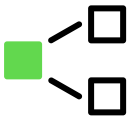
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Related topics

Domain separation for service providers

Notifications

Use ServiceNow® Notifications to manage system email, create system notifications, and configure how your system responds to inbound email.

Email Administration  With email notifications use email properties to define your instance and set up email accounts	System Notifications  Set up notifications alerts for record changes via email, SMS text message, push notification, or messaging app	Provider Notifications  Send notifications directly to recipients via the provider on supported channels
Email Client  Send email directly from any record, such as an incident, change request, or problem record	Inbound Email  Configure your instance to send replies, create incidents, or update records automatically in response to inbound emails	Notification Preferences  With notification preferences you can manage and choose the notifications you want to receive

Troubleshoot and get help

- Troubleshooting Notification emails
- Ask or answer questions in the Platform community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Email Administration

All email notifications use the email properties that you define for your instance and the email accounts that you set up. Your email service can also affect the successful transmission of incoming and outgoing email.

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Get started

Explore  Explore email administration	Configure  Configure email administration	Email Accounts  Create, filter and service email accounts
Email Encryption  Secure/Multipurpose Internet Mail Extensions (S/MIME) is an end-end encryption protocol to support data confidentiality, authenticity, and integrity	Reference  References for email size limit and email bounce	

Troubleshoot and get help

- Troubleshooting Notification emails
- Ask or answer questions in the Platform community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Explore email administration

Learn about email administration.

Email Administration benefits

Benefit	Feature
Define your instance and the email accounts that you set up. Your email service affect the successful transmission of incoming and outgoing email.	Email administration
Email messages can be seen in the System Mailboxes menu, which gives you access to the system Inbox, Outbox, and Sent mail box.	System mailboxes

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Benefit	Feature
Email accounts store the connection details and credentials the system uses to access external email servers and services.	Email accounts
Specify which inbound emails to ignore or move to a particular mailbox.	Email filters
The Email Service API provides endpoint to install the Email API on the instance.	Email service
Limit sending emails to IDs that are known to generate bounces as per RFC3463 and allowing the admins to control blocked ids	Email bounce management

Email administration

All email notifications use the email properties that you define for your instance and the email accounts that you set up. Your email service can also affect the successful transmission of incoming and outgoing email.

Email accounts

Email administrators set up email accounts to allow the system to connect to external mail services such as POP3, SMTP, or IMAP servers. You can use the ServiceNow - provided email accounts or create your own accounts for your own email services.

Email properties

Use Email Properties to configure settings for inbound and outbound email. Email properties apply to all email accounts.

Email service size restrictions

Your email service, whether you are using a standard ServiceNow email configuration or an alternate email configuration, determines the successful transmission of incoming or outgoing emails based on a maximum email size. An email configuration consists of your instance, email server, and email client.

- Standard email configurations – For instances that use the standard email configuration, the ServiceNow mail servers cannot send or receive emails larger than approximately 50 MB (before encoding), including the email header, body text, and attachments. Email messages are encoded by an email client, which increases total email message size. The maximum ServiceNow mail server size restriction is 75 MB (after encoding). The maximum email size limit is enforced regardless of any configured attachment size limits.
- Alternate email configurations – If your email service uses a company-owned or third-party server, the approximate size restriction of 50 MB (including the email header, body text, and attachments) may still apply. However, your service might support different maximum total file sizes for inbound and outbound emails. Check with the email administrator of your email service to verify email size limits.

For details on how encoding can affect email message size and email transmission, see KB0521772.

Email service availability

Email service is intentionally shut down on instance clones to prevent resending already delivered email. Upgrades no longer require an extended interruption of email service. Instances

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continue to process email during an upgrade. For a possible explanation for undelivered emails, see this blog post by a ServiceNow Technical Support Engineer in the ServiceNow Community.

For instructions on creating and sending custom emails when events on the instance occur, see the tasks in Email and SMS notifications.

Instance-to-instance communication via email

Use Web services to communicate between two instances.

Designate untrusted and trusted email domains

Using Instance Security Center, you can monitor the blocked and allowed incoming email metrics for your instance. For more information, see Designate untrusted and trusted email domains.

Next steps after enabling email

After enabling email on your instance, consider performing several of these important tasks.

- Test the email configuration by routing all email to a single user (set the *glide.email.test.user* property).
- Review the baseline notification categories, email notifications, and templates to determine if they meet your business needs.
- Review the baseline inbound email actions to determine if they meet your business needs.
- Determine if you want to use email layouts to add consistent content elements.
- Determine if you want to use email filters to restrict the email the instance receives.
- Determine if you want to implement a retention policy to archive and destroy email at certain intervals.
- Determine what kind of watermarks outbound email uses to associate records with email messages.
- Determine if you want to create users when the instance receives an email from an unrecognized user.
- Set the precedence of outgoing mail. By default, the instance sends email with a precedence of bulk (set the *glide.smtp.precedence_bulk* property).
- Consider preventing untrusted users from triggering inbound actions to prevent unwanted email from affecting your instance.
- Implement a spam filter to restrict unwanted messages sent to your custom email addresses.

System mailboxes

Email messages can be seen in the System Mailboxes menu, which gives you access to the system Inbox, Outbox, and Sent mail box.

Each provides a filtered view of emails to let you see only what you need to at any given time, including list fields applicable to each. The system mailboxes menu shows your current POP and SMTP status.

The System Mailbox is hosted by ServiceNow, who have sole access to the mailboxes. By default, once the instance pulls an email message, it is deleted from the mail server and stored in the application on the Email [sys_email] table.

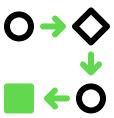
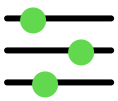
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For information about the fields that are shown in the System Mailbox, see System email log and mailboxes. You can configure the layout of a system mailbox to show any of the email log fields, not only the ones that are shown by default.

- **Inbound emails**: All inbound mail is placed into the Inbox until it is processed. After it is cleared, the email moves to the Received state. If the email message matches the criteria in an inbound email action, the email is changed to Processed. If not, it is changed to Ready. If the system is restarted for any reason (such as during a system upgrade), all inbound mail waits on the external mail server until the system can request delivery.
- **Outbound emails**: All outbound mail is placed into the Outbox until it is processed. Once cleared, it is moved to Sent (if sent) or Skipped (not sent, as in the case of no valid recipients). If the system is restarted for any reason (such as during a system upgrade), all outbound mail waits in the instance database until the system comes online, and the scheduler looks for mail to deliver.

Configure email administration

Setup basic and advanced email, configure email properties, activate email filter and services and grandt non admin user access to email APIs.

Basic Setup  Basic email setup	Advanced Setup  Advanced email setup	Email Properties  Configure settings for inbound and outbound email
Activate  Activate email filters and services	Access  Grant non-admin users access to the Email API	

Basic email setup

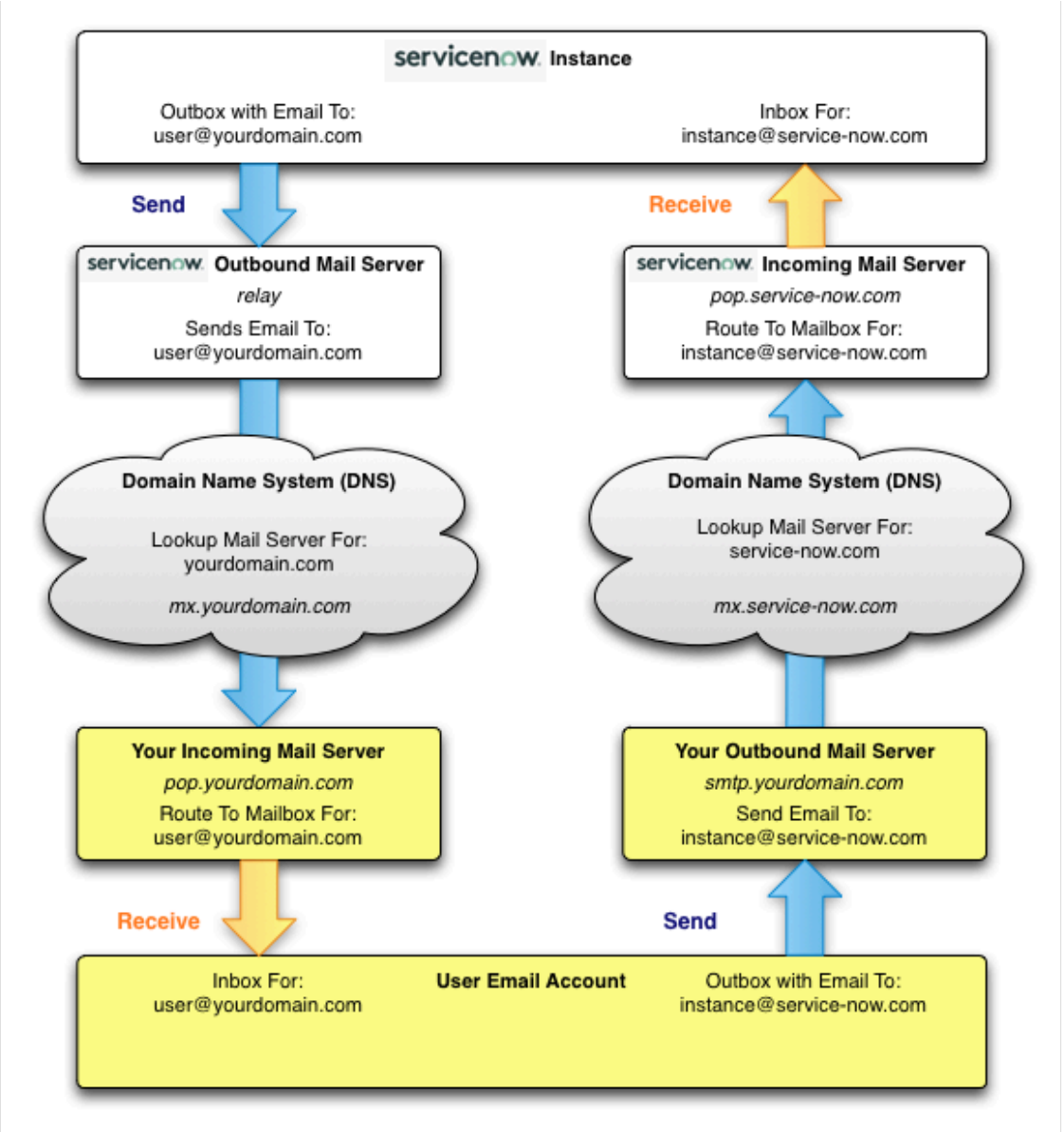
All production instances can send and receive email using ServiceNow - provided resources. The instance has an email address of instance@service-now.com.

Network layout for standard email configuration

Below is an example of a basic email network with ServiceNow as the domain.

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Basic email network



Basic email services and features

- Mail servers maintained by ServiceNow.
  - Encrypt mail with opportunistic TLS (Transport Layer Security) if supported by your mail servers.

    If your internal mail servers send and receive messages via a TLS-encrypted channel, ServiceNow mail servers support that communication.
  - Provide a dedicated mailbox for your instance.
- Pre-configured email accounts to connect to ServiceNow mail servers.
  - An SMTP account sends email to your primary Mail Exchange (MX) server from your instance email address of instance@service-now.com.
  - A POP3 account receives email sent to your instance email address of instance@service-now.com.

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- High availability features from ServiceNow datacenters.
- Spam detection for incoming email.

Administrators who want to use basic email services can do so by enabling the email properties for sending and receiving email.

Enable basic email

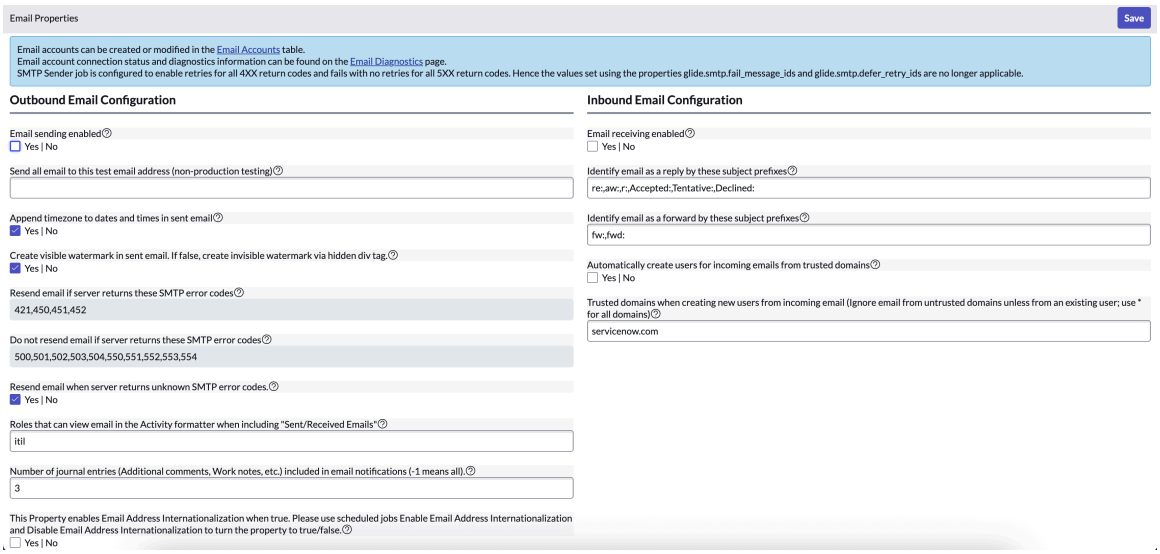
Enable basic email to use ServiceNow - provided email servers and accounts.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **Email Properties**.
2. Configure these email properties and select **Save**.



Email property descriptions

Property section	Label	System property	Setting required
Outbound Email Configuration	Email sending enabled	glide.email.smtp.active	Yes
Inbound Email Configuration	Email receiving enabled	glide.email.read.active	Yes

Advanced email setup

With an advanced email setup, you can use your own SMTP server, POP3 server, or both.

Setting up your own email environment can be useful if you want to use existing filtering, retention, or compliance aspects of your internal email architecture. You can set up email in several ways:

- Use your own SMTP server to forward email to ServiceNow servers.
- Use your own SMTP server to send email.
- Use your own POP3 server to receive email.

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- Use your own SMTP and POP3 servers to send and receive email.
- Use an OAuth 2.0-enabled SMTP server to send email from a third-party service.
- Use an OAuth 2.0-enabled IMAP server to receive email from a third-party service.

The following procedures assume that you enabled basic email properties.

Enable using your own SMTP server

Enable using your own SMTP server so that you can leverage the existing filtering, retention, or compliance aspects of your own SMTP server while also using the ServiceNow POP3 server.

Before you begin

- Role required: admin
- Email server required: SMTP
- Basic email properties: enabled

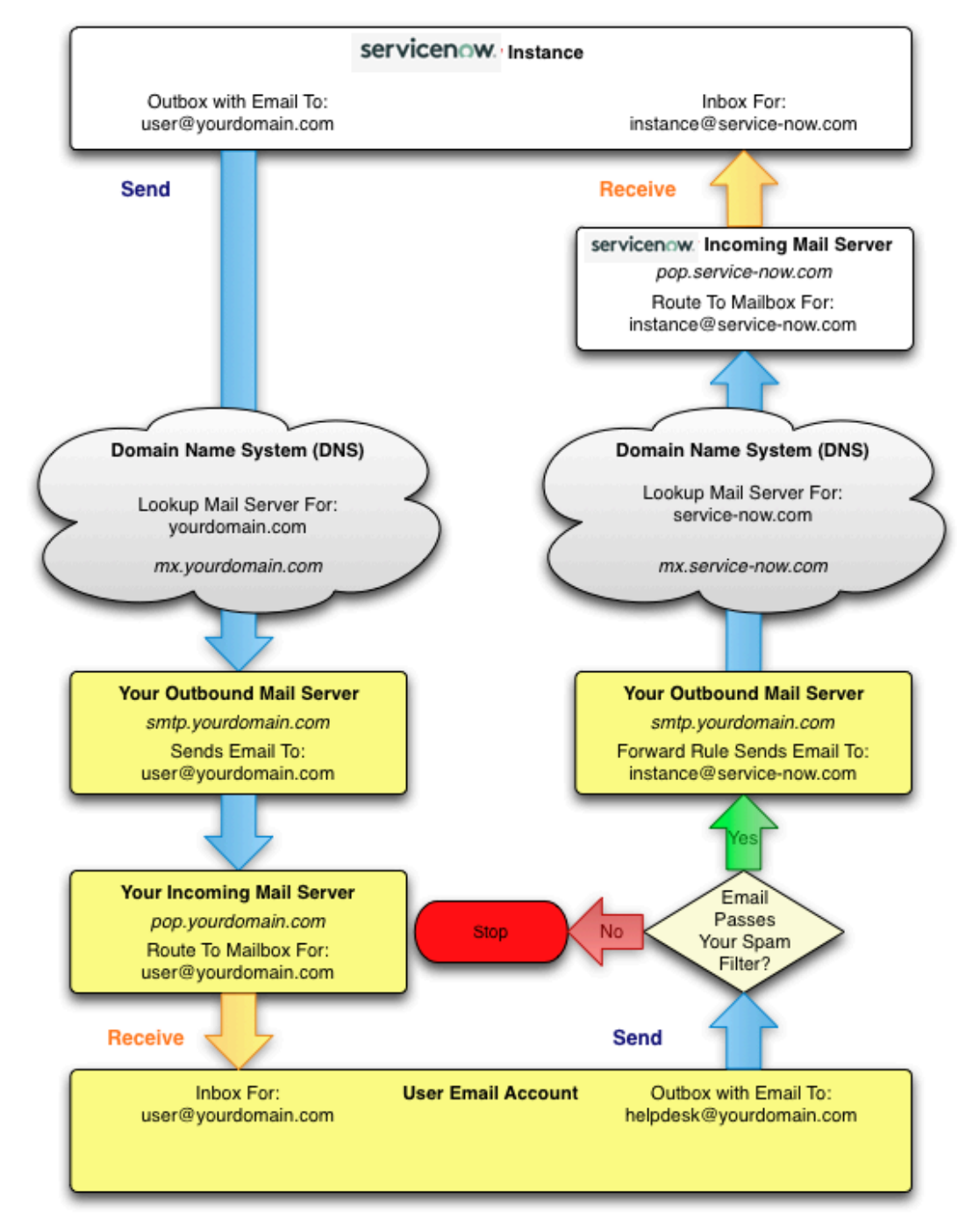
About this task

You can combine your own internal email architecture with the ServiceNow email architecture to handle email. The following diagram demonstrates how you would use your own SMTP server alongside the ServiceNow POP3 server.

Note: Supports only one active SMTP account at a time (for outbound emails).

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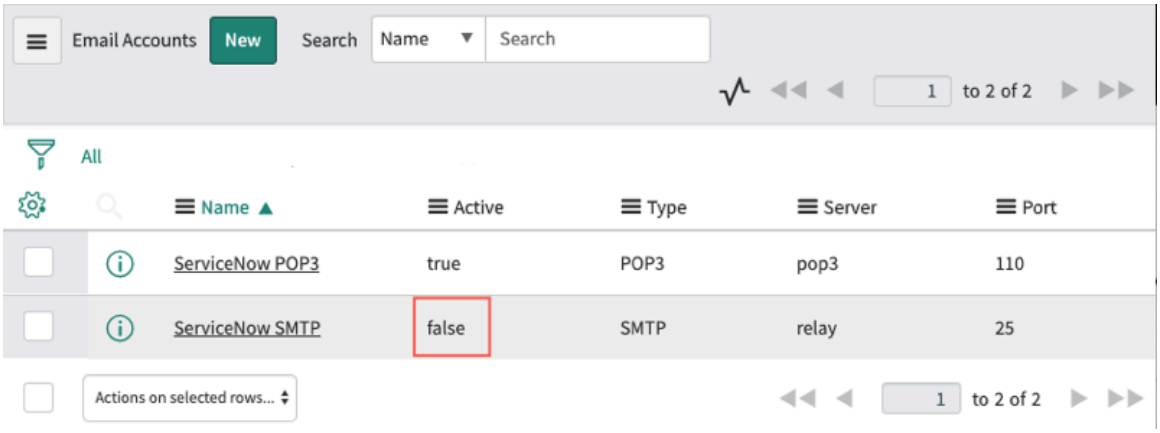
Sending email using your own SMTP server



Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **Email Accounts**.
   The system displays the list of available email accounts.
2. Locate the record for **ServiceNow SMTP** and change **Active** to **false**.

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3. Click **New**.
4. Create an email account record for your SMTP server where the **Type** is **SMTP**.
5. On the form, fill in the fields.

Field	Description
Name	Name of the email account.
Type	Type of mail server.
Authentication	Type of authentication used for the email account to connect to the email server. You can select one of the following: ○ –- None -- ○ Password ○ OAUTH ○ OAUTH 2.0
Server	Remote server to which this account connects. To activate a server for an on-premises installation, enter the full address (FQDN) of the node (for example, `node.customerdomain`).
User Name	Username or ID to authenticate an email address.
Password	Password when the **Authentication** type is **Password**.
Connection Security	Type of secure connection. Choose a setting: **None** No secure protocol is used. **STARTTLS** Upgrades an insecure connection to a secure connection using the SSL/TLS encryption protocol, if your email server supports TLS.

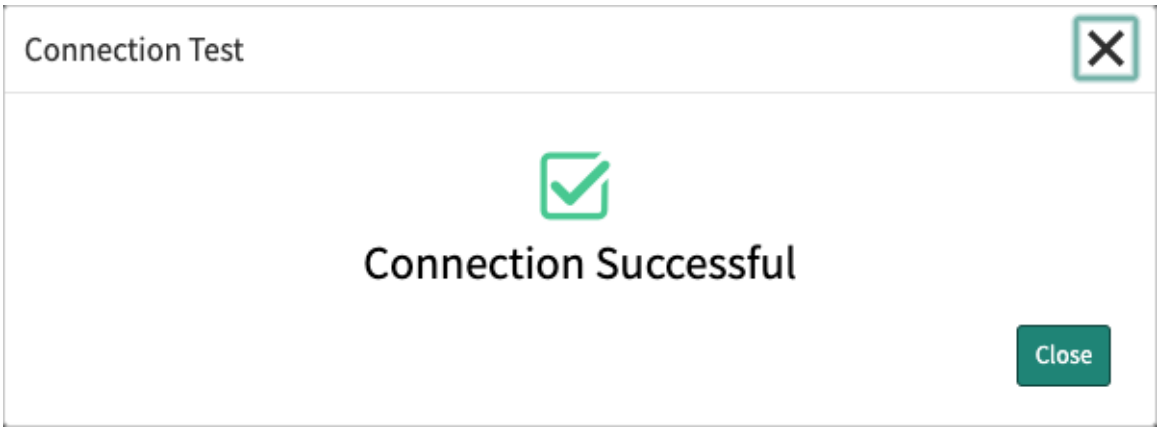
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Field	Description
	SSL/TLS Connect to an SSL/TLS encrypted port to secure the connection. Email is encrypted between the ServiceNow instance and your mail server. ⚠ **Warning:** Selecting a less secure protocol like **STARTTLS** or **None** may expose your data. To better ensure the security of data in your email server, select **SSL/TLS**.
Port	Connection TCP port.
System Address Filter	System address filter to apply to the email account. If left blank, the system uses the default system address filter for inbound or outbound email. For more information, see System address filters.
Active	Option to activate the email account.
ServiceNow Configured	Identifier of whether this account is provisioned by ServiceNow. If you create an account, this option is not selected.
Enable Debug Logging	Option to create node logs for the raw data that is exchanged with the email server. You can review the node logs by navigating to **System Logs** > **Utilities** > **Node Log File Browser**. You can enable this field temporarily to diagnose issues related to receiving or sending email.

6. From **Related Links**, click **Test Connection**.

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If the email account is valid, the system returns a success message.



What to do next

Configure the SMTP server in your internal email architecture to forward email from the custom email address to the instance email address. Implement a spam filter on the custom email address.

Related topics

Create an email account

Enable using your own POP3 server

You can use your own POP3 server to store and receive email for the instance.

Before you begin

- Role required: admin
- Email server required: POP3
- Basic email properties: enabled

Procedure

1. On your POP3 server, create a mailbox for your instance that has a custom email address. For example, create a mailbox for `service-desk@company.com`.
2. Navigate to **System Mailboxes** > **Administration** > **Email Accounts**.
   The system displays the list of available email accounts.
3. **Optional:** If you do not want to receive, email sent to the instance@service-now.com mailbox, locate the record for **ServiceNow POP3** and change **Active** to **false**.
   An instance can receive email from multiple POP3 accounts at the same time. Leaving the **ServiceNow POP3** account active permits the instance to receive email sent to the default email address.
4. Click **New**.
   The system displays an empty email Account form.
5. Create an email account record for your POP3 server where the **Type** is **POP3**.
6. On the form, fill in the fields.

Field	Description
Name	Name of the email account.

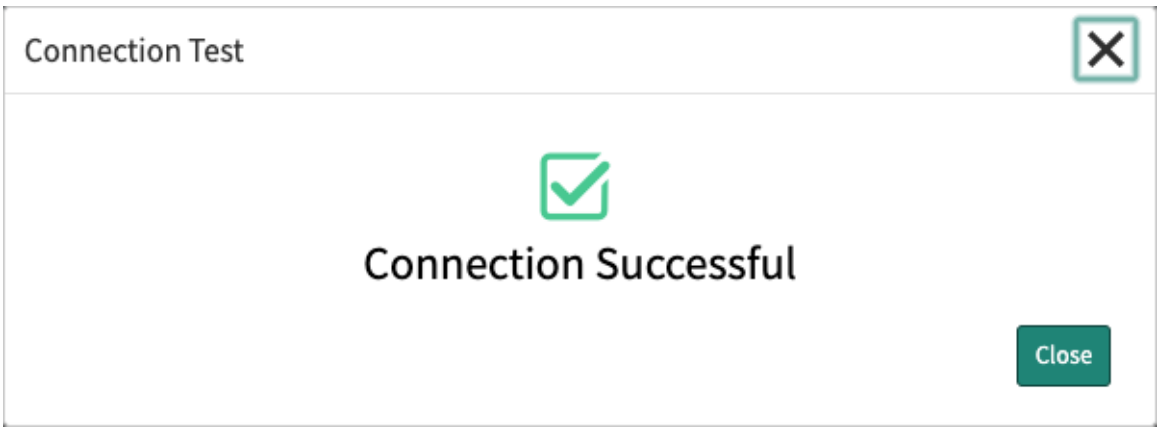
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Field	Description
Type	Type of mail server.
Authentication	Type of authentication used for the email account to connect to the email server. You can select one of the following: ○ –- None -- ○ Password ○ OAUTH ○ OAUTH 2.0
Server	Remote server to which this account connects. To activate a server for an on-premise installation, enter the full address (FQDN) of the node (for example, `node.customerdomain`).
User Name	Username or ID to authenticate an email address.
Password	Password when the **Authentication** type is **Password**.
Connection Security	Type of secure connection. Choose a setting: **None** No secure protocol is used. **STARTTLS** Upgrades an insecure connection to a secure connection using the SSL/TLS encryption protocol, if your email server supports TLS. **SSL/TLS** Connect to an SSL/TLS encrypted port to secure the connection. Email is encrypted between the ServiceNow instance and your mail server. ⚠ **Warning:** Selecting a less secure protocol like **STARTTLS** or **None** may expose your data. To better ensure the security of data in your email server, select **SSL/TLS**.
Port	Connection TCP port.
System Address Filter	System address filter to apply to the email account. If left blank, the system uses the default system address filter for inbound or outbound email.

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Field	Description
	For more information, see System address filters.
Active	Option to activate the email account.
ServiceNow Configured	Identifier of whether this account is provisioned by ServiceNow. If you create an account, this option is not selected.
Enable Debug Logging	Option to create node logs for the raw data that is exchanged with the email server. You can review the node logs by navigating to **System Logs** > **Utilities** > **Node Log File Browser**. You can enable this field temporarily to diagnose issues related to receiving or sending email.

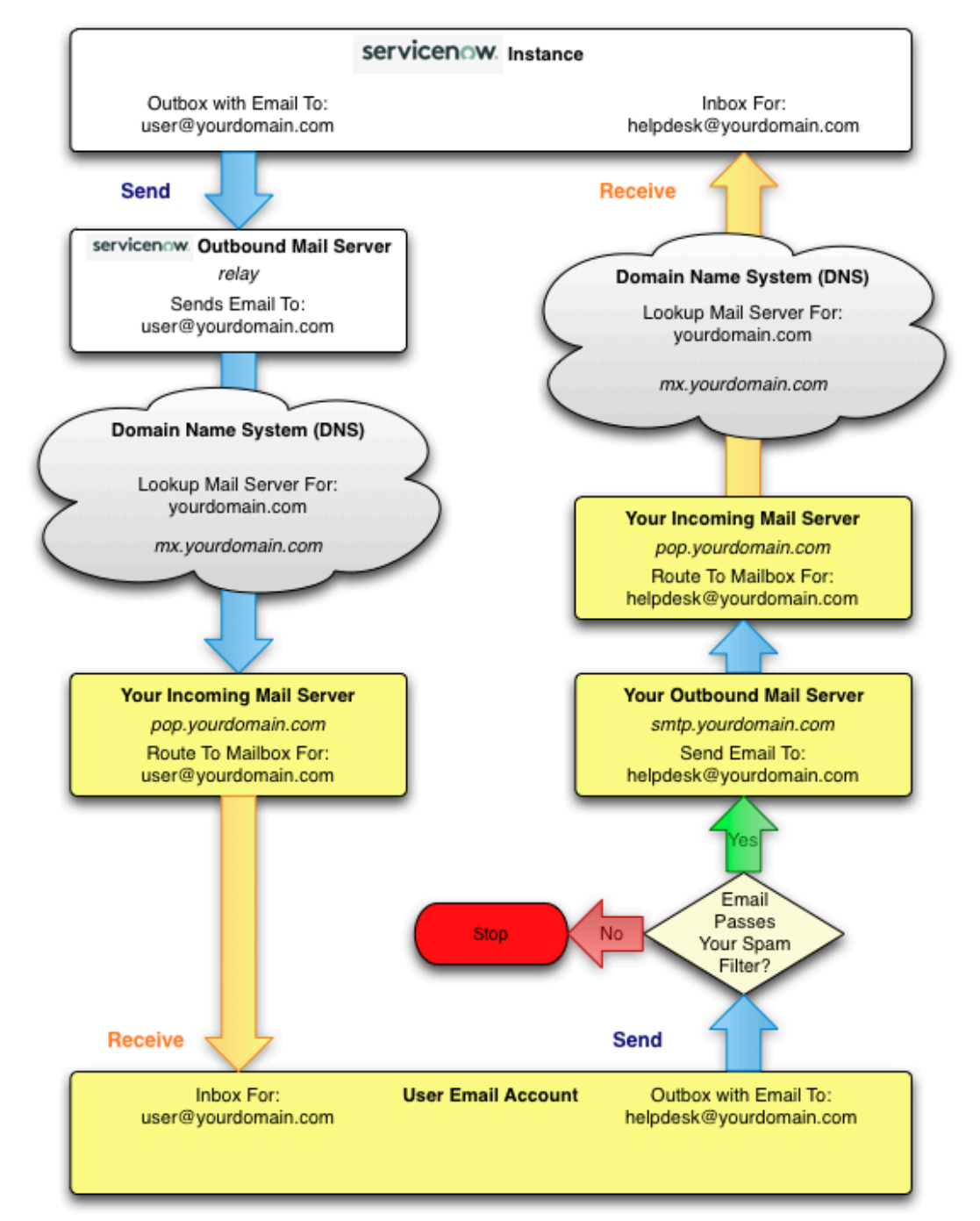
7. From **Related Links**, click **Test Connection**.
   If the email account is valid, the system returns a success message.



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Example:

Receiving email using your own POP3 server



Enable using your own SMTP and POP3 servers

You can use your own SMTP and POP3 servers to send email from the instance and to store and receive email for the instance.

Before you begin

- Role required: admin
- Email servers required:

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- SMTP
- POP3

- Basic email properties: enabled

Procedure

1. On your POP3 server, create a mailbox for your instance.
   For example, create a mailbox for `service-desk@company.com`.
2. Navigate to **System Mailboxes** > **Administration** > **Email Accounts**.
   The system displays the list of available email accounts.
3. Locate the record for **ServiceNow SMTP** and change **Active** to **false**.
4. **Optional:** If you do not want to receive email sent to the instance@service-now.com mailbox, locate the record for **ServiceNow POP3** and change **Active** to **false**.
   An instance can receive email from multiple POP3 accounts at the same time. Leaving the**ServiceNow POP3** account active means that the instance receives email sent to its default email address.
5. Click **New**.
   The system displays a blank Email Account form.
6. Create an email account record for your SMTP server where the **Type** is **SMTP**.
7. On the form, fill in the fields.

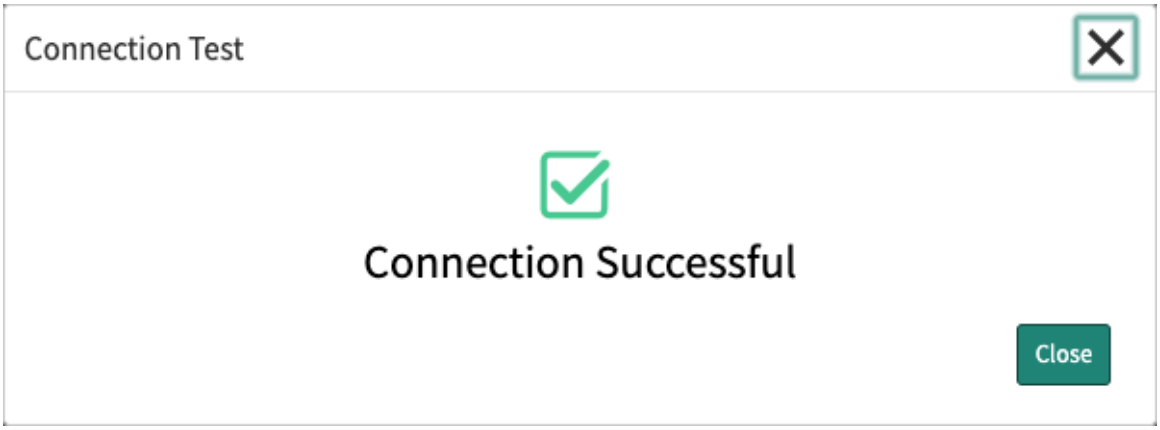
Field	Description
Name	Name of the email account.
Type	Type of mail server.
Authentication	Type of authentication used for the email account to connect to the email server. You can select one of the following: - -- None -- - Password - OAUTH - OAUTH 2.0
Server	Remote server to which this account connects. To activate a server for an on-premise installation, enter the full address (FQDN) of the node (for example, `node.customerdomain`).
User Name	Username or ID to authenticate an email address.
Password	Password when the **Authentication** type is **Password**.
Connection Security	Type of secure connection. Choose a setting: **None** No secure protocol is used. **STARTTLS**

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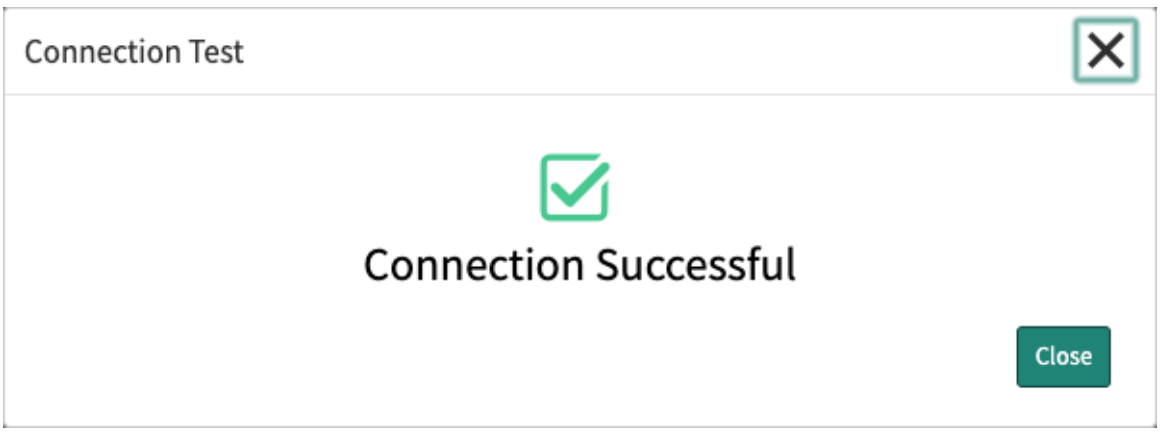
Field	Description
	Upgrades an insecure connection to a secure connection using the SSL/TLS encryption protocol, if your email server supports TLS. **SSL/TLS** Connect to an SSL/TLS encrypted port to secure the connection. Email is encrypted between the ServiceNow instance and your mail server. ⚠ **Warning:** Selecting a less secure protocol like **STARTTLS** or **None** may expose your data. To better ensure the security of data in your email server, select **SSL/TLS**.
Port	Connection TCP port.
System Address Filter	System address filter to apply to the email account. If left blank, the system uses the default system address filter for inbound or outbound email. For more information, see System address filters.
Active	Option to activate the email account.
ServiceNow Configured	Identifier of whether this account is provisioned by ServiceNow. If you create an account, this option is not selected.
Enable Debug Logging	Option to create node logs for the raw data that is exchanged with the email server. You can review the node logs by navigating to **System Logs** > **Utilities** > **Node Log File Browser**. You can enable this field temporarily to diagnose issues related to receiving or sending email.

8. From **Related Links**, click **Test Connection**.
   If the email account is valid, the system returns a success message.

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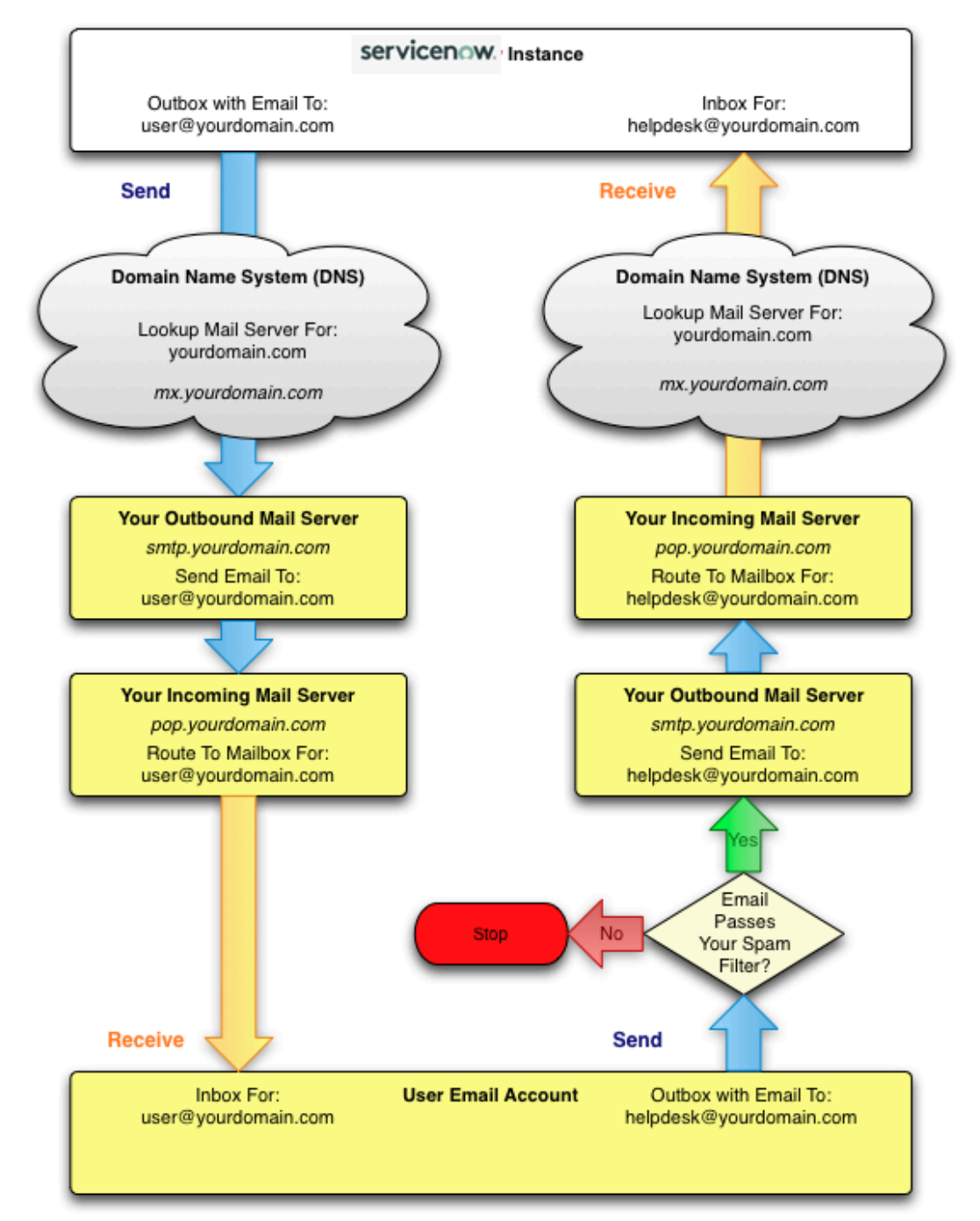
9. Click **New**.
   The system displays a blank Email Account form.
10. Create an email account record for your POP3 server where the **Type** is **POP3**.
11. From **Related Links**, click **Test Connection**.
    If the email account is valid, the system returns a success message.



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Example:

Using your own SMTP and POP3 servers



Email bounce management

Help prevent sending emails to addresses that are known to generate bounces by monitoring and filtering them out while sending emails.

Email bounce

An email bounce signifies the non-delivery of your email message according to RFC3464. When an email gets bounced, the sender receives a delivery status email with the reason for the bounce and the associated status code. For more information about these status codes, see Status codes.

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An email address is blocked after it reaches a certain threshold of bounced emails. The default count for blocking the bounced email addresses is 10.

To view the bounce email addresses, navigate to **All** > **System Logs** > **Bounce Email Addresses**.

Each bounce email address record includes a **Bounce Email Address Logs** related list with an **Original Email** field that provides access to the original email associated with the bounce.

Important: Disabling bounce management is not recommended as it may lead to slow delivery or blocking of emails by the email provider.

Status code

The syntax of the status codes is defined as the following:

```
status-code = class "." subject "." detail

      class = "2"/"4"/"5"

      subject = 1*3digit

      detail = 1*3digit
```

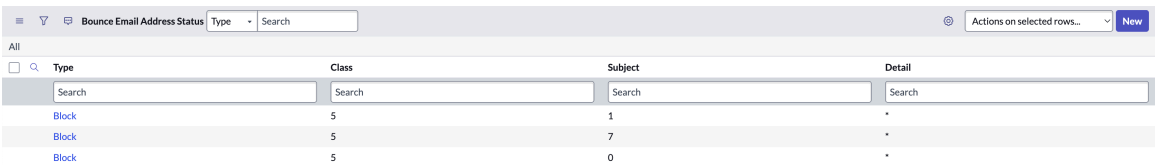
The first subcode indicates whether the delivery attempt was successful. The second subcode indicates the probable source of any delivery anomalies. The third subcode indicates a precise error condition.

Example: Status codes

Code 5.1.1

Code	Summary	Description
5.1.1	Bad destination mailbox address	The mailbox specified in the address doesn't exist. For email names, this means the address portion to the left of the "@" sign is invalid.

The default status codes that are used for blocking bounced email addresses are 5.0.*, 5.1.* and 5.7.*, where the asterisks (*) could be any number in the series according to the status code specification.



Note: There is a possibility that some email providers may use non-standard RFC status codes, potentially leading to functional email addresses being blocked. Administrators action is required to unblock these status codes and email addresses.

To view the blocked status codes, navigate to **All** > **System Mailboxes** > **Administration** > **Bounce Email Address Status**.

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Related topics

Configure bounce email address status

Check the status of bounced email addresses

Configure bounce email address status

Configure a bounced email address status according to type, class, subject, and details.

Before you begin
Role required: admin

About this task
For detailed information on status codes and explanations of the components, see RFC Status codes.

Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **Bounce Email Address Status**.
2. Select **New**.
3. Select the **Type** and enter the **Class**, **Subject**, and **Detail**.

   Note: For example: Status code patterns for 5.1.* are blocked by default, if 5, 1, and 2 are entered as the Class, Subject, and Detail, the Type is selected as unblocked then only 5.1.2 is unblocked. All other status codes patterns for 5.1.* are still blocked.

4. Select **Submit**.

Related topics

Check the status of bounced email addresses

Resend all blocked emails

Unblock the bounce email address and resend all blocked emails.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Logs** > **Bounce Email Addresses**.
2. Select the record from the list.
3. In the record, update the State field to **Unblock**.
4. Select **Save**.
5. To send all blocked emails, select **Resend All Blocked Emails** from **Related Links**.
6. To resend a single or multiple blocked emails, select **Blocked Emails** tab.
   a. Hover on the email and select the email or emails.
   b. From the **Actions on selected rows** drop-down, select **Resend Blocked Emails**.

OAuth email authentication

OAuth enables your instance to receive and send email through a third-party email account.

Open Authentication (OAuth) is an open standard for authorization that provides administrators with an authorization method when connecting to incoming IMAP and outgoing SMTP servers.

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OAuth enables an instance to receive and send email from a third-party account, such as Gmail, without having to enter the credentials for that account.

The OAuth 2.0 implementation requires you to obtain an access and refresh token from your third-party email provider for each third-party email account. The tokens are automatically saved to the instance database. They provide authorization for all email communication between the instance and the authorized third-party account. A scheduled job regularly checks to see if email access tokens are valid. If the access token is not valid, but the refresh token is, the instance automatically regenerates a new access token.

OAuth 2.0 support is available starting with the Geneva release. The OAuth implementation supports IMAP and SMTP accounts only. POP3 is not supported. OAuth 1.0 is no longer supported.

Note: Customer email accounts configured to use OAuth 1.0 authentication with Gmail cease to function as of April 20, 2015. See KB0546976 for more information.

Activating the Email - OAuth support for IMAP and SMTP plugin allows you to use OAuth with email. If you upgrade to Geneva or later instances and are already using OAuth 1.0, activate the plugin again.

Note: For configuring SMTP and IMAP email accounts with Microsoft Office 365 using OAuth 2.0, see KB0816072.

See Outbound REST with OAuth 2.0 profile tutorial - integrating with Google Contacts API for an example of using an OAuth 2.0 profile to authenticate an outbound REST message with Google to retrieve contact information. Also see OAuth 2.0 for more information on OAuth 2.0 support in the instance.

Activate OAuth email authentication

You can activate the Email:OAUTH support for IMAP, Microsoft Graph (Receiving), and SMTP plugin (com.glide.email.oauth) for Notifications if you have the admin role.

Before you begin

Role required: admin

About this task

The following items are installed with Email:OAUTH support for IMAP, Microsoft Graph (Receiving), and SMTP:

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Email:OAUTH support for IMAP, Microsoft Graph (Receiving), and SMTP plugin (com.glide.email.oauth) 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.

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Enable OAuth 2.0 for email

Setting up OAuth 2.0 for email requires you to obtain access and refresh tokens from your email provider.

Before you begin

- Role required: admin
- Plugin required: Email - OAUTH support for IMAP and SMTP

Procedure

1. Log in to your third-party email account, such as Gmail, and enable OAuth 2.0.
2. Obtain the following from your third-party email account:
   - client ID
   - client secret
   - authorization URL
   - token URL
   - redirect URL
   - token revocation URL
3. Navigate to **System OAuth** > **Application Registry**.
4. Click **New**.
5. Click **Connect to a third party OAuth Provider** to create an application registry record that email uses.
6. Use the information you obtained from your third-party email account to fill in the fields on the form.
   See Use a third-party OAuth provider for instructions.
7. Create the OAuth application registry record and its associated OAuth Entity Profile and OAuth Entity Scope records.
8. Click **Submit**.
9. Navigate to **System Mailboxes** > **Administration** > **Email Accounts**.

   Note: Port and Connection Security information is provided by the provider.

   The system displays the list of available email accounts.
10. **Optional:** If you do not want to receive email sent to the default instance email address, locate the record for **ServiceNow POP3** and change **Active** to **false**.
    The system can receive email from multiple POP3 and IMAP email accounts.
11. Locate the records for **ServiceNow SMTP** and change **Active** to **false**.
12. Click **New**.
13. Create an email account record for your OAuth 2.0 SMTP server where the **Type** is **SMTP**.
14. For **Authentication**, select **OAuth 2.0**.
15. For **OAuth Profile**, select the application registry record you created.
16. Click **Authorize Email Account Access** to obtain the access and refresh tokens.

    Another browser window opens asking you to authorize the account access on the third-party email account.

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17. Authorize the access.

    After the authorization is successful and the tokens are saved to the instance, the **Authorize Email Account Access** button no longer appears on the Email Account form.

18. Click **New**.

19. Create an email account record for your OAuth 2.0 IMAP server where the **Type** is **IMAP**. Use the same **Authentication** and **OAuth profile** settings as the OAuth SMTP email account.

System address filters

Prevent your system from communicating with untrusted domains and email addresses.

System address filters control who can communicate with your instance via email. You can improve email security by filtering domains and email addresses that you find suspicious.

For example, you might identify `example.com` as a suspicious domain. You can stop receiving emails from `example.com` by specifying the domain in a system address filter. You can also use another system address filter to prevent your system from sending emails to `example.com`.

There are two types of system address filters:

Outbound

Controls which domains and email addresses can receive email from your instance.

Inbound

Controls which domains and email addresses can send email to your instance.

When setting up system address filters, you can create one default outbound filter and one default inbound filter. A default outbound filter applies to all active SMTP email accounts automatically. A default inbound filter applies to all active IMAP or POP3 email accounts automatically.

To control senders and recipients for a specific email account, create a non-default filter and then apply it to the account.

Before setup

Before you set up system address filters, consider doing the following:

- Monitor your email to identify suspicious domains and email addresses.

  Using Security Center, you can monitor the blocked and allowed incoming email metrics for your instance. For more information, see Designate untrusted and trusted email domains.

- Designate someone to set up system address filters by assigning them the email_account_admin role.

Setting up system address filters

To set up system address filters for your instance, complete the following tasks:

1. Set email address filters

   Specify which domains and email addresses are allowed or disallowed.

2. Create a system address filter

   Define how email address filters apply to inbound and outbound email.

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Next steps

After you set up system address filters, configure email filters for an added layer of security. Email filters enable you to ignore an inbound email or move it to a particular mailbox. For more information on configuring email filters, see Email filters.

Set email address filters

Specify which domains and email addresses are allowed or disallowed.

Before you begin

Role required: email_account_admin

About this task

You can specify two types of email address filters:

- Allow List: A list of allowed domains and email addresses
- Deny List: A list of disallowed domains and email addresses

You can also specify exceptions to the allowed or disallowed domains and email addresses.

Procedure

1. Navigate to **System Mailboxes** > **Administration** > **Email Address Filters**, and then select **New**.
2. Enter the **Name** of the address filter.
3. Select the filter **Type**:
   - Allow List: Allow all specified domains. All other domains are disallowed.
   - Deny List: Disallow all specified domains. All domains that don't match the denied list domains are allowed.
4. In the **Domains** field:

   a. Select the lock icon to unlock it and access the domains controlled by this filter.

   b. Select an existing domain or enter a new domain:

   - If the filter **Type** is Allow List, select the Search icon. Select the domains for which all email addresses are allowed. To add a new domain, select **New**, enter the **Domain**, and select **Submit**.
   - If the filter **Type** is Deny List, select the Search icon. Select the domains for which all email addresses are disallowed. To add a new domain, select **New**, enter the **Domain**, and select **Submit**.

   Note: You can specify a wildcard (*) in the domain name, for example `*.com`. If you create an email configuration that has multiple email address filters, all the filters evaluate the given email addresses. The filters determine whether the addresses are valid and the message can be sent as outbound email.

   By default, the maximum number of domains that you can associate with an email address filter is 100. You can reconfigure this limit by setting the *`glide.email_address_filter.max_domains`* property.

   c. Select the lock icon to lock the **Domains** field.

5. Specify any email addresses that are **Exceptions** to the domains specified in Step 4.

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a. Select the lock icon to open the Email Address Filter Exceptions [sys_email_address_filt_except] table.

b. Click the search icon to choose an existing email address.

c. To add a new email address, select **New**, enter the email address exception, and select **Submit**.

Note: You can specify a wildcard (*) in an email address exception.

By default, the maximum number of exceptions that you can associate with an email address filter is 1000. You can reconfigure this limit by setting the *glide.email_address_filter.max_exceptions* property.

d. Select the lock icon to lock the **Exceptions** field.
The exception is added to the Email Address Filter Exceptions [sys_email_address_filt_except] table.

6. Select **Submit**.
The email address filter is added to the Email Address Filters [sys_email_address_filter] table.

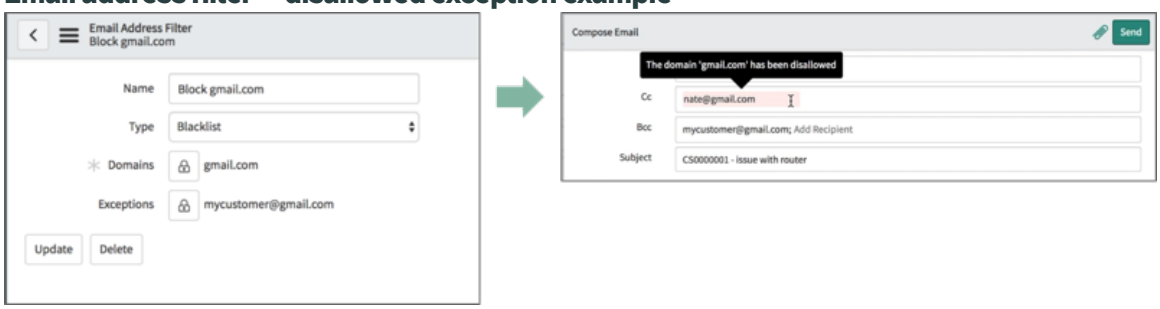
Example: Email address filter

Note: After the email address filter is added to the Email Address Filters [sys_email_address_filter] table, Create an email client configuration.

Email address filter — allowed exception example



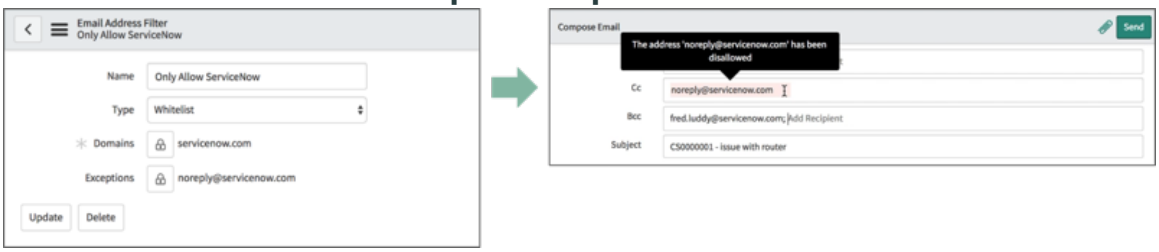
Email address filter — disallowed exception example



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Example:

Email address filter — allowed exception example



Email address filter — disallowed exception example



What to do next

Apply the email address filter to a system address filter. For more information, see Create a system address filter.

Read or send emails using Microsoft Graph

Use Microsoft Graph endpoints to read or send emails from Microsoft Exchange Online.

Using Microsoft Graph with ServiceNow

In addition to the standard IMAP, SMTP, and POP3, the ServiceNow AI Platform supports Microsoft Graph as an email type.

Email account administrators, which are users who have the email_account_admin role, can configure

- ServiceNow AI Platform to read emails from an Microsoft Exchange Online tenant using Graph Endpoints by authenticating with a client ID and client secret or with certificates.
- ServiceNow AI Platform to send emails from an Microsoft Exchange Online tenant using Graph Endpoints by authenticating with a client ID and client secret.

Note: Antispam and malware scanning are managed by the customer and not ServiceNow.

To receive and email, go to the **Email Account** form, select, **Microsoft Graph (Receive)** in the **Type** field.

To send and email, go to the **Email Account** form, select, **Microsoft Graph (Send)** in the **Type** field.

Activate Email - Support for Email Processing by Microsoft Graph API

You can activate the Email - Support for Email Processing by Microsoft Graph API plugin (com.glide.email.graph) for Notifications if you have the admin role.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Email - Support for Email Processing by Microsoft Graph API plugin (com.glide.email.graph) 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.

Reading email using Microsoft Graph

Use Microsoft Graph API to retrieve emails from Microsoft Exchange Online and save them to sys_email table.

In the **Email Account** form, select, **Microsoft Graph (Receive)** in the **Type** field.

Configure an OAuth profile to use a client ID and secret for token generation

Configure an OAuth profile using a client ID and client secret to create an email account for using Microsoft Graph (receive) in your email account type.

Before you begin

Create an Microsoft Azure account to configure OAuth profile.

Complete the set up steps using your Microsoft Azure Developer account. See the Microsoft Azure product documentation for instructions on creating and configuring custom applications.

Role required: admin and Microsoft Azure portal administrator

Procedure

1. Log in to the Microsoft Azure registration portal with your organization credentials.
   For more information, see the Microsoft Azure registration portal documentation.
2. Register a new custom application by filling in the application name, supported account type, and redirect URI, and select **Register**.

   Note: Enter the redirect URI in the following format: `https://<instance>/oauth_redirect.do`.

   An overview of the application's basic information is displayed.
3. Copy the client ID to a text file.
   You will use this ID and the client secret value generated in the next steps to register the app as a third-party OAuth provider on your ServiceNow instance. You use the application ID as the client ID when you connect the application to your instance.
4. Enable the **Mail.ReadWrite** permission.
   a. In Microsoft Azure, navigate to **Manage** > **API permissions**.
   b. Select **Add a permission**.

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c. Select the Microsoft Graph tile.
d. Select **Application Permissions**.
e. In the **Select permissions** field, enter `Mail.ReadWrite`.
f. Select the **Mail.ReadWrite** check box.
g. Select **Add permissions**.

5. Select **Grant admin consent for <your organization name>**.
6. Select **Yes** to confirm.
7. Add a client secret.
   a. In Microsoft Azure, navigate to **Manage** > **Certificates & secrets**.
   b. Select **New client secret**.
   c. Provide a description and an expiration date and select **Add**.
8. Copy the value (secret value) to a text file.
9. Navigate to **Overview** > **Endpoints** and copy the **OAuth 2.0 token endpoint (v2)** to a text file.

Register an application as an OAuth provider

Use the information generated during Microsoft Azure account configuration to register an application as an OAuth provider.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **New**.
3. On the **What kind of OAuth application** screen, select **Connect to a third-party OAuth Provider**.
4. On the form, fill in the fields.

Application Registries form

Field	Value required
Name	Name to uniquely identify the record.
Client ID	Application ID of the application you created in Microsoft Azure.
Client Secret	The client secret you generated when you created the application in Microsoft Azure. **Note:** When using certificates, the **Client Secret** is a dummy value.
OAuth API Script	OAuth API script name. For more information see, OAuth API Script. **Note:** This is required only while using certificates.
Default Grant type	Client Credentials.
Token URL	Token URL copied after configuring the Microsoft Azure account.

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Field	Value required
Redirect URL	`https://<instance>./oauth_redirect.do` **Note:** This URL should be the same as the URL in Microsoft Azure.

5. Right-click the form header and select **Save**.
   An OAuth Entity Profile record is created.
6. In the OAuth Entity Scopes related list, add scopes to match the permissions you defined when you configured the application.
7. Select **Insert a new row**.
8. Enter `Default` as the name and `.default` as OAuth scope.
9. Right-click the form header and select **Save**.
10. In the OAuth Entity Profiles embedded list, select the profile created by default.
11. In the OAuth Entity Scopes embedded list, add a new row and select the **Default** scope.
12. Select **Update**.

What to do next

Create an email account for Microsoft Graph (receive) using the OAuth profile.

Configure an OAuth profile to use certificates for authentication with Microsoft Azure

Configure an OAuth application profile to authenticate using certificates.

Before you begin

Create an Microsoft Azure account to configure OAuth profile.

Complete the set up steps using your Microsoft Azure Developer account. See the Microsoft Azure product documentation for instructions on creating and configuring custom applications.

Role required: admin and Microsoft Azure portal administrator

Procedure

1. Log in to the Microsoft Azure registration profile with your organization credentials.
   For more information, see the Microsoft Azure registration portal documentation.
2. Register a new custom application by filling in the application name, supported account type, and redirect URL, and then select **Register**.

   Note: Enter the redirect URL in the following format: `https://<instance>/oauth_redirect.do`.

   An overview of the application's basic information is displayed.
3. Copy the client ID to a text file.
   You will use this ID and the secret value generated in the next steps to register the app as a third-party OAuth provider on your ServiceNow instance. You use the application ID as the client ID when you connect the application to ServiceNow.
4. Enable the **Mail.ReadWrite** permission.
   a. In Microsoft Azure, navigate to **Manage** > **API permissions**.
   b. Select **Add a permission**.
   c. Click the Microsoft Graph tile.

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d. Select **Application Permissions**.

e. In the **Select permissions** field, enter `Mail.ReadWrite`.

f. Select the **Mail.ReadWrite** check box.

g. Select **Add permissions**.

5. Select **Grant admin consent for <your organization name>**.
6. Select **Yes** to confirm.
7. Upload the certificate
   a. In Microsoft Azure, navigate to **Manage** > **Certificates & secrets**.
   b. Select **upload certificate**.
   c. Provide a description, a start date, and an expiration date and upload the certificate.
8. Copy the client ID and directory ID to a text file.
9. Navigate to **Overview** > **Endpoints** and copy the **OAuth 2.0 token endpoint (v2)** to a text file.

What to do next

Configure a JWT provider

Configure a JWT provider

Configure a JWT provider on the ServiceNow AI Platform to configure an OAuth application profile to authenticate using certificates.

Before you begin

Upload a Java Key Store certificate. Attach a JKS certificate containing the certificate uploaded on Microsoft Azure to your instance to use when enabling the JWT client authentication. For more information, see Upload Java Key Store certificate.

Create a JWT signing key to assign to your Java KeyStore (JKS) certificate. For more information, see Configure a JWT signing key.

Role required: admin

Procedure

1. Add a JWT provider to your ServiceNow instance and fill in the claim values.

Claim Name	Claim Value
aud	https://login.microsoftonline.com/{tenantId}/oauth2/v2.0/token **Note:** Tenant ID is the directory ID copied from Microsoft Azure.
iss	Client ID copied from Microsoft Azure
sub	Client ID copied from Microsoft Azure

   For more information, see Create a JWT provider with a JWT signing key.
2. From the JWT Provider record menu, select **Copy sys_id** and copy the JWT provider sys_id.

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What to do next
Generate a SHA-1 thumbprint

Generate a SHA-1 thumbprint

Generate a SHA-1 thumbprint using the JWT provider's sys_id and JKS certificate's sys_id and certificate's alias to be added to the GraphCertificateOAuthTemplate script.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scripts-Background**.
2. Paste the following script to generate the SHA-1 thumbprint value.

```
var certId = "<sys_id of the certificate record>";

var certAlias = "<alias name for the certificate>";

var gce = new GlideCertificateEncryption();

var thumbprint = gce.getThumbPrintFromKeyStore(certId,
 certAlias,"SHA-1");

gs.log(thumbprint);
```

3. Select **Run script**.

What to do next
Create an OAuth API script

Create an OAuth API script

Create and duplicate an OAuth API script for application registry.

Before you begin
Generate a SHA -1 thumbprint. For more information see Generate a SHA-1 thumbprint.

Ensure you have the Email - Support for Email Processing by Microsoft Graph API plugin (com.glide.email.graph) installed.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Script Includes**.
2. Select and open **GraphCertificateOAuthTemplate**.
3. Duplicate the script by changing the name in the **Name** field,select **Insert and Stay** from the record menu.

   Note: The name should begin with **OAuth**.

   The script is copied and created with a different name.
4. In the script, enter the JWT provider sys_id and SHA -1 thumbprint.
5. Select **Update**.

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What to do next
Register an application as an OAuth provider.

Create an email account for Microsoft Graph (receive)

Create an email account for reading emails from Microsoft Exchange Online using Microsoft Graph Endpoints.

Before you begin
Role required: email_account_admin

About this task
Antispam and malware scanning are managed by Microsoft Graph account and not ServiceNow

Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **Email Accounts**.
2. Select **New**.
3. On the form, fill in the fields.

Email Accounts form

Field	Description
Name	Name of the email account.
Type	Microsoft Graph (Receive)
Authentication	OAUTH 2.0 - Type of authentication used for the email account to connect to the email server.
Inbox email address	Address of the inbox for reading emails.
OAuth Profile	OAuth profile configured during application registry.
Active	Option to activate the email account.
Enable debug output	Option to create node logs for the raw data that is exchanged with the email server. You can enable this field temporarily to diagnose issues related to receiving or sending email.

4. Select **Submit**.
5. Select the test connection link at the bottom to test the account.

Sending email using Microsoft Graph

Use Microsoft Graph endpoints to deliver emails through Microsoft Exchange Online using the SMTP Sender.

In the **Email Account** form, select, **Microsoft Graph (Send)** in the **Type** field.

Configure OAuth profile to use a client ID and secret for token generation

Configure an OAuth profile using a client ID and client secret to create an email account for using Microsoft Graph (send) in your email account type.

Before you begin
Create an Microsoft Azure account to configure OAuth profile.

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Complete the set up steps using your Microsoft Azure Developer account. See the Microsoft Azure product documentation for instructions on creating and configuring custom applications.

Role required: admin and Microsoft Azure portal administrator

Procedure

1. Log in to the Microsoft Azure registration portal with your organization credentials.
   For more information, see the Microsoft Azure registration portal documentation.
2. Register a new custom application by filling in the application name, supported account type, and redirect URI, and select **Register**.

   Note: Enter the redirect URI in the following format: `https://<instance>/oauth_redirect.do`.

   An overview of the application's basic information is displayed.
3. Copy the client ID to a text file.
   You will use this ID and the client secret value generated in the next steps to register the app as a third-party OAuth provider on your ServiceNow instance. You use the application ID as the client ID when you connect the application to your instance.
4. Enable the **Mail.ReadWrite** permission.
   a. In Microsoft Azure, navigate to **Manage** > **API permissions**.
   b. Select **Add a permission**.
   c. Select the Microsoft Graph tile.
   d. Select **Application Permissions**.
   e. In the **Select permissions** field, enter `Mail.Send`.
   f. Select the **Mail.Send** check boxes.
   g. In the **Select permissions** field, enter `Mail.ReadWrite`.
   h. Select the **Mail.ReadWrite** check boxes.
   i. Select **Add permissions**.
5. Select **Grant admin consent for <your organization name>**.
6. Select **Yes** to confirm.
7. Add a client secret.
   a. In Microsoft Azure, navigate to **Manage** > **Certificates & secrets**.
   b. Select **New client secret**.
   c. Provide a description and an expiration date and select **Add**.
8. Copy the value (secret value) to a text file.
9. Navigate to **Overview** > **Endpoints** and copy the **OAuth 2.0 token endpoint (v2)** to a text file.

Register an application as an OAuth provider

Use the information generated during Microsoft Azure account configuration to register an application as an OAuth provider.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **New**.
3. On the **What kind of OAuth application** screen, select **Connect to a third-party OAuth Provider**.
4. On the form, fill in the fields.

Application Registries form

Field	Value required
Name	Name to uniquely identify the record.
Client ID	Application ID of the application you created in Microsoft Azure.
Client Secret	The client secret that you generated when you created the application in Microsoft Azure. **Note:** When using certificates, the **Client Secret** is a dummy value.
OAuth API Script	OAuth API script name. For more information see, OAuth API Script. **Note:** This is required only while using certificates.
Default Grant type	Client Credentials.
Token URL	Token URL copied after configuring the Microsoft Azure account.
Redirect URL	`https://<instance>./oauth_redirect.do` **Note:** This URL should be the same as the URL in Microsoft Azure.

5. Select and hold (or right-click) the form header and select **Save**.
   An OAuth Entity Profile record is created.
6. In the OAuth Entity Scopes related list, add scopes to match the permissions you defined when you configured the application.
7. Select **Insert a new row**.
8. Enter `Default` as the name and `.default` as OAuth scope.
9. Select and hold (or right-click) the form header and select **Save**.
10. In the OAuth Entity Profiles embedded list, select the profile created by default.
11. In the OAuth Entity Scopes embedded list, add a new row and select the **Default** scope.
12. Select **Update**.

Create an email account for Microsoft Graph (send)

Create an email account for sending emails from Microsoft Exchange Online using Microsoft Graph Endpoints.

Before you begin

Role required: admin

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About this task
Antispam and malware scanning are managed by Microsoft Graph account and not ServiceNow

Procedure
1. Navigate to **All** > **System Mailboxes** > **Administration** > **Email Accounts**.
2. Select **New**.
3. On the form, fill in the fields.

Email Accounts form

Field	Description
Name	Name of the email account.
Type	Microsoft Graph (Send)
Authentication	OAUTH 2.0 - Type of authentication used for the email account to connect to the email server.
Email user label	Name of the sender.
OAuth Profile	OAuth profile configured during application registry.
Active	Option to activate the email account.
Enable debug output	Option to create node logs for the raw data that is exchanged with the email server. You can enable this field temporarily to diagnose issues related to receiving or sending email.

4. Select **Submit**.
5. Select the test connection link at the bottom to test the account.

Sending email using client credential flow

Use the client credential flow to send emails from Microsoft Exchange Online.

Email account administrators, who are users that have the email_account_admin role, can configure ServiceNow AI Platform to send emails from an Microsoft Exchange Online tenant. The email account administrators can use SMTP by authenticating with a client ID and client secret or with certificates.

Activate OAuth support

You can activate the Email:OAUTH support for IMAP, Microsoft Graph (Receiving), and SMTP plugin (com.glide.email.oauth) for Notifications if you have the admin role.

Before you begin
Role required: admin

About this task
The following items are installed with Email:OAUTH support for IMAP, Microsoft Graph (Receiving), and SMTP:

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Email:OAUTH support for IMAP, Microsoft Graph (Receiving), and SMTP plugin (com.glide.email.oauth) 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.

Configure client credential flow for SMTP OAuth2 using a client id and secret

Configure outbound email accounts in a ServiceNow instance using a client id and secret.

Before you begin

Create an Microsoft Azure account to configure an OAuth profile.

Complete the setup steps using your Microsoft Azure Developer account. See Microsoft Azure product documentation for instructions on creating and configuring custom applications.

Role required: Microsoft Azure portal administrator and admin

Procedure

1. Log in to the Microsoft Azure registration portal with your organization credentials.
   For more information, see the Microsoft Azure registration portal documentation.
2. Register a new custom application by filling in the application name, supported account type, and redirect URL, and select **Register**.

   Note: Enter the redirect URL in the following format: `https://<instance>/oauth_redirect.do`.

   An overview of the application's basic information is displayed.
3. Copy the client ID to a text file.
   You'll use this client ID and the client secret value generated in the next steps to register the app as a third-party OAuth provider on your ServiceNow instance. You use the application ID as the client ID when you connect the application to your instance.
4. Enable the **SMTP.SendAsApp** permission.
   a. In Microsoft Azure, navigate to **Manage** > **API permissions**.
   b. Select **Add a permission**.
   c. Select the Microsoft Office 365 tile.
   d. Select **Application Permissions**.
   e. In the **Select permissions** field, enter `SMTP SendAsApp`.

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f. Select the **SMTP SendAsApp** check box.

g. Select **Add permissions**.

5. Select **Grant admin consent for <your organization name>**, then select **Yes** to confirm.
6. Add a client secret.
   a. In Microsoft Azure, navigate to **Manage** > **Certificates & secrets**.
   b. Select **New client secret**.
   c. Provide a description and an expiration date, then select **Add**.
7. Copy the value (secret value) to a text file.
8. Register service principals in Microsoft Exchange using PowerShell.
   a. Run the following commands.

```
Install-Module -Name ExchangeOnlineManagement -allowprerelease
Import-module ExchangeOnlineManagement
Connect-ExchangeOnline -Organization <tenantId>
```

   For more information, see Authenticate SMTP connection using OAuth

   b. Register an Microsoft Entra ID application's service principal by running the following command.

```
New-ServicePrincipal -AppId <APPLICATION_ID> -ObjectId <OBJECT_ID>
```

   Important: For the OBJECT_ID value, go to **Overview** > **Managed applications in local directory** and copy the Object ID.

   c. Add permission to user email ID using the following command.

```
Add-MailboxPermission -Identity "<email_id>" -User <object_id>
 -AccessRights FullAccess
```

9. Navigate to **Overview** > **Endpoints** and copy the **OAuth 2.0 token endpoint (v2)** to a text file. You use the **OAuth 2.0 token endpoint (v2)** when registering an OAuth provider. For more information, see Register an OAuth provider.

What to do next

Register an OAuth provider

Register an OAuth provider

Use the information generated during the Microsoft Azure account configuration to register an application as an OAuth provider.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **New**.
3. On the **What kind of OAuth application** screen, select **Connect to a third-party OAuth Provider**.

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4. On the form, fill in the fields.

Application Registries form

Field	Description
Name	Name to uniquely identify the record.
Client ID	Application ID of the application that you created in Microsoft Azure.
Client Secret	The client secret that you generated when you created the application in Microsoft Azure. **Note:** When using certificates, the **Client Secret** is a dummy value.
OAuth API Script	OAuth API script name. For more information see, OAuth API Script. **Note:** This field is required only while using certificates.
Default Grant type	Client Credentials
Token URL	Token URL that you copied after configuring the Microsoft Azure account.
Redirect URL	`https://<instance>./oauth_redirect.do` **Note:** This URL should be the same as the URL in Microsoft Azure.

5. Select and hold (or right-click) the form header and select **Save**.
An OAuth Entity Profile record is created.
6. In the OAuth Entity Scopes related list, add scopes to match the permissions that you defined when you configured the application.
7. Select **Insert a new row**.
8. Enter `smtp` as the name and `https://outlook.office365.com/.default` as the OAuth scope.
9. Select and hold (or right-click) the form header and select **Save**.
10. In the OAuth Entity Profiles embedded list, select the profile created by default.
11. In the OAuth Entity Scopes embedded list, add a new row and select the **smtp** scope.
12. Select **Update**.

What to do next
Use the OAuth profile to create an email account with SMTP OAuth2.0. For more information, see Create an email account with SMTP OAuth2.0.

Configure client credential flow for SMTP OAuth2 using certificate-based authentication

Configure an OAuth application profile to authenticate using certificates for outbound email.

Before you begin
Create an Microsoft Azure account to configure an OAuth profile.

Complete the setup steps using your Microsoft Azure Developer account. See Microsoft Azure product documentation for instructions on creating and configuring custom applications.

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Role required: Microsoft Azure portal administrator and admin

Procedure

1. Log in to the Microsoft Azure registration profile with your organization credentials.
   For more information, see the Microsoft Azure registration portal documentation.
2. Register a new custom application by filling in the application name, supported account type, and redirect URL, and then select **Register**.

   Note: Enter the redirect URL in the following format: `https://<instance>/oauth_redirect.do`.

   An overview of the application's basic information is displayed.
3. Copy the client ID to a text file.
   You'll use this client ID and the secret value generated in the next steps to register the app as a third-party OAuth provider on your ServiceNow instance. You use the application ID as the client ID when you connect the application to ServiceNow.
4. Enable the **SMTP.SendAsApp** permission.
   a. In Microsoft Azure, navigate to **Manage** > **API permissions**.
   b. Select **Add a permission**.
   c. Select the Microsoft Office 365 tile.
   d. Select **Application Permissions**.
   e. In the **Select permissions** field, enter `SMTP.SendAsApp`.
   f. Select the **SMTP.SendAsApp** check box.
   g. Select **Add permissions**.
5. Select **Grant admin consent for <organization name>**, then select **Yes** to confirm.
6. Upload the certificate.
   a. In Microsoft Azure, navigate to **Manage** > **Certificates & secrets**.
   b. Select **upload certificate**.
   c. Provide a description, a start date, and an expiration date, then upload the certificate.
7. Copy the client ID and directory ID to a text file.
8. Register service principals in Microsoft Exchange using PowerShell.

   a. Run the following commands.

   ```
   Install-Module -Name ExchangeOnlineManagement -allowprerelease
   Import-module ExchangeOnlineManagement
   Connect-ExchangeOnline -Organization <tenantId>
   ```

   For more information, see Authenticate SMTP connection using OAuth

   b. Register an Microsoft Entra ID application's service principal by running the following command.

   ```
   New-ServicePrincipal -AppId <APPLICATION_ID> -ObjectId <OBJECT_ID>
   ```

   Important: For the OBJECT_ID value, go to **Overview** > **Managed applications in local directory** and copy the Object ID.

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c. Add permission to user email ID using the following command.

```
Add-MailboxPermission -Identity "<email_id>" -User <object_id>
 -AccessRights FullAccess
```

9. Navigate to **Overview** > **Endpoints** and copy the **OAuth 2.0 token endpoint (v2)** to a text file. You use the **OAuth 2.0 token endpoint (v2)** when configuring a JWT provider. For more information, see Configure a JWT provider.

What to do next
Configure a JWT provider

Configure a JWT provider

Configure a JWT provider on the ServiceNow AI Platform to configure an OAuth application profile to authenticate using certificates.

Before you begin
Upload a Java Key Store (JKS) certificate. Attach a JKS certificate containing the certificate uploaded on Microsoft Azure to your instance to use when enabling the JWT client authentication. For more information, see Upload Java Key Store certificate.

Create a JWT signing key to assign to your JKS certificate. For more information, see Configure a JWT signing key.

Role required: admin

Procedure
1. Add a JWT provider to your ServiceNow instance and fill in the claim values.

Claim Name	Claim Value
aud	https://login.microsoftonline.com/{tenantId}/oauth2/v2.0/token **Note:** The tenant ID should be replaced with the directory ID copied from Microsoft Azure.
iss	Client ID copied from Microsoft Azure
sub	Client ID copied from Microsoft Azure

For more information, see Create a JWT provider with a JWT signing key.

2. From the JWT Provider record menu, select **Copy sys_id** and copy the JWT provider sys_id.

What to do next
Generate a SHA-1 thumbprint

Generate a SHA-1 thumbprint

Generate an SHA-1 thumbprint using the JWT provider's sys_id, the Java Key Store (JKS) certificate's sys_id, and the JKS certificate's alias to the GraphCertificateOAuthTemplate script.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scripts-Background**.
2. Paste the following script to generate the SHA-1 thumbprint value.

```
var certId = "<sys_id of the certificate record>";

var certAlias = "<alias name for the certificate>";

var gce = new GlideCertificateEncryption();

var thumbprint = gce.getThumbPrintFromKeyStore(certId,
 certAlias,"SHA-1");

gs.log(thumbprint);
```

3. Select **Run script**.

What to do next
Create an OAuth API script

Create an OAuth API script

Create and duplicate an OAuth API script for application registry.

Before you begin
Generate an SHA-1 thumbprint. For more information, see Generate a SHA-1 thumbprint.

Generate a sys_id when you configure a JWT provider. For more information, see Configure a JWT provider.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Script Includes**.
2. Select and open **EmailCertificateOAuthTemplate**.
3. Duplicate the script by changing the name in the **Name** field, select **Insert and Stay** from the record menu.

   Note: The name must begin with **OAuth** to create an OAuth script.

   The script is copied and created with a different name.
4. In the copied script, enter the JWT provider sys_id and SHA-1 thumbprint.
5. Select **Update**.

What to do next
Register an OAuth provider.

Create an email account with SMTP OAuth2.0

Create an email account from Microsoft Exchange Online with SMTP OAuth2.0.

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Before you begin

Role required: email_account_admin

Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **Email Accounts**.
2. Select **New**.
3. On the form, fill in the fields.

Email Accounts form

Field	Description
Name	Name of the email account.
Type	SMTP
Authentication	Select **OAUTH 2.0**. Type of authentication used for the email account to connect to the email server.
Server	Server used for creating the email accounts.
Email user label	Display value used for outgoing messages. This field is for SMTP type accounts only.
User name	User name or ID to authenticate an email address. The value in this field is also the **From** address when the instance sends an email. If you're using SMTP, the value must be a full email address. The value in the **From** field can override this field for SMTP accounts.
From	The From email address used for notifications sent with this account. This address takes precedence over the **User name** field. If nothing is present in this field, the User name is used as the return address for notifications sent from the instance. **Note:** This value is for SMTP only.
OAuth Profile	OAuth profile configured during application registry.
Connection Security	If your email server supports TLS, an insecure connection is upgraded to a secure connection using the SSL/TLS encryption protocol.
Port	Connection TCP port.
Active	Option to activate the email account.
ServiceNow Configured	Identifier of whether this account is provisioned by ServiceNow. If you create an account, this option isn't selected.
Enable debug output	Option to create node logs for the raw data that is exchanged with the email server. You can enable this field temporarily to diagnose issues related to receiving or sending email.

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4. Select **Submit**.
5. Test the connection by selecting the **Test Connection** link.

Personal corporate mailbox

Enables sales agents to integrate their personal corporate mail boxes to send and receive emails.

A personal corporate user mailbox refers to an individual employee's official email account provided by their organization (for example, user@company.com). This mailbox is used for business communication and is uniquely associated with a single user, unlike shared or departmental mailboxes. It can be integrated with enterprise systems to support workflows around sending and receiving email notifications.

Set up personal corporate mailbox

Set up your personal corporate mailboxes with ServiceNow platform.

Before you begin

The User Mailbox Integration (com.glide.email.user_mailbox.integration) plugin must be installed.

Role required: user_email_account

Procedure

1. From the user menu, navigate to **Preferences** > **Notifications** and then select the **Advanced Preferences** link.
2. Select the **Delivery Channels** tab.
3. If no devices are configured, follow these steps to add an email device.
   a. In the Email channel section, select **+Add**.
   b. Expand the **Channel info** section and provide the channel name and email address in the fields.
   c. Select **Save**.
4. Set up personal mailbox.
   a. In the Set up personal mailbox section, select the **Set up personal mailbox** option.
   b. In the Create dialog, select **Password** or **OAuth 2.0** from the Authentication drop-down list. For **Password** as the authentication type, enter the App password provided by your email service provider in the **App password** field.
   c. In the **User email** field, enter the email address of the mailbox that you want to connect.
   d. Select a template from the list of configured user email account templates. To configure a new template aside from the preconfigured templates, see Configure templates for personal corporate mailboxes.
   e. Review the information.
   f. Integrate the mailbox by selecting the **I acknowledge** option.
   g. Select **Connect**.

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h. Optional: Expand the Set up personal mailbox section to view the connected mailboxes.

Note: At least one mailbox must be connected to view the connected mailboxes.

Configure templates for personal corporate mailboxes

Configure personal corporate mailboxes in the ServiceNow platform to enable users and agents to send and receive emails.

Before you begin

The email account should be created and connected. For more information, see Create an email account.

The User Mailbox Integration (com.glide.email.user_mailbox.integration) plugin must be installed.

Role required: admin

Procedure

1. Create an email client template.
   To configure an email client template, see Create an email client template.
   a. On the **Sender Configuration** tab, for the **From Generation Type** select **User Email Addresses**.
   b. To include shared email address, select the **Include Shared Email Address** check box.
   c. Select **Submit**.
2. Apply an email client template.
3. Navigate to **All** > **User Mailboxes** > **Administration** > **Server Configuration**.
4. Select **New**.
5. On the form, fill in the fields.

User Email Account Server form

Field	Description
Name	Name of the email account.
Server	Remote server to which this account connects.
Type	Type of mail server. Select **SMTP**. **Note:** The system can use only one active SMTP account at a time.
Port	Connection TCP port.
Connection Security	Type of secure connection. Choose a setting: **None** No secure protocol is used. **STARTTLS** Upgrades an insecure connection to a secure connection using the SSL/TLS

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Field	Description
	encryption protocol, if your email server supports TLS. **SSL/TLS** Connect to an SSL/TLS encrypted port to secure the connection. Email is encrypted between the ServiceNow instance and your mail server. ⚠ **Warning:** Selecting a less secure protocol like **STARTTLS** or **None** may expose your data. To better ensure the security of data in your email server, select **SSL/TLS**.

6. Select **Submit**.
7. Navigate to **All** > **User Mailboxes** > **Administration** > **Template Configuration**.
8. Select **New**.
9. On the form, fill in the fields.

User Email Account Template

Field	Description
Name	Name of the email account.
Authentication Type	Type of authentication used for the email account to connect to the email server. You can select one of the following: ○ -- None -- ○ Password ○ OAUTH ○ OAUTH 2.0 The Email: OAUTH support for IMAP, Microsoft Graph (Receiving), and SMTP (com.glide.email.oauth) plugin must be active for the OAuth options to be visible.
Mail Server	Remote server to which this account connects.
OAuth profile	OAuth application registry record for this account. This field appears if you select **OAuth 2.0** as the authentication type.

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Field	Description
Domain	Enter a domain name to identify your email service (for example gmail.com).

10. Select **Submit**.

Integrate personal corporate mailbox for receiving emails

Integrate your personal corporate mail boxes with ServiceNow to receive emails in your personal corporate mailbox.

Before you begin

Role required: email_admin

Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **Email Accounts**.
2. Select the Type.
   For more information, see Create an email account.
3. From **Account type**, select **Forwarding Address**.
4. Select **Update**.
5. From your personal mailbox, set up forwarding rules for your personal mailbox (for example forwarding rules for Microsoft Outlook or Gmail).

Email properties

The Email Properties page is where you can configure settings for inbound and outbound email.

Email properties are available from either of these modules:

- **System Mailboxes** > **Email Properties**
- **System Properties** > **Email Properties**

Email accounts are configured in the **System Mailboxes** > **Administration** > **Email Accounts** module. For more information and instructions, see Create an email account.

Email diagnostics are available from the **System Mailboxes** > **Email Diagnostics** module.

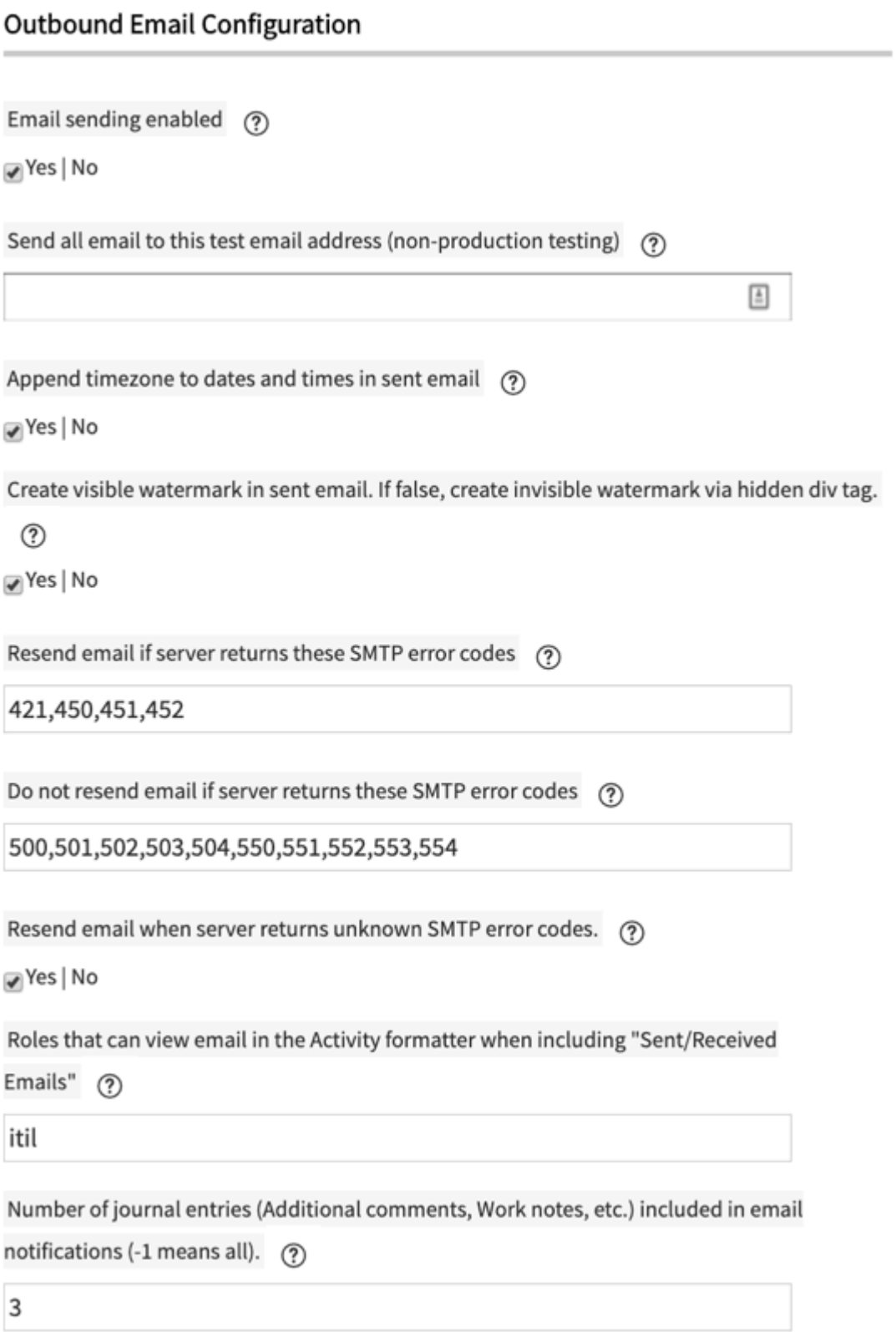
Note: To learn more about the security properties that affect email processing, see SMTP authentication (deprecated) in Instance Security Hardening Settings.

Outbound email configuration

The **Outbound Email Configuration** section of the Email Properties page contains properties for sending email.

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Outbound email configuration



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Outbound email properties

Property	Label	Description
glide.email.smtp.active	Email sending enabled	Specifies whether to enable or disable the outgoing mail server. • Type: true | false • Default value: true
glide.email.test.user	Send all email to this test email address (non-production testing)	Specifies the comma-separated list of email addresses to which the instance sends all email messages. Typically used in non-production instances for testing purposes. • Type: string • Default value: none
glide.email.append.timezone	Append time zone to dates and times in sent mail	Specifies whether to append the system time zone to date and date/time values in outbound emails. For example, 2010-07-02 04:01:14 PST. • Type: true | false • Default value: true
glide.email.watermark.visible	Create visible watermark in sent mail. If false, create invisible watermark via hidden div tag.	Indicates whether the watermark in email notifications is visible (true) or wrapped in a hidden div tag (false). • Type: true | false • Default value: false
glide.smtp.defer_retry_ids	Resend email if server returns these SMTP error codes	Specifies the comma-separated list of SMTP error codes that force the instance to resend email. • Type: string • Default value: 421,450,451,452
glide.smtp.fail_message_ids	Do not resend email if server returns these SMTP error codes	Specifies the comma-separated list of SMTP error codes that prevent the instance from resending email. • Type: string • Default value: 500,501,502,503,504,550,551,552,553,554
glide.smtp.default_retry	Resend email when	Enables (true) or disables (false) resending email when an unknown SMTP error

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Outbound email properties (continued)

Property	Label	Description
	server returns unknown SMTP error codes.	code is encountered. The instance only recognizes the SMTP error codes defined in the *glide.smtp.defer_retry_ids* property. • Type: true | false • Default value: true
glide.ui.activity.email_roles	Roles that can view email in the Activity formatter when including "Sent/ Received Emails"	Specifies the comma-separated list of roles that can view email in the activity formatter. • Type: string • Default value: itil
glide.email.journal.lines	Number of journal entries (Additional comments, Work notes, etc.) included in email notifications (-1 means all).	Specifies the number of entries from a journal field, such as Additional comments or Work notes, included in email notifications. A value of -1 includes all journal entries. • Type: integer • Default value: 3 • Learn More:Restrict the Number of Entries Sent in a Notification

Inbound email configuration

The **Inbound Email Configuration** section of the Email Properties page contains properties to control inbound email.

Inbound email properties

Property	Label	Description
glide.email.read.active	Email receiving enabled	Specifies whether to enable or disable the inbound mail server. • Type: true | false • Default value: true
glide.email.reply_subject_prefix	Identify email as a reply by these	Specifies the comma-separated list of prefixes in the subject line that identify an email reply.

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Inbound email properties (continued)

Property	Label	Description
	subject prefixes	• Type: string • Default value: re:,aw:,r:,Accepted:,Tentative:,Declined: **Note:** The case of the reply prefix in the email, for example RE:, must exactly match the case of the prefixes defined in this property. If, for example, an email contains the Re: prefix and only RE: is defined in the property, the email will not be recognized as a reply. Therefore, it is a best practice to define multiple versions of the prefix, including mixed-case versions, such as RE:, Re:, and so on.
glide.email.forward_subject_prefix	Identify email as a forward by these subject prefixes	Specifies the comma-separated list of prefixes in the subject line that identify a forwarded email. • Type: string • Default value: fw:,fwd: **Note:** The case of the forward prefix in the email, for example fw:, must exactly match the case of the prefixes defined in this property. If, for example, an email contains the Fwd: prefix and only fwd: is defined in the property, the email will not be recognized as a forward. Therefore, it is a best practice to define multiple versions of the prefix, including mixed-case versions, such as FWD:, Fwd:, and so on.
glide.pop3readerjob.create_caller	Automatically create users for incoming emails from trusted domains	Controls the behavior when an instance receives an email from an email address not associated with a user record. If this property is set to **true**, the instance creates a new user record for the email address and places that new user in the **Caller** field of any tickets created. If the property is set to **false**, the instance places **Guest** in the **Caller** field of any tickets created.

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Inbound email properties (continued)

Property	Label	Description
		• Type: true | false • Default value: false • Learn More:Enabling Automatic User Creation
glide.user.default_password	Default password for users created from email sent from trusted domains. (must reset upon login)	Specifies the password for new users created from incoming email. Users must reset the password at first login. • Type: string • Default value: password • Learn More:Enabling Automatic User Creation
glide.user.trusted_domain	Trusted domains when creating users from incoming email.	Comma-separated list of trusted domains for which the instance automatically creates a user based on incoming emails. Use an asterisk (*) to trust all domains. If an email is not from a trusted domain, the instance processes the inbound email as a "guest user" but it does not create a guest user in the instance. • Type: string • Default value: servicenow.com • Learn More:Enabling Automatic User Creation

Email image filtering properties

Use email image filtering properties to control how inbound email images attach to a target record.

When a user sends an email to the system, email images (such as logos or email signatures) attach to the target record by default. These images are also visible in the activity stream of the target record. The system then replicates these images, which can cause duplicate image attachments to the target record and also duplicate images in the activity stream.

To filter images from emails and reduce duplicate image attachments to target records, configure the following properties in the System Properties [sys_properties] table. Use these properties to:

- Specify the email image sizes eligible for filtering.
- Choose an action that controls image attachment behavior and image visibility in the activity stream.

Note: These properties do not delete attachments. You can verify attachment records in the Attachments [sys_attachment] table.

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Email image filtering properties

Name	Description
glide.email.inbound.image_sys_attachment.min_image_size_bytes	Set the minimum image size in bytes for inbound email images to attach to the target record. Any image that is below this size limit is subject to the image filtering behavior that you set in the *glide.email.inbound.image_sys_attachment.fi* property. To disable image filtering entirely and attach all email images to the target record, set the minimum byte size to 0. • Type: Integer • Default value: 0
glide.email.inbound.image_sys_attachment.filtering_behavior	Specifies the image filtering behavior. **Note:** Regardless of the action you select, the image is visible when you choose to **Preview HTML Email** or **Show Email Details** in the activity formatter. • Type: Choice list ○ AttachTarget - Associate the image to the target record. The image is visible in the activity formatter and in the attachment to the target record. ○ AttachEmail - Attach the image to the email record. The image is not visible in the activity formatter of the target record nor in the attachment to the target record. ○ AttachNone - Do not attach the image to a record. You can select this option to attach the image manually at a later time. • Default value: AttachEmail

Related topics

Add a system property

Email digest properties

Several properties are available to manage digest intervals for email digests.

The following properties are available for the email digest feature.

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

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Properties for email digest intervals

Property	Description
glide.email.digest.default_interval	The sys_id of the default email digest interval available to users. • **Type**: string • **Default value**: 28d157e07f1332007f005212bdfa9116 • **Location**: System Property [sys_properties] table
glide.email.digest.max_intervals	The maximum number of email digest intervals that can be defined. • **Type**: integer • **Default value**: 100 • **Location**: System Property [sys_properties] table • **Learn more**: For details on digest intervals, see Create or modify email digest intervals.

Advanced email properties

Use advanced email properties to fine-tune the way your instance sends or receives email.

Add these properties to the System Property [sys_properties] table before they can be used to overwrite the defaults.

com.glide.email.max_read

Specifies the maximum number of emails a POP3 reader should process concurrently.

- Type: integer
- Default value: 20

com.snc.on_call_rotation.reminders.showtz

Specifies whether to show a user's time zone.

- Type: true | false
- Default value: false

glide.cms.use_email_override_url

Forces the system to use the *glide.email.override.url* property, rather than the *glide.servlet.uri* property, when a notification has a link to a CMS page in an instance.

- Type: true | false
- Default value: false
- Location: System Property [sys_properties] table

glide.email_address_filter.max_domains

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Sets the maximum number of domains that can be associated with a single email address filter.

- Type: integer
- Default value: 100

glide.email_address_filter.max_exceptions

Sets the maximum number of exceptions that can be associated with a single email address filter.

- Type: integer
- Default value: 1000

glide.email.allow_duplicate_message_ids

Allows storing of emails with duplicate message IDs and adds error message "Duplicate message-id encountered, prevented loop."

- Type: true | false
- Default value: false

glide.email.append.timezone

Appends the user time zone to all date and time values in outbound email messages (for example, 2018-07-02 04:01:14 PST). The time zone does not show if the system property *glide.sys.time_format* does not have a "z" value. For more information on configuring the time zone in email notifications, see Time zone for email notifications.

- Type: true | false
- Default: false

glide.email.email_client.check_attachment_availability

Enables a system scan of each file that a user attaches to an email draft in the email client. If a file is found to be infected with a virus, the user can't send the email with the attached file. The user must remove the attachment to send the email.

- Type: true | false
- Default value: true

glide.email.email_with_no_target_visible_to_all

Email that is missing a target record or whose target record is the email are made visible to any user regardless of their roles. By turning this property to false, the user is restricted unless they sent in the record or have an admin role.

- Type: true | false
- Value: true

glide.email.inbound.calendar_behavior

Specifies how the system stores calendar data, such as an invitation or an invitation response. Enter one of these options (not case sensitive):

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- Attach: Store the calendar data as an attachment on the associated record, such as the incident or change that triggers an invitation.
- Ignore: Discard the calendar data.
- Inline: Store the calendar data as text in the email Body field.
- Type: string
- Default value: Attach

glide.email.inbound.check_attachment_availability

Prevents users from downloading and using virus-infected files that are attached to inbound emails.

The system detects infected files in an email by checking the ServiceNow virus header. If there are multiple email attachments, the system scans the files via Antivirus Scanning. All attachments that are found to be infected are made unavailable for use.

- Type: true | false
- Default value: true

glide.email.inbound.convert_html_inline_attachment_references

Specifies whether to convert inbound email HTML so email images appear in the email HTML body preview. The system displays broken cid (content ID) links in place of images received when this property is disabled. The format in which the system displays an email image depends on the property setting at the time the email is received, not the current property setting.

- Type: true | false
- Default value: true

glide.email.inbound.generate.missing.html.part

Enables the system to generate HTML text for inbound emails that contain only a plain text message.

- Type: true | false
- Default value: true

glide.email.inbound.generate.missing.text.part

Enables the system to generate plain text for inbound emails that contain only an HTML message.

- Type: true | false
- Default value: true

glide.email.inbound.max_attachment_count

Sets the maximum number of attachments allowed per inbound email.

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- Type: integer
- Default value: 30
- Location: System Property [sys_properties] table

glide.email.inbound.max_body_chars

Sets the maximum body size in characters allowed per inbound email.

- Type: integer
- Default value: 524288

glide.email.inbound.max_total_attachment_size_bytes

Sets the maximum total attachment size in bytes allowed per inbound email.

- Type: integer
- Default value: 18874368
- Location: System Property [sys_properties] table

glide.email.inbound_action_set_email_ignored_when_user_disabled

Sets email to received ignored when met with one of two conditions:

- User account (guest or any other account used to run the inbound email action) is inactive.
- The user account (guest or any other account used to run the inbound email action) is locked out and the glide.pop3.process_locked_out property is set to false.

- Type: true | false
- Default value: true

glide.email.mail_to

Specifies the email address for sending notifications that use the ${mailto:} variable.

- Type: string
- Default value: SMTP email address that is active by default

glide.email.name_split

Specifies the delimiter used between first and last names in an email address. For example, a delimiter of "." (period) in the email address john.smith@company.com tells the system to look for a user record for John Smith.

- Type: string
- Default value: period (.)

glide.email.notification.save_when_no_recipients

Controls whether a notification-generated `sys_mail` record is saved even if there are no recipients. Used along with other notification recipient logging properties, this property enables investigating problems with notifications.

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- Type: true | false
- Default value: false

glide.email.outbound.check_attachment_availability

Prevents users from sending emails that contain virus-infected files.

If an outbound email contains an attachment that was previously marked as infected via Antivirus Scanning, then the system doesn't send the email. An event is created to indicate that the email attachment is not available for use.

- Type: true | false
- Default value: true

glide.email.outbound.header.auto_submitted

Stores the value used in the "Auto-submitted" outbound email header. Clear the property value to remove the "Auto-submitted" header from all outbound emails. Some spam filters flag auto-generated email as spam.

- Type: string
- Default value: auto-generated

glide.email.outbound.max_attachment_count

Sets the maximum number of attachments allowed per outbound email.

- Type: integer
- Default value: 30
- Location: System Property [sys_properties] table

glide.email.outbound.max_body_chars

Sets the maximum body size in characters allowed per outbound email.

- Type: integer
- Default value: 524288

glide.email.outbound.max_total_attachment_size_bytes

Sets the maximum total attachment size in bytes allowed per outbound email.

- Type: integer
- Default value: 18874368
- Location: System Property [sys_properties] table

glide.email.override.url

Sets the URL to use in emailed links in place of the instance URL.
The URL should end with nav_to.do. An example value is `https://servicenow.customerdomain.com/production.nav_to.do`. This property is suitable for customers who use custom redirect URLs for their instances.

- Type: string
- Default value: instance URL

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glide.email.remove_illegal_address_quotes

Removes invalid quotation marks from an inbound email address, thus allowing the inbound email address to be accepted as valid. For example, when you set the property to true, the address "john.doe@example.com" is changed to john.doe@example.com. However, only addresses that are formatted as John Doe <'john.doe@example.com'> are removed entirely.

- Type: true | false
- Default: false

glide.email.smtp.max_recipients

Specifies the maximum number of recipients the instance can list in the To:, CC:, BCC: lines combined for a single email notification. Notifications that would exceed this limit instead create duplicate email notifications addressed to a subset of the recipient list. Each email notification has the same maximum number of recipients.

- Type: integer
- Default value: 100

glide.email.smtp.max_send

Specifies how many emails to send through each new SMTP connection. If there are more emails to send than the specified value, the instance establishes a new SMTP connection.

- Type: integer
- Default value: 100

glide.email.smtp.max_recipients_overall

Specifies the overall maximum number of recipients an email can be sent to. Specifies the maximum number of recipients the instance can list in the To:, CC:, BCC: lines for a single email notification.

- Type: integer
- Default value: 100000

glide.email_system_address_filter.max_address_filters

Sets the maximum number of email filters that can be associated with a single system address filter.

- Type: integer
- Default value: 100

glide.email.text_plain.strip_xhtml

Converts the XML of both outbound and inbound emails that are shown in comments to plain text. If false, the system preserves the XML.

- Type: true | false
- Default value: true

glide.notification.recipient.exclude_logging

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Enables or disables logging all reasons a recipient was excluded. If set to true, the subsequent properties dealing with the exclusion of logging are enabled. If false, the properties are disabled. This property cannot suppress log messages generated by the *glide.email.test.user* property.

- Type: true | false
- Default value: true

glide.notification.recipient.exclude_logging.device_inactive

Logs recipients who are excluded because their chosen notification device record is marked as inactive.

- Type: true | false
- Default value: true

glide.notification.recipient.exclude_logging.device_schedule

Logs recipients who are excluded based on the **Schedule** field on the Notification Device [cmn_notif_device] record for their chosen notification device.

- Type: true | false
- Default value: true

glide.notification.recipient.exclude_logging.event_creator

Logs recipients who are excluded because they initiated the notification event, such as updating an incident record. The **Send to Event Creator** check box is then cleared on the notification record.

- Type: true | false
- Default value: true

glide.notification.recipient.exclude_logging.invalid_email

Logs recipients who are excluded because the email address for that user is invalid, for example the @ is missing, or empty.

- Type: true | false
- Default value: true

glide.notification.recipient.exclude_logging.user_calendar_integration_disabled

Logs recipients of calendar invitations who are excluded. Recipients are excluded because the **Calendar Integration** field is set to **None** on the user record.

- Type: true | false
- Default value: true

glide.notification.recipient.exclude_logging.user_inactive

Logs recipients who are excluded because the **Active** check box is cleared on the user record.

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- Type: true | false
- Default value: true

glide.notification.recipient.exclude_logging.user_notification_disabled

Logs recipients who are excluded because the **Notification** field is set to **Disabled** on the user record.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging

Enables or disables logging all reasons a recipient was included. If set to true, the subsequent properties dealing with the inclusion of logging are enabled. If false, the properties are disabled.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.delegate

Logs recipients who are included because they are delegates of another user.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.event_parm

Logs recipients who are included because they are in the **parm1** or **parm2** fields of the event record.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.recipient_fields

Logs recipients who are specified in the **Users/Groups in Field** field for the notification record. The recipient_fields are fields in the target record that contain a recipient to add. For example, to include an incident assignee as a recipient, set the **Users/Groups in Field** field to **Assigned to**.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.recipient_groups.group_email

Logs users who are included in a notification that is sent to a group. The property also logs users in the event **parm1** or **parm2** field.

- Type: true | false
- Default value: true

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glide.notification.recipient.include_logging.recipient_groups.manager

Logs recipients who manage a recipient group. The property also logs users in the event **parm1** or **parm2** field.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.recipient_groups.membership

Logs recipients who are part of a notification recipient group. The property also logs users in the event **parm1** or **parm2** field.

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.recipient_users

Logs recipients who are included via notification record's **Users** field (recipient_users).

- Type: true | false
- Default value: true

glide.notification.recipient.include_logging.subscription

Logs recipients because they are subscribed via the user notification preferences.

- Type: true | false
- Default value: true

glide.pop3.parse_start

Specifies the text that indicates the beginning of the email body section. The instance parses name:value pairs within this section to set or update field values when processing inbound email actions.

- Type: string
- Default value: none

glide.pop3.parse_end

Text indicating the end of the email body section where the instance should parse name:value pairs to update field values when processing inbound email actions.

- Type: string
- Default value: none

glide.smtp.dateformat

Specify the date format to use for outgoing email notifications.

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- Type: string
- Default value: date format listed in email sender's user record `[sys_user.date_format]`

glide.smtp.precedence_bulk

Specifies whether outbound email includes the header "Precedence: bulk". Some spam filters flag bulk email as spam. Set the value to **false** to remove this header from outbound email.

- Type: true | false
- Default value: true

glide.smtp.send_partial

Splits outgoing email between valid and invalid recipients. The email is sent only to the valid recipients. A new email containing the invalid recipients is created in the **send-ready** state and attempts to send again.

- Type: true | false
- Default value: true

glide.smtp.timeformat

Specify the time format to use for outgoing email notifications.

- Type: string
- Default value: time format listed in email sender's user record `[sys_user.time_format]`

glide.ui.activity.email.use_display

Specifies whether to display email addresses or user IDs (display value from the User table) in email headers. If true, the instance searches for a user record with a matching email address. If it cannot find a matching user record, it displays the email address.

- Type: true | false
- Default value: false

glide.activity.rule.sys_email.expand_max_body_size

Specifies the limit of the volume of data which can be processed via a single click of Expand All or getEmailBodies operation. If limit value is hit the user is notified that The maximum allotted email text threshold has been reached and some mails are not expanded.

glide.ui.email_client.email_address.disambiguator

Sets the columns from the User `[sys_user]` table that the auto-complete list displays. Separate each column name with a semicolon character (;).

- Type: string
- Default value: name

glide.ui.incident_activity.max_addresses

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Specifies the maximum number of addresses to list in an email audit record. If the number of addresses exceeds this limit, the instance truncates the list after the maximum value and displays an ellipsis character (...).

- Type: string
- Default value: 5

NotifyAffectedCI.max_rel_level

Sets a value that is used by the **Affected ci notifications** business rule. The business rule notifies subscribers when tasks affect configuration items (CIs). The business rule generates notifications for parent CIs up to the level defined by this property. You can adjust the property value according to the complexity and depth of your CI relationships.

- Type: integer
- Default value: 5

glide.email.inbound.attachment_extensions_blacklist

Restrict attachments with questionable file extensions for inbound email.

glide.email.smtp.claim.lookback.hrs

Sets the default value of 24 hours. Any email older than 24 hours will not be sent by the system. This protects the system from having a huge number of sent emails at a time or if the outbox has a large number of emails waiting to be sent.

Set to a value greater than 24 (hours) and increase it in intervals to not send a large number of emails at one time. Depending on how big the backlog of emails is and how spaced out they are created in time, you might want to start with a value of 36 (1.5 days worth), let those go out, then set the value again to maybe 48 (two days), and keep increasing the value until all of the older emails are sent.

- Type: integer
- Value: 24

glide.email.outbound.static_translation.enabled

Enables the system property for static translation of notifications for the global application.

- Type: true | false
- Default value: true

glide.notification.translation.dynamic

Enables the system property for dynamic translation of notifications for the global application.

- Type: true | false
- Default value: true

glide.security.file.mime_type.validation.inbound_email

When set to `true`, validates the mime type of attachments in the inbound email.

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- Type: true | false
- Default value: false

Activate email administration

Activate email filter and email service.

Activate email filters

Administrators can activate the Email Filters plugin (com.glide.email_filter).

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

What to do next
Create an email filter

Activate Email Service

Users with the admin role can activate the Email Service plugin (com.glide.email.service) to enable the Email API.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

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

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

What to do next

Create a system address filter

Related topics

List of plugins (Brazil)

Grant access to the Email API

To grant non-admin users access to the Email API, administrators must create an access control and assign a special role.

Before you begin

Role required: admin

About this task

For additional details, see Email API .

Procedure

1. Elevate privileges to security_admin.
2. Navigate to **System Security** > **Access Control (ACL)**.
3. Click **New**.
4. Create an access control for the Email [sys_email] table.

Access control values

Field	Value
Type	record
Operation	create
Admin overrides	Selected
Name	sys_email
Requires role	email_api_send

5. Assign the email_api_send role to the non-admin user.
6. Verify the non-admin user either has read access to all records in the notification target table or has read access to a specific record in the table.
   For example, to work with incident notifications the non-admin user needs access to the Incident table. You can provide record access by:
   - Granting the user an appropriate role, such as the itil role.
   - Selecting a specific incident that was opened on behalf of the user.

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Creating an email account

Use email administrator to create email accounts, email filter, and create an email account for Microsoft Graph.

Email accounts

Email accounts store the connection details and credentials the system uses to access external email servers and services.

By default, instances come with email accounts for ServiceNow - managed SMTP and POP3 servers to send and receive email. These accounts cannot be modified, but can be deactivated if you do not want to use them. To connect to other email servers and services you must create email accounts for them. You can create email accounts for servers and services that use these protocols:

- SMTP
- POP3
- IMAP

Note: The system only allows one SMTP email account to be active at a time and sends all email through this account. You can however receive email from multiple POP3 or IMAP accounts.

The system stores individual email accounts in the `sys_email_account` table. Create separate email accounts to send and receive email. Use email properties to define how the system processes email for all email accounts.

By default, the ServiceNow POP3 server provides each instance with its own mailbox at the address instance@service-now.com. Likewise, the ServiceNow SMTP server sends email from the address instance@service-now.com. To create another mailbox, provision your own POP3 or IMAP server and create an email account to the server on the instance. To change the sent from email address, update the address in the email account you use for sending email.

Emails received via a POP3 or IMAP server account are stored in the Email [sys_email] table and then deleted from the account.

Note: ServiceNow has exclusive access to an account you configure. After a mail is read from a POP or IMAP account that you have configured, ServiceNow deletes the email from the server.

Create an email account

You can create email accounts in addition to the accounts provisioned for you.

Before you begin

- Role required: admin
- Email server: a compatible email server
  - SMTP
  - POP3
  - IMAP

Warning: An SMTP server that uses a localhost or loopback (127.0.0.1) IP address is not accepted as a compatible email server. For more information, see KB0724199.

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Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **Email Accounts**, and then select **New**.
2. On the form, fill in the fields.

Field	Description
Name	Name of the email account.
Account type	**Shared Address** A shared address refers to a shared mailbox that multiple users or team members can access. **Forwarding Address** A forwarding address is an email address where emails are automatically redirected or forwarded from another account. **Note:** Account type is specific to personal corporate mailbox. For more information,see Personal corporate mailbox.
Type	Type of mail server. You can select one of the following: ○ POP3 ○ IMAP ○ SMTP **Note:** The system can use only one active SMTP account at a time.
Authentication	Type of authentication used for the email account to connect to the email server. You can select one of the following: ○ –- None -- ○ Password ○ OAUTH ○ OAUTH 2.0 The Email: OAUTH support for IMAP, Microsoft Graph (Receiving), and SMTP (com.glide.email.oauth) plugin must be active for the OAuth options to be visible.
OAuth Provider	OAuth application registry record for this account. This field appears if you selected **OAuth 2.0**.
Server	Remote server to which this account connects. To activate a server for an on-premise installation, enter the full address (FQDN) of the node (for example, `node.customerdomain`).
Active	Option to activate the email account.
ServiceNow Configured	Identifier of whether this account is provisioned by ServiceNow. If you create an account, this option is not selected.

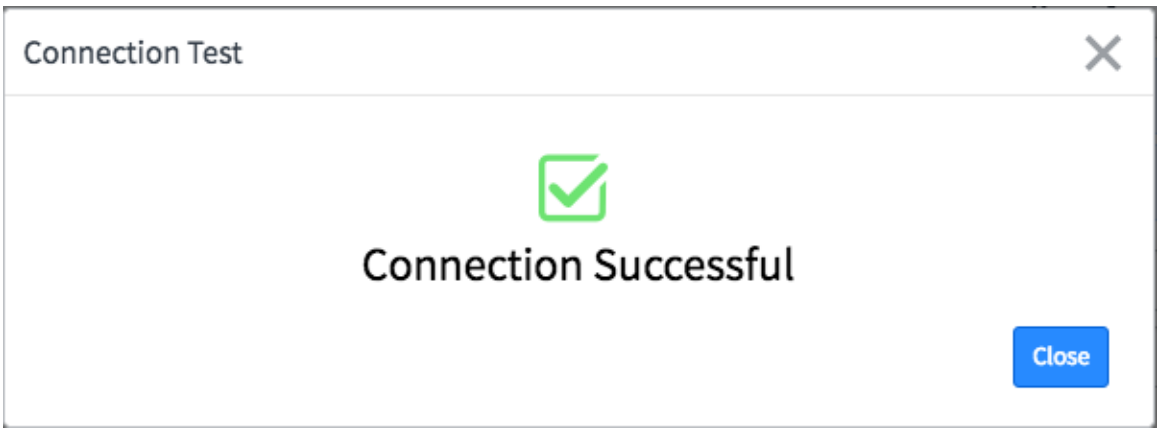
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Field	Description
Enable debug output	Option to create node logs for the raw data that is exchanged with the email server. You can review the node logs by navigating to **System Logs** > **Utilities** > **Node Log File Browser**. You can enable this field temporarily to diagnose issues related to receiving or sending email.
Email user label	Display value used for outgoing messages. This field is for SMTP type accounts only.
User name	User name or ID to authenticate an email address. The value in this field is also the **From** address when the instance sends email. If you are using SMTP, this must be a full email address. The value in the **From** field can override this (for SMTP accounts). **Note:** The address in the **From** field on the Notification [sysevent_email_action] form takes precedence over this field.
Password	Password when the **Authentication** type is **Password**. **Note:** You may need to increase the size of this field to accommodate longer passwords. By default, this field has a size of 40 characters.
From	(SMTP only) The From address used for notifications sent with this account. This address takes precedence over the **User name** field. If nothing is present in this field, the User name is used as the return address for notifications sent from the instance.
Connection Security	Type of secure connection. Choose a setting: **None** No secure protocol is used. **STARTTLS** Upgrades an insecure connection to a secure connection using the SSL/TLS encryption protocol, if your email server supports TLS. **SSL/TLS** Connect to an SSL/TLS encrypted port to secure the connection. Email is encrypted between the ServiceNow instance and your mail server. **Warning:** Selecting a less secure protocol like **STARTTLS** or **None** may expose your data. To better ensure the security of data in your email server, select **SSL/TLS**.
Port	Connection TCP port.
System Address Filter	System address filter to apply to the email account. If left blank, the system uses the default system address filter for inbound or outbound email. For more information, see System address filters.

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3. Select **Submit**.
4. Select the test connection link at the bottom to test the SMTP, POP3, or IMAP account.

   The system displays a pop-up window with the results of the connection test.



   If the test succeeds, select **Close** to return to the email account record. If the test fails, select **View Logs** to display more information about the test results.

Result
The system uses the email account to send or receive email.

What to do next
Enable the system to send or receive email.

Multiple email readers

Organize POP3/IMAP email accounts into email account groups (subsets of email accounts) that can be processed by multiple email reader jobs. To improve the performance of inbound email account processing, you can incrementally add email account groups and if needed, email reader jobs to process email account groups concurrently.

How email account group processing works

By default, the email reader job processes POP3/IMAP email accounts serially, which can result in longer processing times when you have many email accounts. It can also be difficult to identify any problematic email accounts that might contribute to slower processing times.

To reduce email account processing time, you can create one or more email account groups that contain subsets of your email accounts. Organizing your email accounts into groups enables the default email reader job to process each email account group separately. After creating one or more email account groups, you can then add another email reader job to process account groups concurrently.

Use the *glide.email.inbound.account_group_processing* system property to activate email account group processing.

During email account group processing:

- The system stores the email accounts in the Email Account Groups [sys_email_account_group] table.
- The default email reader job runs every two minutes. The email reader chooses the account group to be processed based on the account group processing state and the date and time that the group was last processed.

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  - Claimed state: If an account group has a claimed state, the email reader is processing the account group. If you defined other email reader jobs, no other email reader job can claim the group for processing.
  - Unclaimed state: If an account group is unclaimed, the account group is available for processing by the email reader.
- The email reader job processes the email accounts contained in the selected account group.
- The email reader job chooses the next available account group for processing and continues processing that account group.

You can monitor the processing of each email account group by using the Email Account Groups [[sys_email_account_group]] table. Each account group record includes the processing duration (how long it takes for the email reader to process all the accounts in the group).

After you review the processing times for your email account groups, determine whether to make further adjustments in email account group processing. For example, you can create another email account group or create another email reader job to process your email account groups in parallel. You define additional email reader jobs using the Schedule [sys_trigger] table.

Set up email account group processing

To set up email account group processing, you must have the email_account_admin or admin role.

1. **Create email account groups.**

   Define one or more email account groups that contain a subset of your POP3/IMAP email accounts. Your base system includes a default email account group. Any POP3/IMAP accounts not contained in an email account group are processed as part of the default email account group.

2. **Enable email account group processing**

   Navigate to sys_properties.list and locate the *glide.email.inbound.account_group_processing* system property. Set the **Value** to **true**. The email reader job starts processing the email account groups that you created.

3. **Monitor email account group processing.**

   Check the status of your email account groups to see if processing time has been reduced. Determine whether the additional groups sufficiently reduce account processing time or consider adding another email reader job to further reduce processing time.

4. **Create an email reader job.**

   As part of fine-tuning email account group processing, create an email reader job to process email account groups concurrently, in addition to the default email reader job.

Create email account groups

Define an email account group that contains a subset of your POP3/IMAP email accounts. The email reader job automatically processes each email account group as scheduled.

Before you begin
Role required: admin or email_account_admin

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Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **Email Account Groups** and click **New**.
2. Fill in the form.

Field	Description
Name	The name of the account group.
Email Accounts	A subset of POP3/IMAP email accounts. Select the email accounts that make up the group. **Note:** When you add an email account to a group, it cannot be reused in other account groups.
Active	Check box that enables the email account group for processing. New account groups are active by default.
Default	Read only. Check box that indicates the account is the default email account.
Status	Read only. Processing state of the email account group: Unclaimed or Claimed.
Claimed by	Read only. ID of the email reader job currently in progress.
Last Processed	Read only. The last time that the email reader job processed this group.
Processing Duration	Read only. The length of time taken by an email reader job to process the account group.

3. Click **Create**.
   The system updates the Email Account Group [sys_email_account_group] table with the new account group. Use the this table to monitor email account group processing.

What to do next

- Review email account group processing.
- Determine if you want to continue fine-tuning email account processing. You could add another email account group or another email reader job to process email account groups concurrently.

Enable email account group processing

Enable the email reader job to start processing your email account groups so that you can reduce the time it takes to process inbound email accounts.

Before you begin

Create email account groups.

Role required: admin

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Procedure

Add a system property with the following settings:

- Name: *glide.email.inbound.account_group_processing*
- Type: true | false
- Value: **true**

What to do next

Check the status of your email account groups to see if processing time has been reduced. For more information, see Monitor email account groups.

To further reduce processing time, consider creating another email reader job to process inbound email accounts. For more information, see Create an email reader job.

Monitor email account groups

Use the Email Account Groups [sys_email_account] table to check the status of email account groups processed by email reader jobs.

Before you begin

1. Create email account groups.
2. Enable email account group processing.

Role required: email_account_admin or admin

Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **Email Account Groups**.
2. Review the processing details for each account group:

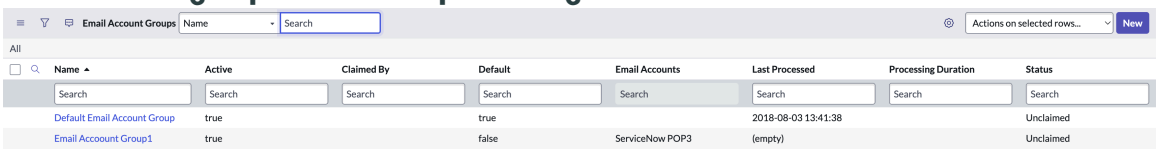
Field	Description
Name	The name of the email account group.
Active	The operational state of the email account group. The value true indicates that the account is enabled for email account processing.
Claimed by	The ID of the email reader job if the job is running on the account group.
Default	The default indicator. The value true indicates that the email account group is the default.
Email Accounts	The names of the email accounts contained in the email account group.
Last Processed	The day and time that the email reader job last processed this account group.
Processing Duration	The length of time (in hours, minutes, seconds) to process the account group.
Status	Processing state of the email account group:

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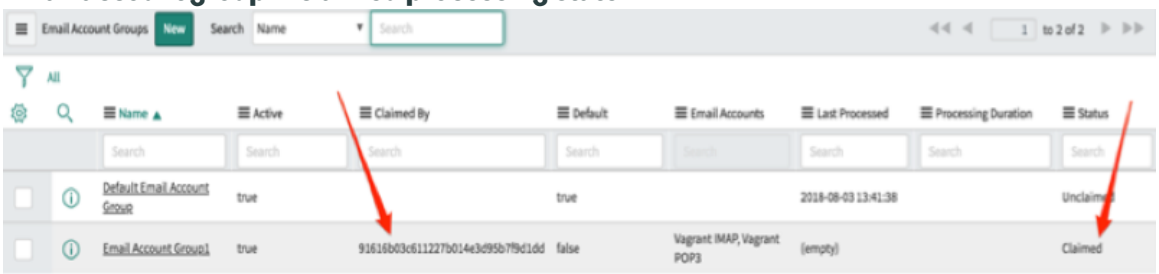
Field	Description
	○ Unclaimed: The account group is available for processing by the next email reader job. ○ Claimed: An email reader job is processing the current account group.

Example:

Email account group — unclaimed processing state



Email account group — claimed processing state



What to do next

If fine-tuning email accounts, consider doing one of the following:

- Create another email account group.
- Create another email reader job to process email account groups concurrently.

Create an email reader job

If you created email account groups to fine-tune inbound email account processing, you can create an email reader job to process those account groups concurrently, in addition to the default email reader job.

Before you begin

1. Create email account groups.
2. Enable email account group processing

Role required: email_account_admin or admin

Procedure

1. In the Navigation filter, type `sys_trigger.list`.
2. In the sys_trigger table, select the Email Reader job record.
3. In the Email Reader job form:
   a. Enter a unique name for the email reader job to be added so that you can differentiate it from the default email reader job.
   b. If needed, change the time interval for this email reader job.

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4. From the form context menu, click **Insert**.
   Another email reader job is created. This job runs concurrently with the default email reader job to process email account groups.

What to do next

Monitor email account group processing and determine if the additional reader job reduces processing time. If needed, you can continue fine-tuning email account processing. For example, you might consider adding another email account group.

Email filters

Specify which inbound emails to ignore or move to a particular mailbox.

When an email is ignored, the email is saved to your instance but is not processed. You can access an ignored email by viewing its Email [sys_email] record.

The Email Filters (com.glide.email_filter) plugin is active by default for releases after Kingston, for releases before Kingston, it needs to be activated, for more information see Activate email filters.

Default email filters

By default, the following filters are available from the **System Mailboxes** > **Administration** > **Filters** module:

Default email filters

Filter	Description
Ignore VCAL	Ignores all email containing vCalendar requests. This filter prevents inbound email actions from creating unnecessary incident records when the instance receives a response to sent email. vCalendar requests in email responses are identified by the EmailUtils script include.
Ignore header	Ignores email that contains specific headers. This filter overrides the *glide.pop3.ignore_headers* property.
Junk email - sender equals recipient	Filters out emails that are from the same user as the SMTP user to the Junk folder.
Ignore subject	Ignores email with specific terms or phrases in the subject line. This filter overrides the *glide.pop3.ignore_subjects* property. This filter might not apply to emails arriving from unknown users. Unknown users can be locked out.
Move spam to junk folder	Moves email identified as spam to the Junk folder. This filter checks for the value of the ServiceNow spam header. If the header is `X-ServiceNow-Spam-Status: Yes`, the filter moves the email to the Junk folder

Note: Filter action should be configured to indicate how the system should react when the conditions of this filter evaluate to true. The two choices in the base system are: Mark as Ignored and Move to Junk. You can use the Action script to perform additional email tasks.

To learn more about enabling spam scoring and filtering, see Email spam scoring and filtering (instance security hardening) in Instance Security Hardening Settings.

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Email filter script include

Email filters use a script include called `EmailUtils` that contains a simple utility function to determine if `vCalendar` is in the body of the response email. The results of this query are used in a condition script in the *Ignore VCAL* email filter.

Spam scoring and virus scanning

Every message sent through email servers is assessed for the likelihood of being spam. Based on this assessment, the instance adds headers to each message that can be used for filtering within the customer instance using the Email Filters plugin.

The system also adds the `X-ServiceNow-Virus:INFECTED` header to an email that contains one or more virus-infected attachments. The system ignores the email.

Spam scoring and virus scanning are available only for instances that use the ServiceNow email infrastructure. For more information on spam scoring and filtering, see KB0549426.

Related topics

Create an email filter

Create an email filter

You can create email filters to apply a custom action script or filter actions when email matches your filter's conditions.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **Filters**.
2. Click **New**.
3. On the form, fill in the fields.

Field	Description
Name	Name of the email filter.
Application	Application scope of the email filter.
Order	Priority that the email filter takes over other filters for the same table. To give the filter higher priority over other filters, enter a lower number.
Active	Option to activate the email filter.
Short description	Description of what the filter does.
Conditions	Conditions to define which emails to filter.
Condition script	Script to define which emails to filter. Use this script to access other tables, variables, or methods. For example, the condition script for the Ignore VCAL filter looks for the results of the EmailUtils script include, which detects vCalendar attachments.
Action script	Script to define additional behavior to be performed when the filter condition evaluates to true. This might include an email action not included in the default filter actions. In the base system, the action

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Field	Description
	script is used to produce the error string that is published to the email log (**System Logs** > **Email**).

4. Right-click in the header bar and select **Save** from the context menu.

   The *Filter Actions* related list appears.

5. Click **New** in the related list.
6. Select how the system should react when the conditions of this filter evaluate to true.

   The two choices in the base system are: *Mark as Ignored* and *Move to Junk*. You can use the *Action script* to perform additional email tasks.

   Note: Before creating additional email actions with a script, see Inbound Email Actions. Like business rules, inbound email actions use both conditions and scripts and can provide a number of useful actions on emails the instance receives.

Email service

The `Email Service` API provides endpoint to install the Email API on the instance.

By default, `Email Service` only allows admin users to access the Email API. Administrators can grant access to the Email API by:

1. Adding an access control for creating records in the Email [sys_email] table linked to the email_api_send role.
2. Assigning the email_api_send role to the non-admin user.
3. Verifying the non-admin user has read access to the notification target table. For example, an email notification for an incident, requires read access to the Incident table.

Non-admin users with the email_api_send role can access the `Email` API from the REST API Explorer.

Create a system address filter

Define how email address filters apply to inbound and outbound email.

Before you begin

Complete the steps in Set email address filters.

Role required: email_account_admin

About this task

You can use a combination of allowed list and denied list email address filters in a system address filter.

A system address filter blocks a domain or address that appears only on denied lists and never on allowed lists. To ensure that a system address filter effectively blocks a certain domain or address, check for the following:

- The domain or address is included in at least one denied list
- The domain or address is not included in any allowed list

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Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **System Address Filters**, and then click **New**.
2. On the form, fill in the fields.

Field	Description
Name	Name of the system address filter.
Active	Option to activate the system address filter.
Type	Type of system address filter. Select one of the following: **Outbound** Control which domains and email addresses can receive email from your instance. Select this option if you plan to use the system address filter for an SMTP server. **Inbound** Control which domains and email addresses can send email to your instance. Select this option if you plan to use the system address filter for an IMAP or POP3 server.
Application	Application scope of the system address filter.
Default	Option to use this system address filter as the default inbound or outbound filter. To control senders and recipients for a specific email account, leave this field cleared.
Short description	Description of the system address filter.
Email Address Filters	Email address filters to apply to the system address filter. By default, the maximum number of email address filters that you can associate with a single system address filter is 100. You can reconfigure this limit by setting the *glide.email_system_address_filter.max_address_filters* property.

3. Click **Submit**.

Result

A default outbound filter applies to all active SMTP email accounts automatically. A default inbound filter applies to all active IMAP or POP3 email accounts automatically.

For a non-default filter, the next step is to apply the filter to an email account manually. For more information on applying a filter to an email account, see Create an email account.

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Email encryption - S/MIME protocol

Secure/Multipurpose Internet Mail Extensions (S/MIME) is an end-end encryption protocol for sending digitally signed and encrypted emails that support data confidentiality, authenticity, and integrity.

Introduction to S/MIME

An administrator with privileges can enable and configure S/MIME. Understanding of the following is required when using the full capabilities of S/MIME:

- Digital signatures and signature verification
- Message encryption and decryption
- Public key
- Digital certificates

Digital signatures and verification

With digital signature, S/MIME verifies the identity of the sender of the email. This verification ensures the following:

- Message in the email is the exact message sent by the sender.
- Message is received from the right sender and not someone pretending to be the sender.

Message encryption and decryption

S/MIME uses encryption to protect the content of the email, which ensures that only the receiver can decrypt the content. Encryption creates coded information so that it cannot be read or understood until it is decoded and readable. Message encryption helps with the two key security factors of confidentiality and data integrity.

Public key

S/MIME uses key pairs and asymmetric cryptography. A private key in a key pair belongs only to the sender. If the private key has been used, the owner of that key has used it.

Public key cryptography ensures secure communication between the sender and the receiver. Both have a key-pair, with one being private and the other public.

Public keys are shared between the sender and the receiver. A public key is paired to only one private key. The corresponding public key is used to identify its paired private key and only its paired private key. A public key can be used by multiple recipients.

A key pair can be used to

- Sign and verify a signature
- Encrypt and decrypt the content of an email

S/MIME digital signatures and encryption require each sender and recipient to have it enabled. They also need to send or exchange public keys though digital certificates to identify each other.

For more information about key management and cryprographic module, see Key Management Framework Reference.

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Digital certificates

Digital certificates help in delivering the public key in the key pair. A digital certificate is a digital credential that provides information about the identity, validity, and any other required information. Digital certificates are issued by a certification authority (CA) and are valid for only a specific period of time.

Note: ServiceNow® does not provide S/MIME certificates for ServiceNow mail infra users. Users should get their S/MIME certificates issued from the third party S/MIME certificate solution providers.

S/MIME outbound emails

Signing outbound mails

The ServiceNow AI Platform uses the private key of the sender (instance email account) and the receiver uses the public key to verify signatures.

Encrypting outbound mails

The ServiceNow AI Platform uses public keys of the recipients to encrypt the emails and every recipient uses their private key to decrypt the email.

S/MIME for inbound email

Sign verification for inbound mails

The sender uses a private key to sign the email and the ServiceNow AI Platform uses the public key of the sender to verify the signature.

Decrypting inbound mails

The sender uses the public key to encrypt the email and the ServiceNow AI Platform uses the private key to decrypt the email.

Activate S/MIME Email

You can activate the S/MIME Email plugin (com.glide.email.smime) for Notifications if you have the admin role.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the S/MIME Email plugin (com.glide.email.smime) 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.

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

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

What to do next

Import an S/MIME key pair

Setting up S/MIME for email

S/MIME is a protocol for sending digitally signed and encrypted emails to ensure the confidentiality, authenticity and integrity.

Set up S/MIME for outbound mails (signing and encryption)

You can use S/MIME for outbound mails for the following purposes:

- Digital signature
- Encryption
- Digital signature and encryption

To set up S/MIME, the admin must have the following:

- email_account_admin and sn_kmf.cryptographic_manager roles
- Key pair (private key and public key)
- CA certificate
- Email certificate

Upload the instance email account key pair and email certificates, and enable outbound S/MIME properties. For more information, see Enable S/MIME.

If there are multiple recipients and some of the recipients do not have valid certificates, the email will be sent only to recipients with a valid certificate.

Set up S/MIME for inbound mails (sign verification and decryption)

S/MIME for inbound mails can be used for the following:

- Signature verification
- Decryption
- Signature verification and decryption

For information about enabling inbound S/MIME properties, see Enable S/MIME.

If the system fails to decrypt a message, no inbound actions will run on the email and it is moved to the received-ignored status.

To set up the system to ignore inbound signed emails if the signature cannot be verified or is invalid, admins can create the *`email.inbound.smime.ignore_unverified_emails`* and set it to true.

For more information about key management and cryprographic module, see Key Management Framework Reference.

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Import an S/MIME key pair

Import an S/MIME key pair consisting of the private key and certificate to sign outbound emails or decrypt emails.

Before you begin

Role required: email_account_admin and sn_kmf.cryptographic_manager

Upload the private-public key pair corresponding to the instance email account.

You must have the key alias.

Note: When you create a PKCS12 file, ensure that it's created with a key alias.

Make sure the file format is PKCS #12.

About this task

This video shows you how to perform the following procedure.

Procedure

1. Navigate to **All** > **System Mailboxes** > **Administration** > **Email Accounts**.
2. Select the email account.

   Note: The keypair is associated with the email address and not the email account.

3. Select the **Import SMIME Key Pair** related link.
4. Select the **Crypto Specifications** tab and select the key alias.
   The algorithm definition screen is displayed.
5. Complete the Algorithm Definition form.

Algorithm Definition form

Field	Description
Crypto module	Read only. Name of the selected cryptographic module displays.
Crypto purpose	SMIME Crypto Purpose
Algorithm	Type of algorithm used to accomplish the crypto purpose. The algorithm also controls the key origin. Adjusts automatically based on the selected crypto purpose.
Enroll module for resource exchange	Allows clones or backups to get their own unique keys. **Note:** Do not check the box.

6. Select **Next**.
7. In the **Lifecycle Definition** screen, select a Key Lifecycle from the Applies to column.

Key Lifecycle fields

Applies to	Selected key that the lifecycle applies to.

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For field	Control for the key that the lifecycle applies to.
Type	Select if the valuation for the key lifecycle is a relative value or an absolute value or none. Relative value depends on other data entries in the system, such as key generation, activation, and deactivation. Absolute value is an exact value, such as a date.
Lifecycle default	Read only. Displays a value if set.
Order	Enter the sequence in which to process the key lifecycle state for the crypto specification.
Relative duration	Number of years, months, or days the key is valid.
Relative duration type	Duration of the lifecycle: Years, Months, or Days.
Relative operation	**Before** or **After**.
Relative to	Field the duration is relative to. Displays if a relative duration or operation is selected.

8. Select **Update**.
9. Select **Next**.
10. In the Key Origin screen, in the **Origin** field select **Import from PKCS12** and enter the key alias in the **Key Alias** field.
11. Select **Next**.
12. In the Key Creation screen, select **Import Key**.
13. In the Import Keystore/Certificate dialog box, provide the keystore password and import the keystore/certificate.
    a. Provide the password in the **Enter Keystore Password** field.
    b. In the **Import Keystore/Certificate** field, select **Browse** and select the certificate to be imported.
    c. Select **OK**.
14. Select the **Module Keys** tab to view the keys.

    Secure information for the keys will be stored on the Module Keys tab along with the private key and public key. The **Key lifecycle state** is set to **Active**.

Upload a CA certificate

Upload a digital CA (Certificate Authority) certificate to validate email certificates for secure communication.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Notification** > **SMIME** > **CA Certificate**.
2. Select **New**.
3. Select the attachment icon to upload the CA certificate.
4. On the form, fill in the fields.

Fields	Descriptions
Name	Unique name for the CA certificate.
Type	The type of CA certificate.
Expiration notification	Option to enable expiration.
Warn in days to expire	Number of days to send a warning prior to the expiration date.
Active	Option to enable the CA certificate.
Short description	Description for the CA certificate.

5. Select **Submit**.

What to do next

Upload an email certificate.

Upload an email certificate

Upload an email certificate to validate a signature for inbound email or encrypt an outbound email or both for secure communication.

Before you begin

- To enable signing in the instance, upload the private-public key pair corresponding to the instance email account.
- To enable encryption in the instance and send encrypted email to a recipient's email address, upload the public key/certificate corresponding to the recipient’s email address.

Role required: admin

Procedure

1. Navigate to **All** > **System Notification** > **SMIME** > **Email Certificate**.
2. Select **New**.
3. Select the attachment icon to upload the email certificate.
4. On the form, fill in the fields.

S/MIME email certificate form

Fields	Descriptions
Email	Email address for sending the email.
Expiration notification	Select the check box to enable expiration.

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Fields	Descriptions
Notify on expiration	Add yourself to be notified before expiration.
Warn in days to expire	Number of days to send the warning prior to the expiration date.
Active	Check box to enable the email certificate.
Key store password	Key password to protect PKCS #12 file.
Short description	The description for this email certificate.

5. Select **Submit**.

What to do next

EnableEnable S/MIME.

Enable S/MIME

Configure S/MIME settings for inbound and outbound email.

Enable S/MIME for Inbound and Outbound emails

You can configure email properties from the Email Properties page through the **System Mailboxes** or **System Properties** module.

Email properties are available from either of these modules:

- **System Mailboxes** > **Email Properties**
- **System Properties** > **Email Properties**

Outbound S/MIME configuration

For encryption, you must upload the email certificate for the recipients in PEM format and the CA certificates for the issuing authority. For more information, see Upload an email certificate and Upload a CA certificate.

For signing, you must upload the email account key pair in P12 format. For more information, see Import an S/MIME key pair.

Outbound S/MIME configuration properties

Configuration	Related property
Digitally sign your outbound emails.	email.outbound.smime.signing.enabled
Send a public certificate in the outbound email.	email.outbound.smime.signing.send_public_cert
Encrypt message contents and attachments.	email.outbound.smime.encryption.enabled
Encryption algorithm. Select **AES-CBC** or **AES-GCM**. **Note:** Before selecting AES-GCM, check whether GCM is supported by the client for S/MIME.	email.outbound.smime.encryption.algo

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Inbound S/MIME configuration

For decryption, you must upload the email certificate for the recipients in PEM format and the CA certificates for the issuing authority. For more information, see Upload an email certificate and Upload a CA certificate.

For signature verification, you must upload the email account key pair in P12 format. For more information, see Import an S/MIME key pair.

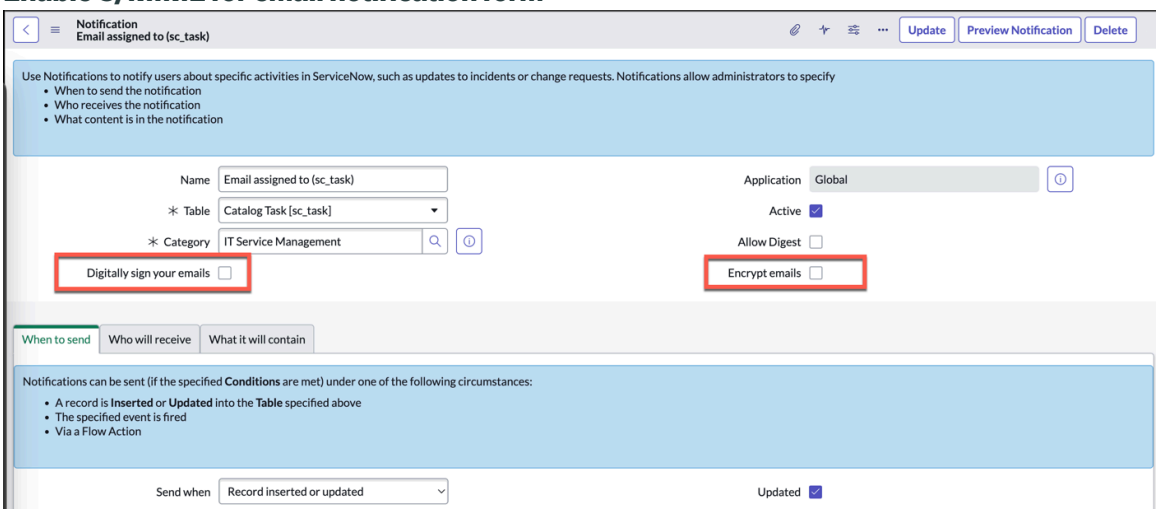
Inbound S/MIME configuration properties

Configuration	Related property
Verify the signature for inbound emails.	email.inbound.smime.verify_sign
Decrypt inbound emails.	email.inbound.smime.decrypt

Enable S/MIME for email notification form

To digitally sign or encrypt your emails, go to **All** > **Email** > **Notifications**, select **New** and select the **Digitally sign your emails** check box for digitally signing emails and **Encrypt emails** check box for email encryptions.

Enable S/MIME for email notification form



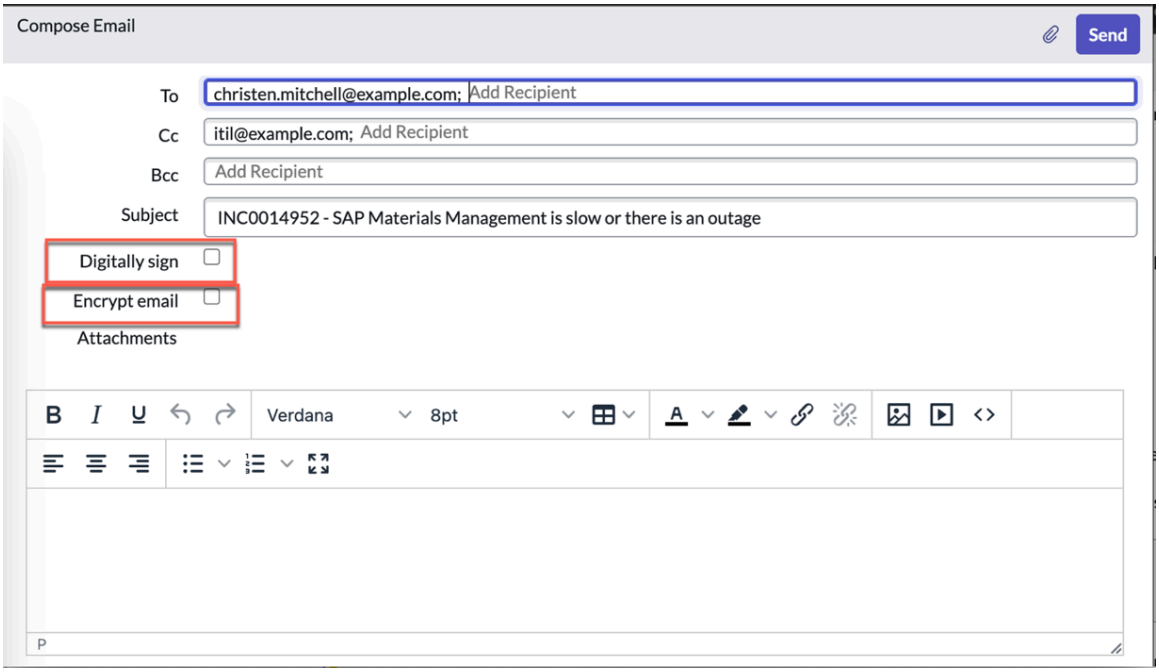
For more information, see Create an email notification.

Enable S/MIME for email client

In the compose email form, select the **Digitally sign your emails** check box for digitally signing emails and **Encrypt emails** check box for email encryptions.

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Enable S/MIME for email client



Reference

Reference section provides additional information about email administration.

Email size limits

To prevent issues with large email messages, the system enforces configured limits on the maximum allowed email body size, total attachment file size, and number of attachments per email.

An email or attachment that exceeds the system capacity may not be processed as expected. To ensure that your emails and attachments are processed as expected, you can configure properties that limit the size of emails and attachments.

Message body size limit properties

Add properties to control the maximum email body size allowed for inbound and outbound email messages.

Properties

By default, the system processes up to 524,000 characters in the email **body** and **body_text** fields.

You can add and configure system properties *glide.email.inbound.max_body_chars* and *glide.email.outbound.max_body_chars* to increase or decrease the email body size limits. The system truncates the email body when it exceeds the configured limit. For example, if you configure the body size limit of *glide.email.inbound.max_body_chars* to 1,000 characters but receive an inbound email that is 2,000 characters, then the system truncates the email body at 1,000 characters.

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Message body size limit properties

Name	Description
glide.email.inbound.max_body_chars	Sets the maximum body size in characters allowed per inbound email. • Type: integer • Default value: 524288
glide.email.outbound.max_body_chars	Sets the maximum body size in characters allowed per outbound email. • Type: integer • Default value: 524288

Note: A different property, *com.glide.attachment.max_size*, sets the maximum file size allowed for any attachment in the system and overrides any larger values of *glide.email.inbound.max_total_attachment_size_bytes* and *glide.email.outbound.max_total_attachment_size_bytes*.

Inbound email body processing

For inbound emails, the system enforces the maximum body size as set by the *glide.email.inbound.max_body_chars* property. When the body size exceeds the configured value:

- The system does not run inbound email actions that would otherwise be triggered by the email.
- The system truncates the Body text on the Email form.
- The system logs a warning and sets the Error string field on the Email form. The log message for such an email might look like this: `Email set to receive-ignored because its size exceeds the value set in` *glide.email.inbound.max_body_chars*.

Outbound email body processing

For outbound emails, the system enforces the maximum body size as set by the *glide.email.outbound.max_body_chars* property. When the body size exceeds the configured value:

- The system does not send the email.
- The system truncates the Body text on the Email form.
- The system logs a warning and sets the Error string field on the Email form. The log message for such an email might look like this: `Email set to send-ignored because its size exceeds the value set in` *glide.email.outbound.max_body_chars*`. 1337 character(s) were truncated from the body field.`

Related topics

Advanced email properties

Attachment limit properties

Several properties control email attachment limits.

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To see the status of all email attachments, go to the Email Attachments [sys_email_attachment] table.

Properties

All the properties are located in the System Property [sys_properties] table. Setting any of the following properties to an excessively large value may cause performance issues.

Attachment limit properties

Name	Description
glide.email.inbound.max_attachment_count	Sets the maximum number of attachments allowed per inbound email. • Type: integer • Default value: 30 • Learn more: Inbound Email Attachment Processing
glide.email.inbound.max_total_attachment_size_bytes	Sets the maximum total attachment size in bytes allowed per inbound email. • Type: integer • Default value: 18874368 • Learn more: Inbound Email Attachment Processing
glide.email.outbound.max_attachment_count	Sets the maximum number of attachments allowed per outbound email. • Type: integer • Default value: 30 • Learn more: Outbound

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Attachment limit properties (continued)

Name	Description
	Email Attachment Processing
glide.email.outbound.max_total_attachment_size_bytes	Sets the maximum total attachment size in bytes allowed per outbound email. To send an email, the system must encode the contents of the email. This process may significantly increase the size of the email, including any attachments. It is best to set this property to a value well below the maximum email size. • Type: integer • Default value: 18874368 • Learn more: Outbound Email Attachment Processing

Note: A different property, *com.glide.attachment.max_size*, sets the maximum file size allowed for any attachment in the system and overrides any larger values of *glide.email.inbound.max_total_attachment_size_bytes* and *glide.email.outbound.max_total_attachment_size_bytes*.

Inbound email attachment processing

For inbound emails, the system enforces the maximum number and size of attachments as set by the *glide.email.inbound.max_attachment_count* and *glide.email.inbound.max_total_attachment_size_bytes* properties. When an attachment for an inbound email exceeds either value, the attachment is discarded. A record is created in the Email Attachments [sys_email_attachment] table containing the discarded file name and the reason it was discarded. The discarded file remains in the Email [sys_email] record. The order in which the system processes the attachments determines which attachments are discarded. This order may not be consistent from email to email.

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When an inbound email attachment is discarded, the system also fires the *inbound.email_attachments.discarded* event. You can use the event to trigger a notification that alerts the email sender. For an example of a notification that can be triggered by the event, see the inactive "Demo Email Attachment(s) Discarded" notification.

Inbound email attachments are prevented from attaching to the target record if an identical attachment exists.

Outbound email attachment processing

For outbound emails, the system enforces the maximum number and size of attachments as set by the *glide.email.outbound.max_attachment_count* and *glide.email.outbound.max_total_attachment_size_bytes* properties. Email records are created from various sources and may exceed the configured attachment limits.

Emails that are ready to be sent from the Email [sys_email] table are subject to the outbound attachment limits. Emails that exceed either limit trigger a warning in the email system log and are sent with attachments up to the maximum number or total file size.

The log message for such an email might look like this: `Maximum combined attachment size exceeded. (max:15728640 bytes). One or more attachment records ignored.`

Emails for notifications, scheduled reports, and exported tables

Notifications can be set to include all the attachments from the record that triggers the notification. If the attachments exceed either of the outbound email attachment limits, the system excludes the excess attachments from the email and logs a warning message.

Reports can be scheduled for email distribution as attachments. Large reports may exceed the outbound attachment size limit. In this case, the system sends the scheduled report email without the report attached and logs a warning message. To avoid the issue, send links to large reports instead of sending the reports as attachments.

If a user attempts to export numerous records from a list that exceeds a configured warning threshold, a dialog box offers the option to email the exported records as an attachment. If the attachment exceeds the outbound attachment size limit, the system sends the email without the exported record list attached and logs a warning message.

Check the status of bounced email addresses

Choose the email address record that you want to modify, and update the state field as needed.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Logs** > **Bounce Email Addresses**.
2. From the state of the mail address, select the state and choose the desired state to block or unblock the email address

   Important: Before modifying the status, address the reason for the failure of that particular email address.

3. Select the confirm icon () to confirm the status.

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User criteria form

User criteria enables you to allow access to users based on role, department, group, location, or company. Administrators can control access by creating and applying user criteria. User criteria records define conditions that are evaluated against user records. When user criteria is defined, records are only visible to users who pass the defined conditions.

User Criteria form

Field	Description
Name	Name of the user criteria.
Users	Users who can access the quick link when you apply the user criteria. Click the Unlock users icon to select users. Click the Add me icon to add yourself as a user. Click the Add email address icon to add a user's email address.
Groups	Groups who can access the quick link when you apply the user criteria. Click the Unlock Groups icon to select the groups. **Note:** Use Groups instead of the Advanced user criteria to get your data cached.
Roles	Roles who can access the quick link when you apply the user criteria. Click the Unlock Roles icon to select the roles.
Advanced	Option to create a script for the user criteria. **Note:** Use Groups instead of the Advanced user criteria to get your data cached.
Application	This field is automatically set.
Active	Option to activate this user criteria for use.
Companies	Companies who can access the quick link when you apply the user criteria. Click the Unlock Companies icon to select the companies.
Locations	Locations which can access the quick link when you apply the user criteria. Click the Unlock Locations icon to select the locations.
Departments	Departments who can access the quick link when you apply the user criteria. Click the Unlock Departments icon to select the departments.
Match All	Option to make every condition required when the user criteria is applied. The conditions are set in the previous fields, such as Companies, Locations, Departments, and so on.

Granular admin roles for Notifications

Granular admin roles enable organizations to assign specific administrative permissions based on functional responsibilities, replacing broad admin access with targeted role assignments. Use the new admin roles to grant users administrative capability without using the admin role.

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Granular admin roles for Notifications

Role name	Functionality	Description	Plugin
email_bounce_admin	Email Bounce	Provides access to configure email bounce related tables.	com.glide.email.bounce_management
smime_certificate_admin	SMIME	• To install a private key in the KMF module, the user needs the sn_kmf.cryptographic_manager role • To install a CA or Email certificate, the user requires the smime_certificate_admin role • To check SMIME logs, the user must have the email_log_viewer role	com.glide.email.smime
email_log_viewer	Email logs, SMIME logs	Provides access to view email logs and SMIME logs.	com.glide.mailbox
email_digest_admin	Email digest	Provides access to sys_email_digest_part_user and sys_email_digest_part tables.	com.glide.email_digest
notification_classification_admin	Notification classification	Provides access for adding add Notification classification to sys_notification_classification table.	com.glide.notification.classification
notification_category_admin	Notification category	Provides access for adding add Notification category to sys_notification_category table.	com.glide.notification.preference.servic
push_admin	Push credential	Provides access for push_admin to sys_push_instance_credential table.	com.glide.push_proxy
portal_notification_pref_admin	Widget preference	Provides access to sys_recipient_user_mapping table.	com.glide.notification.unify.preference.s

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Granular admin roles for Notifications (continued)

Role name	Functionality	Description	Plugin
notification_admin	Notifications	Provides access to configure notifications through the sysevent_email_action table,with access to the sys_email_layout and sysevent_email_template tables. Additionally,they can set the digest interval. For Request Translation user needs to have localization_requestor role.	com.glide.notification
email_admin	Resend email, Reprocess Email	Provides access to reprocess inbound emails and resend outbound emails. Additionally, to view logs, they must have the email_log_viewer role.	com.glide.mailbox
oauth_admin	Authorize Email Account Access, Test Connection	Provides access to authorize an email account and do test connection. To view logs, they must have the email_log_viewer role.	com.glide.mailbox

System notifications

Set up notifications to alert users of record changes that may concern them. You can notify users via email, SMS text message, push notification, or messaging app.

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Get started

Email and SMS Notifications	Push Notifications	Notifications in Messaging Applications
		
Use email notifications to send selected users email or SMS notifications in the system	Push notifications to mobile devices	Use the Now Actions app to configure the messaging apps for your instance

Troubleshoot and get help

- Troubleshooting Notification emails
- Ask or answer questions in the Platform community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Email and SMS notifications

Use email notifications to send selected users email or SMS notifications about specific activities in the system, such as updates to incidents or change requests.

Important: Service providers such as AT&T and Verizon may soon be deprecating the **email-to-text** functionality. See Using Notify with SMS for SMS delivery.

Email notifications allow administrators to specify:

- When to send the notification
- Who receives the notification
- What content is in the notification
- Whether the notification can be delivered in an email digest and if so, the digest content

Additional email notification options are available. You can subscribe to notifications, and administrators can make some notifications mandatory.

Administrators also have the option of converting existing email notifications to a rich HTML format. This format provides several advantages, including:

- Raw HTML content is converted into a WYSIWYG format.
- The content can be edited in a feature-rich HTML editor.
- Mail scripts are condensed into a single, easy-to-read line that can be reused in multiple email notifications.
- To avoid broken links, items like images and incidents, that are linked with URLs relative to an instance are converted to absolute links. For example, if an incident is linked using a relative URL, the link is converted to an absolute link.

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Note: The rich HTML format is the default for all new email notifications.

Note: Instances can't send or receive encrypted email messages. The system strips out the body of the encrypted email because it can't process the encrypted content in plain text or HTML.

An email notification can also send as an SMS notification if the recipient has subscribed to the notification on an SMS channel. The system uses the subject line of the email notification and converts it to an SMS message. If the administrator doesn't want to use the email notification subject for the SMS notification, they can define an alternate SMS message in the email template form or email notification form. For more information, see Create an email notification.

For more information on creating an SMS channel, see Create notification channels.

For more information on setting up SMS notification see KB0712569.

If you want to change how the instance processes incoming email, see Inbound email actions. See System email log and mailboxes for examples of messages the system displays when notifications or inbound email actions aren't processed.

Create notification categories

You can create notification categories to identify and group related notifications that are listed in the notification settings for your users.

Before you begin
Role required: admin

About this task
Before adding new categories, review the base system notification categories in the Notification Categories [sys_notification_category] table to determine if you need a new category.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notification Categories**.
2. Select **New**.
3. Enter the **Name** of the category to identify the family of notifications.
   Provide a category name that is meaningful to your users, so that they can easily find their notifications under the appropriate category in their notification settings.
4. Enter a **Short description** to identify the category.
5. Select **Submit**.

Result
The system adds the new category to the Notification Categories [sys_notification_category] table. After you create at least one, active notification that uses the new category, the category and notification are listed in the Notification preferences for users (**User Menu** > **Preferences** > **Notifications** > **System Notifications**).

Create an email notification

Create an email notification specifying when to send it, who receives it, what it contains, and if it can be delivered in an email digest.

Before you begin
Role required: admin
Consider the following items when you create or update a notification:

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- Your notification recipients must be active users and have a valid email address defined.

  ServiceNow users or members of groups must be defined as active users in the User [sys_user] table. They must also have a valid email address defined for their primary channel (device) in the Notification Device [cmn_notif_device] table. If users don't have an active profile and a valid email address, the notifications won't be received.

- Your notification recipients must have the appropriate notification preferences enabled.

  If the notification is subscribable, each ServiceNow user or group member must have the notification and channels (devices) for the notification enabled in their notification preferences. Admins can impersonate users to review and configure their notification preferences.

- To have your email notification also send as an SMS notification, recipients must subscribe to the notification on an SMS channel. For more information on creating an SMS channel, see Create notification channels.
- After you create or update the notification, use the **Preview Notification** option to examine it. For example, you can test links that you may have added and verify the notification recipients. For details, see Preview email notifications.
- For information on operators available for filters and queries, see Operators available for filters and queries.

About this task

Watch the video to learn about the actions that the instance can take in response to messages from users and shows how to create or modify email notifications to users.

https://player.vimeo.com/video/995190091?badge=0&autopause=0&player_id=0&app_id=58479

Use the following tabs in the Notification form to configure an email notification:

- **When to send** — Conditions required to send the notification.
- **Who will receive** — Recipients of the notification.
- **What it will contain** — Contents of the notification.
- **What Digest will contain** — Contents of the email digest if the notification can be delivered in a digest.

Note: If you don't see all the fields on the form, switch to the **Advanced** view.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Select **New**.
3. Fill in the fields at the top of the Notification form, as appropriate.

Field	Description
Name	Enter a unique name for the email notification. Descriptive names help identify the purpose of the email notification. For example, Incident Opened & Unassigned.
Table	Select the database table to link the notification to, for example Incident [incident].

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Field	Description
	Important: Don't select the Task [task] table. This table is for extending other tables. Notifications that run on the Task table directly aren't supported. **Note:** Only tables and database views that are in the same application scope appear in the list.
Type	Select the type of notification that you're creating: EMAIL or Meeting Invitation.
Active	Select the check box to enable the email notification.
Category	Select the category to which this notification belongs. A category identifies and groups related notifications. This notification, if active and subscribable, is listed in the selected **Category** in the notification preferences for each user (**Notifications** tab in the System Settings window). **Note:** Don't leave the category as **Uncategorized**, as users may not be able to find the notification in their list of notifications. If you need a new category, see Create notification categories.
Allow Digest	Select the check box if an email digest is to be created for the notification. If selected, the **What Digest will contain** tab is displayed for creating the digest content.
Description	Type a description for this notification.

4. Fill in the fields on the **When to send** tab.

Note: If the same trigger generates multiple notifications, the system only sends one notification. The system considers all other notifications, even if they have a different subject and body, as duplicates. The Ignore Duplicates business rule controls this functionality.

Field	Description
Send when	Select under what condition that the notification is sent: ○ When a record is inserted or updated ○ When a particular event is fired ○ When Notification step in Flow Designer
Weight	[Required] Set a numerical value for the notification priority relative to duplicate notifications. Notifications that have the same target table and recipients are considered duplicates if the weights are different. If weights are same, an additional evaluation is done to check if the subject and the body (excluding watermark) are same to qualify as duplicate notification. When there are duplicate notifications, the system only sends the notification with the highest weight. All other notifications are moved from the Outbox to the Skipped mailbox. The default value 0 causes the system to send the notification (assuming the conditions are met).

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Field	Description
	For example, suppose that a service desk agent adds a comment to an incident and shortly thereafter closes it. By default, these actions trigger both the Incident commented and Incident Closed notifications. However, both notifications are from the Incident table and also notify the incident caller. The system only sends the notification with the highest weight, which in this case is the Incident Closed notification. **Note:** The SMTP Sender scheduled job determines how often to send email. By default, this job runs every minute.
Conditions	Use the condition builder to select the conditions under which this notification is sent. For example, select **Priority** > **greater than** > **3 - Moderate** to send the notification only for High and Critical priority incidents.
Inserted	Select the check box to enable email notification when a record is inserted. This field appears when you set the **Send when** field to **Record inserted or updated**.
Updated	Select the check box to enable email notification when a record is updated. This field appears when you set the **Send when** field to **Record inserted or updated**.
Event name	Select the event that triggers this notification. This field appears when you set the **Send when** field to **Event is fired**.
Advanced condition	Create a script to perform certain actions, like sending a notification based on the current email record, changing field values, or changing system properties. The advanced condition script must return **true** or set a global answer variable to **true** to send the notification. The advanced condition script uses the following global variables: ○ *current*: Contains the current record from the table to which the notification is linked. ○ *event*: Contains the event that triggered the notification. **Note:** The **Advanced condition** field is evaluated in addition to other conditions that you set on the notification. Both the condition and advanced condition must evaluate to true to send the notification.

5. Fill in the fields on the **Who will receive** tab.

   The following example shows the default view of the tab. The advanced view contains additional fields (see table).

   Tip: Consider limiting the recipient list of any notification to 1000 users. By default, if a notification has more than 100 intended recipients, the system creates multiple notification messages with up to 100 recipients each. If you want to change the recipient limit, set the system property *glide.email.smtp.max_recipients*.

Field	Description
Users	Select the users that you want to receive the email notification. You can search for users with the reference lookup icon or manually add their email addresses. This list of users is static.

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Field	Description
Users/ groups in fields	Select fields from the target record that reference the User [sys_user] or Group [sys_user_group] tables. The system sends the notification to users or groups in each field that you select. For example, if a notification uses the Incident [incident] table, you can select the **Opened by** field to send the notification to users or groups who opened the incident. This list of users or groups is variable and depends upon the values of the associated task record. You can also select a field that includes an email address string to send a notification to that address. **Note:** You can dot-walk to values in reference fields by selecting the plus sign in the field selector and then selecting the related field. If you address the notification to a user with an inactive record in the User [sys_user] table, the system doesn't send the notification to that user.
Groups	Select the groups that you want to receive the email notification from. You can search for groups with the reference lookup icon or by manually entering the group name. This list of groups is static. **Note:** Group members receive individual notifications only if **Include members** is selected in the group record.
Exclude delegates	Select this option to help prevent the instance from sending email notifications to delegates of the users and members of the groups you selected.
Send to event creator	Select this check box to send the notification to the person who performed the action that started the notification process if the person is also a recipient. If the event creator isn't specified in one of the recipient fields, the event creator doesn't receive a notification regardless of the setting in this field. For new notifications, this option is selected by default. If you want to know why you may not be receiving certain email notifications, see the blog post Troubleshooting email notifications- Send to the Event Creator by a ServiceNow Technical Support Engineer in the ServiceNow Community.
Event parm 1 contains recipient	Select this check box if the event parameter 1 contains one or more notification recipients (in a comma separated-list). This field is visible only when the **Send when** field is set to **Event is fired**.
Event parm 2 contains recipient	Select this check box if the event parameter 2 contains one or more notification recipients (in a comma-separated list). This field is visible only when the **Send when** field is set to **Event is fired**.
Subscribable	Select this check box to enable all users to subscribe to this notification. See Subscription-based notifications for more information. **Note:** If the record contains sensitive or protected data, consider restricting the recipient list only to those users and groups who normally have access to it, and don't enable the **Subscribable** option. You can also configure your notification content so that private or sensitive data isn't exposed. For example, you could insert a link back to the associated record, so that details aren't revealed in the notification.

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The system doesn't exclude recipients based on access controls. Recipients can receive email about records that they can't normally access from the user interface. For example, requesters can receive email about incidents and catalog requests opened on their behalf even though they normally don't have access to these records. If a notification includes the record details, verify that all recipients need these details.

Note: By default, the system doesn't send email notifications to itself. For example, an email notification from instanceABC@service-now.com doesn't send to instanceABC@service-now.com. The system helps prevent this behavior to avoid looping.

6. Fill in the fields on the **What it will contain** tab.
The following example shows the default view of the tab. The advanced view contains additional fields (see table).

Field	Description
Email template	If you want to reuse existing content, select an email template to add content to the email notification. You can only select an email template that meets one of the following conditions: ○ shares the same scope and table as the notification ○ shares the same scope but has no specified table ○ shares the same table and is in the global scope
Subject	Enter the subject line for the email message. The subject can include variables from the **Select variables** column. If empty, the system uses the **Subject** value from the **Email template**. If you enter a value in this field, it overrides the template value. If your recipients subscribe to the email notification on an SMS channel, then the system sends the email notification subject as an SMS message. To send a different SMS message, fill in the **SMS alternate** field on the email template form or the email notification form.
Message HTML	Enter the content of the email notification message. The message can include variables from the **Select variables** column. Variables map to column names available from the notification table, its parent tables, and reference tables. Use variables to include values from a record in the table such as an incident short description or comments and work notes. The **Message HTML** field is visible only if you set the content type to **HTML and plain text** or **HTML only**. If empty, the system uses the **Message HTML** value from the **Email template**. If you enter a value in this field, it overrides the template value. To avoid adding extra `<p>` and `<div>` elements to your email notifications, see the blog post Extra line spacing with paragraph tags in email client by a ServiceNow employee in the ServiceNow Community.
SMS alternate	Enter the notification message to send to an SMS device. The SMS alternate message is limited to 140 characters.

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Field	Description
	If empty, the system uses the **SMS alternate** value from the **Email template**. If you enter a value in this field, it overrides the template value. If you don't fill in the **SMS alternate** field on this form or the email template, then the system uses the email notification subject as the SMS message.
Importance	Set the importance of the email message to low or high.
Content type	Select the content type for the email notification: ○ HTML and plain text ○ HTML only ○ Plain text only By default, **HTML only** is enabled.
Include attachments	Select this check box to send all attachments from the triggering record as email attachments.
Omit watermark	Use this check box to apply or remove the watermark attached to each email. If the email doesn't contain a watermark, the system reviews the conditions of the inbound actions to create or update task records. For more information, and an alternative way to hide watermarks, see Watermarks on notification emails.
Message Text	Enter the notification message to send in plain text. This field appears when you set the content type to **HTML and plain text** or **Plain text only**. If empty, the system uses the **Message Text** value from the **Email template**. If you enter a value in this field, it overrides the template value.
From	Enter the email address that you want the email notification to use in the From field. For example, helpdesk@yourcompany.com. The email must be in a valid format, otherwise a notification message appears near the field. Changing this address may require an advanced email setup such as enabling email forwarding, for example when using Sender Policy Framework (SPF) records for spam detection.
Reply to	Enter the email address that you want people to use when replying to the email notification. For example, helpdesk@yourcompany.com. The email must be in a valid format, otherwise a notification message appears near the field. You can add no more than one email address in this field. Changing this address requires an advanced email setup such as enabling email forwarding.
Push message only	Select this option to send this notification only as a push notification to a mobile device. The Push Notification feature must be active.
Push messages	Associate one or more push messages with this notification. The Push Notification feature must be active. **Note:** The push message and notification must be for the same table.

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7. If you selected the **Allow Digest**check box, fill in the fields on the **What Digest will contain** tab to create the email digest content for the notification.
The following example shows the default view of the tab. The advanced view contains additional fields (see table).

Field	Description
Digest Template	If you want to reuse existing content, such as headers or footers, select an email template to add content to the email digest.
Digest Subject	Enter the subject line for the email digest. The subject can include variables from the **Select variables** column. If empty, the system uses the **Subject** value from the **Email template**. If you enter a value in this field, it overrides the template value.
Digest HTML	Enter the recurring content for the email digest. The digest content can include variables from the **Select variables** column. Variables map to column names available from the notification table, its parent tables, and reference tables. Use variables to include values from a record in the table such as an incident short description or comments and work notes. To avoid adding extra `<p>` and `<div>` elements to your email digest, see the blog post Extra line spacing with paragraph tags in email client by a ServiceNow employee in the ServiceNow Community.
Digest Separator (HTML)	Use the line to separate each item summarized in the digest.
Digest From	Enter the email address to be used in the From field of the email digest. For example, helpdesk@yourcompany.com. The email address must be in a valid format, otherwise a notification message appears near the field. Changing this address requires an advanced email setup such as enabling email forwarding.
Digest Reply To	Enter the email address that you want people to use when replying to the email digest. For example, helpdesk@yourcompany.com. The email must be in a valid format, otherwise a notification message appears near the field. Changing this address requires an advanced email setup such as enabling email forwarding.
Digest Text	Enter the recurring content of the email digest to send in plain text. This field appears when you set the content type to **HTML and plain text** or **Plain text only**.
Digest Separator (text)	[Optional] Use the dash character as a line to separate each item summarized in the digest. This field appears when you set the content type to **HTML and plain text** or **Plain text only**.

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When you save or update the notification, the email **Digest**option is available for the notification in the notification settings of your users.

8. When you finish creating the notification, select **Submit** or, if you're done modifying the notification, select **Update**.

What to do next

Use the **Preview Notification** option to check your notification, for example, you can see:

- How the **Subject** and **Message** fields are displayed.
- Which users will or won't receive the notification, including the reasons why the users won't receive it.

Convert legacy email notifications to rich HTML

By default, new email notifications are created in the rich HTML format. But you can also convert legacy notifications to rich HTML.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. On the **Email Notifications** list screen, click the name of the email notification you want to convert.
3. Click the **What it will contain** tab.
4. Click **Switch to Rich HTML Editor**.

The system copies any raw HTML from the **Message** field and converts it to rich HTML in the **Message HTML** field. Additionally, any mail scripts in the body are automatically saved to the Email Script `[sys_script_email]` table and are replaced in the notification body with an embedded script tag. This makes the notification body easier to read.

Note: The string "div" at the bottom of the screen shows the location of your cursor within the **Message HTML** field. In this case, the cursor is in a line containing an HTML `<div>` tag.

What to do next

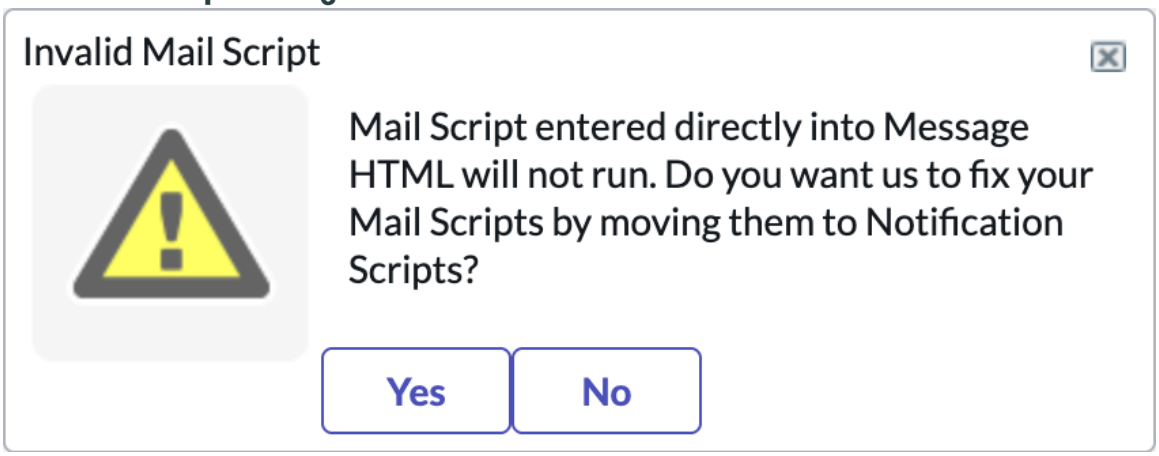
When you convert an email notification that was created in a version prior to Eureka to rich HTML, mail scripts are automatically moved to the Email Script [sys_script_email] table and an embedded script tag with the name of the script is automatically inserted into the body of the notification.

When creating new email notifications, write mail scripts using **System Notification** > **Email** > **Notification Email Scripts**. When the scripts are completed, add a `${mail_script:script name}` embedded script tag to the email notification body. This makes it easy to use the same scripts in multiple email notifications. All you need to copy and paste from one notification to the next is the embedded script tag.

If you manually enter a mail script, any text bounded by `<mail_script> </mail_script>` in the body of a new or converted email notification or template which is saved to the record, a message asks whether the mail script should be converted.

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Invalid mail script message



In many cases, an unconverted mail script fails to run from inside the HTML editor. If you select **Yes**, the script is added to the Email Script [sys_script_email] table and is automatically replaced in the body with an embedded script tag. You can view the mail scripts in their original form by opening the email notification and clicking the **Show Notification Scripts** related link.

Control visibility to email records generated by notifications

Define conditions that restrict read access to target email records containing sensitive information.

Before you begin

Role required: admin

About this task

Use the Email Access Restriction [email_access_restriction] table to define conditions that control read access to an email record generated by a notification containing sensitive information. These conditions are processed by the base system ACL for the Email [sys_email] table.

When you specify conditions to restrict access for a notification, the email records are visible only to users that match the conditions specified for the notification.

Procedure

1. Navigate to **All** > **System Notification** > **Email Access Restriction**.
2. Click **New**.
3. Complete the form.

Field	Description
Notification	Choose the notification that generates the email record that should be restricted.
Application	Displays the application scope.
Table	Displays the target table for the notification that you selected.
Condition	Use the condition builder to determine who can access the email record. The conditions must evaluate to true to enable read access to the email record.

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Field	Description
Description	Enter a short description of the read access restriction.

4. Click **Submit**.

Advanced conditions for email notifications

Use an advanced condition to send a notification based on the current email record, changing field values, or system properties.

To send a notification using an advanced condition, you can:

- Call a function that returns a value, or
- Set the global variable `answer` using a script

For example, in the following code, you call a function to prevent the system from sending an email notification if the sender of a self-service request is a member of the XYZ group:

```
(function() {
  var groupMember = gs.getUser();
  return !groupMember.isMemberOf('XYZ');
})();
```

Alternatively, you can script the same advanced condition by using the `answer` variable:

```
var groupMember = gs.getUser();
  if(groupMember.isMemberOf('XYZ')){
    answer = false;
  } else {
    answer = true;
  };
```

Note that the script must set the `answer` variable to **true** to send the notification. If you script no conditionals, the value of `answer` is equal to the last value that you set for the variable.

You can add a script-based condition in the **Advanced condition** field by configuring the Email Notification form and adding the field. You can access the field in the **Advanced** view without configuring the form.

The advanced condition script uses the following business rule global variables:

- current: contains the current record from the table to which the notification is linked.
- event: contains the event that triggered the notification.

Note: The **Advanced condition** field is evaluated in addition to other conditions you set on the notification. Both the **Condition** and **Advanced condition** must evaluate to true in order to send the notification.

Related topics

Create an email notification

Edit HTML content in an email notification

For added control over the content of an email notification, you can edit the underlying HTML.

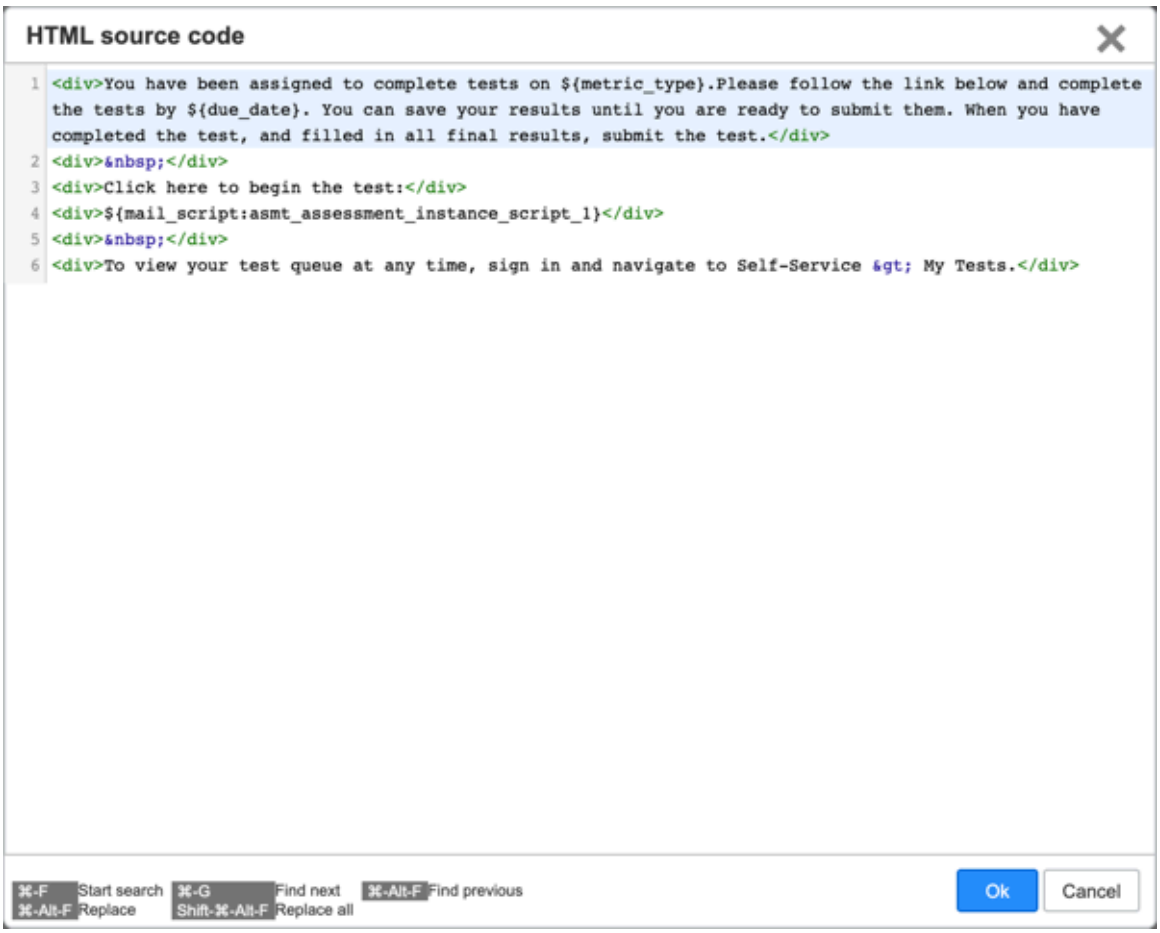
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Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Open an email notification record.
3. On the form, open the **What it will contain** tab.
4. In the **Message HTML** field, click the source code icon (< >) to open the HTML source code editor.



5. Make the needed changes to the HTML.
6. On the window, click **Ok**.
7. On the form, click **Update**.

Document attachments on an email notification

You can attach documents and reports to email notifications by scripting or linking to the sys ID of the record.

You can include all attachments from the source record with the notification. For example, if an incident update generates a notification, you can include all attachments from the incident record with the notification. To include all attachments from the source record, go to **Advance view** and select the check box for the **Include attachments** under **What will it contain** tab. The email messages, including attachments, cannot exceed the maximum email size. This size includes MIME encoding. For details on MIME encoding, see Email service size restrictions.

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Attaching documents with scripting

Using scripting, you can attach documents by linking to them, or you can attach various types of reports by specifying their IDs in the system.

Linking to an attachment

You can add an attachment to a notification by linking to the attachment record in the message of the notification. Upon clicking the link, email recipients log in to the instance to view the attachment record.

Linking to attachment records in this fashion requires using email notification scripting. For example:

```
template.print ( 'Attachment: <a
 href="/sys_attachment.do?sys_id=' + now_GR. sys_id + '">' +
 now_GR. file_name + '</a>\n ' ) ;
```

Attaching reports using the Sys ID

You can also attach various types of reports, including gauges, dashboards, and charts, to a notification. The scripts to attach these reports take the following syntax:

```
${report:X:Y}
```

where:

X is the type of report you want to attach (reportID, gaugeID, dashboardID, or chartID).

Y is the sys ID of the report, gauge, dashboard, or chart to be attached.

For example:

- ${report:reportID:<abc123>}
- ${report:gaugeID:<abc123>}
- ${report:dashboardID:<abc123>}
- ${report:chartID:<abc123>}

Note: Multilevel pivot reports can't attach to email notifications.

Line breaks in email notifications and rich HTML

Rich HTML provides additional control over line breaks in your email notifications and templates.

To provide control over line breaks, a **Newlines to HTML** check box is available in the **Email Script** form.

Selecting the **Newlines to HTML** check box indicates that the method for handling line breaks in earlier versions carries forward for email notifications and templates. When an email notification or template is converted to rich HTML, the **Newlines to HTML** check box is automatically selected.

For new mail scripts, add correct HTML line breaks to template.print() statements.

If an email notification or template is not converted to rich HTML, newlines are automatically wrapped with tags, the same as previous versions. The old mail scripts still work. However, the administrator does not enjoy the benefits of working in the rich HTML format, and does not have as much control over exact HTML formatting.

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HTML line breaks in new scripts

When writing new scripts, insert explicit HTML line breaks and clear the **Newlines to HTML** check box so that no HTML tags are injected when email notifications are generated. For existing notifications and templates, replace template.print("\n") JavaScript function calls with template.print("
"). This replacement gives you better control over the HTML formatting of your email notifications.

Preview email notifications

You can preview what notifications look like before you actually enable the instance to send them.

Before you begin

Role required: admin

About this task

You can preview both types of notifications as specified by the **Send when** field on the Notification form:

- **Record inserted or updated**: A change to record in the instance triggers the notification.
- **Event is fired**: An event, such as the expiration of a certificate or an inbound email action, triggers the notification.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Open the notification or create one.
   You must save the record before you can view the preview accurately.
3. Click **Preview Notification** on the form header.
4. On the Notification Preview window, verify that the notification works as expected.

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Field	Description
Preview records for this breakdown source	The type of event that triggers the notification. This list appears if you preview an event-triggered notification. Select one of the following: ○ **Generated Event**: Preview the notification with a generic event that the previewer creates. This does not actually generate an event record. ○ **Existing Event**: Preview with an existing event record in the instance. If you select this option, select the event in the **Event Record** field.
Event Record	An existing event to preview an event-created notification. This option appears if you select **Existing Event** as the event type (for event-triggered notifications only).
Event Creator	The user triggering the notification for the preview. The event creator defaults to the user who clicked **Preview Notification**. You can change the creator as needed. You can change the preview record as needed to see the changes in the notification content.
Preview Record	The record triggering the notification for preview. The preview record defaults to one of the records in the table specified in the **Table** field on the Email Notification form. You can change the preview record as needed to see the changes in the notification content.
Users	The users who will receive the notification, as specified in the **Who will receive** section of the Email Notification form: ○ All users that you specify on the form appear, but only the users that will actually receive the notification with the current preview settings appear in black text. ○ Users that are specified but for whatever reason will not receive the notification appear in red, strikethrough text. Place the cursor over any of these names to see the reason the user will not receive the notification. For example, one reason could be that the user's notification settings are turned off.
Subject and Body	The content of the notification as defined by the template. The **Subject** and **Body** sections on the preview display the content in the corresponding **Subject** and **Message** fields on the template. If the template includes a link to the record that triggered the notification, the **Preview Record** link is used. Click the link to go to that record.

5. After you have reviewed the notification, exit the preview window.
6. Make the necessary changes to the notification or template, if necessary.

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Time zone for email notifications

A system property controls the time zone that the instance uses for the date and time stamp of a message.

The date and time stamp of a notification uses the system time zone, not the time zone of any recipient. The email property `glide.email.append.timezone` controls whether to append the time zone. If true, the system time zone of the instance is appended to any Date/Time fields in outbound email messages (for example, 2018-07-02 04:01:14 PST).

Specify alternative outbound email addresses for notifications

By default, the system sends all outbound email notifications from the default email address of the instance, but you can specify an alternative address.

Before you begin

Role required: admin

About this task

For organizations that need to send email messages from specific email addresses, such as from multiple service desks, or they want to send notifications in different languages, the platform supports configuring multiple outbound addresses.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Select an existing notification record for the desired event, such as **Incident Closed**.
3. Create a copy of this notification for each outbound email address.
4. Open one of the notification copies, and click the **Advanced view** related link.
5. In the **What it will contain** section, add an email address to the From field that is different from the default instance address.
   For more information on how to construct the From address, refer to section 3.6.2 of RFC 2822.
6. Add a different email address than the**From** address to the **Reply to** field if you want replies to this notification to go to a different address.

   The system checks the **From** field for an address. If this field is empty, then the system uses the default address for the instance. If the **Reply to** field is empty, then all replies are sent to the address from which the notification was sent. If the **Reply to** field contains an email address, then the system sends all replies to the notification to this address.
7. Create mutually-exclusive conditions for notifications of the same type, so only the desired notification is sent when the event is fired.

   For example, if the **Company** is a certain value, then the notification comes from a unique email address entered in the **From** field.
8. Click **Update**.

Specify an outbound email address for a particular language

You can specify a different email address for each language your instance supports.

Before you begin

Role required: admin

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Procedure

1. Create or copy a notification record for the desired event.
2. In the **What will it contain** section, enter a new email address in the **From** field.
3. Create the **Subject** and **Message** content in the desired language.
4. In the **When to send** section, create a condition as follows:
   a. In the list of **Condition** fields, select **Show Related Fields** from the bottom of the choice list.
   b. From the choice list of **Related Fields**, select the field that identifies the recipient.

      For example, select **Caller** > **User** fields to send the notification to the user who called in an incident, or **Assigned to** > **User** fields to send the notification to the user to whom an incident is assigned.

   c. From the choice list of user fields, select **Language**.
   d. Select the **is** operator.
   e. Complete the condition by selecting the language of the desired user.
5. Click **Update**.
   All notifications for that event originate from the specified email address and go out in the language of the recipient.

Notification variables

Use notification variables to display dynamic information in the body of a notification such as a field value, a link to a record, or a link to system preferences.

Syntax

Specify a notification variable using this syntax:

```
${variable-name+variable-parameters}
```

The *variable-name* portion is always required. Not all notification variables support the *variable-parameters* portion. When available, most variable parameters are optional. See the list of available notification variables for variable names and available parameters.

Available variables

The system provides these notification variables.

Available notification variables

Variable	Description	Available parameters
${field-name}	Display the value of the specified field.	None
${image-field-name}	Display an image associated with a record. This variable is typically used with HTML to specify the source of an image element.	None

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Available notification variables (continued)

Variable	Description	Available parameters
• ${URI} • ${URI_REF}	Display a link to the current record. • *URI*: The link text is the word `LINK`. • *URI_REF*: The link text is the display value of the record. **Note:** These variables don't apply to records in Workspace. To link to a record in Workspace, create a mail script that prints a URL to a notification. For more information, see Linking to a record in Workspace.	Any valid *sysparm* URL parameter. For example: • sysparm_scriptlet • sysparm_view
• ${`reference-field`.URI} • ${`reference-field`.URI_REF}	Display a link to the record listed in a reference field. • *URI*: The link text is the word `LINK` • *URI_REF*: The link text is the display value of the record.	Any valid *sysparm* URL parameter. For example: • sysparm_scriptlet • sysparm_view
${CMS_URI}	Display a link to the specified record within a CMS page.	*<CMS-site>/<CMS-page>*: The required relative path to the CMS page.
${notification:body}	Display the body contents of an email template or email notification. Use this notification variable to specify where to display body content in an email layout.	None
${mail_script:`script-name`}	Run the specified mail script.	None
${NOTIF_UNSUB}	Display a link unsubscribe from this notification.	*link_text*: specify the text to display as a link within quotation marks.
${NOTIF_PREFS}	Display a link to set notification preferences.	*link_text*: specify the text to display as a link within quotation marks.
${comments:n}	Display the most recent comments that were made on the target record. The number of comments to display is n. For example, ${`comments:3`} displays the last three comments that were made to the record. To display all comments, use the variable ${`comments`}.	Any number greater than 0.

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Available notification variables (continued)

Variable	Description	Available parameters
${comments_and_work_notes:n}	Display the most recent comments and work notes that were made on the target record. The number of comments and work notes to display is n. For example, `${comments_and_work_notes:3}` displays the last three comments and work notes that were made to the record. To display all comments and work notes, use the variable `${comments_and_work_notes}`.	Any number greater than 0.

Examples

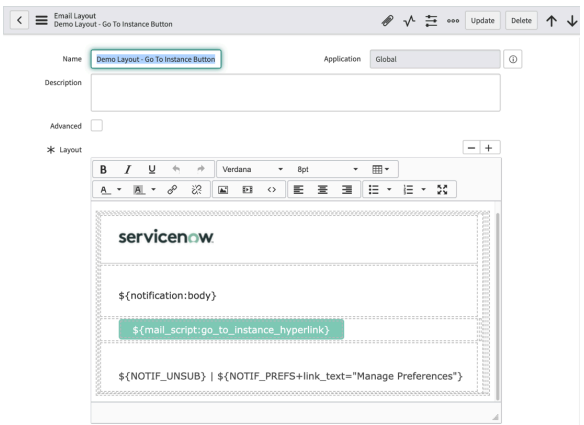
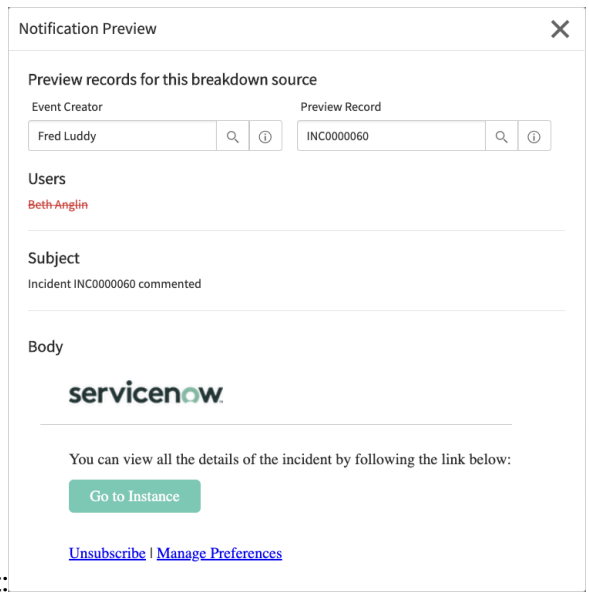
Refer to the following examples to see how each notification variable is rendered in the output:

Variable	Example
`${field-name}`	Source: `Incident ${number} - comments added` Output: `Incident INC1000001 - comments added`
`${image-field-name}`	Source: `<img src='${picture}?t=medium'/>`  Output:
• ${URI} • ${URI_REF}	${URI} Source: `Click here to view incident: ${URI}` ${URI} Output: Click here to view incident: LINK

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Variable	Example
	${URI_REF} Source: `Click here to view incident: ${URI_REF}` ${URI_REF} Output: Click here to view incident: INC0000055

• `${reference-field.URI}`
• `${reference-field.URI_REF}`
	Source:
	`Click here to view Incident: ${URI_REF}`
	`Click here to view Related Problem: ${problem_id.URI_REF}`
	
	Output: Click here to view Incident: INC0010002
	Click here to view Related Problem: PRB0040001

${CMS_URI}	Source: `${CMS_URI+ess/incident_detail}` Output: a link to a target CMS page such as `https://<instance name>.service-now.com/ess/incident_detail.do?sysparm_document_key=incident,46e18c0fa9fe19810066a0083f76bd56`
${notification:body} ${mail_script:`script-name`} ${NOTIF_UNSUB} ${NOTIF_PREFS}	Source:  Output: 

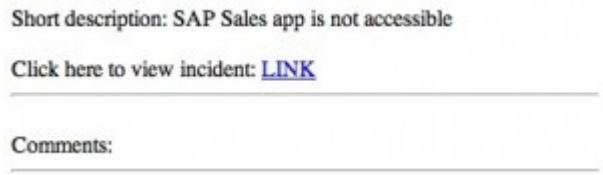
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Links to records in email notifications

Adding the *${URI}* parameter to an outbound email body or template creates a link to a specific record.

When a user clicks the word LINK, the instance prompts the user to log in if not already logged in, and then redirects the user to the record specified in the URI.

Link displayed by ${URI} parameter



The ${URI} parameter has an extension called the ${URI+} format to specify additional arguments in the email link, such as sysparm terms, in addition to the automatically created URI. For example (whitespace added for improved readability):

```
${URI+&sysparm_scriptlet=current.assigned_to=gs.getUserID()
&sysparm_scriptlet_condition=current.assigned_to.nil()
&sysparm_view=incident_active}
```

This example executes the JavaScript:

```
current.assigned_to=gs.getUserID()
```

when the condition of

```
current.assigned_to.nil()
```

is satisfied. Additionally, the script sets the view to `incident_active`.

Linking to a record in Workspace

The `${URI}` and `${URI_REF}` variables don't apply to records in Workspace. To link to a record in Workspace, create a mail script and reference it in your notification. For more information on using mail scripts, see JavaScript in emails.

The mail script that you create should print a URL to the notification. The URL must have the following format:

```
https://<instance_name>/now/workspace/<workspace_name>/record/<table_name>/<sys_id>
```

The following example script shows the logic that a mail script must include to create a link to a record in Workspace.

```
// Dynamically construct an Agent Workspace URL and insert a
 link in the notification
  var agentURL = '<a href="' +
 gs.getProperty('glide.servlet.uri') +
 '/now/workspace/agent/record/'+ current.getTableName() + '/' +
 current.sys_id + '">' + current.number + '</a>';
  template.print(agentURL + "<br />");
```

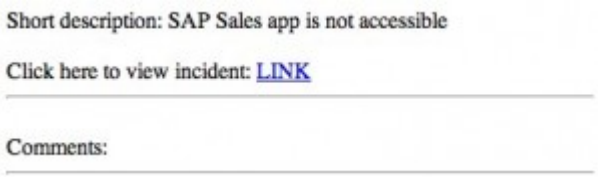
Enable links to records

Adding the special *${URI}* parameter to an outbound email body or template creates a link to a specific record.

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When a user clicks the word **LINK**, the instance prompts the user to log in if not already logged in, and then redirects the user to the record specified in the URI.

URI email notification



The *${URI}* parameter has an extension called the *${URI+}* format to specify additional arguments in the email link, such as sysparm terms, in addition to the automatically created URI. For example (whitespace added for improved readability):

```
${URI+&sysparm_scriptlet=current.assigned_to=gs.getUserID()
&sysparm_scriptlet_condition=current.assigned_to.nil()
&sysparm_view=incident_active}
```

This example executes the JavaScript:

```
current.assigned_to=gs.getUserID()
```

The JavasScript is executed when the condition is satisfied:

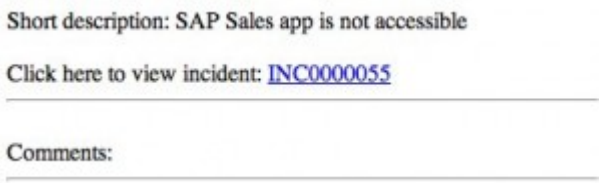
```
current.assigned_to.nil()
```

Additionally, the script sets the view to *incident_active*.

Change the link text

To show the display value of the record as the link text instead of the word LINK, use the ${URI_REF} parameter instead of the ${URI} parameter.

URI_REF email notification



For example, if the URL displays an incident record, the link text is the incident number, which is the display value for incidents. If the URL displays a user record, then the link text is the user name.

Link to related records

A notification can link to a related record by specifying a reference field in front of the *${URI}* or *${URI_REF}* parameters.

Format the related record link as follows:

- `${<reference field that contains the related record you want to display>.URI}`
- `${<reference field that contains the related record you want to display>.URI_REF}`

For example:

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Related records

Related record to provide link to	Notification record table	Reference field	Samples
Related task record to be approved from an approval notification	Approval [sysapproval_approver]	Approval for [sysapproval]	• ${sysapproval.URI} • ${sysapproval.URI_REF}
Related problem record in an incident notification	Incident	Problem [problem_id]	• ${problem_id.URI} • ${problem_id.URI_REF}

For example, the following notification template produces the email links in the picture below:

```
Click here to view Incident: ${URI_REF}
Click here to view Related Problem: ${problem_id.URI_REF}
```

Related record link

Click here to view Incident: INC0010002
Click here to view Related Problem: PRB0040001

Content page links in email notifications

Links to CMS pages can be put in notifications to make it easy for the reader to access the pages.

The link takes the following format: *${CMS_URI+<site>/<page>}*.

For example, to link the email recipient to a page called Incident in the content site ESS, with the current incident as the target document, use the following format: *${CMS_URI+ess/incident_detail}*

The resulting email URL has this format: `https://<instance name>.service-now.com/ess/incident_detail.do?sysparm_document_key=incident,46e18c0fa9fe19810066a0083f76bd56`

Email unsubscribe links

Administrators can enable your users to stop receiving particular email messages by adding unsubscribe links to notifications.

Note: Base system notifications include unsubscribe and notification preferences links.

The two types of unsubscribe links are:

- An unsubscribe link that creates an email message to the instance.
- An unsubscribe link that opens the notification preferences for the user on the instance.

The available parameter for both of these unsubscribe links is *link_text*, used to specify the text to display as a link within quotation marks.

Available unsubscribe macros

Unsubscribe type	Macro used	Description
Unsubscribe by email	${NOTIF_UNSUB}	The system generates an HTML *mailto* hyperlink. When users select the link, their

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Available unsubscribe macros (continued)

Unsubscribe type	Macro used	Description
(Unauthenticated)		browser or email client creates a preformatted unsubscribe email message to the instance.
Unsubscribe by notification preferences (Authenticated)	${NOTIF_PREFS}	The system generates an instance link directly to the notification preferences for this notification type.

Administrators can add unsubscribe macros to the following notification record types:

- Email layouts
- Email templates
- Email notifications

Unsubscribe by email

You can enable users to unsubscribe from emails either by using the list unsubscribe header or a preformatted email message.

- **Unsubscribe using list unsubscribe header**

  Unsubscribing from email notification using the list unsubscribe header provides users with an unsubscribe link that appears next to the email address. It sends an unsubscribe request and a preformatted email message is automatically sent.

  Note: The unsubscribe option or the placement of the button can vary based on the email client being used.

- **Unsubscribe with preformatted email message**

  Unsubscribing by email requires the user email client or browser to create a preformatted email message containing the following elements:

  - The **To** field includes the email address of the instance.
  - The **Subject** starts with the string **Unsubscribe from**.
  - The **Body** has a JSON string with a name-value pair consisting of *`Unsubscribe`* and an array value that contains two more name-value pairs.
    - The *`notification_id`* parameter specifies the sys_id of the notification that the user wants to unsubscribe from.
    - The *`unsub_token`* parameter specifies an instance ID that the system uses to verify that the email came from a ServiceNow instance.

Note: Some email clients and web browsers, such as Gmail on Chrome, require extra client configuration to support mailto hyperlinks. Administrators can provide an alternative unsubscribe method for users whose email client or browser doesn't support mailto links.

The **Unsubscribe from Notification** inbound action processes the email and unsubscribes the sender from the listed notification. Unsubscribing by email message doesn't require users to authenticate with the instance first.

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For translation-enabled emails, if the unsubscribe option does not work, follow these steps:

1. Create a system property named *glide.email.translation.unsubscribe.prefix* and set it to **true**. Enabling this property adds the prefix **[UNSUB] :** to the preformatted email subject line.
2. Activate the **Unsubscribe from Translated Notifications** inbound email action, or update the existing **Unsubscribe from Notification** inbound email action to include the **[UNSUB] :** prefix in the subject line using conditions or a script.

Note: Users with multiple subscribed email addresses who unsubscribe from the primary email address are automatically unsubscribed from all other email addresses. Unsubscribing through secondary email addresses is supported beginning with the Xanadu release. The request is fulfilled only for that secondary email address.

Unsubscribe by notification preferences

Unsubscribe by notification preferences requires the user's browser to navigate to the notification preferences page on the instance. After logging in, the system displays the notification preferences for this particular notification.

You can set preferences for this notification such as disabling notifications for a particular device and save the notification preferences for changes to take effect.

Example: Unsubscribe links

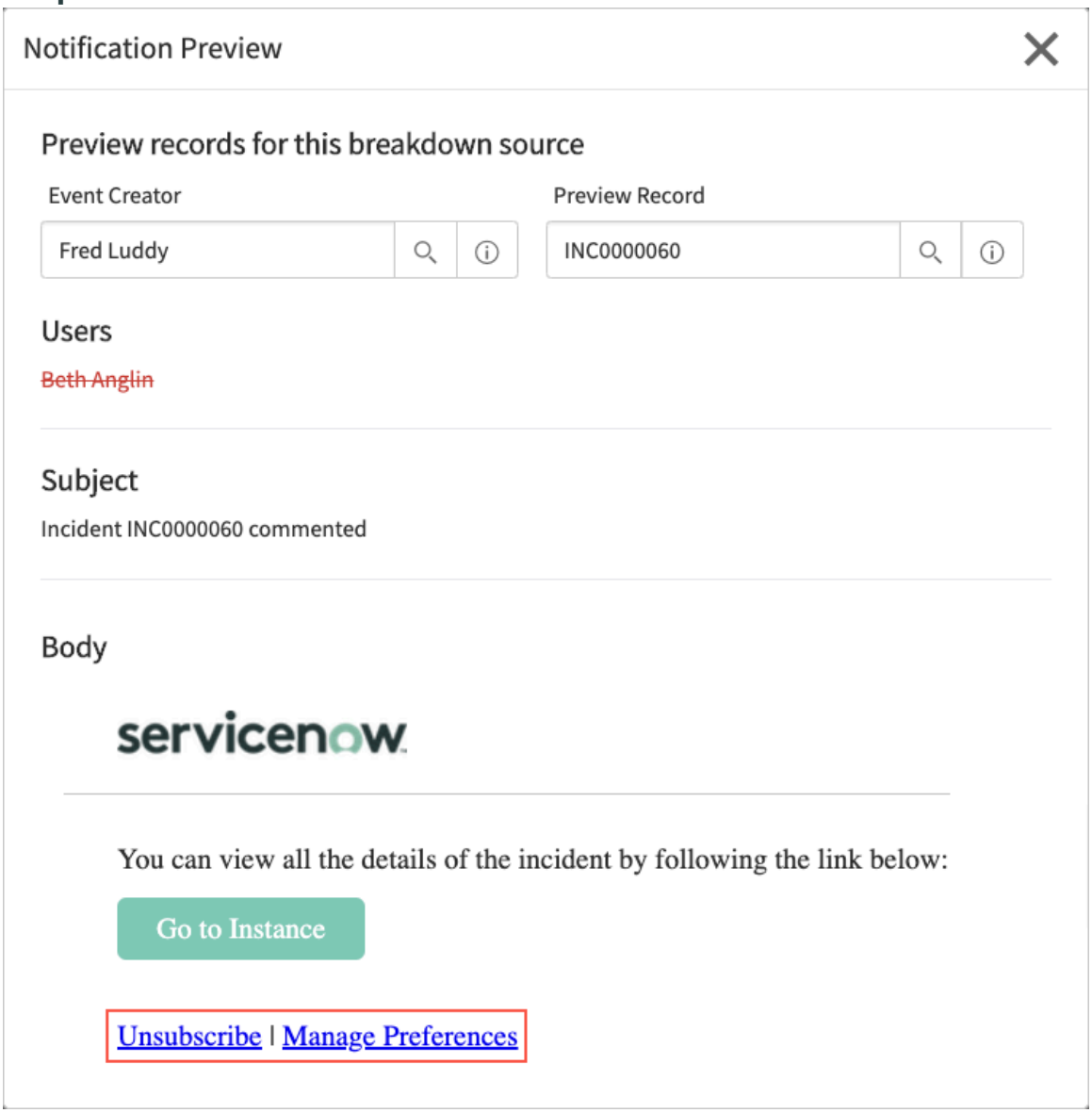
This email layout adds several unsubscribe links to the bottom of each email notification.

```
${NOTIF_UNSUB} from this notification by email or
 ${NOTIF_UNSUB+link_text="click
      here"}.
Manage your ${NOTIF_PREFS} or ${NOTIF_PREFS+link_text="click
 here"}.
```

When rendered in an email notification, the unsubscribe links display only the link text.

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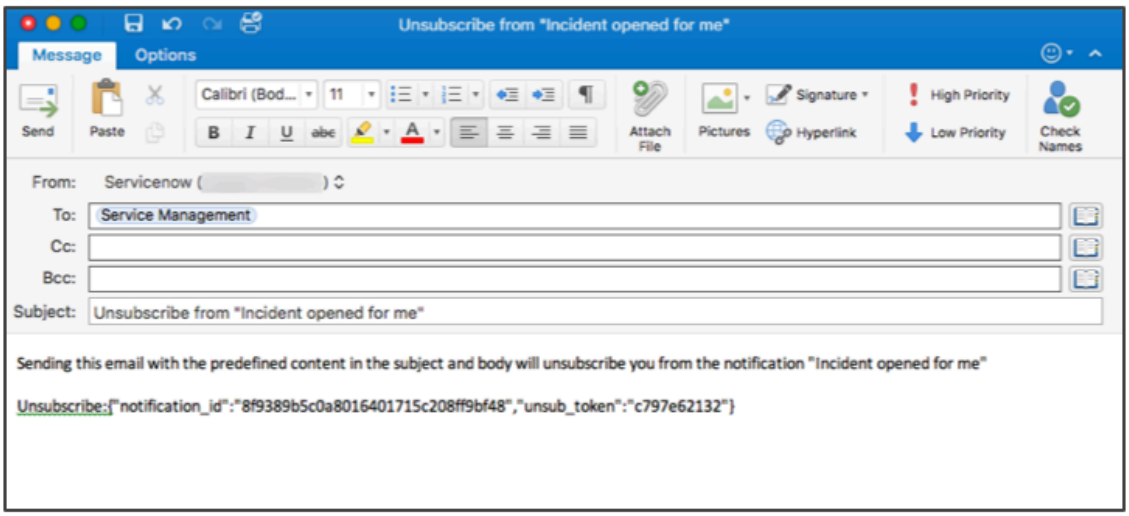
Sample email with unsubscribe links



If the **Unsubscribe** link is selected, the email client creates a message similar to the one shown in the following figure.

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Sample unsubscribe by email message



Scripting for email notifications

Email scripts enable you to use business rule-like scripting within an outbound email message.

With mail scripts, you can dynamically change the email output of your system based on different criteria. Mail scripts enable you to perform simple tasks, such as displaying incident data, and complex ones, such as making advanced database queries.

You can use the same scripts in multiple email notifications or templates by adding an `${mail_script:script name}` embedded script tag to the body of the email notification or template, replacing *`script name`* with the name of the script you created.

If you manually enter a mail script bounded by `<mail_script>` and `</mail_script>` in the body of a new or converted email notification or template, and then attempt to save the record, a message asks whether the mail script should be converted. In many cases, an unconverted mail script fails to run from inside the HTML editor. If you select **Yes**, the script is added to the Email Script [sys_script_email] table and is automatically replaced in the body with an embedded script tag (`${mail_script:script_name}`).

When you manually enter a mail script enclosed in `<mail_script>` and `</mail_script>` tags in the body of a new or converted email notification or template and save the record, you will be prompted to convert the mail script.

In many cases, mail scripts that are not converted fail to run within the HTML editor. If you select **Yes**, the script is added to the Email Script [sys_script_email] table and is automatically replaced in the body with an embedded script tag (`${mail_script:script_name}`).

If you enter a mail script inside `${{mail_script:script name}}` and the HTML sanitizer configuration is done, the output of the mail script will be HTML sanitized. For more information about HTML sanitizer, see HTML Sanitizer.

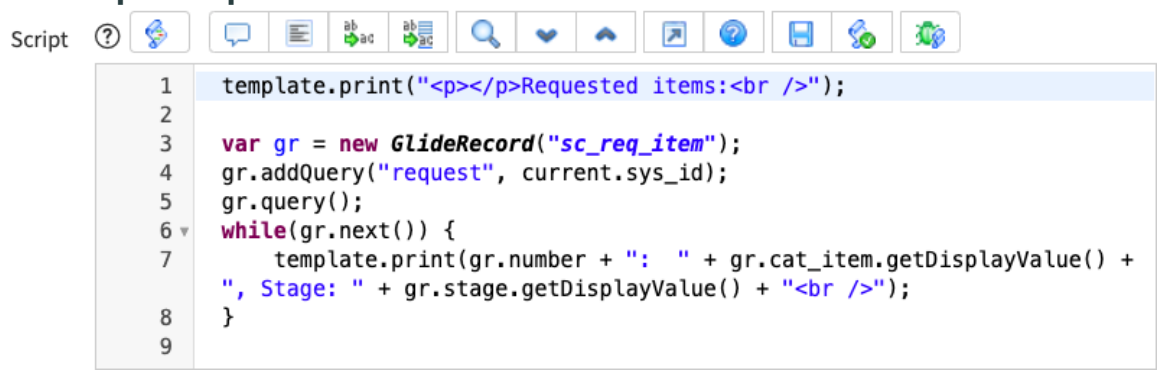
JavaScript in emails

Create mail scripts in **System Notifications** > **Email** > **Notification Email Script**, and refer to them by using `${mail_script:script name}` in the script field.

To print text into the body of the message, use the *`template.print("a string")`* function.

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JavaScript in templates



The *event.parm1* and *event.parm2* parameters that come from the originating event can also be used.

For additional information on creating mail scripts, see Notification Email Scripts on the Developer Site.

Mail script variables

Certain variables are available when processing mail_script scripts.

For examples of mail scripts, see Example scripting for email notifications.

Mail script variables

Variable	Object Description

template	Handles printing from the mail script to the email message.
	
	`template.print("message"); //outputs message to the email body.`
	
	`template.space("number of spaces"); //outputs spaces to the email body.`

email_action	GlideRecord object for the email notification (sysevent_email_action).
event	GlideRecord object for the event that fired the notification (sysevent).
email	EmailOutbound object Available methods: • `addAddress(String type, String address, String displayname)` : type can be cc or bcc. • `setFrom(String address)` : override the sender address. • `setReplyTo(String address)` : override the reply to address. • `setSubject(String subject)` : override the subject of the message. • `setBody(String message)` : override the body of the message. The email address that is passed by `setFrom` and `setReplyTo` needs to be in a valid form such as `helpdesk@sn.com` or `Display Name <helpdesk@sn.com>`. If the email address includes a 'Display Name', then that value overrides the instance's display name.

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Mail script variables (continued)

Variable	Object Description
	For more information, see GlideEmailOutbound - Scoped.

Example scripting for email notifications

Examples of scripting for email notifications.

Scripting examples for email notifications

A simple text string is the most basic example of the way a mail script works. This script prints out "Incident number - INC00001".

```
template.print("Incident number - "+ current.number);
```

More advanced scripts, like this one, can be found by browsing through the base system email templates.

```
template.print("Summary of Requested items:<br />");
var now_GR = new GlideRecord("sc_req_item");
now_GR.addQuery("request", current.sysapproval);
now_GR.query();
while(now_GR.next()) {
  template.print(now_GR.number + ":  " + now_GR.quantity + " X "
 + now_GR.cat_item.getDisplayValue()
                  + " at " +
 now_GR.cat_item.price.getDisplayValue() + " each <br />");
}
```

To dynamically change field values within an email, use the following functions within <mail_script> syntax:

```
...
email.setFrom(current.caller_id.email);
email.setReplyTo("joe.employee@yourcompany.com");
email.setSubject("This is the new subject line");
email.setBody("This is the new body");
...
```

Using the *instance_name* property ensures that the notification still works when migrated between instances.

```
dothis();

function dothis(){
    var now_GR =new GlideRecord('sys_attachment');
    now_GR.addQuery('table_sys_id',current.sys_id);
    now_GR.query();while(now_GR.next()){
        template.print('Attachment: <a href="https://'+
 gs.getProperty('instance_name')+'
           .service-now.com/sys_attachment.do?sys_id='+
 now_GR.sys_id+'">'+ now_GR.file_name+'</a>');}}
```

You can specify copied and blind copied recipients by using the email object within a mail script.

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```
//email.addAddress(type, address, displayname);
    email.addAddress("cc","john.copy@example.com","John
 Roberts");
    email.addAddress("bcc","john.secret@example.com","John
 Roberts");
```

The following is an example script to add users from *watch_list* as copied recipients.

```
if(!current.watch_list.nil()){
   //get watch list addresses and add to cc
   var watcherIds = current.watch_list.split(",");

   //get user records
   var user = new GlideRecord("sys_user");
   user.addQuery("sys_id", watcherIds);
   user.addQuery("notification",2);
   //email
   user.addQuery("email","!=","");
   user.query();

   while(user.next()){
      //add to cc list
      email.addAddress("cc", user.email,
 user.getDisplayValue());}}
```

Related topics

TemplatePrinter API

GlideEmailOutbound API

Useful attachment scripts

This is a searchable version of the Useful Attachment Scripts.

Warning: The customization described here was developed for use in specific instances, and is not supported by Now Support. This method is provided as-is and should be tested thoroughly before implementation. Post all questions and comments regarding this customization to our community forum.

Copy attachments from record to record

Use the following script to copy an attachment from one record to another record:

```
GlideSysAttachment.copy('sourcetable','sys_id','destinationtable
','sys_id');
```

Note: GlideSysAttachment.copy copies all attachments; it cannot select specific attachments.

Delete duplicate attachments

Use the following script in a business rule, scheduled job, or background script to delete duplicate attachments located in the Attachments [sys_attachment] table:

```
function fixDuplicateImages(){
  var now_GR = new GlideRecord('sys_attachment');
  now_GR.addQuery('table_name','LIKE','ZZ_YY%');
  now_GR.orderBy('table_sys_id');
```

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```
  now_GR.orderByDesc('sys_created_on');
  now_GR.query();
  var lastID ='not_a_match';
  var lastFile ='not_a_match';
  while(now_GR.next()){
    var isDuplicate = (lastID == now_GR.table_sys_id)&&(lastFile
 == now_GR.file_name);
    lastID = now_GR.table_sys_id;
    lastFile = now_GR.file_name;
    gs.print(now_GR.table_sys_id + ' ' + now_GR.table_name +
 ' ' + now_GR.file_name + ' ' + now_GR.sys_created_on + ' ' +
 isDuplicate);
    if(isDuplicate)
      now_GR.deleteRecord();
  }
}
```

Display whether tasks have attachments in list view

Use the following script in a business rule to display whether tasks have attachments when viewed in the record list view. Note that the script needs a custom field on the Has Attachments [u_has_attachments] table.

```
checkAttachment();

function checkAttachment(){
  // if inserting then the task has an attachment
  if(current.operation()=='insert') {
    hasAttachment('true'); // if deleting attachment check for
 other attachments
    if(current.operation()=='delete') {
      var timeNow3 =new GlideDateTime();
      gs.log('has_attachment br: gliderecord query start date
 time is: '+ timeNow3.getNumericValue(),'jwtest');
      var attachCount = new GlideAggregate('sys_attachment');
      attachCount.addQuery('table_sys_id',current.sys_id);
      attachCount.addAggregate('COUNT');
      attachCount.query();
      var numAttachments ='0';

      // if no other attachments task does not have attachment
      if(attachCount.next()){
        numAttachments = attachCount.getAggregate("COUNT");
        if(numAttachments >0){
          hasAttachment ='true';
        } else {
          hasAttachment('false');
        }
        var timeNow4=new GlideDateTime();
        gs.log('has_attachment br: gliderecord query start date
 time is: '+ timeNow4.getNumericValue(),'jwtest');
      }

function hasAttachment(answer){
  var task = new GlideRecord('task');
  task.addQuery('sys_id',current.table_sys_id);
  task.query();
```

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```
  if(task.next()){
    task.u_has_attachment= answer;
    task.autoSysFields(false);  //Don't set the lastUpdatedTime
 or the Simultaneous Update Alert will likely get triggered
    task.setWorkflow(false);  //Don't allow other business rules
 to run, otherwise multiple notifications will likely be sent
    task.update();
  }
}
```

Note: Schedule the business rule to run after insert/delete.

Link to attachments in an email notification

Use the following script in an email notification or template to include links to attachments:

```
printattachments();

function printattachments(){
  var now_GR =new GlideRecord('sys_attachment');
  now_GR.addQuery('table_sys_id',current.sys_id);
  now_GR.query();
  while(now_GR.next()){
    template.print('Attachment: <a
 href="http://'+gs.getProperty("instance_name")+'.service-now.c
om/sys_attachment.do?sys_id='+ now_GR.sys_id+'">'+
 now_GR.file_name+'</a>');
  }
}
```

Note: Replace "instance_name" with your instance name.

Attachment Logging

Whenever a user downloads an attachment, the action writes an *attachment.read* event record to the event log. If desired, you can process these events with a Script Action or an Email Notification. This can be useful if you want to do something when an attachment is read. For example, you can record when and by whom certain attachments are downloaded. For this functionality, the *current* variable must point to a sys_attachment record, and the event record must use the following parameters:

- parm1: File name
- parm2: Table name

Baseline email notifications

The baseline system provides several email notifications.

Some events listed in this table do not appear in a business rule and are fired by other conditions in the platform. Some events are hardcoded and are not user configurable.

Note: The below table list is not an exhaustive list. Products can create their own notifications.

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Baseline email notification descriptions

Email notification	Description	Triggering event	Business Rule Controlling Event
Appointment Invite	Type: Meeting Invitation Adds a meeting invitation to the recipient's calendar by sending an iCalendar formatted email	itil_appointment.inserted	Global business rule
Appointment Update	Type: Meeting Invitation Updates an existing meeting in the recipient's calendar by sending an iCalendar formatted email	itil_appointment.updated	Global business rule
Approval Rejected	Type: EMAIL A task-based approval has been rejected – includes the approver's name.	approval.rejected	approver events
Approval Rejected by Other	Type: EMAIL A task-based approval has been rejected – includes the approver's name.	approval.rejected.by.other	approval events
Approval Request	Type: EMAIL Sends an email for the recipient to reply with an approval decision. In the approval email, the recipient selects a link that builds the appropriate reply email. These emails come only from task-based approvals.	approval.inserted	approver changes
Catalog Approval Rejected	Type: EMAIL A catalog request has been rejected – includes the approver's name.	request.approval.rejected	approval events
Catalog Approval Request	Type: EMAIL	request.approval.cancelled	approver changes

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Baseline email notification descriptions (continued)

Email notification	Description	Triggering event	Business Rule Controlling Event
	A catalog request for which you were an approver has been cancelled.		
Catalog Approval Request	Type: EMAIL A catalog request for which you are an approver has been made.	request.approval.inserted	approval events
Certificate Expired	Type: EMAIL Notification that the X.509 certificate has expired.	certificate.expired	certificate events
Certificate Expiring	Type: EMAIL Notification that the X.509 certificate is expiring in N days.	certificate.expiring	certificate events
Change approved	Type: EMAIL A change request has been approved.	change.approved	Change events and task events
Change assigned to me	Type: EMAIL A change request has been assigned to you.	change.assigned	Change events
Change assigned to my group	Type: EMAIL A change request has been assigned to your group.	change.assigned.to.group	Change events
Change commented (to assignee)	Type: EMAIL A comment has been added to a change request. The person assigned to the change request receives an email notification.	change.commented	Change events
Change commented (unassigned)	Type: EMAIL	change.commented	Change events

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Baseline email notification descriptions (continued)

Email notification	Description	Triggering event	Business Rule Controlling Event
	A comment has been added to a change request. The assignment group assigned to the change request receives an email notification.		
Change Notification	Type: EMAIL Notification of a change in the fields label in a form.	label.notify	
Change rejected	Type: EMAIL A change request has been rejected.	change.rejected	Change events and task events
Change Task worknoted (unassigned)	Type: EMAIL A work note has been added to a change task. The assignment group assigned to the change task receives an email notification.	change_task.worknoted	Change task events
Change Task worknoted (to assignee)	Type: EMAIL A work note has been added to a change task. The person assigned to the change task receives an email notification.	change_task.worknoted	Change task events
Change Task assigned to my group	Type: EMAIL A change task has been assigned to your group.	change_task.assigned.to.group	Change task events
Change Task assigned to me	Type: EMAIL A change task has been assigned to you.	change_task.assigned	Change task events
Change worknoted (to assignee)	Type: EMAIL	change.worknoted	Change events

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Baseline email notification descriptions (continued)

Email notification	Description	Triggering event	Business Rule Controlling Event
	A work note has been added to a change request. The person assigned to the change request receives an email notification.		
Change worknoted (unassigned)	Type: EMAIL A work note has been added to a change request. The assignment group assigned to the change request receives an email notification.	change.worknoted	Change events
Email assigned to	Type: EMAIL An incident has been assigned to you (the recipient of the email).	incident.assigned	incident.events
Email assigned to (sc_task)	Type: EMAIL A task has been assigned to you (the recipient of the email). **Note:** This email notification was used for the legacy Delivery Plan system of email notifications. In order to use this email notification with a workflow, the **work_start** field needs to be set by the workflow using a Set Value activity.	sc_task.assigned.to.user	sc_task_events
Email assigned To Group	Type: EMAIL An incident has been assigned to an assignment group of which you are a member (the recipient of the email).	incident.assigned.to.group	incident events

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Baseline email notification descriptions (continued)

Email notification	Description	Triggering event	Business Rule Controlling Event
Email assigned to group (sc_task)	Type: EMAIL A Service Catalog task has been assigned to an assignment group of which you are a member (the recipient of the email).	sc_task.assigned.to.group	sc_task_events
Incident Closed	Type: EMAIL An incident opened by you (the recipient of the email), has been closed.	incident.updated	incident events
Incident Commented	Type: EMAIL An incident opened by you (the recipient of the email) has had comments added. This notification uses a template for an employee self-service (ESS) user.	incident.commented	incident events
Incident Commented	Type: EMAIL An incident assigned to you (the recipient of the email) has had comments added. This notification uses a template for an ITIL user.	incident.commented	incident events
Incident Opened	Type: EMAIL An incident has been opened for you (the recipient of the email) by someone else. This notification uses a template for an employee self-service (ESS) user.	incident.inserted	incident events
Incident Opened & Unassigned	Type: EMAIL An incident has been opened and is unassigned.	incident.inserted	incident events

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Baseline email notification descriptions (continued)

Email notification	Description	Triggering event	Business Rule Controlling Event
	This notification uses a template for an ITIL user.		
Incident Resolved	Type: EMAIL An incident opened by you has been resolved, and feedback is required to determine if the incident should be closed.	incident.updated	incident events
Knowledge Closed Created	Type: EMAIL A contributor's submission to the Knowledge Base was accepted and an article was created.	kb.submission.closed_created	KB event
Knowledge Closed Duplicate	Type: EMAIL A contributor's submission to the Knowledge Base was determined to be a duplicate, and no article was created.	kb.submission.closed_duplicate	KB event
Knowledge Closed Invalid	Type: EMAIL A contributor's submission to the Knowledge Base was determined to be invalid (unusable).	kb.submission.closed_invalid	KB event
Notify Change Calendar	Type: Meeting Invitation Notifies the recipients of the schedule for a change request and exports the schedule to the Microsoft Outlook calendar. The email is in the format of iCalendar formatted email.	change.calendar.notify	change events
Notify Change Calendar Remove	Type: Meeting Invitation Notifies the recipients that a scheduled change has	change.calendar.notify.remove	change events

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Baseline email notification descriptions (continued)

Email notification	Description	Triggering event	Business Rule Controlling Event
	been closed or assigned to someone else and removes the entry from the Microsoft Outlook calendar. The email is in the format of iCalendar formatted email.		
Problem Task assigned to me	Type: EMAIL A problem task has been assigned to you.	problem_task.assigned	Problem task events
Problem Task assigned to my group	Type: EMAIL A problem task has been assigned to your group.	problem_task.assigned.to.group	Problem task events
Problem Task worknoted (to assignee)	Type: EMAIL A work note has been added to a problem task. The person assigned to the problem task receives an email notification.	problem_task.worknoted	Problem task events
Problem Task worknoted (unassigned)	Type: EMAIL A work note has been added to a problem task. The assignment group assigned to the problem task receives an email notification.	problem_task.worknoted	Problem task events
Problem worknoted (to assignee)	Type: EMAIL A work note has been added to a problem. The person assigned to the problem receives an email notification.	problem.worknoted	Problem events
Problem worknoted (unassigned)	Type: EMAIL A work note has been added to a problem. The assignment group assigned	problem.worknoted	Problem events

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Baseline email notification descriptions (continued)

Email notification	Description	Triggering event	Business Rule Controlling Event
	to the problem receives an email notification.		
Reminder Insert	Type: Meeting Invitation Creates a calendar reminder regarding an open task. The email is in the format of iCalendar formatted email.	reminder.notify	
Reminder Insert	Type: Meeting Invitation A task has been closed or deleted. This notification removes the task reminder from Outlook. The email is in the format of iCalendar formatted email.	reminder.notify.delete	
Reminder Insert Email	Type: EMAIL Sends the recipient a reminder email about a specific task.	reminder.notify.email	
Request Approved	Type: EMAIL A Service Catalog request, opened by the recipient, has been approved.	sc_request.approved	sc_request events
Request Assigned	Type: EMAIL A Service Catalog request has been assigned to the recipient.	sc_request.assigned	sc_request events
Request Completed	Type: EMAIL A Service Catalog request, opened by the recipient, has been completed.	sc_request.updated	sc_request events
Request Item Assigned	Type: EMAIL	sc_req_item.assigned	sc_request events

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Baseline email notification descriptions (continued)

Email notification	Description	Triggering event	Business Rule Controlling Event
	An item requested from the Service Catalog has been assigned to you.		
Request Item Delivery	Type: EMAIL An item requested from the Service Catalog by the recipient is being delivered.	sc_req_item.delivery	sc_request events
Request Opened on Behalf	Type: EMAIL A Service Catalog request has been opened on behalf of the recipient.	sc_request.requested_for	sc_request events
Reset Password	Type: EMAIL The recipient's password has been reset as requested.	reset.password	
Scheduled Import Completed	Type: EMAIL A scheduled import set has completed.	scheduled_import_set.completed	
System Upgraded	Type: EMAIL The recipient's system has been upgraded.	system.upgraded	
Task approved	Type: EMAIL An ITIL task has been approved.	task.approved	Change events and task events
Text Index Completed	Type: EMAIL A scheduled system index has completed.	text_index.complete	
Unscheduled Change	Type: EMAIL	cmdb.unscheduled.change	

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Baseline email notification descriptions (continued)

Email notification	Description	Triggering event	Business Rule Controlling Event
	A named configuration item has changed, and no active change request exists.		

Note:

Notification example: notify an assignment group of updates to Priority 1 Incidents

Notify users by email when there are updates to high priority incidents.

Before you begin

Role required: admin

About this task

Send emails to an assignment group whenever there are updates to an incident in which the **Priority** is **1 - Critical**. Include information that is of interest to the recipients, such as the incident number, category, assignees, and any comments that were added to the incident.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**, and then click **New**.
2. On the email notification form, enter the following values:

Field	Value
Name	Priority 1 Incident Updated
Table	Incident [incident]
Active	Selected
Category	Incident Alert
Send when	Record inserted or updated
Inserted	Selected
Updated	Selected
Conditions	[Priority][is][1 - Critical] AND [Updated][changes]
Users/Groups in fields	Assignment group
Subject	`Priority ${priority} Incident updated` **Note:** In this notification, the variable ${priority} returns the value **1 - Critical**.

3. In the **Message HTML** field, enter the following message and script:

```
Short Description: ${short_description}
Click here to view incident: ${URI}
```

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```
Incident number: ${number}
Category: ${category}
Assigned to: ${assigned_to}
Assignment group: ${assignment_group}
<hr/>
Comments:
${comments}
```

4. From the form context menu, click **Save**.
5. Preview the email notification to ensure it includes all the needed information.
   a. On the notifications form, click **Preview Notification**.
   b. Note that the email includes the following information:
      - Short description
      - A link to the incident record
      - Incident number
      - Category
      - The name of the user to whom the incident is assigned
      - The group assigned to the incident
      - Comments from the incident record
6. Test that the email notification sends to an assignment group when its Priority 1 Incident is updated.
   a. Create a user who has an email address that you can monitor, and then create a group that includes the user that you created.
   b. Navigate to **Incident** > **Open**, and then open an incident in which the **Priority** is **1 - Critical**.
   c. In the **Assignment group** field, enter the group that you created.
   d. From the form context menu, click **Save**.
   e. Add comments to the form to update the incident, and then click **Update**.
   f. Check the email account of the user member in the assignment group.

Notification example: notify task assignees

Notify users who are assigned a Task [task] record.

Before you begin

Role required: admin
Set up your email as a test email address. Navigate to **System Properties** > **Email Properties**, and then enter your email address under **Send all email to this test email address**.

Procedure

1. Navigate to **System Notification** > **Email** > **Notifications**, and then click **New**.
2. On the form, enter the following values:

Field	Value
Name	Task Assigned

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Field	Value
Table	Task [task]
Active	Selected
Category	Uncategorized
Send when	Record inserted or updated
Inserted	Selected
Updated	Selected
Conditions	[Assigned to][changes]
Users/Groups in fields	Assigned to
Subject	Task Assigned

3. In the **Message HTML** field, add a message to send to whomever the task is assigned to.
4. From the form context menu, click **Save**.
5. To see a mock version of the system email that you created, click **Preview Notification** on the notification form.
6. Test the notification sends to a task assignee.
   a. Assign some task records.
   b. Check your email for assignment notifications.

Email notifications dashboard

The email notification dashboard provides visibility into key metrics and enables admins to configure the dashboard to enable access to other users.

To access Email notifications dashboard, navigate to **All** > **System Notification** > **Email** > **Email notifications dashboard**

The dashboard enhances visibility and supports proactive management of email notifications, and includes highlights about:

- Email notification insights
- Active notifications
- Notification trends
- Top 10 email notifications by usage, users, and tables

https://player.vimeo.com/video/1091898176?h=a555c32cca&badge=0&autopause=0&player_id=0&app_id=58479

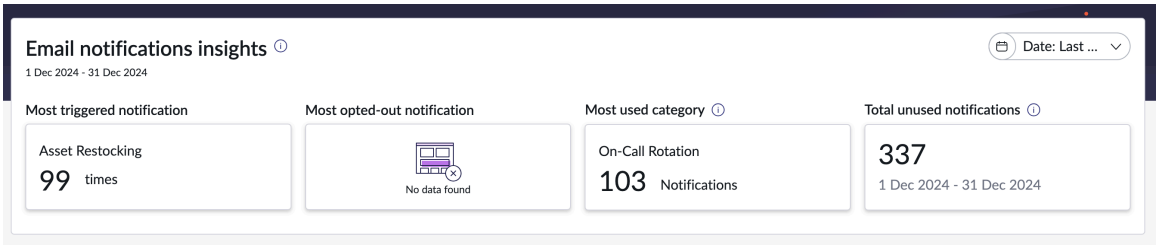
Data collection is triggered by configuring and executing jobs. For more information, see Configure jobs for email notifications dashboard.

Note: Configuration of jobs is required for data to be displayed on the dashboard.

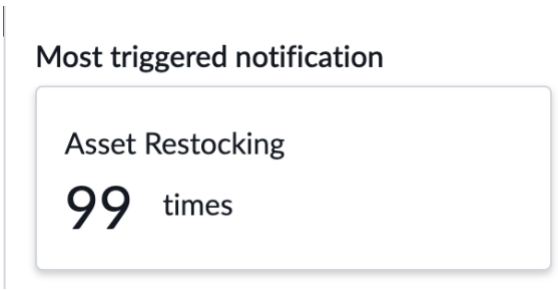
Key insights

Email notification insights highlights and shows the system notification sent over emails for the selected time period.

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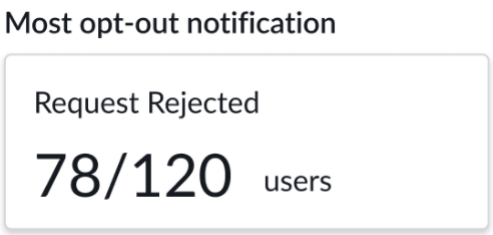
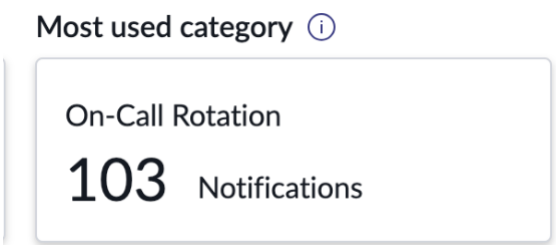


Email notifications insights

UI component	Description
Date	Select the time period for the data that you want to view. • Last 3 months • Last month • Last quarter • Last week • Yesterday
Most triggered notification	 The most triggered notification in the selected time period. In the above example the Asset Restocking notification has been triggered 99 times. Clicking on **Most triggered notification** gives more insight into the notification overview for the selected period which includes: • Triggered count: Comparison for the selected period • Opted out overview: The overview of the fraction of users who have opted out from a notification and the total number of users who have received at least once • Total unsubscribed count: Highlights the total number of users who unsubscribed after subscribing through custom notifications

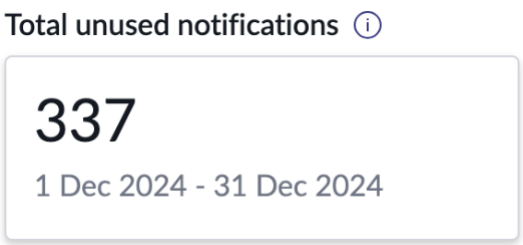
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Email notifications insights (continued)

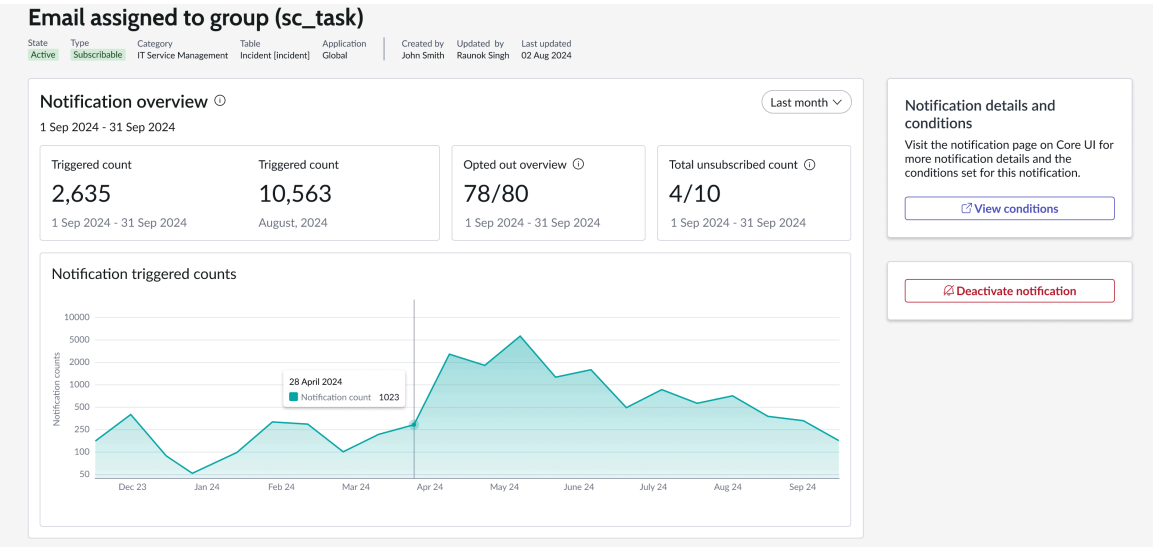
UI component	Description
	• Conditions: View the notification details and condition set • Activate or Deactivate: Option to activate or deactivate the notification
Most opted-out notification	 The overview of all recipients receiving the notification vs. the users who opted out of the notification. In the above example 120 users were receiving the notification and out of the 120 users, 78 users have chosen to opt out from receiving the notification. Clicking on **Most opted-out notification** gives the notification overview for the selected period which includes: • Triggered count: Comparison for the selected period and the prior period (for example, the same month or the previous month or quarter) • Opted out overview: The overview of the fraction of users who have opted out from a notification and the total number of users who have received at least once • Total unsubscribed count: Highlights the total number of users who unsubscribed after subscribing through custom notifications • Conditions: View the notification details and condition set • Activate or Deactivate: Option to activate or deactivate the notification
Most used category	

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Email notifications insights (continued)

UI component	Description
	Notification category of the that was most triggered in the selected time period. Clicking on **Most used category** displays the top 100 most used notification categories with: • Triggered count (times) • Opted-out count (users) • Category name • Table name
Total unused notification	 Total number of notifications that weren't triggered during the selected time period. Clicking on **Most unused notification** displays the top 100 most unused notifications with: • Triggered count (times) • Opted-out count (users) • Category name • Table name

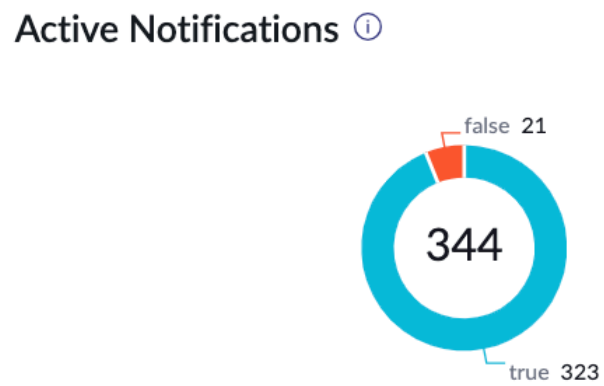
Example for deeper insights into a notification



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Active notifications

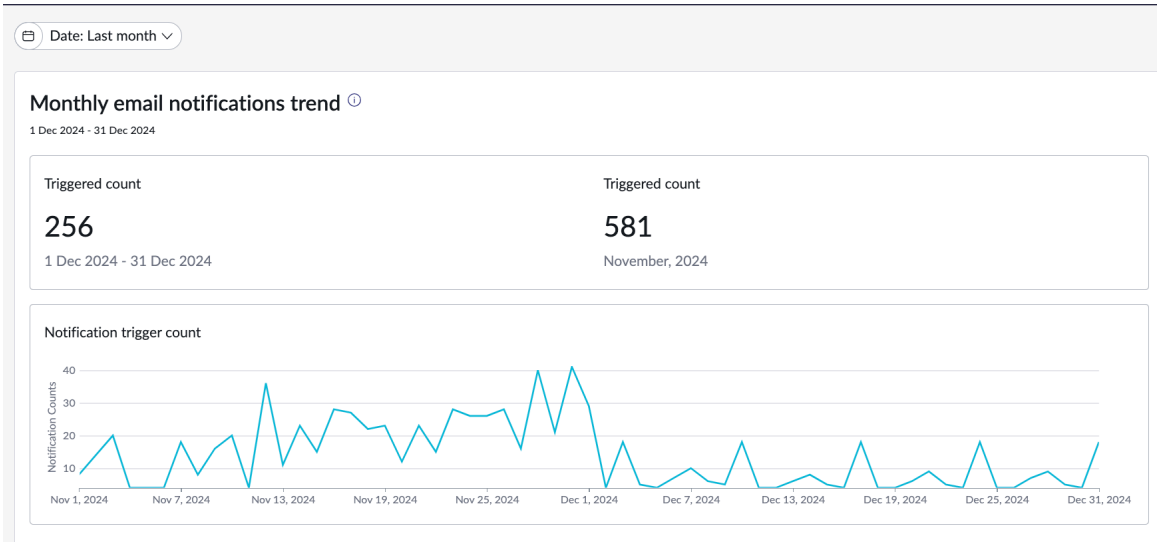
Active notifications shows the number of total notifications where true represents the number of active notifications and false represents the number of inactive notifications.



Notifications trend

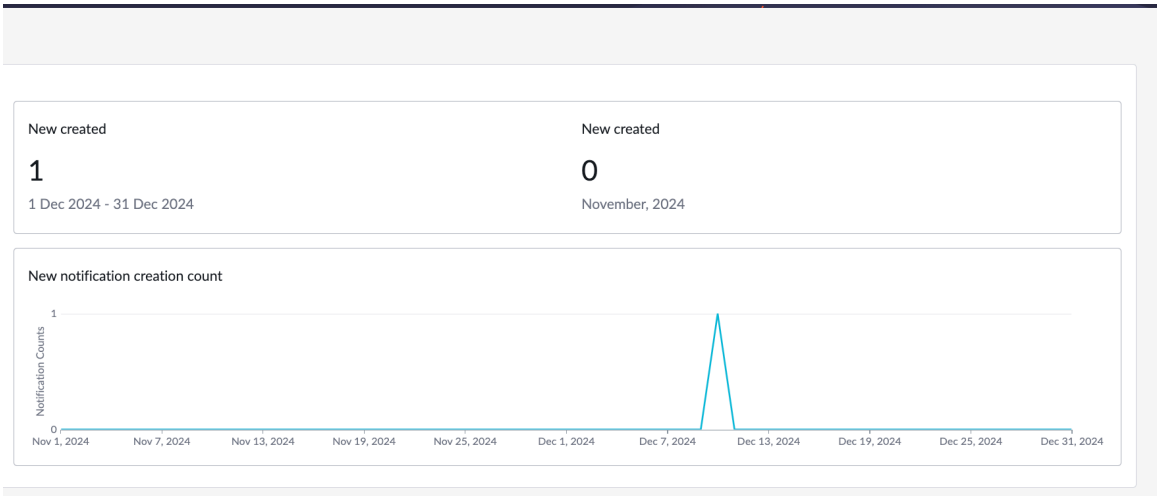
Monitor notifications trend on triggered counts and newly created notifications. It shows the trend for the selected time period, comparing the current triggered count to the previous period (for example, the same month or the previous month or quarter). It also provides an overview of how the triggered count has evolved over time, with a graphical representation for better visualization of the trend. You can view the email notification trends by:

- Triggered count

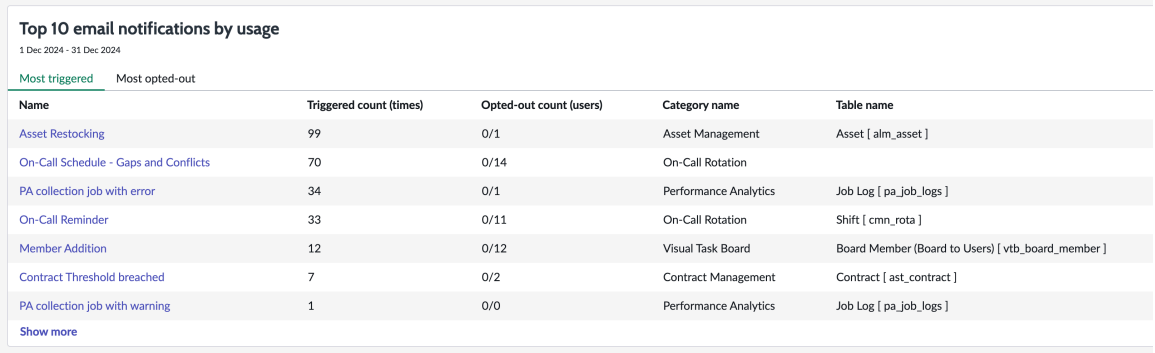


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- Newly created notifications



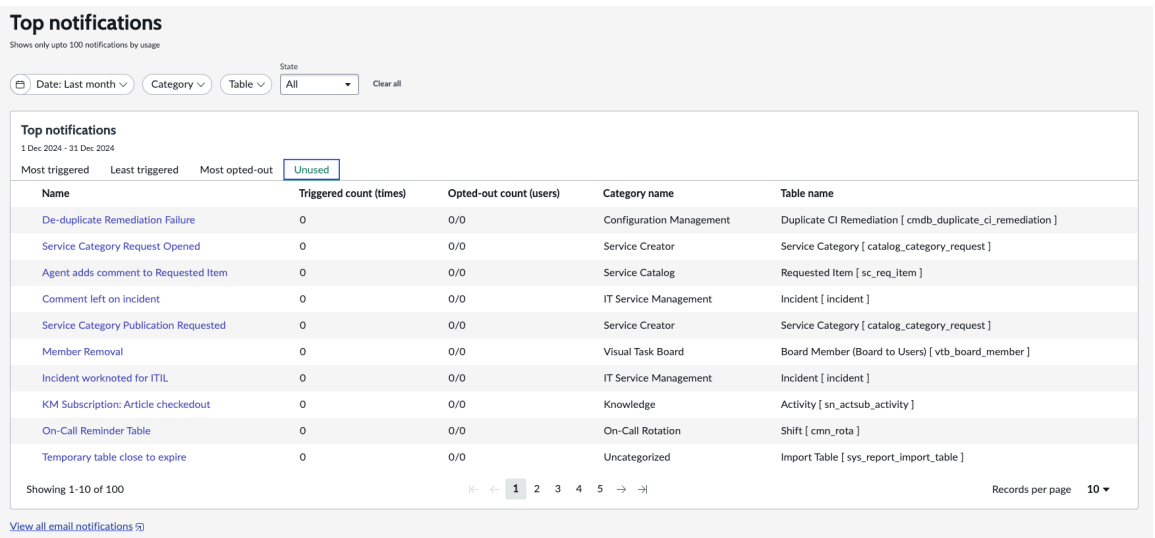
Top email notifications



The top 10 email notifications can be viewed by:

- Usage
- Users
- Tables

You can select **Show more** to view up the top 100 notifications.



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The top 100 notifications for Most triggered, Last triggered, Most opted-out and Unused notifications can be filtered and viewed by Date, Category, Table, and State.

To view all the email notifications, select **View all email notifications**.

Configure jobs for email notifications dashboard

Configure data collection jobs for the email notification dashboard.

Before you begin

Data collection is triggered by configuring and executing jobs, except **Run as** field all other fields are preconfigured.

Role required: admin or notification_dashboard_admin

Procedure

1. Navigate to **All** > **Platform Analytics Administration** > **Indicators** > **Automated Indicators**.
2. From Indicators, search for **Email Notifications Sent**.
3. Select and open **Email Notifications Sent**.
4. Scroll down and select the **Jobs** tab.
5. Select and open **Daily job to fetch Email Indicator Data and Email Notifications created**.
   a. From the **Run as** field, select the user that has the access to run this job.
   b. Select and hold (or right-click) the form header and select **Save**.
   c. Select **Execute Now**
6. Go back to the **Jobs** tab.
7. Select and open **Job to fetch Historical Email Indicator Data**.
   a. From the **Run as** field, select the user that has the access to run this job.
   b. Select and hold (or right-click) the form header and select **Save**.
   c. Select **Execute Now**
8. Go back to Indicators, search and select **Email Notifications Created**.
9. Scroll down and select the **Jobs** tab.
10. Select and open **temporary job for collecting Email Notifications Created**.
    a. From the **Run as** field, select the user that has the access to run this job.
    b. Select and hold (or right-click) the form header and select **Save**.
    c. Select **Execute Now**
    Once the jobs are completed and the data is collected, the data is visible in the email notifications dashboard.

Email diagnostics dashboard

The email diagnostics dashboards provide visibility in to email delivery metrics that can help in improving the email health by identifying errors and areas that need deeper investigation.

To access Email diagnostics dashboard, navigate to **All** > **System Notification** > **Email** > **Email notifications dashboard** > **Diagnostics**.

Email diagnostics are available in a new tab within the Email Notifications dashboard for admins to track the following areas:

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- Bounce management
- Email delivery metrics
- SMTPSender jobs health
- Error metrics and connection status

Data is displayed for the last six hours and can be refreshed at any time.

https://player.vimeo.com/video/1123333012?h=6347b03782&badge=0&autopause=0&player_id=0&app_id=58479

Analytics

Analytics provides comprehensive insights into the status and performance of your email metrics and enables you to monitor for all the email-related operations within your instance.

Email health overview

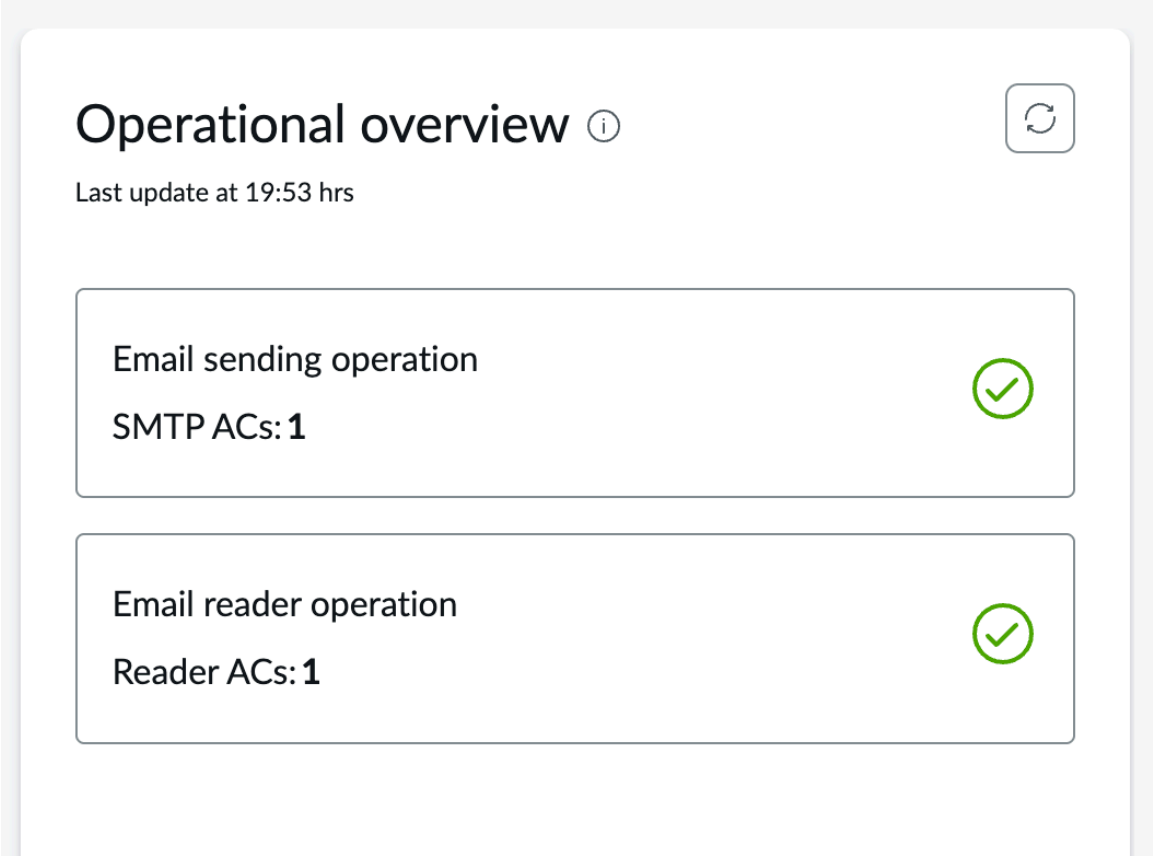
UI component	Description
Email status	Email status is the total count of emails in each status category within the email queue for the displayed time frame.
Bounce management	Bounce management shows the total number of hard and soft bounces received due to delivery failures within the displayed time frame.
Throughput rate	The average number of emails sent per minute during the displayed time frame.
Avg Latency per email	The average time taken to move emails from send-ready state to sent state within the displayed time frame.
Avg Job processing time	The average time taken by an SMTP sender job to complete the email processing within the displayed time frame.
Avg email sending time	The average time taken for an email to be relayed to the SMTP server within the displayed time frame.

Operational overview

The operational overview gives the overview of email sending and reader operations for the displayed time and can be refreshed to fetch the latest updated status.

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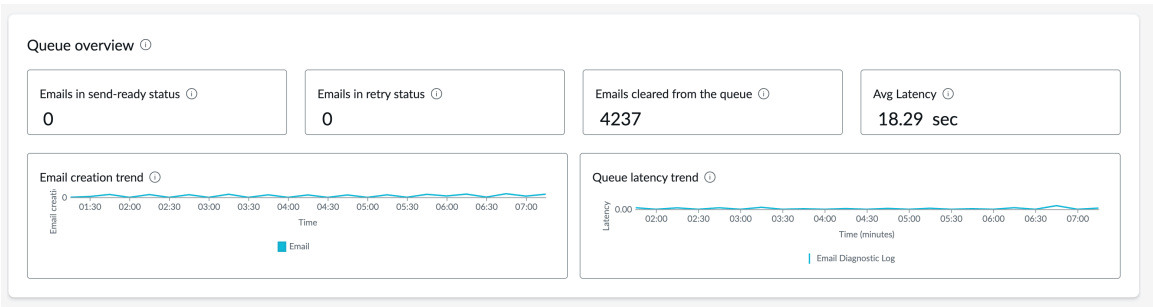
Operational overview



Queue overview

Queue overview gives insights into all email records including the records pending for processing and their status.

Queue overview



Queue overview

UI component	Description
Emails in send-ready status	The number of emails that are ready to be picked up for processing.
Emails in retry status	Then number of emails that encountered delivery failures and are scheduled for reprocessing.
Emails cleared from the queue	The number of emails processed successfully during the displayed timeframe.

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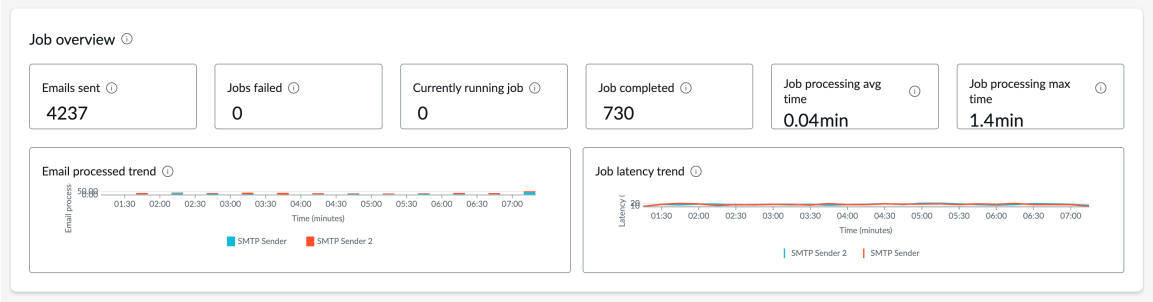
Queue overview (continued)

UI component	Description
Avg Latency	The average time taken to process each email successfully and move it out of the queue.
Email creation trend	The trend of email records created in sys_email table at various intervals.
Queue latency trend	The average latency trend at various intervals for all jobs within the displayed timeframe.

Job overview

A Job Overview is a consolidated view that displays the status, performance, and metrics, giving administrators and users a quick insight into their operational state. Only processed jobs insights are displayed and jobs that are currently in execution are excluded.

Job overview



Job overview

UI component	Description
Emails sent	The number of emails sent successfully within the displayed timeframe.
Jobs failed	Total number of jobs that failed during execution within the displayed timeframe.
Currently running job	Jobs currently in execution during the displayed timeframe (real-time status).
Job completed	Jobs that completed execution within the displayed timeframe.
Job processing avg time	Average time taken to process emails per job within the displayed timeframe.
Job processing max time	Maximum time taken by a job to process emails within the displayed timeframe.
Email processed trend	Displays the trend of emails processed by all sender jobs within the displayed timeframe.
Job latency trend	Displays the trend of average latency at various intervals for all jobs within the displayed timeframe.

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Error log overview

Provides a quick, visual summary of all the errors occurrences, types, and trends to enable quick identification of issues.

Error overview

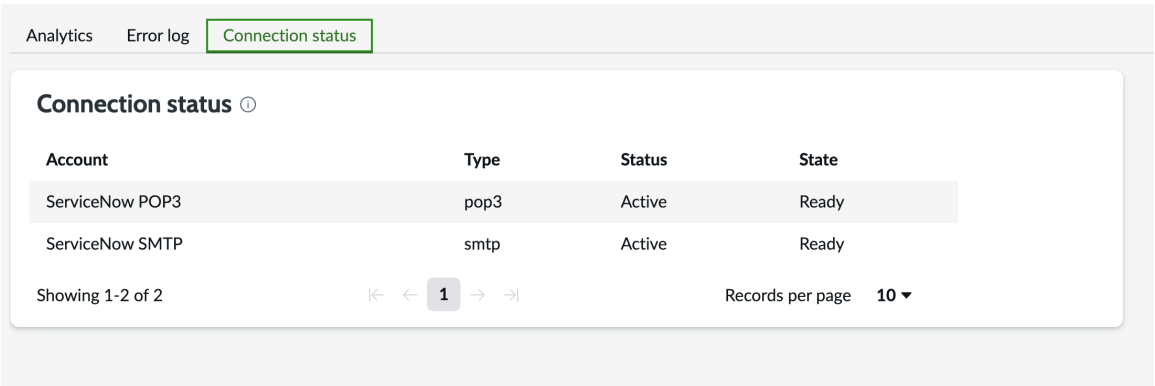
UI component	Description
No. of errors	Displays total number of errors during the displayed timeframe.
Blocked email addresses	Count of email addresses that are blocked due to bounces during the displayed timeframe.
Hard bounce	Count of hard bounces within the displayed timeframe.
Soft bounce	Count of soft bounces within the displayed timeframe.
Top errors	Displays the top 5 errors with their counts within the displayed timeframe.
Bounce trend	Displays the hard and soft bounces received over the period displayed in the timeframe.

Error Log

An error log captures and provides information about issues, failures, or unexpected events that occur within the instance.

Connection status

Connect status



Connection status displays the real time status of all email accounts configured in an instance.

Email templates

Email templates enable administrators to create reusable content for the subject line and message body of email notifications.

Templates deliver consistent information on specific system activities and improve the efficiency of creating multiple email notifications for similar actions. If necessary, you can make minor changes on the fly to an email that uses a template by overriding the subject line and message body content in the notification form. A common practice is to define the message body in a

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template and create new subject lines for different types of recipients. There is no limit to the number of templates that you can create.

Email templates are created in rich HTML format, and administrators have the option of converting existing email templates to rich HTML (starting with the Eureka release). This format provides several advantages, including:

- Raw HTML content is converted into a WYSIWYG format.
- The content can be edited in a feature-rich HTML editor.
- Mail scripts are condensed into a single, easy-to-read line that can be reused in multiple email notifications.
- To prevent broken links, images linked using URLs relative to a particular instance are converted to absolute links.

Create an email template

You can create an email template with rich HTML formatting, rather than plain text.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Templates**.
2. Click **New**.
3. Fill in the form fields (see table).

Field	Description
Name	Enter a unique name for the template. For example, `change.update.risk`.
Application	The type of scoped application.
Email layout	If the message body for the template is to be formatted using a predefined email layout, select the layout.
Table	Select the name of the table involved. For example, **Change Request** `[change_request]`.
Subject	Enter a subject line that explains the purpose of the email. Select the appropriate variables for the subject line from the fields available on the selected table. Place the cursor where you want the variable to appear, and click the field name in the **Select variables** column. For example: `${sys_class_name} ${number} with ${risk} risk has been assigned to you.`
Message HTML	Enter the content of the email template message. You can use the HTML editor toolbar to format the HTML, and you can include variables from the **Select variables** column. Variables map to column names available from the notification table, its parent tables, and reference tables. Use variables to include values from a record in the table such as an incident short description or comments and work notes. Notes:

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Field	Description
	○ When a template is applied to a notification, the contents of this field are used when you select **HTML and plain text** or **HTML** in the **Content Type** field in the Email Notification form. ○ You cannot use HTML code to control the appearance of the contents in the `${comments}` variable. ○ If you want to include a link to the record that triggered the notification, see Enable links to records.
Message Text	Enter the notification message to send in plain text. **Note:** When a template is applied to a notification, the contents of this field are used when you select **HTML and plain text** or **Text** in the **Content Type** field in the Email Notification form.
SMS alternate	Create a different message to be delivered to an SMS device. Enter a brief message, showing the most important information only. If this message field is blank, the contents of the **Message Text** field are used for the SMS message. **Note:** The message in this field is used when the message is sent to a device configured as SMS.

Related topics

Create an email layout

Apply a template to an email notification

After you create an email template, you can apply it to a notification.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Open the email notification record that should use the template.
3. Navigate to the **What it will contain** section.
4. From the **Email template** field, select the appropriate template.
5. Click **Update**.

Convert an email template to rich HTML

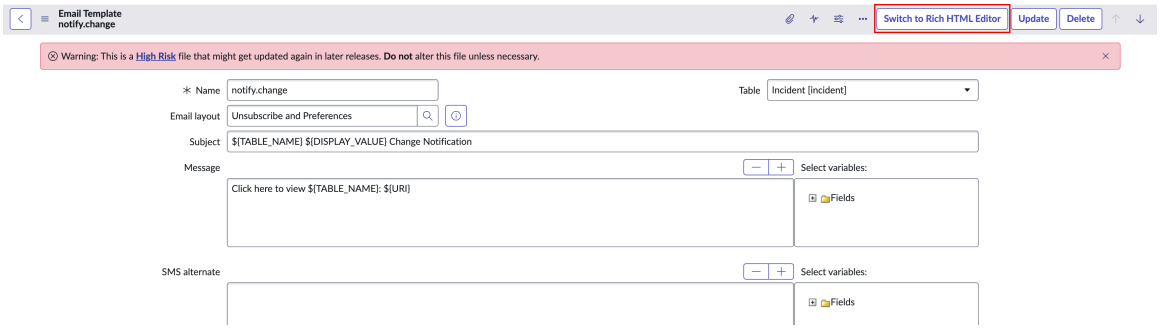
If you have an email template created prior to the Eureka release, you can convert it to rich HTML.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Templates**.
2. Open the email template you want to convert.

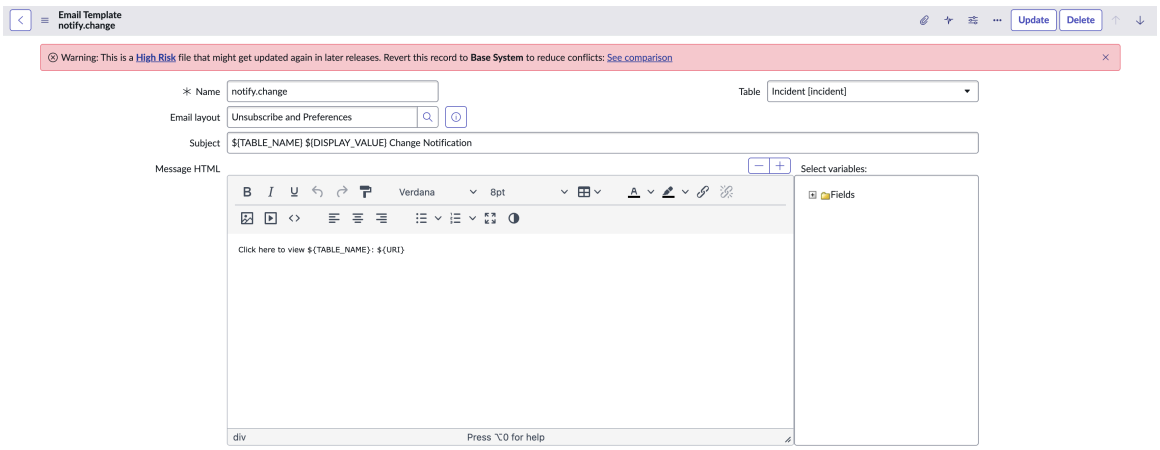
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3. Select **Switch to Rich HTML Editor**.

   When content is converted, these changes are made to the content:

   - HTML Editor: Any raw HTML in the **Message** field is rendered as WYSIWYG text in the **Message HTML** field. The content can be edited in a feature-rich HTML editor.
   - Simplified Mail Scripts: Any mail scripts in the body are automatically saved to the Email Script [sys_script_email] table and are replaced in the notification body with an embedded script tag. This makes the template body easier to read and makes it easier to reuse scripts in multiple email templates.



4. Modify the message text, as needed, using the WYSIWYG editor or by editing the underlying HTML.

   Note: The letter "P" at the bottom of the screen shows the location of your cursor within the **Message** field. In this case, the cursor is in a line containing an <HTML> tag.

   Note: Email templates that are already formatted with rich HTML do not show the **Switch to Rich HTML Editor** button.

Example:
Whether you are working with templates converted from earlier versions or creating new templates in the rich HTML format, it is a good practice to write mail scripts in **System Notification** > **Email** > **Notification Email Scripts**. When the scripts are completed, a `${mail_script:script name}` embedded script tag should be added to the email template body. This makes it easy to use the same scripts in multiple email templates. All that must be copied and pasted from one template to the next is the embedded script tag.

If you manually enter a mail script in the body of a new or converted email notification or template, and then attempt to save the record, a message asks whether the mail script should be converted. Unconverted mail scripts often fail to run from inside the HTML editor. If you select

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Yes, the script is added to the Email Script [sys_script_email] table and is automatically replaced in the body with an embedded script tag.

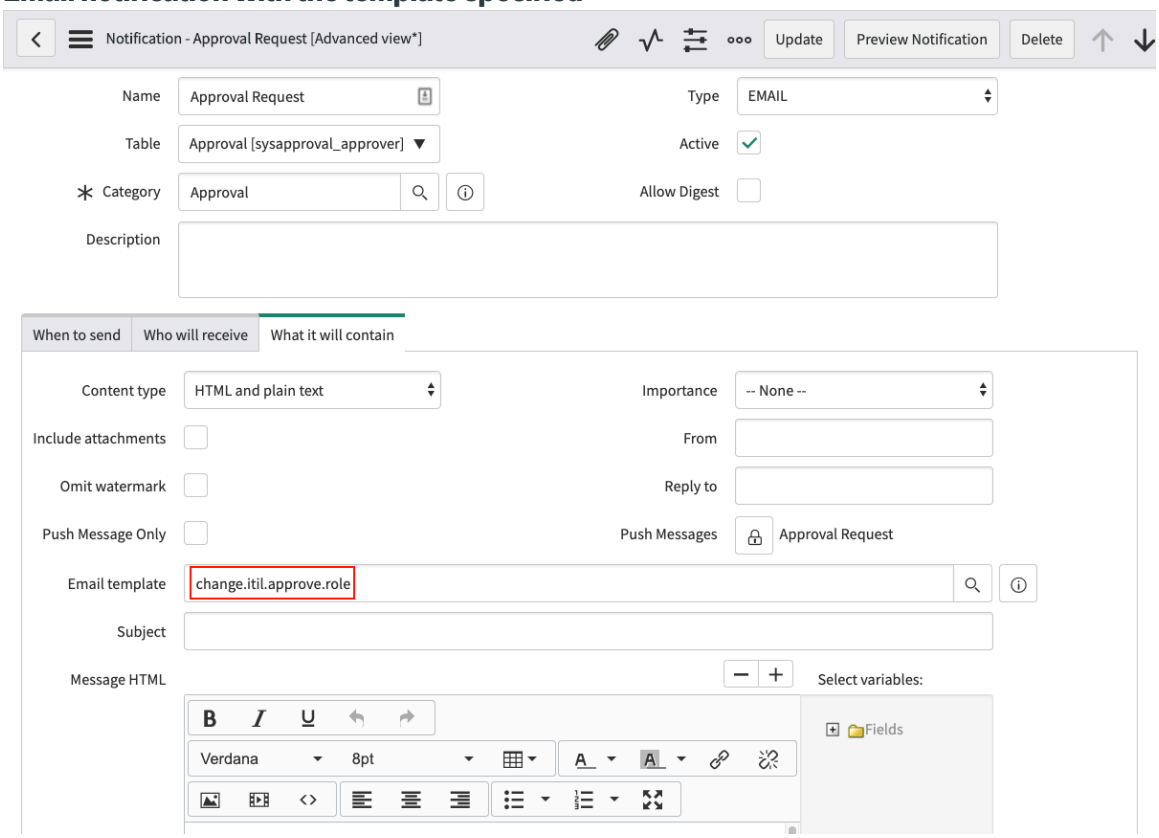
You can view the mail scripts in their original form by opening the email template and clicking the **Show Notification Scripts** related link.

Construct an email message with a template

Email templates provide a list of the fields from database tables that are available for constructing an email message.

An email template can include a **mailto** automatic response link, which enables the email recipient to simply choose a link that sends a preformatted response back to the instance. An example is the email template used for notification that an approval is required. The following example shows the base email:

Email notification with the template specified

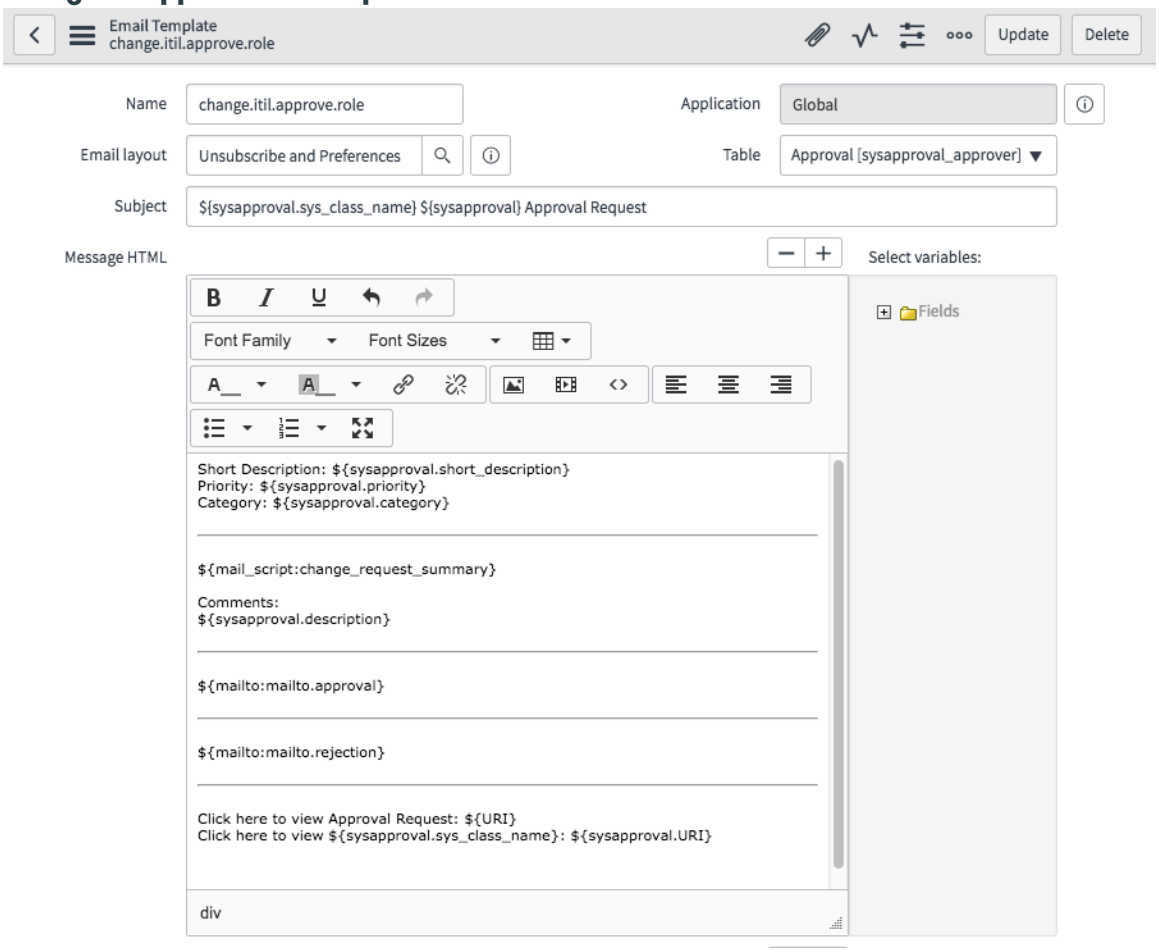


In this case, when a change request approval is requested, an update is made to the `sysapproval_approval` table. The "approval events" business rule is then executed, which creates the "approval.inserted" event. The "Approval Request" email event is defined to process the approval.inserted event, and this email event is defined to use the following change.itil.approve.role email template. Notice that this template has two mailto: items specified. One for "mailto.approval" and one for "mailto.rejection." This email template builds an automatic response that lets the email receiver simply click a link in the email to either approve or reject the change request.

Here is what the **change.itil.approve.role** template looks like using the rich HTML editor:

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change.itil.approve.role template

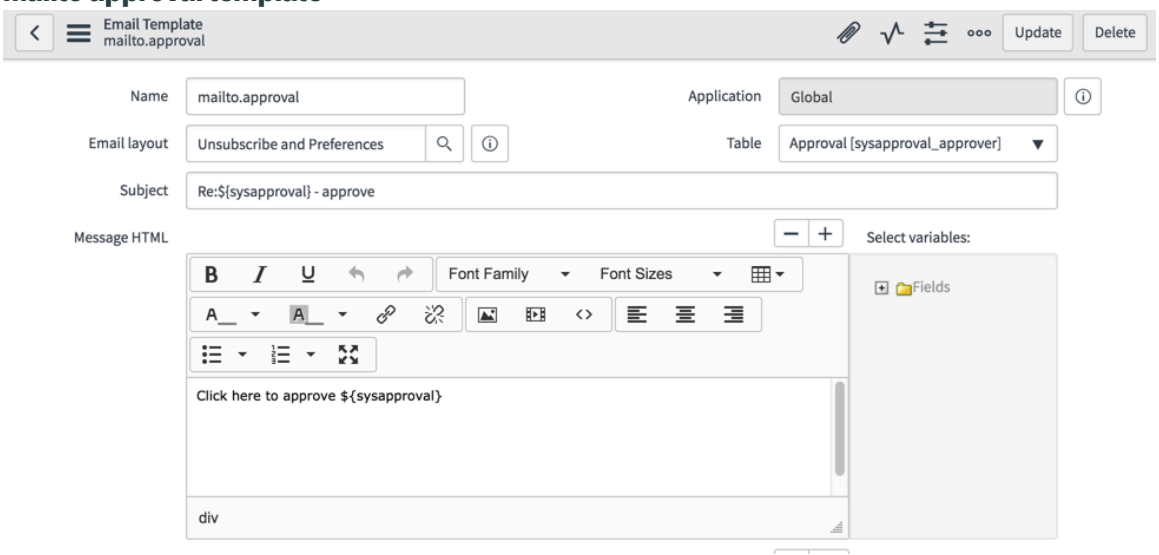


The selection list on the right shows the available fields from the `sysapproval_approver` table.

Notice the **change.itil.approve.role** template also uses a predefined email layout (Unsubscribe and Preferences), which provides links for the recipient to unsubscribe from approval notifications and set notification preferences.

And here is the **mailto.approval** template:

mailto approval template

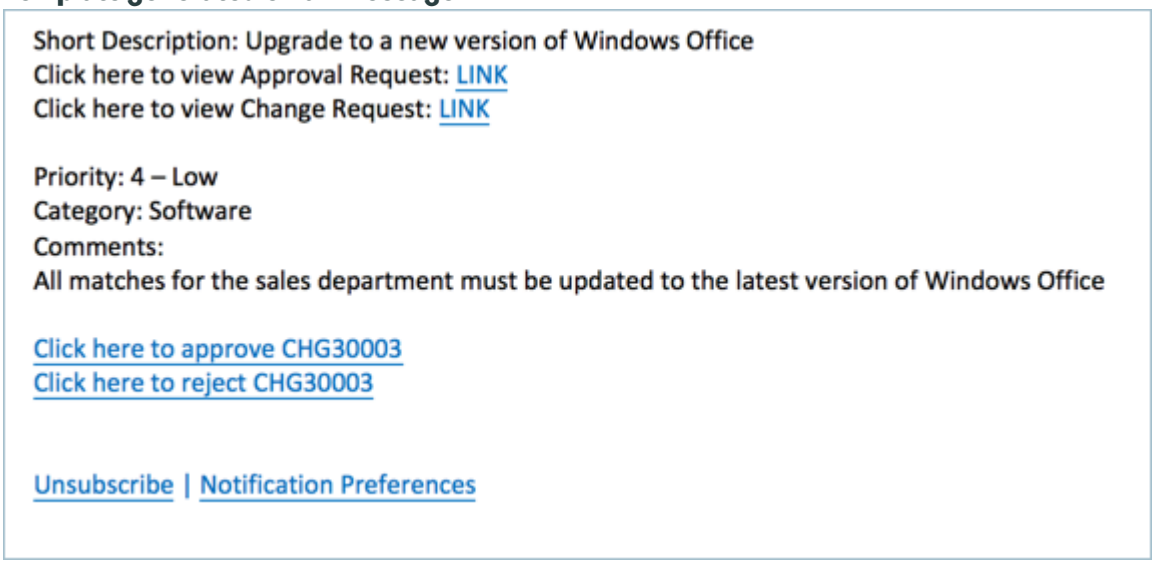


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Note: If you put text on the lines following the **Click here to approve ${sysapproval}** line, this text forms the actual body of the email.

The combination of templates used would generate an email similar to the following example:

Template generated email message



Notice that the email recipient can use the following links in the mail:

- A link to view all the details of the change request
- A link to view the approval record
- A link that generates an automatic email response to approve the change
- A link that generates an automatic email response to reject the change
- A link to unsubscribe from approval notifications and another link to set notification preferences

Related topics

Email layouts

Add blank lines in an email template

You can easily add blank lines in an email template using HTML tags.

Judicious use of these HTML tags can make your email easier to read.

- You can use **
** to insert a line break
- You can wrap paragraphs in ** ... ** tags to format your email nicely.

Calendar integration

With email notifications, you can use import export maps to leverage information about records and integrate with Outlook or another calendar.

For example, an email notification can create a calendar event based on the planned start and end dates of a change request. To enable integration with a calendar, the following iCalendar variables are available to be added to an email template message and reference the email template from the notification. The variables must be added to the **Message Text** field.

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Variable	Description
${dtstart}	Start Date
${dtend}	End Date
${location}	Location
${alarm_time}	Alert or reminder time

By default, the instance computes the value of iCalendar variables using import and export maps for the Appointment [itil_appointment] and Change Request [change_request] tables. The instance also uses import and export maps for other tables, depending on which plugins you activate. For example, if you activate the Incident (com.snc.incident) plugin, the instance uses the import and export maps of the Incident [incident] table.

Each import export map can specify a different set of iCalendar fields. For example, the icalendar.change_request import export map only maps two iCalendar fields.

The instance uses the **External Name** value as the variable name in the email template. For example, the icalendar.change_request import export map defines the *dtstart* and *dtend* variables.

External name	Associated variable name	Table	Field mapped	Field label
dtstart	*${dtstart}*	change_request	start_date	Planned start date
dtend	*${dtend}*	change_request	end_date	Planned end date

Map date fields to iCalendar variables

You can specify what fields provide the date information in calendar invitation notifications by changing the field mappings of the *dtstart* and *dtend* variables in the import export map for the iCalendar invitation.

Before you begin

Role required: admin

Procedure

1. In the navigation filter, enter `sys_impex_map.list`.
2. Open a map to edit.
3. In the Field Maps related list, click either the **end_date** or **start_date** mapped field to change the mapping for *dtstart* or *dtend*, as needed.
4. Change the **Database** field to the field you want to use to set the start date or end date.
5. Click **Update**.

Create iCalendar invitations for custom tables

To generate iCalendar invitations that use field values from custom tables, create an import export map that computes the values of the iCalendar fields.

Before you begin

Role required: admin

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Procedure

1. Create the custom table and fields using the **Date/Time** field type for the fields that map to the *${dtstart}* and *${dtend}* variables.
2. In the navigation filter, enter `sys_impex_map.list`.
3. Click **New**.
4. Set the following fields:
   - **Name**: Use the following naming convention: `icalendar.<table name>`. For example, **icalendar.u_my_custom_table**.
   - **Table**: Select the custom table you created.
   - **Type**: Select **icalendar**.
5. Right-click the form header and select **Save**.
6. In the Field Maps related list, click **New**.
7. In the Mapping Entry Wizard, select **Mapping to a Database Field**.
8. Create field mappings for *dtstart* and *dtend*.

   Example
   For example, map the **External Name** *dtstart* to the**u_meeting_start_time** field in u_my_custom_table.

   Note: These variables are required.

9. Click **Submit**.
10. Create field mappings for any of the following iCalendar fields as necessary.
    - dstart
    - dtend
    - location
    - alarm_time
11. Click **Update**.

    Here are sample field mappings between iCalendar variables and custom fields in a custom table, u_my_custom_table:

    Sample field mappings

External name	Database field	Type	Map
dtstart	u_meeting_start_time	field	icalendar.u_my_custom_table
dtend	u_meeting_end_time	field	icalendar.u_my_custom_table

12. Create an email template that defines what to include in the iCalendar invitation.

    a. Set the **Table** field to the custom table you created.

    b. In the **Message** text field, use the following format to define the iCalendar invitation.

```
BEGIN:VCALENDAR
```

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```
PRODID:-//Service-now.com//Outlook 11.0 MIMEDIR//EN
VERSION:2.0
METHOD:REQUEST
BEGIN:VEVENT
ATTENDEE;ROLE=REQ-PARTICIPANT;RSVP=TRUE:MAILTO:${to}
DTSTART:${dtstart}
DTEND:${dtend}
UID:${sys_id}
DTSTAMP:${dtstamp}
SUMMARY:${u_meeting_summary}
END:VEVENT
END:VCALENDAR
```

Note: Mail script is not allowed or processed in meeting invitation email templates.

iCalendar invitation template details

iCalendar template line	Required?	Notes
BEGIN:VCALENDAR	Yes	
PRODID:-//Service-now.com// Outlook 11.0 MIMEDIR//EN	Yes	
VERSION:2.0	Yes	
METHOD:REQUEST	Yes	
BEGIN:VEVENT	Yes	
ATTENDEE;ROLE=REQ-PARTICIPANT;RSVP=TRUE:MAILTO:${to}	Yes	The ${to} contains the recipients as defined in the notification.
DTSTART:${dtstart}	Yes	You must use the import export map to map dtstart to a start time field on the custom table.
DTEND:${dtend}	Yes	You must use the import export map to map dtend to an end time field on the custom table.
UID:${sys_id}	Yes	You must provide the name of a field that uniquely identifies the record, such as the sys_id or the record number field.
DTSTAMP:${dtstamp}	Yes	
SUMMARY:${u_meeting_summary}	No	To include a summary from a text field on the custom table, provide the name of the field, such as u_meeting_summary. The summary field value must not contain line breaks. You do not need to create a field mapping.
END:VEVENT	Yes	
END:VCALENDAR	Yes	

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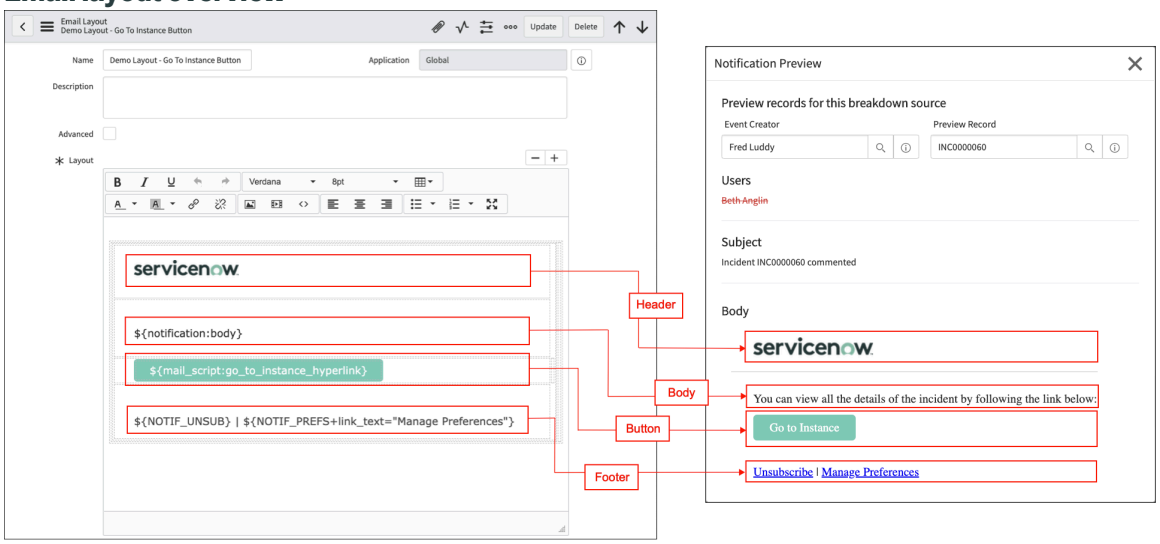
13. Create an email notification to trigger the iCalendar invitation and ensure the following fields are set accordingly:

    - **Table**: Select the custom table.
    - **Type**: Select **Meeting Invitation**.
    - **Content type**: Select **Plain text** only.
    - **Email template**: Select the template you created.

Email layouts

Create reusable content for the message body of email templates.

Email layout overview



Administrators can use email layouts to:

- Ensure all email notifications have a consistent layout such as always displaying a header, body, and footer.
- Display static content on all email notifications such as a company logo or a background.
- Declare inline styles available for use in the message body of an email template such as setting a text font, size, and color.
- Provide users with links to common response actions such as unsubscribe from a notification or manage notification preferences.

> **Note:** To display dynamic content such as mail scripts, use email templates. For more information, see Create an email template.

Email layouts insert HTML elements into the message body of email templates. Any style elements you define in the email layout are available to the email template. Email layouts support style sheets in these formats.

- Internal style sheets defined within a `<style>` element.
- Inline styles within a `style` attribute.

By default, the system includes several sample layouts administrators can use to create their own layouts. Administrators can create email layouts using an inline HTML editor or manually entering HTML code. The system stores email layout records in the Email Layout [sys_email_layout] table.

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Note: If there is no content in the notification from either the notification record or the template, the layout won't be applied.

Create an email layout

Create an email layout to specify the HTML content you want to appear in the body of one or more email templates.

Before you begin

- Role required: admin
- Record required: email template record

Procedure

1. Navigate to **All** > **System Policy** > **Email** > **Layouts**.
   The system displays the list of existing email layouts.
2. Click **New**.
   The system displays a blank email layout form.
3. Fill in the form.

Email layout fields

Field	Description
Name	Specify a unique name for the record.
Application	Lists the parent application to which this record belongs.
Description	Specify an optional description of the layout.
Advanced	Select whether to display the **Advanced Layout** field.
Layout	Use the inline editor to add HTML elements. The system displays HTML from this field in the body of any email template that uses the layout. Include notification variables to show content from the related record. For more information notification variables see Notification variables. **Note:** The editor automatically formats any HTML code you enter from the **Source code** view.
Advanced Layout	Use this field to manually enter HTML code. The system displays HTML from this field in the body of any email template that uses the layout. **Note:** To enter text in this field, select **Click here to disable syntax highlighting and script formatting**.

4. Click **Submit**.
   The system creates the email layout record.
5. Navigate to **System Notification** > **Email** > **Templates**.
   The system displays the list of existing email templates.
6. Select the email template which you want to use an email layout.
   The system displays the email template record.
7. In **Email layout**, select the email layout you want to use to format the body of email messages.

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8. Click **Update**.
   The email template uses the selected email layout to format the body of email messages.

Email retention

You can archive and eventually destroy email messages that you no longer need or if your Email table is excessively large.

Email retention is available starting with the Helsinki release.

Email archive and destruction plugins

The email archiving and destruction feature uses the Data archiving and Email Retention plugins. The Data Archiving plugin must be active to archive and destroy email records. The Email Retention plugin provides a set of rules that specify when the system archives and destroys email records.

Note: The Email Retention plugin also prevents the system from deleting watermarks, which are required for inbound email actions to continue to function.

The Email Retention plugin and associated archive and destroy rules are active by default on new instances. On upgraded instances, you must manually activate both the plugin and the archive and destroy rules. ServiceNow recommends that you review and approve these rules before activating them.

If your instance already has a process to manage email records, you do not need to activate the Email Retention plugin. If you want to replace your current process with Email Retention, be sure to deactivate the current process before activating the archive and destroy rules.

Archiving and destroying email records

Archiving means moving records from the Email [sys_email] table to the Archive Email [ar_sys_email] table when they exceed the archive rule time limit. Destroying means deleting records in the Archive Email table when they exceed the destroy rule time limit.

Note: When a destroy rule deletes email records, associated watermarks are not deleted. They are preserved to ensure that your inbound email actions continue to function.

Default archive and destroy rules

Email Retention provides this email archive rule:

Email - Over a year old or Ignored: archives email message records that were created more than 365 days prior to the current date and are of type **received-ignored** or **sent-ignored**.

Email Retention also provides this email destroy rule:

Email Archive - Over a year old: destroys email records that have been archived for more than 365 days prior to the current date.

With these default settings, your email messages are kept on the instance for a total of two years: one year in the Email table, and one year in the Email archive table. At the end of this period, the system deletes the expired email records from the Email archive table.

Note: By default these rules are active on new instances and inactive on upgrades. The system runs archive and destroy rules when you activate them.

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Compatibility with other record management implementations

If you are already using another method to manage email records, such as table cleaners, you do not have to use the Email Retention feature. To prevent unexpected record deletion, ServiceNow recommends that you avoid using multiple email management processes on the same instance at the same time.

Note: For assistance replacing your existing record management implementation with Email Retention, contact your professional services or sales representative.

Effects of archiving and deleting email records

Inbound email actions copy the body of an email to the work notes of the related record. If the inbound email record is later deleted, Email Received section is no longer visible in the work notes though it still contain a text copy of the email.

When the system sends an email message about a record, the activity formatter displays a **Sent Email** section with a link to the email message. If the system archives the email message, the activity formatter removes **Sent Email** section. When the system deletes the email message, it is no longer visible in the activity formatter nor the work notes.

Note: Set the archive time length long enough so your users can access sent emails though the activity formatter.

Archiving email records changes the methods available to the system to identify inbound email as a reply. After archiving an email record, the system can no longer use the **In-Reply-To** field to match an incoming email to an email record. However, the system can still match incoming email to an existing record from a record number or watermark.

Activate Email Retention

The Email Retention plugin provides archive and destruction rules for email messages. It is active by default for new instances, but must be activated for upgrades.

Before you begin
Role required: admin

About this task
The Email Retention plugin requires these plugins:

- Data archiving
- System Mailboxes

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

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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.

Archive email manually

You can archive email messages manually on demand instead of waiting for the instance to archive them based on a scheduled job.

Before you begin
Role required: admin

About this task
Email Retention provides this email archive rule:

You can manually archive email messages that meet these archive rules or any additional archive rules that you create.

Note: An archive record must be active for the instance to be able to process records with it.

Procedure

1. Navigate to **All** > **System Archiving** > **Archive Rules**.
2. Open the email archiving rule that you want to modify.
3. Select **Recalculate Archive Estimate** to see how many records in the Email [sys_email] table are going to be archived.

   Note: The estimate appears in the **Record estimate** field.

4. Select **Run Archive Now**.

   Note: You can also Create an archive rule.

Watermarks on notification emails

By default, a unique watermark label will be generated at the bottom of each notification email to allow matching incoming email to existing records.

Starting with the Jakarta release, randomized watermarks will be automatically generated for notification emails in base systems. The random character string succeeded by an underscore reduces the possibility of a watermark being guessed or coincidentally matching the watermark of an email from another instance.

Note: If you are upgrading from a release before Jakarta, random watermark support is optional and requires the Random Watermark Support plugin to be activated.

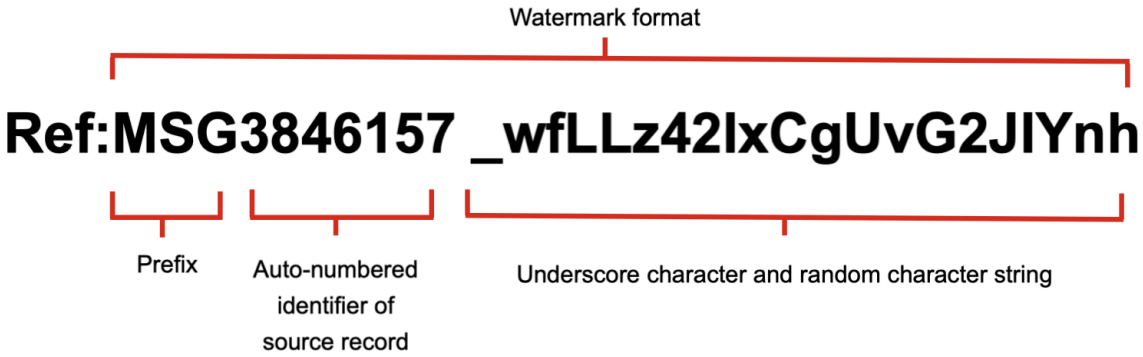
Watermark format

The email watermark always begins with "**Ref:**" to identify the label as a watermark. After this identifier, the default label is 31 characters in length and consists of:

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- A customizable prefix — The default prefix is **MSG**.
- An auto-numbered identifier — The numeric string identifying the source record, such as incident, problem, or change request.
- An underscore character followed by a random character string.

Randomized watermark example



When inbound emails are processed, the system matches random watermarks to the appropriate source records.

Watermark configuration

Watermarks are always generated, but you can configure them as follows:

- Create a custom watermark prefix for each instance to prevent accidentally triggering events in the wrong instance.
- Use custom prefix characters after MSG.
- Hide all email watermarks globally.
- Omit watermarks from individual email messages.

If watermarks are omitted from email notifications, inbound email actions might not work properly. Without a watermark, the system processes inbound email messages as described in Criteria for matching email to inbound actions.

Note: Email clients that use the plain text version of the email still show the watermark.

Create a custom watermark prefix for email notifications

By default, email notifications use the watermark prefix **MSG**, but you can create a custom watermark prefix.

Before you begin

Role required: admin

About this task

Any email notifications that are forwarded from one instance to another might be more easily distinguished with different prefixes for each instance. To avoid unintentionally triggering events in the wrong instance, create a unique watermark prefix for each instance.

Note: Do not use colons (:) in custom watermark prefixes. Colons are a reserved character and may cause the watermark to be ignored.

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Procedure

1. Navigate to **All** > **System Definition** > **Number Maintenance**.
2. Open the **MSG** record in the Email Watermark [sys_watermark] table.
3. Enter the unique **Prefix** for this instance.
4. Click **Update**.

Result

Your custom watermark applies to all new email notifications. Email notifications that existed before you created a custom watermark keep the same watermarks as before.

Omit an email notification watermark

You can omit watermarks on email notifications if you do not want the instance to match the notification to an existing record.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Select the email notification to update.
3. Click the **Advanced View** related link.
4. In the **What it will contain** section, select the **Omit watermark** check box.

What to do next

When incoming email does not contain a watermark, the system searches the subject line and message body for a record number. The system attempts to match any record number that it finds to an existing record. If there is a matching record number, the system updates the record with the values in the incoming email. To ensure that response email messages don't update records, remove the record number variable `${number}` from the **Subject** and **Message HTML** fields.

Hide email watermarks globally

Rather than omitting watermarks, it is possible to hide watermarks for global application using HTML markup.

Before you begin

Role required: admin

About this task

Watermarks can only be hidden in the HTML message for the global application. The text version of the message, because it does not have markup allowing show/hide semantics, will always have the watermark.

Procedure

1. In the **Filter Navigator**, enter `sys_properties.list`.
2. Select **New** to create a new property.
3. In the **Name** field, enter `glide.email.watermark.visible`.
4. From the **Type** drop-down list, select **true | false**.
5. In the **Value** field, enter false.

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6. Select **Submit**.

   This ensures that all watermarks are hidden on all email messages. This cannot be done on a per-email basis.

Parse an email thread

When an email is received, parse the most recent message in an email thread by creating **Email Reply Separators** using specified string or regular expressions.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Policy** > **Email** > **Email Reply Separators**.
   A list of email reply separators shows up.
2. Click **New** to create a new email reply separator.
3. On the **Email Reply Separator** form, fill in the fields.

Fields	Description
Name	Name of the separator.
Application	Scope of the separator.
Active	Option to activate the separator.
Type	Type of separator. ○ String: Searches for the specified string to parse out an email thread. ○ Regex: Searches for the specified regular expression to parse out an email thread. **Note:** Complex regular expressions may take time to evaluate the email thread. In such cases, the regular expression evaluation is timed out after 10 seconds and skipped for that regular expression and the email processing is continued.
Order	Priority of the separator.
Separator	Separator value based on the selection of the **Type**.
Short description	Description about the separator.
Language	Language of the reply separator.

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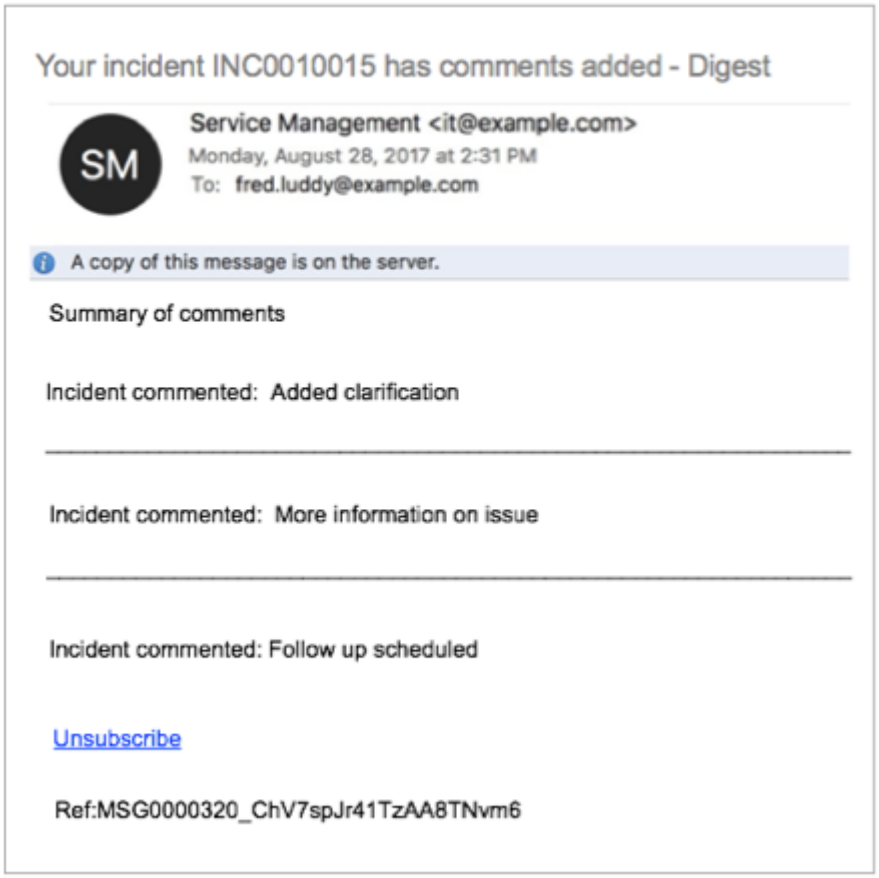
Fields	Description
	Note: All email clients don't indicate a language, so all active reply separators are applied to locate a separator in the email message.

4. Click **Submit**.

Email digests

An email digest is a single email that summarizes the activity for a selected notification and its target records during a specified time interval. You can enable an email digest to reduce the number of notifications received when frequent updates to the associated records occur within a short time period.

Example email digest



Note: Email digests apply to email notifications only and are not supported for SMS messages, push notifications, and activity streams.

How email digests work

In new and upgraded instances, the Email digest (com.glide.email_digest) plugin is activated by default. Your instance must use the Core UI interface, since the email digest feature involves setting user notification preferences.

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Admins determine which notifications can be delivered in an email digest and configure the digest content for those notifications. They also set the intervals for digests. An interval is the length of time that notifications are collected for the digest, such as daily or hourly.

Users enable the digest and select the digest interval for a specific notification in their notification preferences. The system accumulates the notifications that normally would be sent during the specified interval and summarizes them in the email digest.

When processing an email digest, the system:

- Stores the digest configuration for the notification in the Notifications [sysevent_email_action] table.
- Temporarily stores the notification content accumulated for a user in the Email Digest Parts [sys_email_digest_part] table and the Email Digest Part Users [sys_email_digest_part_user] table.
- Runs an email digest job every 15 minutes to check when a digest is ready to be sent to a user.

  The system uses the digest interval to determine when the digest is ready to be sent. The digest interval begins when the first notification is triggered for the user and stops at the end of the interval time.

- Sends the email digest to the user soon after the selected digest interval ends.

  For example, if a user selects an hourly digest interval and the first notification is triggered at 08:15, the interval starts at 08:15. When the digest interval ends, the system generates the email digest approximately one hour later, at about 09:15 or shortly after, depending on when the email digest job ran.

Set up email digests

What to do — admins

1. Review the base system digest intervals and if needed, create or modify intervals.

   The base system digest intervals are one day (24 hours), one hour, every four hours, and seven days (weekly).

2. Determine the email notifications that can be delivered in a digest and configure the email digest content for those notifications.

   When determining which notifications are appropriate for an email digest, consider the notification content and intervals that your users can select. For example, digests that can be generated weekly might be better suited for notifications that are non-urgent.

What to do — all users

For a notification that can be delivered in an email digest, enable the email digest in your notification preferences (**Notifications** tab in the System Settings window). You also specify the interval time that the notifications are accumulated.

Next step

If you are an admin, begin the digest setup process by reviewing the base system email digest intervals and create or modify the intervals.

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Create or modify email digest intervals

Admins can create or modify the email digest intervals (length of time) during which activity for a selected notification is accumulated in an email digest. Users select a digest interval when they enable an email digest in their notification preferences.

Before you begin

Role required: admin

About this task

Before adding an email digest interval, review the base system digest intervals in the Digest Intervals [sys_email_digest_interval] table. You can modify intervals, including the base system intervals, which are one day (24 hours), one hour, every four hours, and seven days (weekly).

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Digest Intervals**.

Action	Description
To add an interval	Select **New**.
To modify an interval	Select the interval to be changed.

2. Enter the new or changed interval information:

Field	Description
Name	Interval name that describes the interval length of time, for example: Every 2 hours.
Interval	Length of the interval, either number of **Days** or **Hours** (hours, minutes, and seconds). The minimum time length allowed is one hour, and the maximum time length allowed is seven days (one week).

3. If you created an interval, select **Submit**, or if you changed an interval, select **Update**.
   The system updates the Digest Intervals [sys_email_digest_interval] table with the new or modified interval. The digest interval is listed as an option in the notification preferences (From your user profile, navigate to **Preferences > Notifications** when a user enables a digest for the notification.
4. To delete an interval, select the interval to be deleted in the Digest Intervals [sys_email_digest_interval] table and select **Delete**.

   Note: If the interval is in use, the system does not remove the interval.

What to do next

Determine the email notifications that can be delivered in a digest and configure the email digest content for those notifications.

Related topics

Email digest properties

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Configure email digests

Use the Notification form to create or modify the content of an email digest for a notification. You can also disable the email digest for a notification so that it isn't available in the notification preferences of your users.

Before you begin

Role required: admin

About this task

When you create or update a notification, use the **What Digest will contain** tab of the Notification form to configure the email digest for the notification. After you define the digest content, the digest option for the notification is available in the notification settings of your users.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.

Action	Description
To create a notification	Select **New** to open the Notification form.
To modify a notification	Select the notification to be changed.

2. In the Notification form, select the **Allow Digest** check box to display the **What Digest will contain** tab and define the digest content.
3. Select the **Digest type**.

Digest Type	Description
Single target record	Allows this notification to be sent in an email digest when it is triggered multiple times dur ing the selected interval for a single target record, for example INC001 only.
Multiple target record	Allows this notification to be sent in an email digest when it is triggered multiple times dur ing the selected interval for a multiple target record, for example INC001, INC002, and more.

4. **Optional:** To enforce a notification as digest, select the **Enable by default** check box.
5. Select the **Default Interval**.
6. Select the **What Digest will contain** tab.
7. Fill in the fields. in the **What Digest will contain** tab.
   The image shows the default view of the tab. The advanced view contains additional fields (see table).

Field	Description
Digest Template	If you want to reuse existing content, such as headers or footers, select an email template to add content to the email digest.

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Field	Description
Digest Subject	Enter the subject line for the email digest. The subject can include variables from the **Select variables** column. If empty, the system uses the **Subject** value from the **Email template**. If you enter a value in this field, it overrides the template value. **Note:** For email digest with multiple target records enabled, it's recommended to use a subject text without any dynamic variables.
Digest HTML	Enter the recurring content for the email digest. The digest content can include variables from the **Select variables** column. Variables map to column names available from the notification table, its parent tables, and reference tables. Use variables to include values from a record in the table such as an incident short description or comments and work notes. To prevent adding extra `<p>` and `<div>` elements to your email digest, see the blog post Extra line spacing with paragraph tags in email client by a ServiceNow employee in the ServiceNow Community.
Digest Separator (HTML)	Use the line to separate each item summarized in the digest.
Digest From	Enter the email address to be used in the From field of the email digest. For example, helpdesk@yourcompany.com. The email address must be in a valid format, otherwise a notification message appears near the field. Changing this address requires an advanced email setup such as enabling email forwarding.
Digest Reply To	Enter the email address that you want people to use when replying to the email digest. For example, helpdesk@yourcompany.com. The email must be in a valid format, otherwise a notification message appears near the field. Changing this address requires an advanced email setup such as enabling email forwarding.
Digest Text	Enter the recurring content of the email digest to send in plain text. This field appears when you set the content type to **HTML and plain text** or **Plain text only**.
Digest Separator (text)	[Optional] Use the dash character as a line to separate each item summarized in the digest. This field appears when you set the content type to **HTML and plain text** or **Plain text only**.

8. When you finish creating the notification, select **Submit**.
   The email **Digest** option is displayed in the notification settings of your users.

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Note: The email recipients identified in the **Who will receive** tab will receive the digest after they enable the digest in their notification preferences. If the user isn't a designated recipient for the notification, a digest isn't generated even though the user may have the digest enabled for a notification. In this case, the user receives the actual notifications when they're generated.

9. **Optional:** To disable the email digest for a notification, unselect the **Allow Digest** check box and select **Update** when you finish your changes to the notification.
   When you disable the digest content, the digest option is also no longer available for the notification and isn't listed in the notification preferences for your users. If a user previously enabled the digest option for the notification, the system stops collecting those notifications for a digest and doesn't generate the digest.

   Note: If you turned off the digest and want to make the digest available again, select the **Allow Digest** check box. The system retains the previously saved digest content and displays it in the **What Digest will contain** tab.

Related topics

Email digests

Create or modify email digest intervals

Enable an email digest in Core UI

Enable email digest in Next Experience

Reduce the number of email notifications you receive by enabling email digest notifications. An email digest is a single email that summarizes the activity for a selected notification and its target record during a specified time interval.

Before you begin
Role required: none

About this task
Notifications do not include the option to be received as an email digest by default. Only admins can create an option to enable email digest for a selected notification.

Procedure

1. From the user profile, navigate to **Preferences** > **Notifications** and then select **Advanced Preferences**.
2. Select **System Notifications**.
3. Expand the notification.
4. Enable **Email Digest** and select the digest interval in which you want to receive the notification communication.

Enable an email digest in Core UI

Reduce the number of notifications you receive for a selected target record during a specified time interval by enabling an email digest. The digest is a single email that collects individual notifications for a targeted record generated during the specified interval. The email digest of two different target records will not be clubbed in a single email.

Before you begin
Role required: none

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About this task

The email digest option is available only if your admin configured email digest content for that notification.

Procedure

1. Select the gear icon () in the banner frame to open the System Settings window, and select the **Notifications** tab.
2. Select the notification:
   a. In the Notifications By Category section, select the row or right arrow (**>**) of the category that you want to view.
   b. In the list of notifications for the category, select the row or right arrow (**>**) next to the notification that you want to edit.
3. To enable or disable an email digest for the notification, if an email digest is available:
   a. Select the **Email Digest** switch.
   The email digest is enabled when the switch is green and disabled when the switch is grey.
   b. If you enabled the digest, select the **Interval** (length of time) during which the notifications are accumulated.

   The digest interval begins with the first occurrence of notification activity. For example, if you select the daily (1 Day) interval and the first notification occurs at 07:00, the system begins accumulating notifications at 07:00 and stops at 07:00 the next day.

Soon after the interval ends, the system sends the email digest to you instead of sending the individual notifications generated during the digest interval. If you disabled the digest, the system immediately stops accumulating the notifications for the digest and does not send the email digest. The system resumes sending the notifications as they are generated.

Related topics

Apply notification conditions

Email digests

Configure email digests

Multilingual email notifications

Using multilingual email notifications, you can send email notifications in the recipient's preferred language and can easily manage notification content in different languages.

Email notification translation

You can customize email notifications for users across multiple regions based on their preferred language. For example, a recipient whose language is set to French will receive notification emails in French, while a German requester would be notified in German.

Two types of translations are available for email notifications:

- Static translation

  Customize email notifications for recipients across multiple regions based on their preferred language. With static translations, the translation request goes to a translator.

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- Dynamic translation

  Customize email notifications automatically for users across multiple regions based on their preferred language.

You can also send emails using a combination of both static and dynamic translation. For example, if an email has to be sent in English, French, Spanish, and German and the translated templates for French and Spanish already exist, then the dynamic translation will only happen for German.

User preference for email translation

The preferred language set is honoured when the property is set to true. To set user preference for email translation:

- Set the *glide.email.translation.honour.user_preference* property to `true`.
- Navigate to **User menu** > **Preferences** > **Language & region**, select and set the preferred language.

Groups

If there is no group email ID, a notification triggered for a group with multilingual recipients can send a group email to different people with different language preferences.

If there is a group email ID, an email is sent in a single language to all the recipients in the group. The recipient's preferred language is not considered.

Email notification translation plugins

Activate the glide notification translation plugin to send multi-lingual emails based on the recipient's preferred language. The localization framework plugin is activated by default along with the Glide notification translation plugin.

Activate the translated email retention plugin to archive emails.

Activate Glide Notification Translation

You can activate the Glide Notification Translation plugin (com.glide.notification.translation) for Notifications if you have the admin role.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Glide Notification Translation plugin (com.glide.notification.translation) 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.

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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.

Activate Translated Email Retention

You can activate the Translated Email Retention plugin (com.glide.email_retention.translation) for Notifications if you have the admin role.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Translated Email Retention plugin (com.glide.email_retention.translation) 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.

Static translation

Using static translation, you can customize email notifications for recipients across multiple regions based on their preferred language.

About static translation for email notifications

Author localized content for the various content fields on notifications, email templates, and email layout forms using static translation after activating the translation plugin.

For static translation, the translation request goes to a translator. The translator provides translations for notification content in different languages.

Not all of the fields on the notification forms are translatable.

Translatable fields

Table name	Translatable fields
Email Notification	Subject, message, message_html, and message_text

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Translatable fields (continued)

Table name	Translatable fields
Email Template	Subject, message, message_html, and message_text
Email Layout	Layout

Note:

- The static content that needs to be translated in mail scripts must be present inside **gs.getMessage()** and translations for the strings must be available in the Message [sys_ui_message] table.
- You can stop the translation of tokens by creating the *glide.email.outbound.static_translation.session.language.change.enabled* system property and setting it to false.

Localization Framework

Use the Localization Framework settings to request translations for the following artifact configurations:

- Email Layout Configuration
- Email Notification Configuration
- Email Template Configuration

Related topics

Request a translation for an email notification, template or layout

Enable static translation

Enable static translation of notifications for the global application.

Before you begin

Role required: admin

Procedure

1. Enter `sys_properties.list` in the navigation filter.
2. Select **New**.
3. On the form, fill in the fields.

Field	Description
Name	Name for the system property, which is `glide.email.outbound.static_translation.ena`
Application	Application for the system property. **Global** applies the system property to all applications when the system property is set to true.

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Field	Description
Description	Description displayed in the System Properties list.
Choices	Description displayed in the System Properties list.
Type	Type of system property, either true or false.
Value	Value for the **Type** selected, which should be set to true.
Ignore cache	Option to ignore the cache.
Private	Option to keep the system property private.
Read roles	Roles that can read the system property.
Write roles	Roles that can modify the system property.

4. Select **Submit**.

Request a translation for an email notification, template or layout

Request a translation to send an email in the recipient's preferred language.

Before you begin

An email notification must exist. For more information, see Create an email notification.

You must activate the Glide Notification Translation (com.glide.notification.translation) plugin.

The Localization Framework settings should be configured to request the translation for the artifact configurations and add languages.

Role required: admin

About this task

Notification recipients must be defined as active users in the User [sys_user] table and have a valid email address defined for their primary channel (device) in the Notification Device [cmn_notif_device] table.

Procedure

1. Navigate to the email item for which you want to request a translation.
   - For notifications, navigate to **All** > **System Notification** > **Email** > **Notifications**
   - For templates, navigate to **All** > **System Notification** > **Email** > **Templates**.
   - For layouts, navigate to **All** > **System Policy** > **Email** > **Layouts**.

   Note: Static translation is not supported for email notifications of type **Meeting Invitation**.

2. Select the item you want to translate from the list.
3. Select **Request Translation** and select the languages to translate into.
4. Select **Submit**.

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Dynamic translation

Using dynamic translation, you can customize email notifications automatically for users across multiple regions based on their preferred language.

About dynamic translation for email notifications

Dynamic content notifications are user-specific. You can use dynamic translation to translate notifications automatically based on the language selected by the recipient.

For example, a requester whose language is set to French will automatically receive notification emails in French, while a Spanish requester would be notified in Spanish.

Using dynamic translation involves the following tasks:

1. Activate Dynamic Translation
2. Set system property for dynamic translation
3. Enable dynamic translation

After dynamic translation is enabled, you can send emails and view or preview the translated email in the preferred languages of the recipients by accessing the **Translated Email Contents** tab.

Note: The language preference of users mentioned in **cc** and **bcc** fields is not considered.

Enable dynamic translation

Enable dynamic translation of notifications for the instance.

Before you begin

Role required: admin

You must activate the Glide Notification Translation (com.glide.notification.translation) plugin.

Procedure

1. Enter `sys_properties.list` in the navigation filter.
2. Select **New**.
3. On the form, fill in the fields.

Enable dynamic translation form

Field	Description
Name	Name for the system property, which should be `glide.notifications.translation.dynamic`.
Application	Application for the system property. **Global** applies the system property to all applications when the system property is set to **true**.
Description	Description displayed in the System Properties list.
Choices	Description displayed in the System Properties list.

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Field	Description
Type	Type of system property, which should be **true | false**.
Value	Value for the **Type** selected, which should be. `true`.
Ignore cache	Option to ignore the cache.
Private	Option to keep the system property private.
Read roles	Roles that can read the system property.
Write roles	Roles that can write the system property.

4. Select **Submit**.

Configure the note banner for translated emails

Configure the content for a translated email note banner displayed at the top of the page to display a customized message to the recipient.

Before you begin
Role required: admin

Procedure

1. Enter `sys_properties.list` in the navigation filter.
2. Search for and select the properties to configure and customize the note banner.

System property	Description
glide.email.translation.dynamic.note.display.body	Displays the message as a header for the translated email html body.
glide.email.translation.dynamic.note.text	Adds the message to the text body of the translated email body text.
glide.email.translation.dynamic.note.style	Applies CSS styles to the note.

Note: If you want to disable the note banner, set the *glide.email.translation.dynamic.note.enabled* system property to false.

Enable dynamic translation for email notifications

Enable dynamic translation for a notification to send dynamically translated emails to recipients in their preferred language.

Before you begin
An email notification must exist. For more information, see Create an email notification.

You must activate the Glide Notification Translation (com.glide.notification.translation) plugin.

Set the system property for the dynamic translation. For more information see, Enable dynamic translation.

Role required: admin

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About this task

Notification recipients must be defined as active users in the User [sys_user] table. They must also have a valid email address defined for their primary channel (device) in the Notification Device [cmn_notif_device] table.

Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Notifications**.
2. Select the name of the email notification you want to send.
3. Select the **What it will contain** tab.
4. If **Advanced view** is not already selected, select it.
5. Select the **Enable Dynamic Translation** check box.

What to do next

Preview email notifications

Domain separation and Notifications

Domain separation is supported in the Notifications application. 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.

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 is specifically supported in Notifications but not in email accounts. Notifications are not data-separated but they are process-separated. Notifications are also triggered by specific actions.

Note: Subscription-based notifications are not domain aware and cannot support domain-specific settings.

How domain separation works in Notifications

There are two basic components of domain separation and Notifications.

- Notifications are process-separated (not data-separated).
- Notifications are triggered in two main ways:

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1. When a record is Inserted or Updated

   Notifications with matching conditions AND in the same domain and global domain as the inserted/updated record are processed.

2. When an event defined in the notification is triggered
   a. Events typically have a target record. For example, [incident.inserted] event references the incident record being inserted.
   b. When an event is fired, notifications configured for that event in the same domain and global domain as the event's target record are processed.

Domains and email accounts

Domain separation is not supported in email accounts for these reasons:

1. Sending mail: There is only one SMTP sender per account. This prohibits providing domains for each account, and they are not configurable.
2. For receiving Inbound mail: You can set up multiple email accounts but cannot meaningfully set the domain of an inbound email action. Inbound Actions are processed in the domain of the user who sent the email. For example: User_A in Domain A sends an email to a ServiceNow email account which executes the "Create an incident" inbound email action. The resulting new incident created by the inbound action is in Domain A.

To learn more see Inbound email actions.

Note: If the number of email accounts exceeds 20, reception of email slows down.

Use case

If an instance is using the Domain separation plugin and a new email notification is defined for a domain that has the same event as the notification on the global domain, the user receives two emails for the same event.

Solution: Set the [sys_overrides] field on the notification that belongs to the domain so it overrides the setting on global. For more information, see Delegated administration.

Related topics

Domain separation for service providers

Email FAQs and troubleshooting notification emails

Logs and diagnostics are provided to help determine whether notification emails are being sent and received successfully, what any issues are, and who receives the email.

Diagnostics help monitor the overall health of the system and troubleshoot general problems, such as not receiving any incoming mail. Logs help identify problems with individual emails, and different logs are useful for diagnosing different types of problems.

Log checking scenarios

Problem	Log
Need to check whether an individual notification email was successfully sent	Check the **Sent** System Mailbox for that email. Also check the **Failed** System Mailbox for failure notifications.

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Problem	Log
Individual email failed	• Check the message log of the individual email. • Check the **Error string** field of the email record. ⚠ **Warning:** Some email servers do not return error strings
Email not received by end user	• Check the **Junk** System Mailbox for notifications about returned emails. These emails also appear in the Emails log with a **Type** of received-ignored. • Check the **Error string** field of the email record. ⚠ **Warning:** Some email servers do not return error strings • Check the message log of the individual email for the reasons different recipients were included or excluded.

Email FAQs

Troubleshooting resources

See the following resources on troubleshooting inbound and outbound email problems.

Error or symptom	Solution
Inbound Email FAQ	See KB0957760.
Instance not receiving inbound email	See Inbound email troubleshooting, ServiceNow KB0524472 and KB0520595. These KB articles also provide links to a video series on troubleshooting inbound emails.
Instance not sending outbound email	See Troubleshooting Outbound email, ServiceNow KB0521382. This KB article also provides links to a video series on troubleshooting outbound emails.
Email from Outlook produces an empty Incident record containing an attachment named winmail.dat.	Configure the local Outlook client or Exchange server not to send Rich Text formatted (RTF) data to the instance.
Emails are getting set to type send-	See KB0790932.

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Error or symptom	Solution
ignored for no obvious reason	
Duplicate emails generated by the instance	See Troubleshooting duplicate emails generated by the instance, KB0529413.
SMTP Sender Job Stuck	See SMTP Sender Job Stuck > 30 Mins alert, KB0755061.
Connection to smtp.office365.com failed	See KB0825391.
IMAP with OAuth error AUTHENTICATE failed	See KB0963959.
Error connecting the POP email account on secure port	See KB0829289.
Inbound email processing is stuck alerts	See KB0855277.
Email Reader / SMTP Sender job stuck	See KB0679998.
Email Reader Job stuck/running for more than 2 hours alerts	See KB0755063.
SMTP retries	The SMTPSender job is responsible for sending emails from the instance and at times there can be delivery failures during transmission. Emails that aren't successfully delivered might need retries. Exponential back-off retries is a mechanism to redeliver them in the interval (1, 5, 10, 20, 40, 60, 120, 120) between the retries. The exponential retries continue until the lookback period mentioned in the *glide.email.smtp.claim.lookback.hrs* system property is lapsed. The retries are attempted for 4xx status codes and for all other status codes such as 5xx are considered as permanent failure. The *glide.smtp.fail_message_ids* and *glide.smtp.defer_retry_ids* system properties aren't considered. Retried emails type is set to **send-retry-backoff**.

Exponential back-off retries

Emails that aren't successfully delivered might need retries. Exponential back-off retries is a mechanism to redeliver them in the interval (1, 5, 10, 20, 40, 60, 120, 120) between

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the retries. The exponential retries continue until the lookback period mentioned in the *glide.email.smtp.claim.lookback.hrs* system property is lapsed.

The retries are attempted for 4xx status codes and fail for 5xx status codes during the email delivery. The *glide.smtp.fail_message_ids* and *glide.smtp.defer_retry_ids* system properties aren't considered.

Retried emails type is set to **send-retry-backoff**.

Note: Address validation errors that occur during the email delivery are handled differently. The type of email record is set to **send-retry-delayed** and the email delivery is retried in fixed intervals of 30 minutes until the lookback period is lapsed.

Email diagnostics

The Diagnostics and Connection page provides information on the current state of your email configuration. This page includes status on email properties, scheduled jobs, and email account connections that affect how your instance receives and sends email.

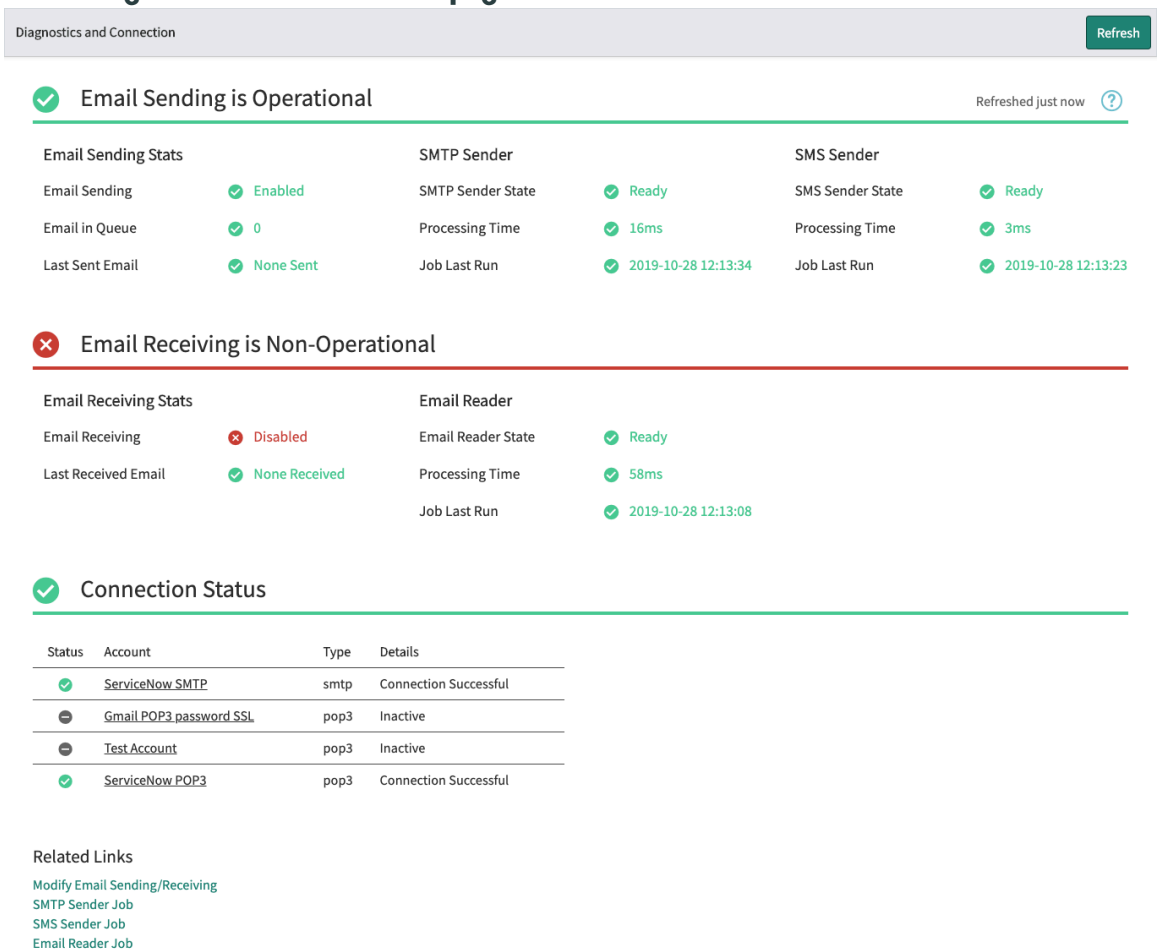
Email diagnostic information can help you identify problems with inbound or outbound email. The following video shows different steps to determine why your instance is not receiving inbound emails. One of the steps uses email diagnostics to check the email connection status and email reader scheduled job.

Navigate to the Diagnostics and Connection page from either of these modules:

- **System Mailboxes** > **Email Diagnostics**
- **System Diagnostics** > **Email Diagnostics**

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Email Diagnostics and Connection page



For quick status on a field, point to the green check mark or red X icon. The check mark icon indicates that the item is operational or healthy, while the X icon indicates that the item is not operational or within the expected range.

Mail diagnostics

Diagnostic	Description
Email Sending is [Status]	
Email Sending	Status of outbound email as either **Enabled** or **Disabled**. To change the status, click the **Modify Email Sending/Receiving** related link, and in the Email Properties form, update the *`Email sending enabled`* property.
Email in Queue	Number of email messages that are ready to be sent.
Last Sent Mail	Date and time the last email message was sent.
SMTP Sender State	Current state of the SMTP Sender job, which sends email on a recurring schedule. By default, this job runs every minute. To update the SMTP Sender state, click the **SMTP Sender Job** related link, and in the Schedule table, open the SMTP Sender record to be changed.

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Mail diagnostics (continued)

Diagnostic	Description
SMTP Processing Time	Duration of the last SMTP Sender job run. This value should be shorter than the SMTP Sender interval.
SMTP Job Last Run	Date and time when the SMTP Sender job last ran.
Default SMTP Status	Indication of whether the SMTP connection was successful, shown only if the email accounts feature is active. Click **Default SMTP** to change your SMTP account settings.
SMS Sender State	Current state of the **SMS Sender** job, which sends SMS notifications on a recurring schedule. By default, this job runs every minute. To update the SMS Sender job, click the **SMS Sender Job** related link, and in the Schedule table, open the SMS sender record to be changed.
SMS Sender Processing Time	Duration of the last **SMS Sender** job run. This value should be shorter than the **SMS Sender** interval.
SMS Sender Job Last Run	Date and time when the **SMS Sender** job last ran.
Email Receiving is [Status]	
Email Receiving	Status of inbound email as either **Enabled** or **Disabled**. To change the status for email receiving, click the **Modify Email Sending/ Receiving** related link, and in the Email Properties form, update the *`Email receiving enabled`* property.
Last Received Email	Date and time the last email message was received.
Email Reader Status	Current state of the email reader job, which downloads any email waiting on the mail server and creates email.read events. To update the Email Reader Status job, click the **Email Reader Job** related link, and in the Schedule table, open the email reader record to be changed.
Email Reader Processing Time	Duration of the last reader job run. This value should be shorter than the reader interval.
Job Last Run	Date and time when the reader job last ran.
Connection Status	
{Accounts}	The result of the test connection to the accounts. The connection is tested every time you load the page.

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Related topics

Scheduled jobs

System email log and mailboxes

The system email log records all emails that the instance creates or receives. System mailboxes are filtered views of this log.

Every notification email that the instance creates or receives is recorded in an Email [sys_email] record. You can navigate to a log of these records at **System Logs** > **Emails**.

The System Mailboxes are filtered views of the Emails [sys_email] table. The instance assigns an email record to a system mailbox depending on the values of the **Type** and **State** fields. For more information, see System mailboxes.

The following fields can be included in the layout of the system log and any of the system mailboxes:

Email log

Field	Description
Mailbox	The system mailbox that lists this email record. The instance sets the value of this field according to the values of the **Type** and **State** fields.
State	The current state of the email (Error, Ignored, Processed, or Ready).
Receive type	The type of inbound email (None, Forward, New, or Reply).
Type	The status of the email. Choices are: • received: The server received this email. • received - ignored: The server received this email, but it was ignored by the instance for inbound email action purposes. Typically, these emails are either spam or auto-replies. See the Error String field for details. • send - failed: The server has attempted to send the email and failed. See the Error String field for details. • send - ignored: The server skipped sending this email. Typically, this is for an email which was generated but lacked a recipient email address or is a duplicate email. See the Error String field for details. • send - ready: The email is ready to be sent, but has not been sent out by the mail server. Typically, an email remains in this state for only a short time. • send - translation - ready: The email is generated during email translation and sent out. Typically, an email remains in this state for only a short time. • sent: The email was sent by the instance without any errors or issues.
Target	A Document ID reference to the record if the email is generated by an insert, update, or delete of a particular record.
User	The name of the user, from the user record, of the instance from which the email notification was sent. **Note:** This is a string field.

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Email log (continued)

Field	Description
Notification Type	The type of notification. Choices are: • None • SMS • SMTP
UID	The unique ID of the email stored on the server.
Created	The date and time of the email activity for the locale of the machine running the instance.
Deleted	For inbound email, indicates whether the email was deleted from the email server.
Weight	The weight of the email, which determines the sending priority relative to other notifications on the same table.
Importance	An indication that the email was sent with a changed level of importance, such as Urgent.
Originating Event and Notification	For emails generated by notifications, an embedded list that stores the event and notification that created the email.
Subject	The email subject. For notifications, you create the subject text in **System Notification** > **Email** > **Notifications**.
Error String	The error string captured from the email server to determine why the email was not sent. This is logged only if the email is send-failed.
Recipients	The email addresses of the recipients.
Body	The body of the email, displayed in raw HTML markup. Use the related link Preview HTML Body to see the body text as rendered HTML.
Content type	The email content type.
Headers	Any headers embedded in the email.

Message logs for individual emails

The email log entries for an individual notification email are accessible as a related list in the email record. The **Error string** field in the email record can provide additional information.

Every email record contains an **Email Log** related list. This list shows the Email Log Entry [syslog_email] records. For troubleshooting purposes, the most useful fields are probably **Level** and **Message**.

To diagnose problems with outbound emails, also examine the **Error string** field in the email record. However, not every receiving email server sends back an error string.

Note: The Email Log Entry record is available for only 7 days after the email record is created.

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Inbound actions on received emails

Check these logs as the first step to diagnose issues with inbound actions. The logs show which inbound action did or did not apply and for what reason.

Note: If an inbound action did not update any field on the target record, the log indicates that the inbound action was skipped.

Reasons for including or excluding recipients

For outbound notifications, the email system log provides reasons that recipients were included or excluded.

Each log entry corresponds to a reason for inclusion or exclusion. For example, all users who were excluded because they are inactive appear in a single log entry.

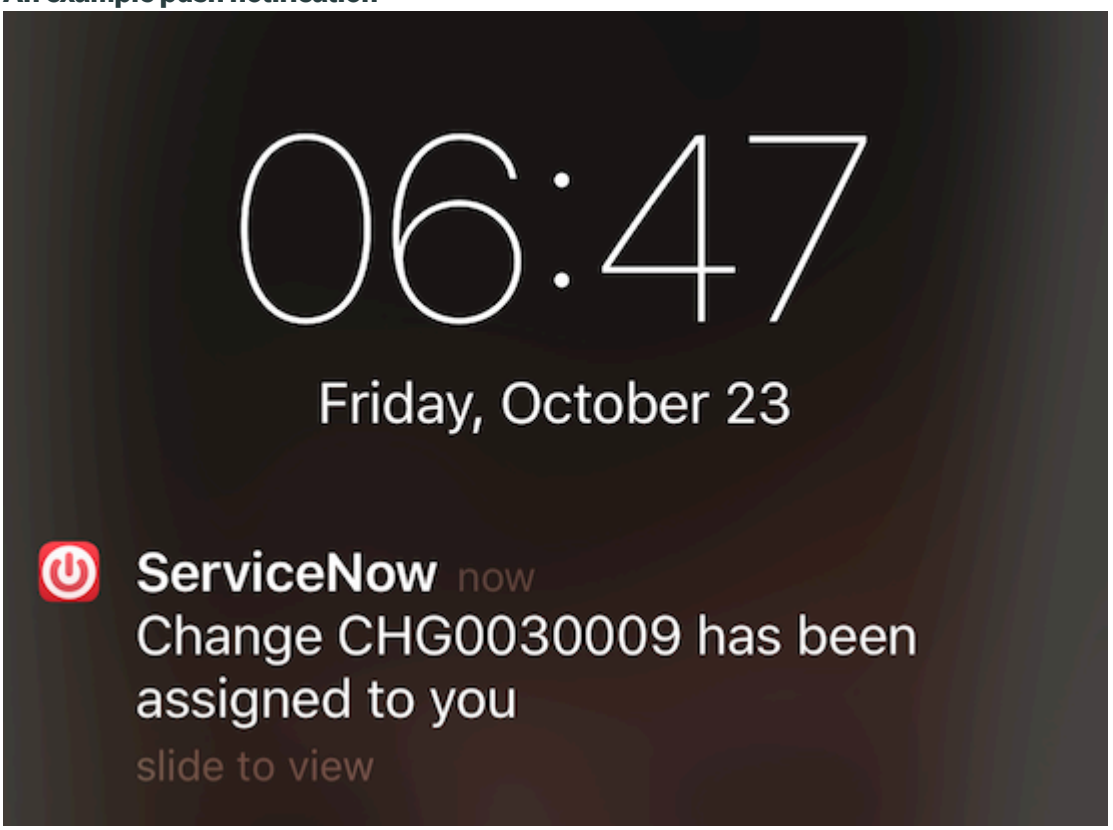
A series of system properties can be used to fine-tune the information to be logged. Two properties, *glide.notification.recipient.include_logging* and *glide.notification.recipient.exclude_logging*, control all recipient inclusion and exclusion logging. Several other properties allow you to tailor the information reported in the logs to meet your needs. All of the properties are enabled by default.

Push notifications

In addition to sending email and SMS notifications, an instance can send push notifications to mobile devices.

A push notification is a text message that appears on a user's mobile device to alert them about something important or to ask them to perform an action. Your instance supports push notifications.

An example push notification



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Use push notifications to send messages to users when certain conditions are triggered on your instance, such as the assignment of an incident to the user. A push notification can even ask for a reply, and the instance can process the reply by acting on the related records. For example, you can have the instance send an approval request for a Change to a user. You can let the user approve or deny the Change by clicking a response button on the push notification. The user's response can then update the status of the Change record.

You can set up push notifications in a similar manner to email and SMS notifications. Determine:

- who to send the notification to
- when it should be sent
- what it should contain

The ServiceNow mobile app is available as ServiceNow Classic and as Mobile Agent. By default, ServiceNow Classic supports push notifications, but you can also develop your own push application and configure your instance to send push notifications to it. For more information on setting up push notifications in Mobile Agent, go to Mobile push notifications.

Push notification setup

Push notification setup differs depending on the mobile or push application that you want your users to use. For an overview, see: Push notification setup with a custom push application for ServiceNow mobile apps. If you create your own application, you must understand how push notifications and the Apple Push Notification Service system work. For more information, see the APNs Overview in theLocal and Remote Notification Programming Guide for Apple developers.

Important: Apple does not guarantee delivery of all push notifications. Review the Quality of Service (QoS) information in the Local and Remote Notification Programming Guide for Apple developers.

Push notification system

The push notification system involves several key elements that manage the delivery of push messages and push notification responses.

Customer instance

Your ServiceNow instance.

Push proxy

An instance that collects all push notifications that go to the ServiceNow Classic mobile application and forwards them to the ServiceNow applications for Apple iOS or Android. If you create a custom push application, you do not use the push proxy.

Push provider

The provider of push messages, which is the Apple Push Notification service (APNs) or Firebase Cloud Messaging (FCM) service, for the ServiceNow Classic mobile app or custom mobile apps.

Push application on a mobile device

The application, such as the ServiceNow Classic mobile application. You can also build and customize your own push application.

Push notification process

The push notification process is as follows:

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1. Activity on the instance triggers a push notification.
2. The instance looks for who to send the notification to and checks the user notification preferences to find their push device settings.
3. The instance sends the push notification to the push notification service, either the Apple Push Notification service (APNs) or Firebase Cloud Messaging (FCM) service. If you are using the ServiceNow Classic mobile app, the instance sends the notification through a push proxy instance, which then forwards the notification to the APNs or FCM service.
4. The push notification service sends the notification to the user's push application. When the instance sends the notification to the push notification service, it includes message content along with the instance name and ID. This information ensures that a response to the notification is sent back to the correct instance. If the user can reply to the notification, such as sending an approval to a change request, the response is sent via REST message back to the instance.
5. The instance identifies a script to run to handle the response.
6. The script performs an action on the instance, such as marking a change request approved. If there is invalid JSON or if the script fails, an error response is sent back to the device.

Push notification system with the ServiceNow Classic mobile app

Push notification responses

With custom push applications, you can have your users act on records in the instance by responding to a push notification.

The actions that they can take are defined in a script that you associate with the notification message. The response is sent to the instance in this format:

```
https://{instance_name}/api/now/v1/push/{application
 Name}/action/{action}
```

The application name is the push application the user is using. The application name must match the application name in the Push Application [sys_push_application] table. The action is the Sys ID of the action in the Push Notifications Actions [sys_push_notif_act_script] table.

Activate push notifications

Several plugins must be activated to use push notifications. If you have the Mobile UI (com.glide.ui.m) plugin active, push notification plugins are automatically activated.

Before you begin

Role required: admin

About this task

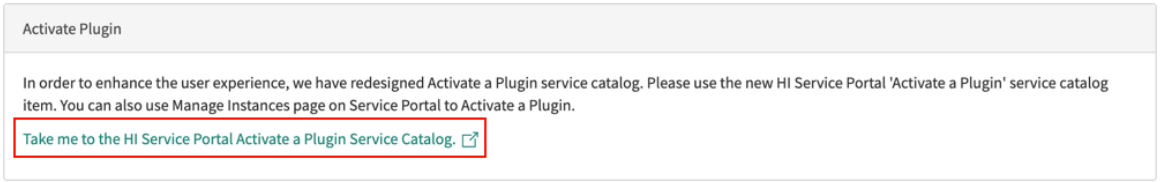
Ensure the following plugins are active on your instance:

- Push Notification: Provides the necessary components and REST APIs to send push notifications to mobile devices.
- Notification System Push Addon: Adds support for push notifications to the existing notification system.
- Push Feedback: Handles feedback from Apple on which devices are no longer valid so they do not keep receiving push notifications.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. On the All Applications page, select **Request Plugin** to open the request 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 form, fill in the fields.

Activate Plugin request form

Field	Description
Target Instance	Instance on which to activate the plugin.
Plugin Name	Name of the plugin to activate.
Specify the date and time you would like this plugin to be enabled	The date and time must be at least two business days from the current time. **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.
Reason/Comments	Information that would be helpful for the ServiceNow personnel who are activating the plugin. For example, if you need the plugin activated at a specific time instead of during one of the default activation windows, specify that in the comments.

7. Select **Submit**.

Enable push notifications for logged-out users

Enable push notifications for users when they're logged out to deliver timely critical updates.

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Before you begin

Important: Avoid including sensitive information or actionable notifications in push notifications sent to logged-out users.

Role required: admin

Procedure

1. Install the Send Push Notifications to logged-out users (com.glide.push.logged_out.users) plugin.
   This is a maint-only plugin. Request the plugin through the Now Support Service Catalog.

   a. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.

   b. Select **Request plugin**.

   c. On the form, fill in the fields.

   Activate Plugin request form

Field	Description
What is your target instance	The instance that you want to activate the plugin on.
Plugin Name	The value should be set to `Send Push Notifications to logged-out users (com.glide.push.logged_out.users)`.
Select Maintenance Date and Time	The date and time to activate the plugin.

   d. Select **Submit**.
   After the Now Support maintenance window timeframe, the plugin will be installed on your instance.

   e. **Optional:** Confirm the installation by viewing the applications listed in the **Installed** tab in the Application Manager.

2. Navigate to **All** > **System Notification** > **Push** > **Push Notifications**.
3. From the list of notifications, select the notification that you want to enable for logged-out users.
4. In the form, select the **Push to inactive users** check box.
   If the **Push to inactive users** check box is not visible, configure the form layout. For more information, see Configuring the form layout.
5. Select **Update**.
6. **Optional:** Configure the number of days users can receive notifications after they log out.

   a. Navigate to **All** and enter `sys_properties.list` in the navigation filter.

   b. Select **New**.

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c. On the form, fill in the fields.

System Property form

Field	Value
Name	`com.glide.push.logged_out.users.threshold_`
Type	String
Value	The number of days up to which you want users to receive notifications after they log out. The default value of this property is 10.

d. Select **Submit**.

Installed with push notifications

Several types of components are installed with the push notifications plugins.

Tables installed with push notifications

These tables are installed with push notifications.

Table name	Description
Push Applications [sys_push_application]	Push applications registered to the instance to receive push messages.
Push Default Registrations [sys_push_notif_default_reg]	Contains all the notifications users are automatically subscribed to for a given push application. You can add notifications to this table on the Push Default Registrations related list on the Push Application form.
Push Feedbacks [sys_push_feedback]	Feedback from the APNs that tells the instance which push devices can no longer receive push messages. The feedback is handled either on the same instance where your notifications are triggered, or on a central instance that uses a REST call to tell your instance which push applications to deactivate.
Push Message Attribute Definitions [sys_push_notif_msg_attr_def]	The attribute definitions used for push message content specification.
Push Message Attribute Values [sys_push_notif_msg_attr_val]	The values associated with push messages.
Push Notifications [sys_push_notification]	The push notifications that the instance attempted to send to users.
Push Notification Actions [sys_push_notif_act_script]	The action scripts that the instance uses in response to an actionable push message.
Push Notification Installations [sys_push_notif_app_install]	The devices with push apps where users agreed to receive push notifications. This table lists the records by the token for the push app. The instance uses this information to know which push device and app to send notifications to. Records

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Table name	Description
	are created in this table when a user logs on an instance with the push app. The Mobile Devices [sys_mobile_devices] table, which is installed with the Mobile UI plugin, contains all the user devices that logged in to the instance with the ServiceNow mobile application.
Push Notification Messages [sys_push_notif_msg]	Messages customized for push notifications. These messages can be associated with a notification.
Push Notification Message Contents [sys_push_notif_msg_content]	The entire content, including JSON, for push messages.
Push Platforms [sys_push_platform]	The platforms that are supported for push notifications, and the maximum payload size.

Business rules installed with push notifications

These business rules are installed with push notifications.

Business rule	Table	Description
Build Device and Subscriptions	Push Installation [sys_push_notification_installation]	Automatically creates a notification device on a user's notification preferences when the user registers a mobile application with the instance.

Outbound REST messages installed with push notifications

These outbound REST messages are installed with push notifications.

REST message	Description
ServiceNowMobileApp Push	The REST message that you can use with your custom iOS mobile app.

Roles installed with push notifications

These roles are installed with push notifications.

Role	Description
push_admin	Can create and modify push notifications.

Push components installed with push notifications

These components are installed with push notifications.

Push applications installed with push notifications

Push application	Description
ServiceNowPushApp	The push application record for the ServiceNow ServiceNow mobile application.

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Push applications installed with push notifications (continued)

Push application	Description
	Note: The ServiceNow mobile app automatically subscribes users to several push notifications. You can see the list of these notifications in the Push Default Registrations related list on the ServiceNowPushApp application record.

Message content installed with push notifications

Message content	Description
ConnectMessageContent	The payload for ServiceNow connect messages.
Generic Approval (Background)	The payload that provides an approval and rejection option to the user receiving the push message.
Generic Approval (Foreground)	The payload that provides an approval and rejection option to the user receiving the push message.
Generic Record Payload	A generic payload that you can use to send push messages to users.

Push notification actions installed with push notifications

Push notification action	Description
Approval - Approve	Allows an administrator to approve a request.
Approval - Reject	Allows an administrator to reject a request.

Push notifications installed with push notifications

Push notifications	Table	Description
ConnectMessagePushNotification	Live Feed Message [live_message]	Sends a push notification when a new live feed message

Push notification properties

Push notifications provides several properties to customize the setup.

Add these properties to the System Properties [sys_properties] table.

`glide.push.apns.version`

Controls which version of the Apple Push Notification service (APNs) to use in your instance. You can use APNs version 1 or 2. The system uses APNs version 2 by default. To use APNs version 1 instead, set the value to **1**.

- Type: integer
- Default value: 2

`glide.push.debug`

Creates entries in the system log for push notification errors.

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- Type: true | false
- Default value: false

glide.push.enabled

Enables or disables push notifications.

- Type: true | false
- Default value: true

glide.push.feedback.debug

Creates entries in the system log for feedback sent by the APNs for custom iOS push applications.

- Type: true | false
- Default value: false

glide.push.notification.ttl_seconds

Specifies the number of seconds after which a queued push notification expires. After a push notification is triggered, it is queued and finally processed by a scheduled job. If the time the notification sits in the queue exceeds this value, the notification is not sent. Check the Push Notifications log for more information.

- Type: integer
- Default value: 21600

Push notification setup with the ServiceNow mobile app

The ServiceNow mobile application automatically enables push notifications and configures mobile devices for push notifications when users initially log in to the instance.

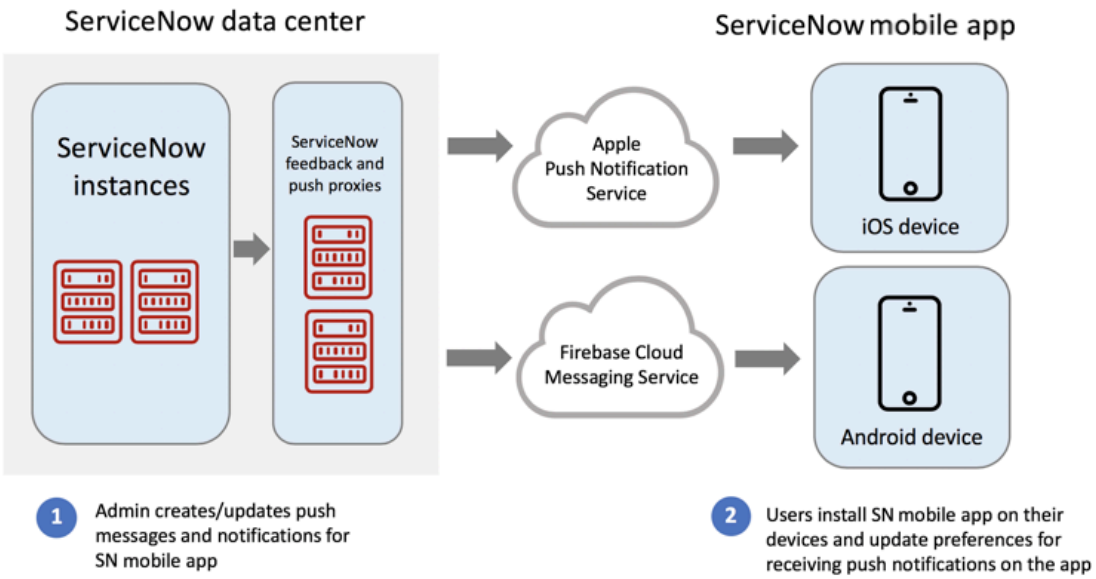
Note: Push notifications with the ServiceNow mobile application are not supported in on-premise instances.

Setting up push notifications involves both the system administrator and users.

- Admin creates or updates push notifications for the ServiceNow mobile app. The admin does not need to set up the mobile devices for users nor update their user preferences for receiving push notifications.
- Users install the ServiceNow mobile mobile on their iOS or Android mobile devices and set their preferences for receiving notifications on the ServiceNow mobile app.

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Push notification setup tasks for the ServiceNow mobile app



What to do — admins

Admins create push notifications, similar to setting up email notifications. A push notification has two main parts: the push message and the notification, which includes the push message.

Note: The push message and notification must be for the same table.

Create the push message

Before creating a push notification, create the push message with the actual message content (JSON payload) to be included in the push notification.

Create the push notification that includes the push message

Create the push notification that includes the push message and message content. A push notification specifically sends the push message. You can update a standard platform notification and use it as a push notification that includes the push message.

Add the new push notification to the Push Default Registration table

To ensure that a new push notification is included and enabled in the notification preferences of your users, register a new push notification in the Push Default Registration table. The notification is listed in the notification preferences of your users the next time that they log in to the ServiceNow mobile app.

What to do — ServiceNow mobile app users

Download the ServiceNow mobile app

Install the ServiceNow mobile app on an iOS or Android mobile device.

Agree to accept push notifications

After installing the ServiceNow mobile app, users are asked to accept push notifications. When the instance receives the push notification acceptance message from a user, it creates a record in the Push Notification Installations [sys_push_notif_app_install] table. This record is what the instance uses to identify the device + mobile application combination necessary to identify a push notification recipient.

The device then performs the following actions:

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- Obtains a token that identifies the device.
- Triggers the creation of the device in the user notification preferences.

Log in to the company instance from the ServiceNow mobile app

Logging in automatically subscribes users to the push-specific notifications registered in the Push Default Registration table.

Update preferences for receiving notifications on the ServiceNow mobile app

Users can enable and disable through **Notification Settings** in the ServiceNow mobile app. They can set additional notification preferences, such as conditions or filters that affect notification delivery, by using the System Settings window on a desktop or mobile browser. For details, see Setting notification preferences in Core UI.

Next steps

If you are an admin, review the base system notifications and determine if new push message content and push notifications are needed.

Create a push message

Before you create a push notification, create the push message with the actual message content for the notification.

Before you begin

The Push notification plugin must be active. The plugin is active by default.

Role required: admin

About this task

The push message and notification must be for the same table.

Procedure

1. Navigate to **All** > **System Notification** > **Push** > **Push Messages** and select **New**.
2. Fill out the fields on the form (see table).
3. Select **Submit**.

Push Notification Message form fields

Field	Description
Name	Enter a descriptive name for the message.
Push App	Select the ServiceNow mobile application.
Push Message Content	Select the JSON content to be included in the push notification payload. For example, you can specify predefined button pairs (Yes/No, Approve/Reject, Accept/Decline) as part of the push message content.
Message	Enter the message. You can add variables just as you would for other notifications. Any message you enter here overrides the message in the notification.

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Field	Description
Related list	
Push Message Attribute Values	Optional. Select the attributes that apply to this notification. For details, see Create an attribute value or action for a push message.

What to do next

Set up the push notification that contains the message created or update an existing push notification to use the push message.

Create a notification using a push message

Email administrators can create a notification that specifically sends a push notification.

Before you begin

Configure the push message before performing these steps.

Role required: admin

About this task

You can associate a push message with a standard notification. A push message specifies the text the system sends as part of the push notification to the mobile device.

Procedure

1. Navigate to **All** > **System Notification** > **Create Push Notification**.
2. Fill out the notification form as necessary (see Create an email notification for descriptions of the form fields.
3. Select the **What it will contain** tab.
4. Next to **Push Messages**, select the lock icon and select a push message.

   Note: The push message and notification must be for the same table.

5. Select **Submit**.

   If the notification fails, the user is not notified. If the message fails to send because it exceeds the maximum payload, the instance logs the failure in the System Log.

What to do next

Add the push notification to the Push Defaults Registrations table so that the push notification is listed in the notification preferences for users. Users can then select which notifications they want to receive for the ServiceNow mobile app.

Add a push notification to the Push Default Registrations table

After you create a new push notification, add it to the Push Default Registration table. Push notifications registered in this table are listed and automatically enabled in the notification settings of your ServiceNow mobile app users.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Notification** > **Push** > **Push Application**.
2. Select the **ServiceNow Mobile Application**.
3. In the Push Application form for the ServiceNow mobile app, select the **Push Default Registrations** tab and click **New**.
4. In the Push Default Registration New record, select the notification to be registered.
5. Click **Submit**.
   The next time that users log in to their instance, the new push notification is included in their list of notifications.

Push notification setup with a custom push application for ServiceNow mobile apps

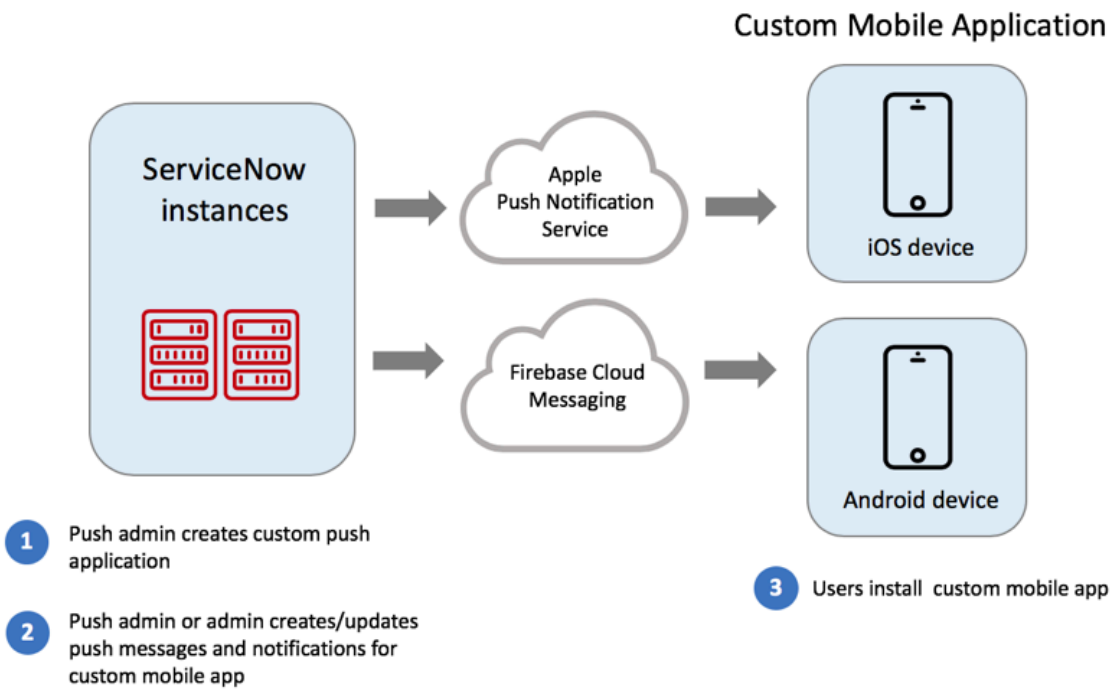
If you are using your own custom mobile or push application, you must configure your app for use and set up the push contents.

Setting up a push notification infrastructure that uses a custom push app involves a push admin (also called push app developer or mobile app developer) and system administrator. When push admins create a customized push app, they also configure the app, its push message content (payload generators), and optional attributes, such as push action scripts. The admin creates and updates the push notifications for the custom push app. After users install the custom push app and initially log in to their instance from their mobile device, the system automatically creates a device (channel) for the custom app.

Note: These instructions are intended for users who develop their own customized push application. You do not need to configure the ServiceNow mobile push application.

This process describes configuration used in the ServiceNow mobile app. Push Notification configuration for the current ServiceNow mobile UI can be found at Mobile push notifications

Push notification setup tasks for a custom push app



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Before you begin

Complete the steps in Activate push notifications.

Assign the push_admin role to your organization's mobile app developer.

What to do — push admin

Configure push notifications for your custom push app. This process differs for iOS and Android devices.

1. (iOS only) Upload a push certificate to your instance

   Upload a push certificate to your instance so that you can use it later to connect your iOS device to the push notification system.

2. Create a push application record for your custom app

   Register your customized mobile application with your instance to receive push notifications for the application. The instance uses this push application record to identify the device + push application combination necessary to determine a push notification recipient.

3. Create push message content

   Create a JSON content payload for different types of push notifications. The content determines how a push notification appears on the push application, and whether the user can send a message in response to the push notification. The push admin can create attribute definitions that specify a default push action script or string, for use in the push message content.

4. (Optional) Create a push message attribute definition

   Push message attribute definitions allow you to create reusable properties for push message content specification.

5. (Optional) Create an attribute value or action for a push message

   You can create attribute values that override the default attribute definitions used in the push message content.

6. (Optional) Create a push action

   A push action is a server-side script that runs when the instance receives a response to an actionable push message.

What to do — admin

Create the push messages and push notifications: The administrator creates the push messages, sets up push notifications for the custom push app, and if desired, the content.

Next steps

Use the Push Installation API to opt users in to receive push notifications. For more information, see Push Installation API.

Upload a push certificate to your instance

Upload a push certificate to your instance so that you can use it later to connect your iOS device to the push notification system.

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Before you begin

Using your Apple developer environment, create a push certificate and convert it to a PKCS (.p12) file. For details on generating the .p12 file with the required certificate and private key, see Enable push notifications and Communicate with APNs using a TLS certificate in the Apple documentation.

Note: Ensure that your certificate is a push certificate and not a developer certificate. Also, if you're developing an app for testing purposes, ensure that you create a Sandbox certificate. If you're developing an app that you plan to launch in the Apple App Store, ensure that you create a Production certificate.

Role required: push_admin or admin

Note: This process describes configuration used in the ServiceNow mobile app. Push Notification configuration for the current ServiceNow mobile UI can be found at Mobile push notifications

About this task

After you create a PKCS (.p12) file that contains the iPhone developer certificate and the private key used to sign the certificate, you need to upload the file to your instance. The system uses the information in the PKCS file to communicate with the APNs.

Procedure

1. Navigate to **All** > **System Definition** > **Certificates**, and then click **New**.
2. On the form, fill in the following fields:
   - Name: Enter a certificate name.
   - Type: Select **PKCS12 Key Store**.
3. Attach the PKCS (.p12) file to the record.
4. Click **Submit**.

What to do next

Create a push application record for your custom app

Create a push application record for your custom app

Register your customized mobile application with your instance to receive push notifications for the application.

Before you begin

Complete the following:

1. Activate push notifications
2. (iOS only) Upload a push certificate to your instance

Role required: admin or push_admin

Note: This process describes configuration used in the ServiceNow mobile app. Push Notification configuration for the current ServiceNow mobile UI can be found at Mobile push notifications

About this task

Push notifications are application-specific: They are sent to one type of mobile application, regardless of how many users have this application installed. If you develop your own mobile application, you must configure it for use by creating a record for it in the Push Application

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[sys_push_application] table. By default, ServiceNow mobile applications are automatically set up and ready to use.

Procedure

1. Navigate to **All** > **System Notification** > **Push** > **Push Application**, and then click **New**.
2. On the form, fill in the fields.

Field	Description
Display Name	Name of the push application.
Name	Database name of the push application. Enter a name that doesn't include spaces.
Push	Type of push service to enable for the application. Because you're setting up a custom push app, select **Direct**.
Feedback	Type of push feedback to use for the application. Because custom push apps don't receive push feedback, select **None**.
Apple	
Certificate	The X.509 certificate that you created on the Apple notifications portal. The certificate enables a device to talk to the APNs.
Sandbox Certificate	Sandbox certificate that you created on the Apple notifications portal. The certificate enable a device to talk to the APNs.
APNS Bundle Id	Bundle ID included in the certificate that you created on the Apple notifications portal. The system populates this field automatically after you specify a certificate.
Google	
API key	FCM API key you obtained from Google for the Android push notification.

3. Click **Submit**.

What to do next

Create push message content that contains the JSON content in the push notification payload.

In the Push Default Registrations related list, you can select the notifications that you want automatically subscribed to users who use this application. Users are subscribed to only active notifications.

Create push message content

Push message content specifies additional JSON content in the push notification payload that is sent to the push provider.

Before you begin

Complete the following:

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1. Activate push notifications
2. (iOS only) Upload a push certificate to your instance
3. Create a push application record for your custom app

You must know how to use JSON with push messages.

Role required: admin or push_admin

Note: This process describes configuration used in the ServiceNow mobile app. Push Notification configuration for the current ServiceNow mobile UI can be found at Mobile push notifications

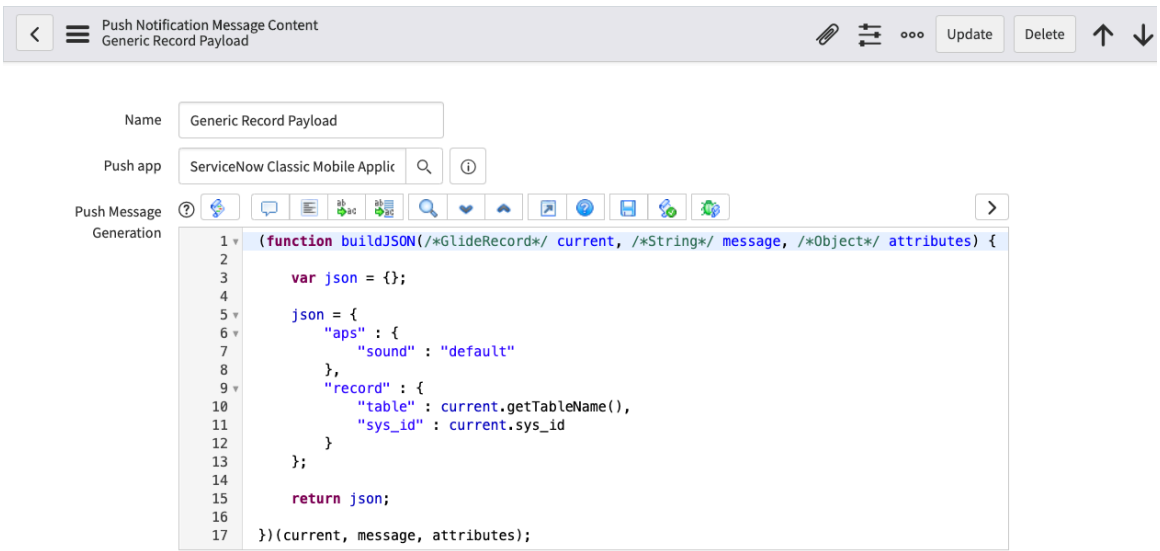
About this task

Push message content defines the style of push notification that can be sent out for your custom app. You can add custom content, such as a picture, icons, or action buttons for the user to respond to the notification. Use the following variables in the script:

- `current`: properties of the current record.
- `message`: push message sent as the body of the entire push content.
- `attributes`: object of the push message attributes that you define.

Procedure

1. Navigate to **All** > **System Notification** > **Push** > **Push Message Content**.
2. In the Push Notification Message Contents table, click **New**.
3. Fill out the fields on the Push Notifications Message Content form (see table).
4. Click **Submit**.



Notification Message form fields

Field	Description
Name	Enter a descriptive name for the message content.
Push app	The push application the content can be used with.

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Field	Description
Push Message Generation	Enter a script that determines the message content. See the example scripts.
Related list	
Push Message Attribute Definitions	Select the attributes that apply to this notification. Attributes can be a value or an action. These attributes are used as default values for the content items you create in the content script. However, any attributes you create with the push message can override these attributes. See Create a push message attribute definition for information on creating attributes.

Example:
The following is an example of a content record that creates a two-button layout, one to approve something, such as a change request, and one to decline it.

```
var json = {
  "table" : current.getTableName(),
  "sys_id" : current.sys_id,
  "template" : {
    "type": "2 button",
    "button1" : {
      "title" : "Approve",
      "action" : attributes.button_action,
      "parameters" : {
        "response" : "approve"
       }
     },
     "button2" : {
       "title" : "Decline",
       "action" : attributes.button_action,
       "parameters" : { "response" : "decline"
       }
     }
   }
};
json;
```

What to do next
Define a push message attribute to specify a default push action script or string that you can use in the push message content.

Create a push message attribute definition

Push message attribute definitions allow you to create reusable properties for push message content specification.

Before you begin

1. Activate push notifications
2. (iOS only) Upload a push certificate to your instance
3. Create a push application record for your custom app
4. Create push message content

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Role required: admin or push_admin

Note: This process describes configuration used in the ServiceNow mobile app. Push Notification configuration for the current ServiceNow mobile UI can be found at Mobile push notifications

About this task

Use an attribute definition to specify a default push action script or string that you can then use in the push message content.

You can override these attributes by creating any push message attribute values.

Procedure

1. Navigate to **All** > **System Notification** > **Push** > **Push Message Content**.
2. Select a content record or script record.
3. In the Push Message Attribute Definitions related list, click **New**.
4. Fill out the fields on the form (see table).
5. Click **Submit**.

Push Message Attribute Definition form fields

Field	Description
Attribute Name	Enter a descriptive name for the layout.
Attribute Type	Select the type of attribute: ○ **Action**: An action to take on the instance, as defined by a script. ○ **String**: An arbitrary string to send as part of the message content. The string can specify items like a button label in the message.
Default Script	Select the mobile action script that tells the instance what to do when it receives a response from the push notification. This option appears if you select **Action** for the **Type**.
Default Value	Specify an arbitrary string value to be placed in the attribute that is used by the message content. For example, the string could specify a button label. This option appears if you select **String** for the **Type**.

What to do next

If you want to override default attribute definitions, see Create an attribute value or action for a push message.

Create an attribute value or action for a push message

Attribute values are associated with push messages to provide a way for the message to include certain types of information in the push notification.

Before you begin

Complete the following:

1. Activate push notifications
2. (iOS only) Upload a push certificate to your instance
3. Create a push application record for your custom app

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4. Create push message content
5. Create a push message attribute definition

Role required: admin or push_admin

Note: This process describes configuration used in the ServiceNow mobile app. Push Notification configuration for the current ServiceNow mobile UI can be found at Mobile push notifications

About this task

These push message attribute values override values that you set in an attribute definition on the Push Content form.

Procedure

1. Navigate to **All** > **System Notification** > **Push** > **Push Messages**.
2. Select a message.
3. In the Push Message Attribute Values related list, click **New**.
4. Fill out the fields on the form (see table).
5. Click **Submit**.

Push Message Attribute Values form fields

Field	Description
Attribute	Select a push message attribute definition.
Value/ Action	Enter the value for the attribute or select the push action. This field changes to Value or Action depending on the type of attribute you select in the Attribute field.

What to do next

(Optional) Create a push action to perform an action on the instance.

Create a push action

A push action is a server-side script that runs when the instance receives a response to an actionable push message.

Before you begin

Complete the following:

1. Activate push notifications
2. (iOS only) Upload a push certificate to your instance
3. Create a push application record for your custom app
4. Create push message content
5. Create a push message attribute definition
6. Create an attribute value or action for a push message

Role required: admin or push_admin

Note: This process describes configuration used in the ServiceNow mobile app. Push Notification configuration for the current ServiceNow mobile UI can be found at Mobile push notifications

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About this task

Create a push action to perform an action on the instance. For example, you might have an actionable push message that lets the user approve a change request. The action that handles the response should update the **Approval** field on the relevant Change Request record.

You can use global variables or, optionally, current variables and parameters passed through the JSON content.

Procedure

1. Navigate to **All** > **System Notification** > **Push** > **Push Action**.
2. Fill in the form fields (see table).
3. Click **Submit**.

Push Notification Action form fields

Field	Description
Name	Enter a descriptive name for the action.
Script	Enter the script.

Requeue failed push notification messages

Push notification delivery might fail for various reasons. You can view which messages failed and requeue them to be sent out if necessary.

Before you begin

Role required: admin

About this task

Note: There is no way for the instance to guarantee or confirm push message delivery. For more information on how Apple handles push notifications, see the Local and Remote Notification Programming Guide for Apple developers.

Messages can also fail to send for several reasons, such as a large message queue or other issue with the instance. You can use a system property to control how long the instance queues a push notification after it is triggered.

Push notification message payload size is limited by provider:

- Apple iOS: 2,048 bytes
- Google: 4,096 bytes

Your instance does not send push messages that exceed this limitation. System logs save any failed messages. For details on Apple payload limitations, see the Local and Remote Notification Programming Guide for Apple developers.

Procedure

1. Navigate to **All** > **System Logs** > **Push Notifications**.
   By default, the messages that were created today appear. You can change the filter if necessary. The Type column can have these values:

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- **failure**: The message could not be sent.
- **pending**: The message is queued for processing.
- **success**: The message was successfully sent, although not necessarily received by the mobile device.

2. Put any failed messages back into the queue to be resent by selecting the check boxes next to the failed messages, and then selecting **Re-queue failed push notifications** from the choice list.
3. If some push notifications continue to fail, consider increasing the value in the *glide.push.notification.ttl_seconds* property.
   See Push notification properties for more information.

Push notification retention

You can archive and eventually destroy push notifications that you no longer need or if your Push Notification table is excessively large.

Push notification retention is available starting with the Jakarta release.

Push notification archive and destruction plugins

The push notification archiving and destruction feature uses the Data Archiving and Push Retention plugins. The Data Archiving plugin must be active to archive and destroy push notification records. The Push Retention plugin provides a set of rules that specify when the system archives and destroys push notification records.

In new instances, the Push Retention plugin and associated archive and destroy rules are active by default. On upgraded instances, you must manually activate both the plugin and the archive and destroy rules. Be sure to review and approve the archive and destroy rules before activating them.

If your instance already has a process for managing push notification records, you do not need to activate the Push Retention plugin. If you want to replace your current process with Push Retention, be sure to deactivate the current process before activating the archive and destroy rules.

Archiving and destroying push notification records

Archiving means moving records from the Push Notification [sys_push_notification] table to the Push Notification Archive [ar_sys_push notification] table when they exceed the archive rule time limit. Destroying means deleting records in the Push Notification Archive table when they exceed the destroy rule time limit.

Default archive and destroy rules

Push retention provides the following push archive rules:

- **Push Notification - Over a year old:** archives push notification records that were created more than 365 days prior to the current date.
- **Push Notification Archive - Over a year old:**destroys push notification records that have been archived for more than 365 days prior to the current date.

With these default settings, your messages are kept on the instance for a total of two years: one year in the Push Notification table, and one year in the Push Notification Archive table. At the end of the period, the system deletes the expired notification records from the Push Notification Archive table.

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Note: By default these rules are active on new instances and inactive on upgrades. The system runs archive and destroy rules when you activate them.

Compatibility with other record management implementations

If you are already using another method for managing push notification records, such as table cleaners, you do not have to use the Push Retention feature. To prevent unexpected record deletion, avoid using multiple push notification management processes on the same instance at the same time.

Note: For assistance replacing your existing record management implementation with push notification retention, contact your professional services or sales representative.

Activate the Push Retention plugin

The Push Retention plugin (com.glide.push_retention) provides the retention policy for push notifications, so that you can specify when the system archives and destroys push notification records.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin 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.

Related topics

List of plugins (Brazil)

Archive push notifications manually

You can manually archive push notifications on demand instead of waiting for the instance to archive them based on a scheduled job.

Before you begin

Role required: admin

About this task

Push retention provides these push notification archive rules:

- **Push Notification - Over a year old:** archives push notification records that were created more than 365 days prior to the current date.
- **Push Notification Archive - Over a year old:**destroys push notification records that have been archived for more than 365 days prior to the current date.

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You can manually archive push notification messages that meet the default archive and destroy rules or any additional archive rules that you create.

Procedure

1. Navigate to **All** > **System Archiving** > **Archive Rules**.
2. Open the push notification archiving rule, for example Push Notification - Over a year old
3. Click **Recalculate Estimate** to see how many records in the Push Notification [sys_push_notification] table are going to be archived.
   The estimate appears in the **Record estimate** field.
4. Click **Run Archive Now**.

Notifications in messaging applications

Enable users to receive their ServiceNow platform notifications in Slack or Microsoft Teams messaging applications. Use the Now Actions app to configure the messaging apps for your instance.

Admin setup

To enable ServiceNow notifications within Slack or Microsoft Teams, you must be an administrator for both ServiceNow and the third-party application.

1. Request Integration Hub

The Slack and Microsoft Teams spokes require a Starter subscription to Integration Hub. To activate Integration Hub and view available subscription types, see Request an Integration Hub plugin.

2. Request the Messaging Notification plugin

To activate this feature, request the Messaging Notification plugin (com.glide.notification.messaging) through the HI Customer Service system. This plugin activates related plugins if they are not already active.

3. Install the Now Actions messaging app for Slack or Microsoft Teams

As an administrator for both ServiceNow and the third-party application, find and install the Now Actions app. Install the application in ServiceNow to associate the app with your instance.

Note: The primary owner of a Slack workspace or organization owns and manages the application. To avoid losing admin access to the workspace or organization, transfer primary ownership before any administration changes occur. If you transfer primary ownership, update the JSON payload for the Slack installation in the Notification Integration page. For more information about editing the Slack installation, see Install the Now Actions messaging app.

If the Now Actions app is uninstalled, the workspace or team displays as inactive in the Notification Integration page. To view the Notification Integration page, navigate to **System Notification** > **Messaging** > **Messaging Integration Configuration**.

4. Configure message content

Create a message in the Message Contents [messaging_content] table that you can use in multiple notifications. Messages can be informative, or they can request action from an individual Slack or Teams user. For example, the Approval Request message includes Approve and Reject buttons to take the associated action in

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ServiceNow. Only users that have linked their Slack or Teams account with their ServiceNow account can take action in ServiceNow from the third-party application.

5. Create a messaging notification

Notifications define when a message is sent, who it is sent to, and what it contains. To send a notification to Slack or Teams, add a messaging content record to the notification and configure the notification messaging channel. Notifications that require action must be sent to individual users instead of groups.

Note: Message Channel Sync Job can sync more than 1000 channels using pagination.

User setup

To enable individual ServiceNow notifications in Slack or Microsoft Teams, and to take action on notifications, configure your system settings and link your user accounts.

Link your ServiceNow user account to your Slack or Microsoft Teams account

Link your ServiceNow account to your Slack or Teams account to take action on ServiceNow notifications from within Slack or Teams. If you do not link accounts, you can still receive notifications within group channels. However, you cannot to approve ServiceNow requests or take action on notifications from within Slack or Teams.

Configure system settings

Each user can enable ServiceNow notifications in a third-party application by configuring the communication channel in their system settings. Opt in to receive approval requests and other actionable notifications in third-party channels.

Notification channels

In ServiceNow, a notification channel is a method or device for receiving notifications. For example, in the base system you can elect to receive notifications through email or SMS channels. If messaging applications are enabled on your instance, you can enable notifications to Slack and Teams using Notification Channels in your system settings.

Actions and events

The Message Actions [messaging_observer_handler] table processes communication channel events, such as adding or deleting a Slack channel, to keep the instance and the third-party application in sync. Only developers creating Slack or Teams applications should add actions to this table. Register new actions with the instance through the Message Event Registry [messaging_observable] table. To remove a base system action, clear the active flag instead of deleting the record.

Logging

The Inbound and Outbound message logs contain information on actions, events, and activities between ServiceNow and the third-party application. Use the logs to identify the content, state, and origin of communications to and from your instance.

Request the Messaging Notification plugin

To activate this feature, request the Messaging Notification plugin (com.glide.notification.messaging) through the HI Customer Service system. This plugin activates related plugins if they are not already active.

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Before you begin
Role required: admin

About this task
There are two ways to request a plugin:

- Access the Now Support Service Catalog directly by selecting **Automation Store** > **Service Catalog** > **Activate Plugin** on Now Support.
- Access the Now Support Service Catalog through the All Applications page on your instance by following these steps.

For additional details about requesting a plugin, see Requesting a Plugin from the Service Catalog [KB0751715] article in the Now Support Knowledge Base.

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.

Related topics
List of plugins (Brazil)

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Install the Now Actions messaging app

As an administrator for both ServiceNow and the third-party application, find and install the Now Actions app. Install the application in ServiceNow to associate the app with your instance.

Before you begin

To activate this feature, request the Messaging Notification plugin (com.glide.notification.messaging) through the HI Customer Service system. This plugin activates related plugins if they are not already active. For more information, see Request the Messaging Notification plugin.

Roles required:

- Admin or messaging_admin in ServiceNow
- Administrator for Slack or Teams

Install the Now Actions messaging app for Slack

Install the Now Actions messaging app from the Slack App Directory and associate the app with your instance.

Before you begin

Role required: admin.

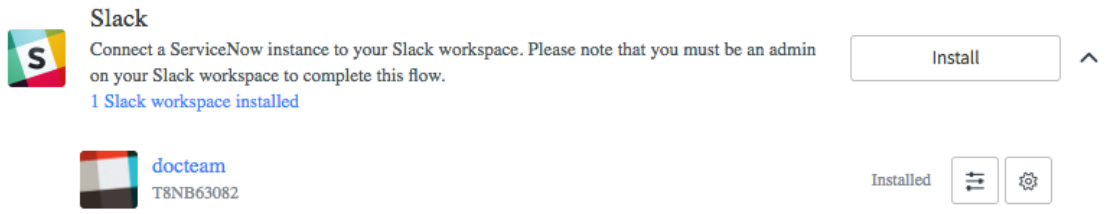
Procedure

1. Install the Now Actions app from the Slack App Directory.
   a. Find and install the Now Actions app in the Slack App Directory.
   b. Click Authorize when prompted.
   c. **Optional:** Enter a customized name, app description, and icon.
   d. Configure your Now Actions web address.
   This is the base URL for your instance.

   Example
   For example, `https://<instance_name>.service-now.com/`.

   e. Copy the JSON configuration found in the **Add your Slack credentials to your app** section for use in later steps.
2. Associate your Slack app with your instance.
   a. Navigate to **System Notification** → **Messaging Integration Configuration**.
   b. Click the **Install** button next to Slack.
   c. In the JSON Configuration pop-up, paste in the JSON configuration you copied in earlier steps.
3. Check for installation verification.
   The Slack workspace should appear below the Slack heading on the Notification Integration page.

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During installation, the instance synchronizes with all public Slack channels in the workspace. New public channels added after installation will automatically synchronize with the instance. You can browse to **System Notification** > **Messaging Channels** on your instance to verify that the new channel appears on the instance.

What to do next

To update the app after installation, use the **Configure JSON Payload** and **Settings on Slack** icons on the Notification Integration page. You can view the JSON payload, view app credentials, change app appearance, or delete the app.

Install the Now Actions messaging app for Microsoft Teams

Associate the Now Actions messaging app with your instance.

Before you begin

Role required: admin.

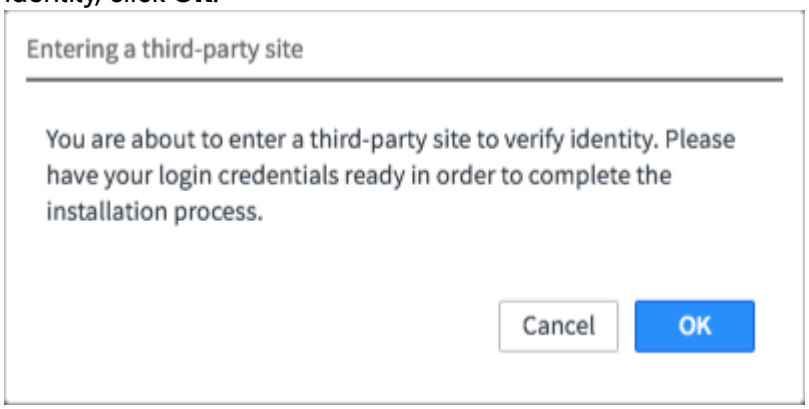
Procedure

1. Associate your Microsoft Teams app with your instance.

   a. Navigate to **System Notification** → **Messaging Integration Configuration**.

   b. Click the **Install** button next to Microsoft Teams.

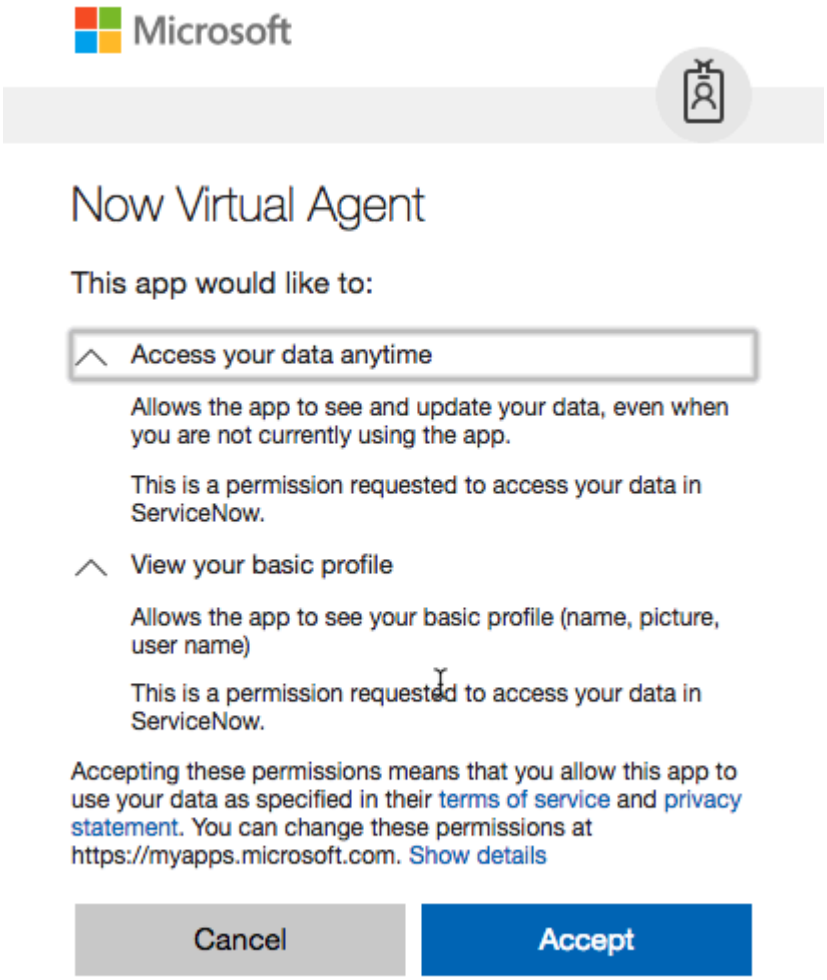
   c. When a pop-up message appears to confirm redirection to Microsoft Teams to verify your identity, click **OK**.



   d. When prompted, log in to Microsoft Teams with your Teams admin account.

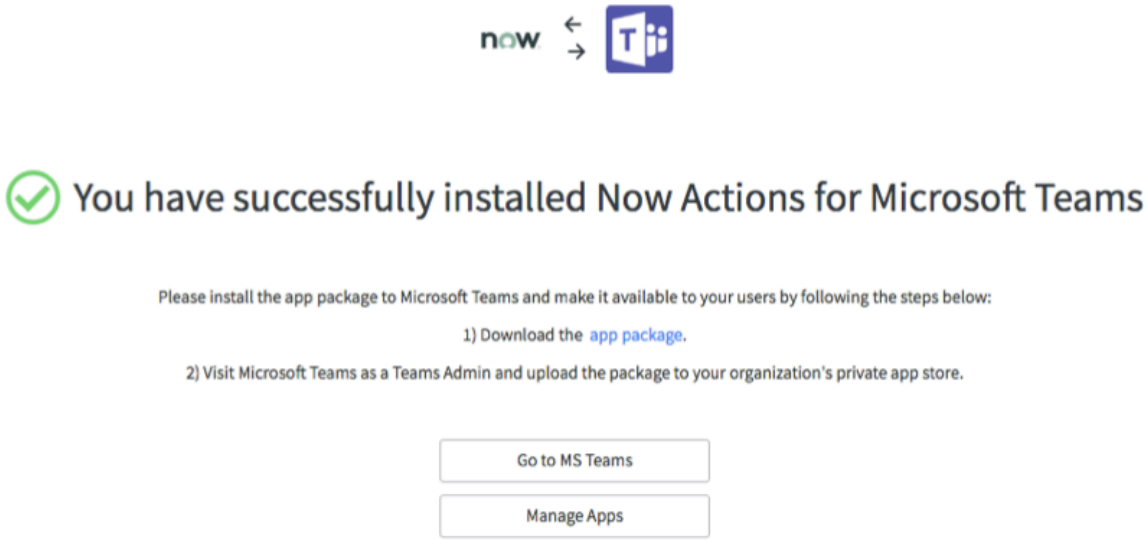
   e. Click *Accept* to accept the permissions for the app.

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f. If the selected workspace has already been assigned, either click **Override** to change the workspace, or click **Cancel** to leave the current assignment in place.
After authentication, installation will start in the background. Once installation completes, a message appears confirming the installation.

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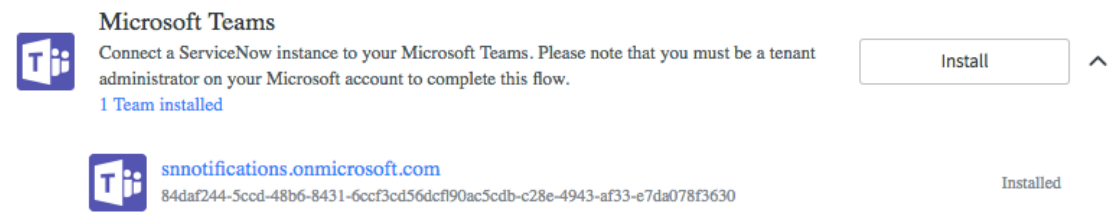
g. Click the **app package** link to access a knowledge base article KB0690098, which contains the application package for Microsoft Teams.

h. Follow the steps in the article to make this package available for your Microsoft Teams users.

2. Check for installation verification.

During installation, the instance synchronizes with all public Teams channels. To add channels created after the install, open Microsoft Teams and @mention the app from the new channel. You can browse to **System Notification** > **Messaging Channels** on your instance to verify that the new channel appears on the instance.

The new team should appear below the Teams heading on the Notification Integration page.



What to do next

To receive a ServiceNow notification in Microsoft Teams, create a message and a notification. See Configure message content and Create a messaging notification.

Configure message content

Create a message in the Message Contents [messaging_content] table that you can use in multiple notifications. Messages can be informative, or they can request action from an individual Slack or Teams user. For example, the Approval Request message includes Approve and Reject buttons to take the associated action in ServiceNow.

Before you begin

Role required: admin or messaging_admin

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About this task

To enable users to take actions in Slack or Teams, use the Buttons message type and define scripted behavior. Only users that have linked their Slack or Teams account with their ServiceNow account can take action in ServiceNow from the third-party application.

Procedure

1. Navigate to **All** > **System Notification** > **Messaging Content**.
2. Open an existing notification record or click **New** to create a new record.
3. Fill in or modify the fields as appropriate.

Messaging content fields

Field	Description
Name	Enter a unique name for the message.
Type	Select a type of message. ○ **Simple**: Send an informative message to an entire Team or Slack channel. ○ **Buttons**: Send a message to an individual user in Slack or Teams and define the desired behavior in the **Script** field. Associate buttons in the message with actions in ServiceNow. Use the Approval Request as an example.
Target table	To use record content in your message, select the appropriate table. **Note:** Notifications running on the Task [task] table are not supported. Instead, use a table extended from task.
Fields	Select which fields from the **Target table** appear in a simple message. Changing the order of the fields changes the display order in the notification.
Message heading	Enter text to appear at the top of the message.
Message	Enter the content of the message. Use notification variables to include dynamic information in your message. For example, use `Incident ${number}` to include the incident number in the message. For available variables, see Notification variables.
Buttons	Select or create buttons to use on the form. After selecting or creating a button, you must define button behavior in the **Script** field. Only visible when Buttons is selected in the **Type** field
Script	This field is only visible when Buttons is selected in the **Type** field. Enter a script to define what happens in your instance when a user selects a button in Slack or Microsoft Teams. Use the `actions.get` method to return the name of the button selected by the user. `if (actions.get('button') == 'Approve') { target.state = 'approved'; target.update(); }`

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Field	Description

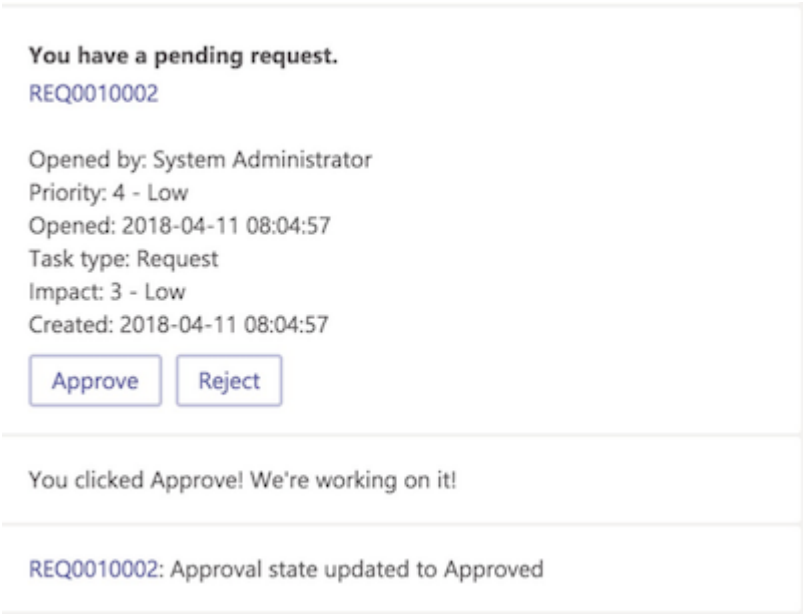
	In this example, the script conditionally executes when the "Approve" button is selected.
	
	Use the method `sn_notification.Messaging.send` to send information to the messaging window.
	
	`var content = new GlideRecord("messaging_content");`
	`content.get("1bb10839572213007f004758ef94f9c4"));`
	`sn_notification.Messaging.send(application, userId, content, target);`
	
	In this example, the script stores a Message Content record in the `content` variable. It then posts a message from that Message Content record.

Application	Select the application scope for this notification.

4. Click **Submit**

Example:

This example shows the output of a message in Microsoft Teams. This message is of the buttons type, which shows buttons and performs scripted actions based on the user selection. In this case, the script uses the `sn_notification.Messaging.send`method to display the change in state for the record.



What to do next

Use the message in a notification. For more information about creating notifications, see Create a messaging notification.

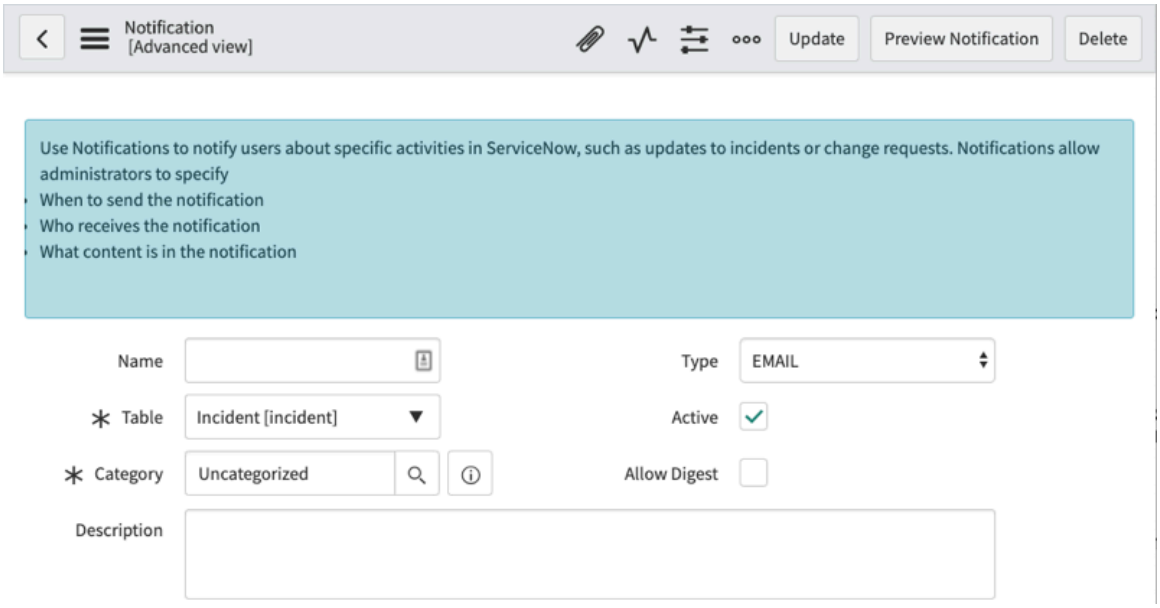
Create a messaging notification

Notifications define when a message is sent, who it is sent to, and what it contains. To send a notification to Slack or Teams, add a messaging content record to the notification and configure the notification messaging channel. Notifications that require action must be sent to individual users instead of groups.

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Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Notification** > **Messaging** > **Messaging Notifications**.
2. Click **New**.
3. Fill in or modify the fields as appropriate.



Messaging notification fields

Field	Description
Name	Enter a unique name for the notification. Use descriptive names to ensure that your users are able to easily distinguish between notifications.
Table	Select a table to trigger the message. Must be a table or database view within the same application scope. **Note:** Notifications running on the task [task] table are not supported. Instead, use a table extended from task.
Category	Select a category for the notification. A category groups related notifications in the system settings. **Note:** Do not leave the category as **Uncategorised**, as users may not be able to find the notification in their list of notifications.
Description	Enter a description for this notification.

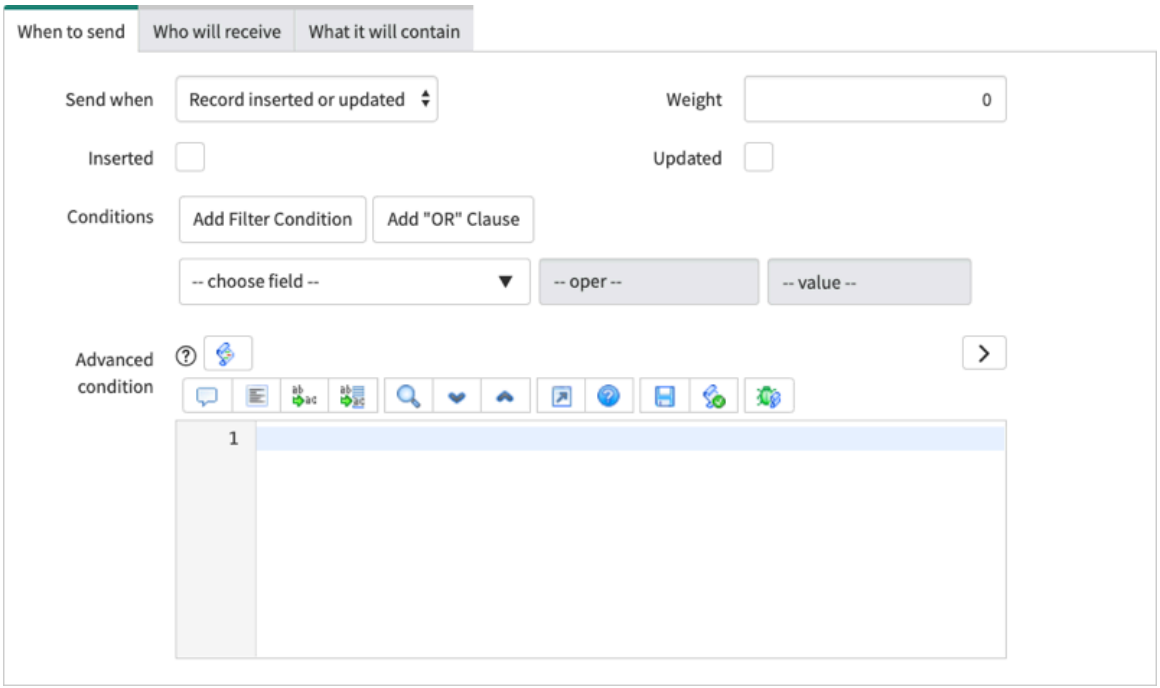
Note: Notification records are shared between messaging, email, and push notifications. Some fields on the form are not relevant to messaging notification records. Leave fields not described here at their default values.

4. Click**Advanced view** under **Related links** to switch the advanced view.

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Note: Switching to the Advanced view saves the current record.

5. Open the **When to send** tab and complete the form.



Note: If the same trigger generates multiple notifications, the system only sends one notification. The system considers all other notifications, even if they have a different subject and body, as duplicates. The Ignore Duplicates business rule controls this functionality.

Field	Description
Send when	Select under what condition the notification is sent: ○ When a record is inserted or updated ○ When a particular event is fired ○ When Notification step in Flow Designer
Weight	Set a numerical value for the notification priority relative to other notifications with the same target table and recipients. The system only sends the notification with the highest weight. The default value 0 causes the system to always send the notification (assuming the conditions are met).
Conditions	Use the condition builder to select the conditions under which this notification is sent. For example, select **Priority** > **greater than** > **3 - Moderate** to send the notification only for High and Critical priority incidents.
Inserted	Select the check box to enable messaging notification when a record is inserted. This field appears when you set the **Send when** field to **Record inserted or updated**.
Updated	Select the check box to enable messaging notification when a record is updated. This field appears when you set the **Send when** field to **Record inserted or updated**.

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Field	Description
Event name	Select the event that triggers this notification. This field appears when you set the **Send when** field to **Event is fired**.
Advanced condition	Create a script to define more filter conditions, like sending a notification based on the current messaging record, changing field values, or changing system properties. The advanced condition script must return **true** or set a global answer variable to **true** to send the notification. The advanced condition script uses the following global variables: ○ *current*: Contains the current record from the table to which the notification is linked. ○ *event*: Contains the event that triggered the notification. **Note:** The **Advanced condition** field is evaluated in addition to other conditions you set on the notification. Both the condition and advanced condition must evaluate to true to send the notification.

6. Open the **Who will receive** tab and fill in or modify the following fields.

Field	Description
Messaging Channels	Select the messaging channels to receive the messaging notification. Only complete this field if creating a simple notification to send to a channel. Simple notifications use a Messaging Content record of Type **Simple**.
Users	Select the users you want to receive the messaging notification. Only complete this field if creating a notification that requires user action. Notifications that require user action use a Messaging Content record of Type **Buttons**.
Users/ groups in fields	Select users or groups from reference fields. For example, if a notification uses the Incident [incident] table, you can select users or groups from incident fields like **Opened by** and **Assignment group**. **Note:** You can dot-walk to values in reference fields by clicking the plus sign in the field selector and then selecting the related field. If you address the notification to a user with an inactive record in the User [sys_user] table, the system does not send the notification to that user.
Groups	Select the groups you want to receive the messaging notification. You can search for groups with the reference lookup icon or by manually entering the group name. This list of groups is static.
Send to event creator	Select this check box to send the notification to the person who performed the action that started the notification process if the person is also a recipient. If the event creator is not specified in one of the recipient fields, the event creator does not receive a notification, regardless of the setting in this field. For new notifications, this option is selected by default.
Event parm 1	Select this check box if the event parameter 1 contains one or more notification recipients (in a comma separated-list). This field is visible only when the **Send when** field is set to **Event is fired**.

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Field	Description
contains recipient	
Event parm 2 contains recipient	Select this check box if the event parameter 2 contains one or more notification recipients (in a comma-separated list). This field is visible only when the **Send when** field is set to **Event is fired**.

7. Open the **What it will contain** tab and fill in or modify the following fields.

Field	Description
Messaging content	Select a messaging content record to be used in this notification.

8. Click **Update**.

Link your ServiceNow user account to your Slack or MS Teams account for Now Actions

Link your ServiceNow account to your Slack or Teams account to take action on ServiceNow notifications from within Slack or Teams. If you do not link accounts, you can still receive notifications within group channels. However, you cannot to approve ServiceNow requests or take action on notifications from within Slack or Teams.

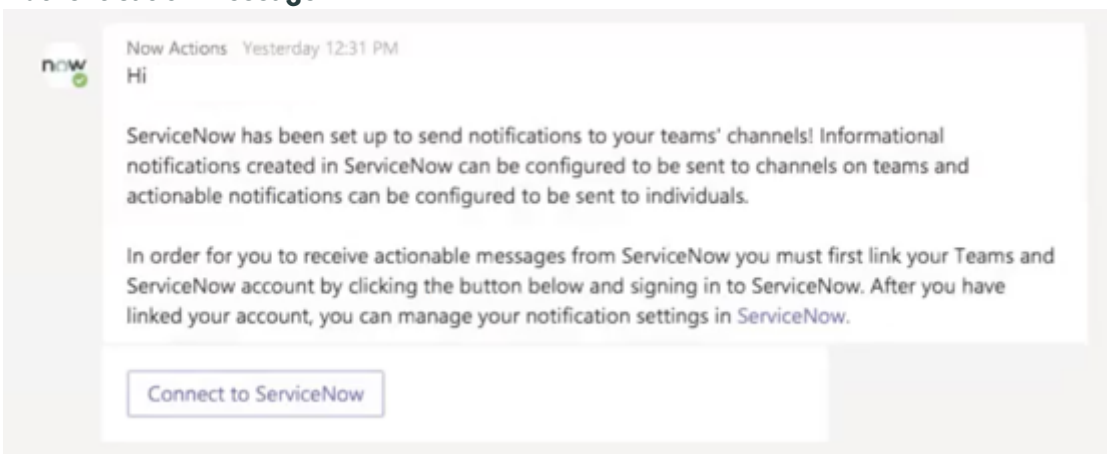
Before you begin

Role required: none

Procedure

1. Open the Slack or Teams application
2. Navigate to the Now Actions bot, which can be found in the left panel of Slack under Apps, and in the left panel of Teams in the **Chat** tab.
3. Start a conversation with the Now Actions bot.
   The bot then presents a link to authenticate.

Authentication message

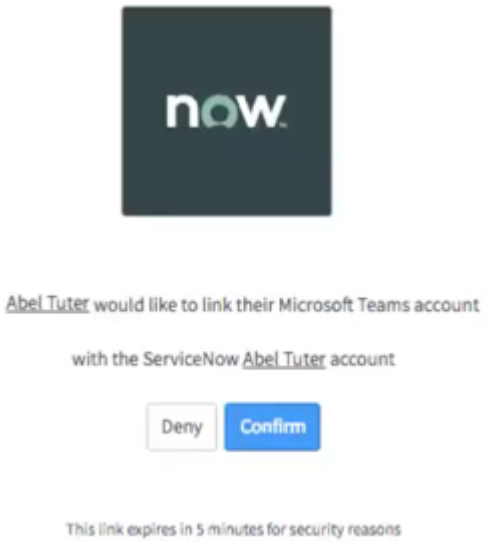


4. Click the **Connect to ServiceNow** link.

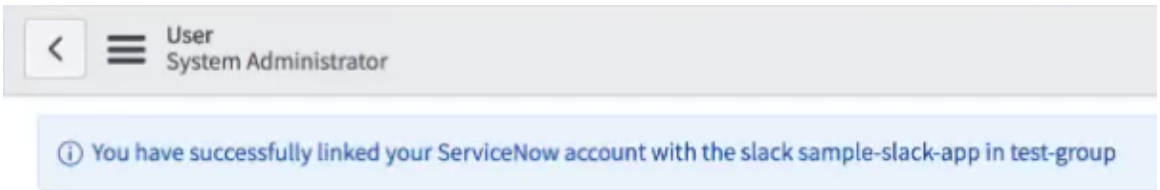
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A new browser tab opens and prompts the user to Deny or Confirm the connect between your Slack or Teams account and your ServiceNow account. This link will expire five minutes after it is displayed.

5. Click **Confirm** to link the accounts.



6. After confirmation, you are directed to the instance user record.
   A confirmation message is displayed at the top of the screen.



Unlink your ServiceNow user account from your Slack or MS Teams account for Now Actions

Unlink your ServiceNow account from your Slack or MS Teams account to stop receiving actionable ServiceNow notifications in Slack or Teams.

Before you begin

Role required: none

About this task

If you unlink your account to a messaging app for Now Actions, you must also disable the corresponding messaging channel in your notification preferences.

Procedure

1. Navigate to **All** > **Self-Service** > **My Profile**.
2. Click the **View Linked Accounts** related link.
3. In the Linked Accounts page, check the selection box for the messaging integration to be unlinked.
4. Select **Actions on selected rows...**, then click **Unlink account**.
   Your ServiceNow account is unlinked from the Now Actions messaging integration (the link is inactive).

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Note: Even though you unlinked your account, you still receive notifications in any group channels to which you belong.

5. Disable the messaging channel in your Notification Preferences.
   a. Select the gear icon in the banner frame to access the System Settings window.
   b. Under Notification Channels, disable the appropriate messaging channel.

Note: If you want to link your ServiceNow account again, follow the steps in Link your ServiceNow user account to your Slack or MS Teams account for Now Actions.

Set up notifications for a custom Slack app

Send ServiceNow notifications to users via your own Slack bot.

Before you begin

- Request Integration Hub
- Request the Messaging Notification plugin
- Create a custom application for Slack

Role required: admin or messaging_admin

Procedure

1. Create a JSON for your custom Slack application.

   Ensure that your JSON matches the following example format:

```
{
"bot_user_id" : "U9TLFR6TA",
"scope" : "bot,channels:read",
"client_id" : "294380102274.335446283495",
"client_secret" : "ed0da5fe1f844fdac15a9e1ac1b0b831",
"verification_token" : "YXSNsRhioCeU8h9Fm2k4ACuO",
"app_id" : "A9VD48BEK",
"access_token" :
 "xoxp-294380102274-295238228534-335452648487-2fac31f923dadd7ff
30f2bc8c852809d",
"bot_access_token" :
 "xoxp-333695856928-6pNwnO3Y6vNSGI7KCAIPwv6V",
"team_id" : "T8NB63082",
"team_name" : "sn-notif-ext-test",
"user_id" : "U8P706QFQ",
"bot_username": "empdmyers1snnotifext"
}
```

   To get the Bot User ID, copy the member ID of the bot user in the Slack app.

   The Scope is always `bot,channels:read`.

   To get the Client ID, Client Secret, and Verification Token, see the Basic Information page in your Slack workspace.

   To get the App ID, copy the 9-character identifier from the app URL in your Slack workspace.

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To get the Access Token and Bot Access Token, see the OAuth & Permissions page in your Slack workspace.

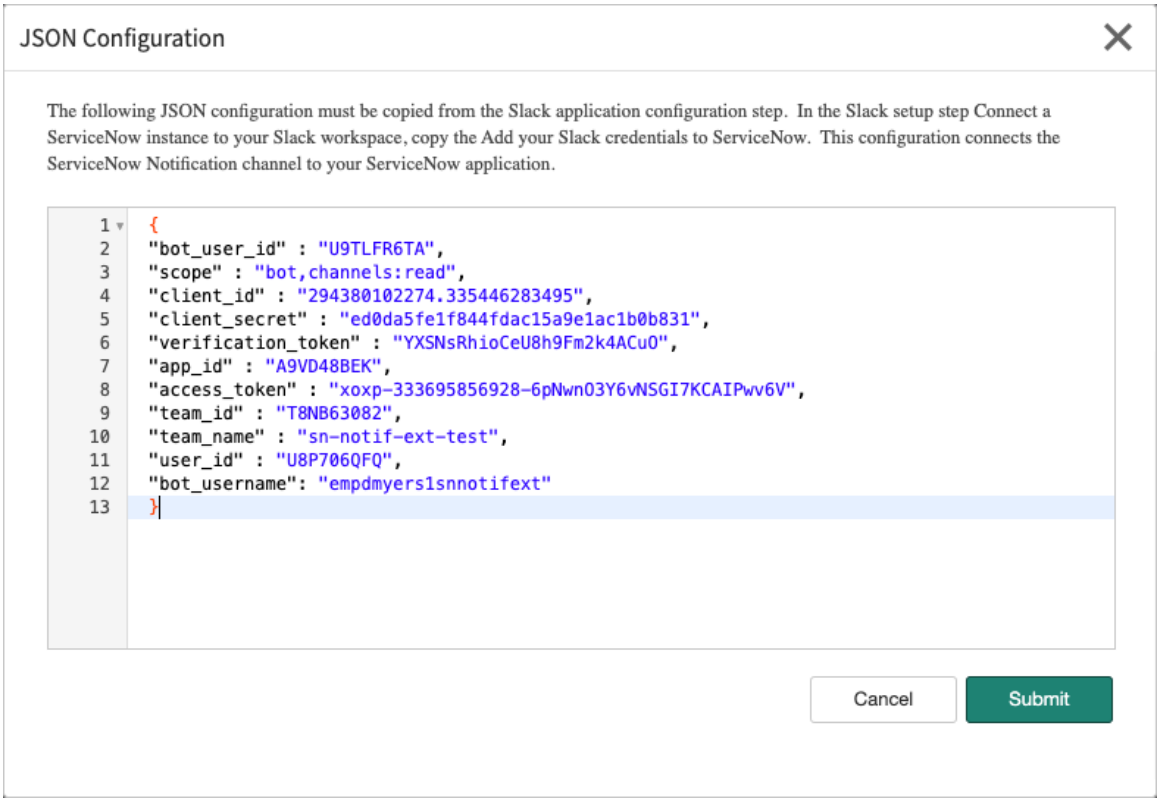
To get the Team ID, view the HTML source code for your Slack workspace page.

The Team Name is the same as your subdomain in your Slack workspace.

To get the User ID, copy the member ID for your own account in the Slack app.

The Bot Username is the name that you assigned to the bot user in Slack.

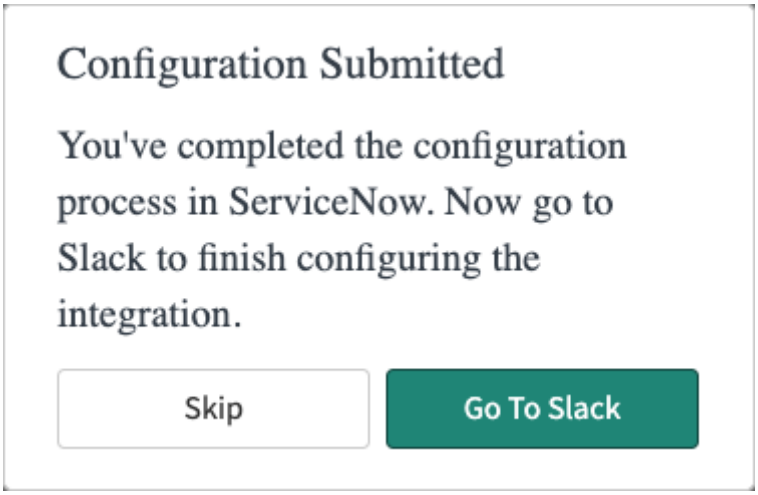
2. In your ServiceNow instance, navigate to **System Notification** > **Messaging** > **Messaging Integration Configuration**.
3. Next to the Slack listing, click **Install**.
4. On the JSON Configuration window, paste the JSON that you created in Step 1.



5. Click **Submit**.

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6. On the confirmation window, click **Skip**.



Result

The system creates a notification channel for your custom Slack app automatically.

What to do next

- Link ServiceNow user accounts to your custom Slack app so that users can take action on notifications that are delivered by your Slack bot.
- For each user account that you link, enable the notification channel using the system settings.
- Create notifications for your custom Slack app by following the steps in Create a messaging notification and Configure message content.

Related topics

Slack API documentation

Provider notifications

Send notifications directly to recipients via the provider on supported channels. Notifications can be simple messages for review, or actionable messages with buttons that users can select to perform certain actions.

Get started

Explore	Create
Explore and learn about provider notifications	Create provider notifications

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Troubleshoot and get help

- Troubleshooting Notification emails
- Ask or answer questions in the Platform community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring provider notification

Send notifications directly to recipients via the provider on supported channels. Notifications can be simple messages for review, or actionable messages with buttons that users can select to perform certain actions.

Provider notification benefits

Provider notification benefits

Benefit	Feature
Send notifications directly to recipients via the provider on supported channels. Notifications can be simple messages for review, or actionable messages with buttons that users can select to perform certain actions.	Provider notification
Create a notification in the notification provider framework to send to both sys and non-sys users.	Create and update a provider notification for all users
Create and use the default content for a notification that doesn't have a content provider or some of the fields in the content provider are not present.	Create default content in a provider
Make a notification mandatory to prevent users from turning off or deleting a subscription to a notification.	Make a notification mandatory for provider framework
Provide better context and information about users' work by creating custom content for in-product notifications in Next Experience.	Create custom notifications in Next Experience
Update and implement a notification action.	Implementing notification action with a script
Enable provider notification definitions to accept actions as scriptable action, flow actions, and virtual agent.	Select provider notification action capabilities
Use the Link Actions to Content related list to add actions to the notification content, selection of the provider notification and ordering of actions of an actionable content.	Add actions to the notification content

What to explore next

To learn more about configuring and using Provider notification, see Create provider notification

Provider notification

Send notifications directly to recipients via the provider on supported channels. Notifications can be simple messages for review, or actionable messages with buttons that users can select to perform certain actions.

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Important terms

Provider

A provider is an implementation that delivers notifications to destinations of a specific channel.

Channel

A channel represents a particular communication mechanism with a recipient.

Destination Type

A destination type represents a logical way of categorizing a destination for the underlying channel and is required to send via a channel, as well as set a preference. As an admin, you can modify the notification **Auto Opt-in** behavior for a destination type.

Destination

A destination is a specific contact information of a recipient for a channel. It includes a destination type and an identifier suitable for use in the channel.

Destination Type sent by default is either set to true or false during the adapter installation. This determines if the destination type is opt-in or opt-out.

- If sent by default is set to true, notifications are delivered to the recipients if they have not explicitly opted-in/out to receive a notification on the destination type.
- If sent by default is set to false, notifications are not delivered to the recipients if they have not explicitly opted in to receive the notification on the destination type.

Destination preference precedence

Notifications are delivered to the destinations that honor the following preference precedence:

1. Notification preference of the recipient
2. Destination preference of the recipient
3. Destination Type send by default. You also have the option to modify **Auto Opt-in** behavior for a destination type.

Note: Groups are not supported as recipients.

Common content for a notification

Provide common notification content so that different notification channels can use the same generic content.

Actionable notification

Enable provider admins to define an actionable notification and send it to users. You can also enable response actions.

Note: A notification should either have Common Content or Provider Content in order to be delivered to the recipients.

All the above-mentioned capabilities are applicable only for Virtual Agent and Workspace providers.

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Create provider notification

Create and update provider notifications, add and implement actions, and customize notifications

Create and update a provider notification for all users

Create a notification in the notification provider framework to send to both sys and non-sys users.

Before you begin

Role required: notifications provider admin and admin

Procedure

1. Navigate to **All** > **System Notification** > **Provider** > **Notifications**.
2. Select **New** to create a notification.
3. On the form, fill in the fields.

Notification form

Fields	Description
Name	Name of the notification.
Application	Scope of the notification record.
Category	Select the category to which this notification belongs. A category identifies and groups related notifications. This notification, if active and listed in the selected **Category** in the notification preferences for each user (Notifications tab in the System Settings window).
Active	Option to activate the notification.
Triggered By	Trigger used in the notification record. **Note:** The options in this field depend on the selected table. For example, if you select an incident table, the options are Events or Record Change.
Table	The table name on which the notification is triggered.
Inserted	Condition to trigger the notification.
Updated	Condition to trigger the notification.
Event	Event that triggers the notification. For example, to send a notification after an incident is closed or resolved, you would select the *incident.inactive* event. By default, this event is logged in the system each time an incident is resolved or closed.

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Fields	Description
	Note: You can select only an event that shares the same table as the notification. This field appears when you select **Event** in the **Triggered By** field.
Conditions	Additional conditions to trigger the notification.
Users	Names of the available sys users.
Recipients in fields	Field in the currently selected table that contains the users or groups who receive a notification. **Note:** The **Recipients in fields** field under Recipients enables you to choose both sys and non-sys users to whom you can send notifications.
Is the originating user included?	Option to include the originating user to be included in the notification.
Event Parm1 contains recipient(s)?	Option to select if Parm 1 contains a list of comma-separated sys_ids.
Event Parm2 contains recipient(s)?	Option to select if Parm 2 contains a list of comma-separated sys_ids.
Resolve Parm1 recipients from table	Table that is used to resolve the sys_id of a Parm 1 recipient. **Note:** This field appears only when you select Event Parm 1.
Resolve Parm2 recipients from table	Table that is used to resolve the sys_id of a Parm 2 recipient. **Note:** This field appears only when you select Event Parm 2.
Advanced event condition	Option to select when the recipients are from more than 2 tables. These options are dynamic conditions.
Advanced condition	Create a script to perform certain actions, like sending a notification based on the current email record, changing field values, or changing system properties. The advanced condition script must return **true** or set a global answer variable to **true** to send the notification.

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Fields	Description
	The advanced condition script uses the following global variables: ○ *current*: Contains the current record from the table to which the notification is linked. ○ *event*: Contains the event that triggered the notification. **Note:** The **Advanced condition** field is evaluated in addition to other conditions that you set on the notification. Both the condition and advanced condition must evaluate to true to send the notification.

4. Select **Submit**.
5. Open the recently created notification.
6. Update the form using any of the available related lists.
   See Create and add additional recipients and Create and add assignment groups for more information.

Note: All the validation messages given by different providers are retained. Warning messages of one provider isn't overridden by warning messages of another provider.

Create and add additional recipients

Update the notifications form by adding additional recipients from the Additional Recipients related list to send notifications to.

Before you begin

Role required: admin and notifications provider admin

Procedure

1. Click Additional Recipients related list on the notification form to add new recipients.

Note: An error message about adding content to the notification shows up. See create common content and create default content to create content for a notification.

2. Click **New** in the Additional Recipients related list to add additional recipients.
   The Additional Recipients form shows up.
3. Fill up the fields in the Additional Notification Recipients form.

Fields	Description
Notification	Name of the notification **Note:** The Notification name auto-populates and the **Recipient Table** field gets User[sys_user] as the default value.

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Fields	Description
Application	Scope of the recipient record
Recipient Table	Table name of the recipient **Note:** You can also select a non-sys users table.
Active	Option to activate the notification
Static Recipients	Names of static recipients of the notification
Dynamic Conditions	Dynamic filter conditions for the users **Note:** Click the refresh button next to the records matching condition link to update the exact number of records matching the latest filter condition. By default, it shows the total number of records in the current table. Only one active record can be added for a particular recipient table. If you want to add another record for the recipient table, you will have to deactivate the current record.

Note: For one recipient table, we can use either static recipients or dynamic conditions.

4. Click **Submit**.

Create and add assignment groups

Create and add assignment groups where you want users that are part of a group to be the recipients of the provider notification.

Before you begin

Role required: admin or notifications provider admin

Procedure

1. Navigate to **All** > **System Notification** > **Provider** > **Notification**.
2. Select the notification.
3. Select **Groups**.
4. Select **New** or **Edit** to add assignment groups.
   - Select **New** to add assignment groups.

     On the form, fill in the fields.

Field	Description
Name	Name of the group.
Manager	Name of the manager.

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Field	Description
Group email	Group email address.
Parent	Name of the parent group.
Description	Description of the group.

- Select **Edit** and select the groups from the collection to add to the group list.

5. Select **Submit** or **Save**.

Make a notification mandatory for provider framework

Enable admins to mark specific notifications as mandatory that their users cannot turn off.

Before you begin

Role required: admin

When you make a notification mandatory, the toggle button for that notification is read only in the user notification preferences, preventing the user from unsubscribing or disabling that notification.

Procedure

1. Navigate to **All** > **System Notification** > **Provider** > **Notifications**.
2. Select and open the notification.
3. Configure the form and add the **Mandatory** field.

   Note: This field does not display by default.

   a. Select the context menu icon and select **Configure** > **Form Layout.**
   b. Select the **Mandatory** field and the order in which you want the field to appear.
   c. Select **Save**.
4. Select the **Mandatory** check box.

   Note: To honor auto opt-in capability over mandatory notifications, add the property *glide.notification.provider.mandatory.honor_auto_opt_in* and set it to `true`.

Create default content in a provider

Create and use the default content for a notification that doesn't have a content provider or some of the fields in the content provider aren’t present.

Before you begin

Role required: admin

Procedure

1. Enter sys_notification_content.list in the application navigator.
   A list of **Notification Contents** shows up.
2. Select **New Provider Content**.
   a. Select and hold any column header and then select **Configure** > **List Control**.
   b. Clear the **Omit new button** to display the **New Provider Content** field.

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Note: Both shared content and provider content can be default content. Provider content has been considered for this example.

3. Select the type of Notification Content that you would like to create.
4. Fill the **Notification Content** form for the type you have selected in the previous step.

Note: The **is default** field is visible only if the **Notifications** field is not present.

5. Select **Submit**.
   A new default content has been created.

Create custom notifications in Next Experience

Provide better context and information about users' work by creating custom content for in-product notifications in Next Experience.

Before you begin
Role required: admin

About this task
Create notifications with custom title and message content for your applications and use cases. Next Experience notifications appear as toast banners and in the Notifications menu.

Note: Next Experience notifications aren't supported in the legacy Agent Workspace.

Procedure
1. Navigate to **All** > **System Notification** > **Provider** > **Notifications**.
2. Select **New**.
3. On the form, fill in the fields.

Notifications form

Field	Description
Name	Name of the notification.
Application	Application scope of the notification.
Active	Option to activate the notification. The notification is active by default.
When to send	
Trigger	System action that triggers the notification. You can send the notification after a record is changed or after an event is triggered.
Inserted	Option to send the notification after a record is inserted. This field appears when you select **Record Change** in the **Trigger** field.
Updated	Option to send the notification after a record is updated. This field appears when you select **Record Change** in the **Trigger** field.

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Field	Description
Event	Event that triggers the notification. For example, to send a notification after an incident is closed or resolved, you would select the *incident.inactive* event. By default, this event is logged in the system each time a user resolves or closes an incident. **Note:** You can select only an event that shares the same table as the notification. This field appears when you select **Event** in the **Trigger** field.
Table	Table to receive notifications about.
Conditions	Filter to specify the table records that users receive notifications about. For example, to send notifications about top-priority incidents, you would select **Incident [incident]** in the **Table** field and set the conditions to **[Priority] [is] [1 - Critical]**.
Who will receive	
Users	Users who receive the notification. **Note:** Notifications in messaging channels are sent only to users with ServiceNow accounts (sys_user profiles). Consumers and customer contacts are considered as guests and can't receive notifications in messaging channels.
Recipients listed in fields	Record fields that include users who receive the notification. For example, to send the notification to the record assignee, select **Assigned to**. **Note:** This field shows up only if you select a table.
Include the person whose action triggered the notification	Option to include the user who changed the record or triggered the event.
Recipient(s) listed in event parm1	Option to select whether Parm 1 contains a list of comma-separated sys_ids. For more information, see Classic Events.
Recipient(s) listed in event parm2	Option to select if Parm 2 contains a list of comma-separated sys_ids
Table containing recipients from event parm1	Table that is used to resolve the sys_id of the recipient **Note:** This field appears only when you select Event parm 1.
Table containing recipients from event parm1	Table that is used to resolve the sys_id of the recipient **Note:** This field appears only when you select Event parm 2.
Advanced event condition	Option to select when the recipients are from more than two tables. These are dynamic conditions.

4. From the form context menu, select **Save**.

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5. Select the **Contents** tab and then select **New Provider Content**.
6. Select **Next Experience** as the content provider.
7. On the form, fill in the fields.

Notification Next Experience Content form

Field	Description
Name	An internal name for the notification content.
Notification	The notification trigger that sends the notification content.
Active	Option for whether the notification is sent when triggered.
Table	Table to receive notifications about.
Route	Next Experience Route
Message Heading	Header text at the top of the message. From the Select variables list, you can select variables to include your message heading.
Message	Secondary text of the message that follows the heading. From the Select variables list, you can select variables to include your message body.

Example

The following example shows the values for a notification with custom content that references the number and short description of an incident.

Field	Value
Name	Incident record update content
Notification	Incident records
Active	true
Message Heading	${number} changed
Message	Short description: ${short_description}

8. Select **Submit**.

Result

When triggered, users configured to receive the notifications see notifications with custom content as banners and in the Notifications menu in the Next Experience Unified Navigation.

The UI Notification Inbox [ui_notification_inbox] table lists all sent notifications and their recipients.

Trouble?

If users receive duplicate notifications, verify that the notification trigger has only one content provider. If the notification has both a Next Experience and Workspace content provider, remove the Workspace content provider from the notification trigger to send only the Next Experience notification with custom content.

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Implementing notification action with a script

Use the **Script** field in the Notification Action form to update and implement a notification action.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Notification** > **Provider** > **Notifications**.
   A list of notifications shows up.
2. Select an existing notification.
3. Scroll down to the Notification Actions related list.
4. Open the Notification Action form and choose between the following options to reach the Notification Action form:
   - If there are no existing notification actions under Notification Actions related list, do the following.
     a. Click **New Provider Action** under Notification Actions related list.
     b. Select the type of notification action you would like to create from the Notification Action wizard.

     Note: Scriptable Action, Flow Action and Virtual Agent are the only types of notification actions available.

   - If there is an existing notification action, select one from the list under Notification Actions related list.

   The Notification Action form shows up.
5. On the form, update the fields as required.

Fields	Description
Name	Name of the actionable notification.
Application	Scope of the actionable notification record.
Notification	Name of the notification containing the actionable notification record.
Active	Option to activate the actionable prompt record.
Script	Script to implement the actionable notification.

6. Click **Update**.

Select provider notification action capabilities

Enable provider notification definitions to accept actions as scriptable action, flow actions, and virtual agent.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Notification** > **Provider** > **Notifications**.
   A list of notifications shows up.
2. Select an existing notification.
3. Scroll down to the related lists.
4. Select the Actions related list.
5. Select **New Provider Action**.
   The Notification Action wizard shows up.
6. Select one of the following types of notification actions you would like to create from the Notification Action wizard.
   - Scriptable Action
   - Flow Action
   - Virtual Agent

Create a scriptable notification action

Select **Scriptable Action** from the Notification Action wizard to create a scriptable notification action.

Before you begin

Role required: admin

`Before performing this task, you must complete` Select provider notification action capabilities .

Procedure

1. Select **Scriptable Action**.
2. On the form, fill in the fields.

Fields	Description
Name	Name of the notification action.
Application	Scope of the notification action record.
Notification	Name of the notification containing the notification action record.
Active	Option to activate the notification action record.
Script	Script to implement the notification action.
Acknowledgement	Acknowledgement message after an action is selected from a notification.

3. Select **Submit**.

Create a flow notification action

Select **Flow Action** from the Notification Action wizard to create a flow notification action.

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Before you begin
Role required: admin

Procedure

1. Select **Flow Action**.
2. On the form, fill in the fields.

Fields	Description
Name	Name of the notification action.
Notification	Name of the notification containing the notification action record.
Async	Option to execute configured flow or action asynchronously.
Active	Option to activate the notification action record.
Choose Flow or Action	Option to select either Flow or Action. See Flow Designer for more information. **Note:** You can select either Flow or Action, but not both.
Inputs	Script used for the creation of flow notification action. **Note:** The script returns Json of key value pairs, which is passed as input in executing configured flow or action.
Acknowledgement	Acknowledgement message after an action is selected from a notification.

3. Select **Submit**.

Add actions to the notification content

Use the Link Actions to Content related list to add actions to the notification content, selection of the provider notification and ordering of actions of an actionable content.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Notification** > **Provider** > **Notifications**.
2. Select **New** to create a notification, or select an existing notification.

   Note: If the notification includes one or more actions, a message appears to remind you to ensure the actions are associated with content.

3. In the related lists section, select the Link Actions to Content related list.

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4. Select **New** to create an actionable content.
5. On the form, fill in the fields.

Actionable Content form

Fields	Description
Name	Name of the action set.
Application	Scope of the notification.
Notification	Name of the notification.
Actions	Option to select the actions. **Note:** You can also set the order of actions of an actionable content.
Content	Option to select the content to apply to the selected action.
Active	Option to activate the action set.
Action(s) listed in event parm1	Option to link actions from event parm1. Actions must be sys_ids from the **sys_notification_action** table.
Action(s) listed in event parm2	Option to link actions from event parm2. Actions must be sys_ids from the **sys_notification_action** table.

6. Select **Submit**.

Email client

Send email directly from any record, such as an incident, change request, or problem record.

Get started

Explore



Explore and learn about sending an email directly from any record

Configure



Configure and manage the behavior of your email client

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Components Installed	Reference
	
View components installed with email client	References for email client

Troubleshoot and get help

- Troubleshooting Notification emails
- Ask or answer questions in the Platform community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring email client

You can use the email client either from a form or the record view in a workspace to send an email directly from any record, such as an incident, change request, or problem record.

Email client benefits

Email client benefits

Benefit	Feature
Send email directly from any record, such as an incident, change request, or problem record	Email client
Enable the email client for a table so that users can send emails directly from the table record	Enable the email client for a table
Use email client configurations to manage the behavior of your email client. Each configuration consists of different email controls for setting allowable email recipients and email addresses	Email client configurations
Give users the option to send an email client message as an SMS text message	Enable SMS delivery with the email client
Create a different template for each table that uses the email client to pre-populate data for recipients and email content	Create an email client template
Create and insert predefined content to add in the email client so that users can write emails consistently and efficiently	Composing emails with quick messages
Customize email address internationalization to turn off processing of inbound and outbound emails, disable support for inbound emails or to add email address format for decoding international email addresses	Email address internationalization

What to explore next

To learn more about configuring and using email client, see:

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- Configure email client
- Components installed with the email client
- Reference

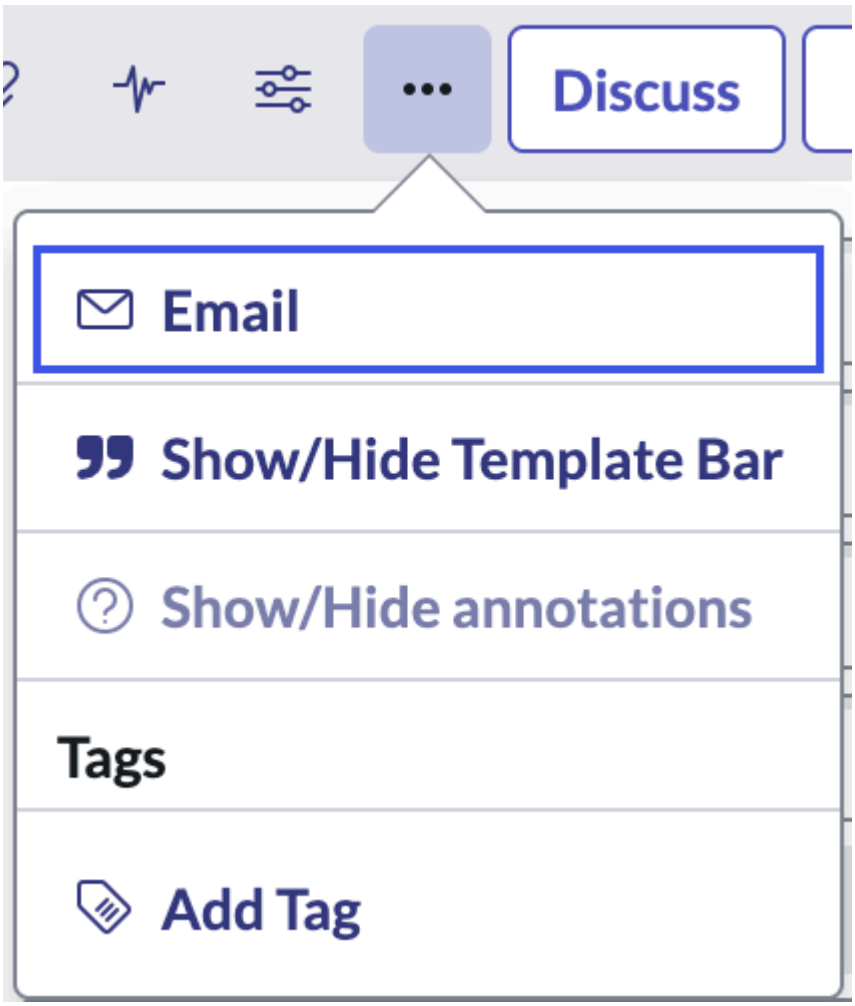
Email client

Send email directly from any record, such as an incident, change request, or problem record.

Using the email client

You can use the email client either from a form or the record view in a workspace. To open the email client in a workspace or from a form, open a record and select the More options icon ···. Select **Email**

Email client



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The email client looks like a standard email interface, which contains a toolbar for text formatting and adding attachments.

The email client uses the multipart/mixed content type and supports HTML markup in the message body.

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Note: The **Subject** field on the email client allows a larger character count than the default setting for the **Subject** field on the Email [sys_email] table. If the subject text from the client is being truncated, increase the **Max length** value for the **Subject** field on the Email table.

For more information on using the email client in a workspace, see Communicating via email in workspace.

Activation information

The email client is activated with the Email Client plugin (com.glide.email_client), which is active by default on the ServiceNow AI Platform.

The email client is enabled by default on the incident table. To enable the email client for another table, add the *email_client* dictionary attribute on the table's collection record. For more information, see Enable the email client for a table.

The email client is enabled by default on the change table.

Give users access to the email client by assigning them the email_composer role.

More setup

You can configure the email client by creating an Email Client Configuration [sys_email_client_configuration] record. For more information, see Email client configurations.

You can also create email client templates or quick messages to use predefined content in email client messages. For more information, see the following:

- Create an email client template
- Composing emails with quick messages

Optionally, you can give users the option to send email client messages as SMS text messages. For more information, see Enable SMS delivery with the email client.

Configure email client

Enable and configure email client.

Configuration overview

Enable the email client for a table

Enable the email client for a table so that users can send emails directly from the table record.

Before you begin
Role required: admin

About this task
The email client is enabled by default on the Incident [incident] table. You can enable the email client for another table by adding the *email_client* dictionary attribute to the table.

Note: This capability is not inherited by tables that extend the current table. For example, enabling the email client on the Task table does not enable it for the Incident or Problem tables.

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Procedure

1. Open a record in the table that you want to enable the email client for.
   For example, to enable the email client for the Problem [problem] table, navigate to **Problem** > **Open**, and then open any problem record.
2. On the form, select the menu icon (⋮) and then select **Configure** > **Dictionary**.
3. On the Dictionary Entries list, open the record of type **Collection**.
   The record does not have any entry for **Column name**.
4. On the form, in the Related Links section, select **Advanced view**.
5. In the **Attributes** field, enter `email_client=true`.
   If there are other values in the field, separate the attribute with a comma.
6. Select **Update**.

Email client configurations

Use email client configurations to manage the behavior of your email client. Each configuration consists of different email controls for setting allowable email recipients and email addresses.

The Email Client Configuration module is activated by default through the Email Client plugin (com.glide.email_client).

How email client configurations work

Email client configurations determine how your email client behaves, such as whether the From address or Reply-To address should be displayed. A configuration applies to a specific ServiceNow table, which enables you to define email client behavior for a specific context, purpose, or application. For example, if you have email client users who send email about Customer Service case records, you can create a configuration that applies email client controls specific to customer service. You can also select the email client recipient qualifiers for controlling the auto-complete recipient results from a selected table, such as the Customer Contact table.

An email client configuration consists of the following components:

Email client recipient qualifiers

Recipient qualifiers control the email recipients returned in the auto-complete results for the To, Cc, and Bcc fields of the email client. You can provide additional qualifiers displayed in the auto-complete results to differentiate recipients that have the same names and narrow the results.

> **Note:** Use the **To is Optional** field in the Email Client Configuration form to make the **To:** field optional to send an email.

Email client From addresses

This control enables the display of the From and Reply-To addresses. Use the Email Client Template to create a set of allowable From addresses that can be used when a user sends an email with the email client. You can provide a specific From address to be used in the email client, or you can choose to hide it entirely.

Email client attachment handling

By default, attachments that are sent from the email client are attached to the target record. Instead, you can select to attach files to the Email [sys_email] record, or you can set conditions that define which email client attachments are added to the target record. To see the status of all email attachments, go to the Email Attachments [sys_email_attachment] table.

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You can also use an Email Client Template to define the content of an email client message and set other message characteristics, such as an email sender (From address) configuration.

Email client configuration process

Users with the admin role define and edit email client configurations. Users with the email_client_admin role can edit configuration information in selected tables.

1. **Build the various email client controls that can be used to create an email client configuration.**
   - Define email client recipient qualifiers
   - Define email client from addresses
2. **Create the email client configuration.**

   Define an email client configuration that determines how your email client behaves when users create an email message.

Define email client recipient qualifiers

Create a configuration that controls the auto-complete list of recipients displayed in the email client.

Before you begin

Role required: email_client_admin

About this task

You can specify recipient qualifiers that display additional fields (from a selected ServiceNow table) in the auto-complete list. These fields differentiate email recipients who have the same first and last names.

Use the following tabs in the Email Client Recipient Qualifier form to define a recipient configuration.

- **Display Configuration** – Set up the email recipient auto-complete behavior and optionally select additional fields to differentiate recipients who have the same name. The additional fields ensure that users select the proper recipient for an email.
- **Query Configuration** – Specify a condition or script that queries the selected table and filters the recipient results returned.

You can define different recipient configurations, which can be used in an email client configuration.

Procedure

1. Navigate to **Email Client** > **Email Client Recipient Qualifier** and select **New**.
2. Fill in the fields at the top of the Recipient Qualifier form.

Field	Description
Name	A unique name for this email client recipient configuration.
Application	The type of scoped application.
Table	The ServiceNow table to be queried for recipients.

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Field	Description
Description	A brief description of this recipient configuration.

3. Fill in the fields in the **Display Configuration** tab to control the auto-complete display in the email client.

Field	Description
Email Address	The field on the table that contains the recipient email address.
Display Name	The field on the table used for the recipient name displayed.
Order	The order of results returned relative to other recipient qualifiers defined.
Additional Display Fields	A content list for choosing additional fields from the table to be displayed in the auto-complete list. Differentiates recipients who share the same name.
Search Additional Fields	A check box for enabling additional fields to be searched. Expands the recipients returned in the auto-complete list by querying (searching) the **Additional Display Fields**.

4. Fill in the fields in the Query Configuration tab.

Field	Description
Prefix Search	Option to find the desired recipient using prefix. **Note:** Selecting the **Prefix Search** option displays the **Last Name Field** drop-down menu with options to filter the recipient's name.
Type	Select the method for filtering the recipients returned in the auto-complete list: ○ Condition ○ Script
Conditions	If you selected Condition for the **Type**, use the condition builder to specify the conditions that must be met to return the appropriate recipients.
Script	If you selected Script for the **Type**, enter a script that uses these variables to return the appropriate recipients:

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Field	Description

	○ *recipientQuery*: GlideRecord for the table being queried.
	○ *targetRecord*: GlideRecord for the target record from which the email client was opened.
	
	For example, this recipientQuery is a GlideRecord that represents the Customer Contact table. The targetRecord variable is a Customer Service case from which the email client was opened. This query limits the email client auto-complete results to contacts who belong to the same account as the Customer Service case.
	
	`(function (recipientQuery, targetRecord) {`
	
	`// Limit results to contacts belonging to the account for the case.`
	`var account = targetRecord.getValue('account');`
	
	`recipientQuery.addQuery('account', account);`
	
	`})(recipientQuery, targetRecord);`

5. Select **Submit**.
   The recipient qualifier configuration is added to the Recipient Qualifier [sys_recipient_qualifier] table and is available for use in an email client configuration.

Define email client from addresses

Set an allowable email address that is displayed in the From address of a message sent from the email client.

Before you begin

Role required: admin

Procedure

1. Navigate to **Email Client** > **Email Client From Address** and click **New**.
2. In the **Display name**, enter the name to be displayed in the From field of the email client message.
3. Enter a valid **Email address** for the From address in the email client.
4. Select **Submit**.
   The From address is added to the Email Client From Address [sys_email_client_from_address] table.

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Create an email client configuration

Define a configuration that controls the display and behavior of the email client that is based on a selected ServiceNow table.

Before you begin

Role required: email_client_admin

About this task

The configuration determines the recipient auto-complete results that are displayed, email addresses that can be entered, and a set of allowable From addresses to be used when sending a message with the client.

You can create one email client configuration per ServiceNow table.

Procedure

1. Navigate to **Email Client** > **Email Client Configuration** and select **New**.
2. On the form, fill in the fields.

Field	Description
Name	Unique name for this email client configuration.
Application	Type of scoped application.
Active	Option that indicates that the configuration is active. The configuration is active by default.
Table	ServiceNow table that this client configuration applies to. Select a table from the list.

3. In the Recipient Configuration section, select **Recipient Qualifiers** to be used for this client configuration.
   a. Select the lock icon ( ).
   By default, two types of recipients are available: Active Users with email accounts and Active Groups with email accounts.
   b. Select the search icon ( ) and select a recipient configuration from the list of available recipient configurations.
   c. Select the lock icon ( ) to lock it.
4. In the Display Configuration section:
   a. Select the **Display From** option to display the From email address in the email client, or clear the check box to hide the From email address in the email client.
   b. Select the **Display Reply-To** option to display the Reply To address in the email client, or clear the check box to hide the Reply To email address in the email client.
5. In the Attachment Handling section, select from one of three choices for the **Attachment Send Action** field.

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Option	Description
Attach to Email Record	Keep email client attachments on the Email [sys_email] record when you send an email.
Attach to Target Record	Attach email client attachments to the target record when you send an email. This option is the default value.
Conditionally Attach to Target Record	Set conditions that define which email client attachments are moved to the target record when you send an email. Attachments that do not meet the conditions remain on the email record when you send an email.

6. In the Filter Configuration section, select **Email Address Filters** to be applied to the email client.
   a. Unlock the lock icon ().
   b. Select the search icon () and select one or more Email Address Filters.
   c. Select the lock icon () to lock **Email Address Filters**.

   Each filter that you select evaluates a given email address and determines whether or not the given address is valid to apply to an outbound email.
7. Click **Submit**.
   The configuration is added to the Email Client Configuration [sys_email_client_configuration] table.

Enable SMS delivery with the email client

Give users the option to send an email client message as an SMS text message.

Before you begin

Role required: admin

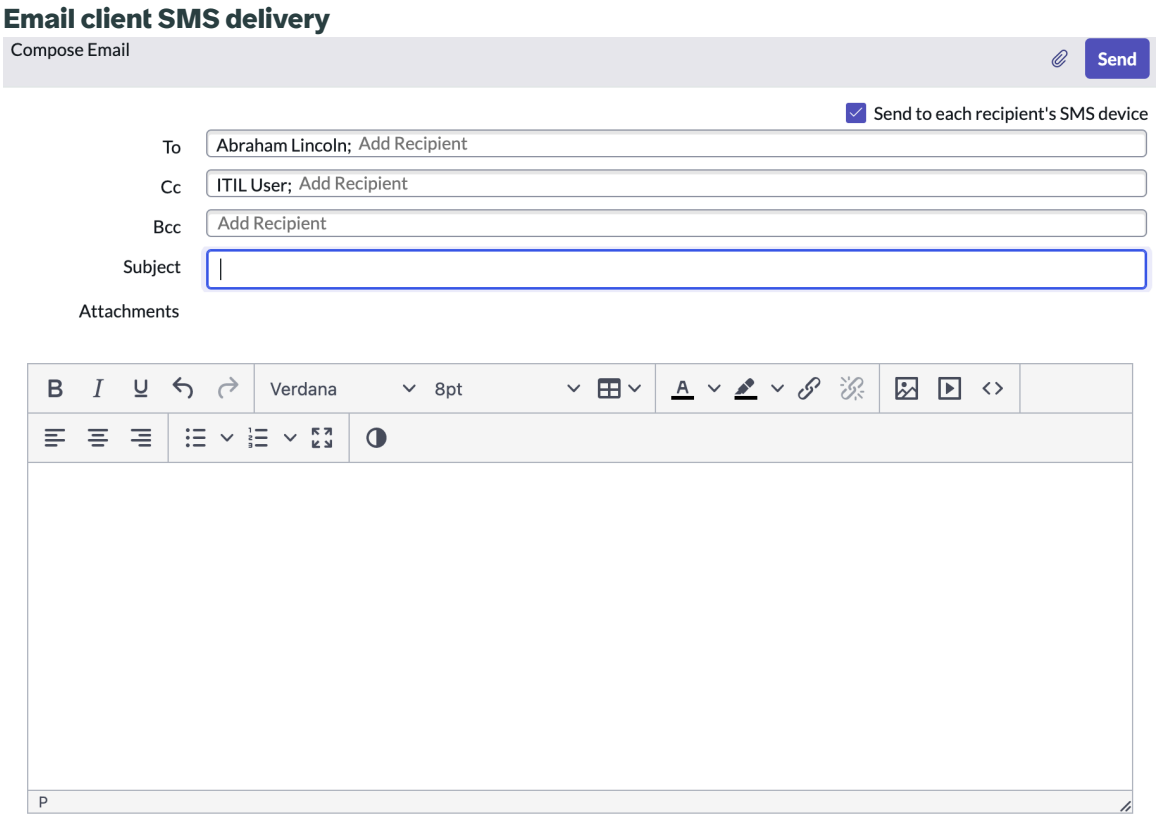
Procedure

1. In the application navigator, enter `sys_properties.list`.
2. From the list, find and open the record for the *`glide.email_client.show_sms_option`* property.
3. On the form, change **Value** to **true**.
4. Click **Update**.

Result

In the email client, user can select to send the message as an SMS text message.

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If the recipient doesn't have a registered SMS device, the email client sends the message to the primary email device.

Related topics

Add a system property

Create an email client template

Create a different template for each table that uses the email client to pre-populate data for recipients and email content.

Before you begin

Role required: admin

About this task

The email client uses its own email templates to define default values for fields. Use the following sections in the Email Client Template form to build a client template:

- Content: The message body.
- Recipients: The email addresses of users receiving the email message. The email addresses are displayed in the To, Cc, and Bcc fields of the message.
- Sender Configuration: The method used to generate the email sender (From email address) of the message.

Procedure

1. Navigate to **All** > **Email Client** > **Email Client Templates**.
2. Select **New**.
3. On the form, fill in the fields.

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Email Client Template form

Field	Description
Name	Unique template name.
Table	The table that the template applies to. Enable the email client for the same table.
Conditions	The conditions that determine when this client template is used. Use the condition builder to identify the target record that must match before this template is applied to the email client. **Note:** Conditions are only used for to apply a default template upon initial load. Conditions are not used when loading a custom email template from a workspace sidebar.
Application	The type of scoped application.
Execution Order	A number that indicates the order in which the template conditions are evaluated. The template with the lowest execution order is considered.
Include attachment from email	Option for including attachments from email to the **replyall-received**, **reply-received**, **forward-sent**, **reply-sent**, **replyall-sent**, and **forward-received** response templates. **Note:** This option is applicable only for response email in a configurable workspace.

4. On the **Content** tab, fill in the fields.

Content tab

Field	Action
Subject	Enter a description of the email. **Note:** The **Subject** field on the email client allows a larger character count than the default setting for the **Subject** field in the Email [sys_email] table. If the subject text from the client is being truncated, increase the **Max length** value for the **Subject** field in the Email table.
Content Type	Select the format of the message body content: **HTML** or **plain text**.
Body HTML	If you've selected **HTML** for the **Content Type** field, enter the content of the message body using the HTML editor toolbar to format the HTML. To reference field values, select variables from the variables list or manually type variable references using the syntax `${table_name.variable_name}`. To reference the user who launches the email client, enter the variable `${current_user}`. **Note:** Line breaks don't appear for multi-line fields such as ${description} and ${comments} in the email client template.

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Field	Action
	You can call a mail script by using `${mail_script:script name}` in the **Body HTML** field.
Body text	If you selected **plain text** for the **Content Type** field, enter any text or mail script that you want to appear in the message body. You can insert a mail script in the **Body text** field by using the following syntax: `<mail_script> [code] </mail_script>`

5. On the **Recipients** tab, fill in the fields.

Recipients tab

Field	Action
To	Enter a comma-separated list of either field names that contain user email addresses or just email addresses. To reference an email address using a script, create a script include and then call the script include in the **To** field. Your script must start with the `javascript:` prefix. The script must return email addresses in a comma-separated string. Use only one JavaScript expression and do not combine it with field names.
Cc	Enter a comma-separated list of either field names that contain user email addresses or just email addresses. To reference an email address using a script, create a script include and then call the script include in the **Cc** field. Your script must start with the `javascript:` prefix. The script must return email addresses in a comma-separated string. Use only one JavaScript expression and do not combine it with field names. This field can't have the same addresses as the **To** field.
Bcc	Enter a comma-separated list of either field names that contain user email addresses or specific email addresses. To reference an email address using a script, create a script include and then call the script include in the **Bcc** field. Your script must start with the `javascript:` prefix. The script must return email addresses in a comma-separated string. Use only one JavaScript expression and do not combine it with field names. This field can't have the same addresses as the **To** or **Cc** fields.

6. On the **Sender Configuration** tab, select the **From Generation Type** method to determine how the sender (From address) in the email client message is generated.

Type	Description
None	The From address isn't generated in the email client message.
SMTP Email Account	Use the From address of the SMTP email account for the instance as the sender.
Select From List	Choose from a list of allowable From addresses de fined in the Email Client From Address [sys_email_client_from_address] table.

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Type	Description

Script	Run a GlideRecord query on the Email Client From Address [sys_email_client_from_address] table.
	
	For example, the following script sets the From address based on the location of the incident caller:
	
	`(function (fromAddressQuery, targetRecord) {`
	`  // targetRecord is incident for this template`
	`  var location = targetRecord.caller_id.country;`
	
	`  if (location == 'us')`
	`  fromAddressQuery.addQuery('email_address', 'servicedesk.us@example.com');`
	`  else if (location == 'japan')`
	`  fromAddressQuery.addQuery('email_address', 'servicedesk.jp@example.com');`
	`  else if (location == 'uk')`
	`  fromAddressQuery.addQuery('email_address', 'servicedesk.uk@example.com');`
	
	`})(fromAddressQuery, targetRecord);`

Text	Enter the email From address to be used in the client.
User Email Addresses	For integrating users or agents personal corporate mail boxes with ServiceNow to send and receive emails. **Note:** This requires User Mailbox Integration (com.glide.email.user_mailbox.integration) plugin to be installed.

Use this method only if you want a different From address than the one defined in your SMTP email account.

Note:

The From email address doesn't appear in the email client unless you configure an email client to display the From address. For more information on managing the behavior of an email client, see Email client configurations.

If the domain for the From address isn't the domain of the SMTP email account server, the owner of the From domain address must configure the SPF record for the domain. The owner changes the domain settings to enable the instance to send an email as if from that domain. For more information on using SPF records, see ServiceNow KB0535456.

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7. Select **Submit**.
   The template is added to the Email Client Templates [sys_email_client_template] table.

Related topics

Script includes

Apply an email client template

After you create an email client template, you can apply it to an email.

Before you begin
Role required: admin

About this task
The following steps are implemented only after creating an email client template

Procedure

1. Click the ellipsis (...) icon at the top of the template to apply the template to an email.
2. Select **Email**.
3. Fill in the fields to compose an email.
   See Create an email client template for field details.

> **Note:** The body of the email is filled up with the details from the incident record. If you modify one or more fields in the incident record and are not saved, the unsaved changes still reflect in the email body.
>
> **Note:** 2000 characters is the total limit for all the changes in the incident record. If some of your changes are not reflected and get truncated in the email body, this is because the total changes is more than 2000 character limit.

Create an email client response template

You can now create custom email client response templates that support conditions.

Before you begin
Role required: admin

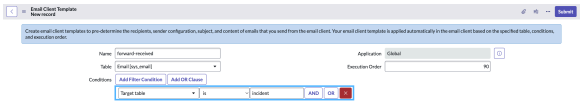
About this task
Email client template is applied automatically in the email client based on the specified table, conditions, and execution order.

Procedure

1. Navigate to **All** > **Email Client** > **Email Client Templates**.
   The following options for **Response Template - Received** and **Response Template - Sent** show up.
2. Click one of the available options to create a template for that selected option.
3. Fill in the fields at the top of the Email Client Template form.

Field	Description
Name	Auto-filled template name based on the selected template option.

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Field	Description
	Note: This is a read-only field.
Table	Auto-filled table name. **Note:** This is a read-only field because for response templates, the table name is always sys_email.
Conditions	The conditions that determine when this client response template is used. Use the condition builder to identify the target record that must match before this template is applied. **Note:** If the conditions are not true, the email client gets the default template. Select the target table name under conditions that the template applies to. Enable the response template for the same table. 
Application	The type of scoped application.
Execution Order	A number that indicates the order in which template conditions are evaluated.

4. Fill in the fields in the **Content** tab.

Field	Description
Subject	Enter a description of the email. **Note:** The **Subject** field on the email client allows a larger character count than the default setting for the **Subject** field on the Email [sys_email] table. If the subject text from the client is being truncated, increase the **Max length** value for the **Subject** field on the Email table.
Content Type	Select the format of the message body content: HTML or plain text.
Body HTML	If you selected HTML for the **Content type**, enter the content of the message body using the HTML editor toolbar to format the HTML. To reference field values, select variables from the variables list or manually type variable references using the syntax `${table_name.variable_name}`. To reference the user who launches the email client, enter the variable `${current_user}`. **Note:** Line breaks don't appear for multi-line fields such as ${description} and ${comments} in the email client template.

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Field	Description
	You can call a mail script by using `${mail_script:script name}` in the **Body HTML** field.
Body text	If you selected plain text for the **Content type**, enter any text or mail script that you want to appear in the message body. You can insert a mail script in the **Body text** field by using the following syntax: `<mail_script> [code] </mail_script>`

5. Fill in the fields in the **Recipients** tab.

Field	Description
To	Enter a comma-separated list of either field names that contain user email addresses or just email addresses. To reference an email address using a script, create a script include and then call the script include in the **To** field. Your script must start with the `javascript:` prefix. The script must return email addresses in a comma-separated string. Use only one JavaScript expression and do not combine it with field names.
Cc	Enter a comma-separated list of either field names that contain user email addresses or just email addresses. To reference an email address using a script, create a script include and then call the script include in the **Cc** field. Your script must start with the `javascript:` prefix. The script must return email addresses in a comma-separated string. Use only one JavaScript expression and do not combine it with field names. This field can't have the same addresses as the **To** field.
Bcc	Enter a comma-separated list of either field names that contain user email addresses or specific email addresses. To reference an email address using a script, create a script include and then call the script include in the **Bcc** field. Your script must start with the `javascript:` prefix. The script must return email addresses in a comma-separated string. Use only one JavaScript expression and do not combine it with field names. This field cannot have the same addresses as the **To** or **Cc** fields.

6. In the **Sender Configuration** tab, select the **From Generation Type** to determine how the sender (From address) in the email client message is generated.
   Use this field only if you want a different From address than the one defined in your SMTP email account.
   - None: The From address is not generated in the email client message.
   - SMTP Email Account: Use the From address of the SMTP email account for the instance as the sender.
   - Select From List: Choose from a list of allowable From addresses defined in the Email Client From Address [sys_email_client_from_address] table.
   - Script: Run a GlideRecord query on the Email Client From Address [sys_email_client_from_address] table.

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For example, the following script sets the From address based on the location of the incident caller:

```
(function (fromAddressQuery, targetRecord) {
    // targetRecord is incident for this template
    var location = targetRecord.caller_id.country;

    if (location == 'us')
        fromAddressQuery.addQuery('email_address',
 'servicedesk.us@example.com');
    else if (location == 'japan')
        fromAddressQuery.addQuery('email_address',
 'servicedesk.jp@example.com');
    else if (location == 'uk')
        fromAddressQuery.addQuery('email_address',
 'servicedesk.uk@example.com');

})(fromAddressQuery, targetRecord);
```

- Text: Enter the email From address to be used in the client.

Note: The From email address does not appear in the email client unless you configure email client to display the From address. For more information on managing the behavior of email client, see Email client configurations.

If the domain for the From address is not the domain of the SMTP email account server, the owner of the From domain must configure the SPF record for the domain. The owner changes the domain settings to allow the instance to send email as if from that domain. For details on using SPF records, see ServiceNow KB0535456.

7. Click **Submit**.

Composing emails with quick messages

Insert predefined content into the message body of emails that you send from the email client.

Using quick messages

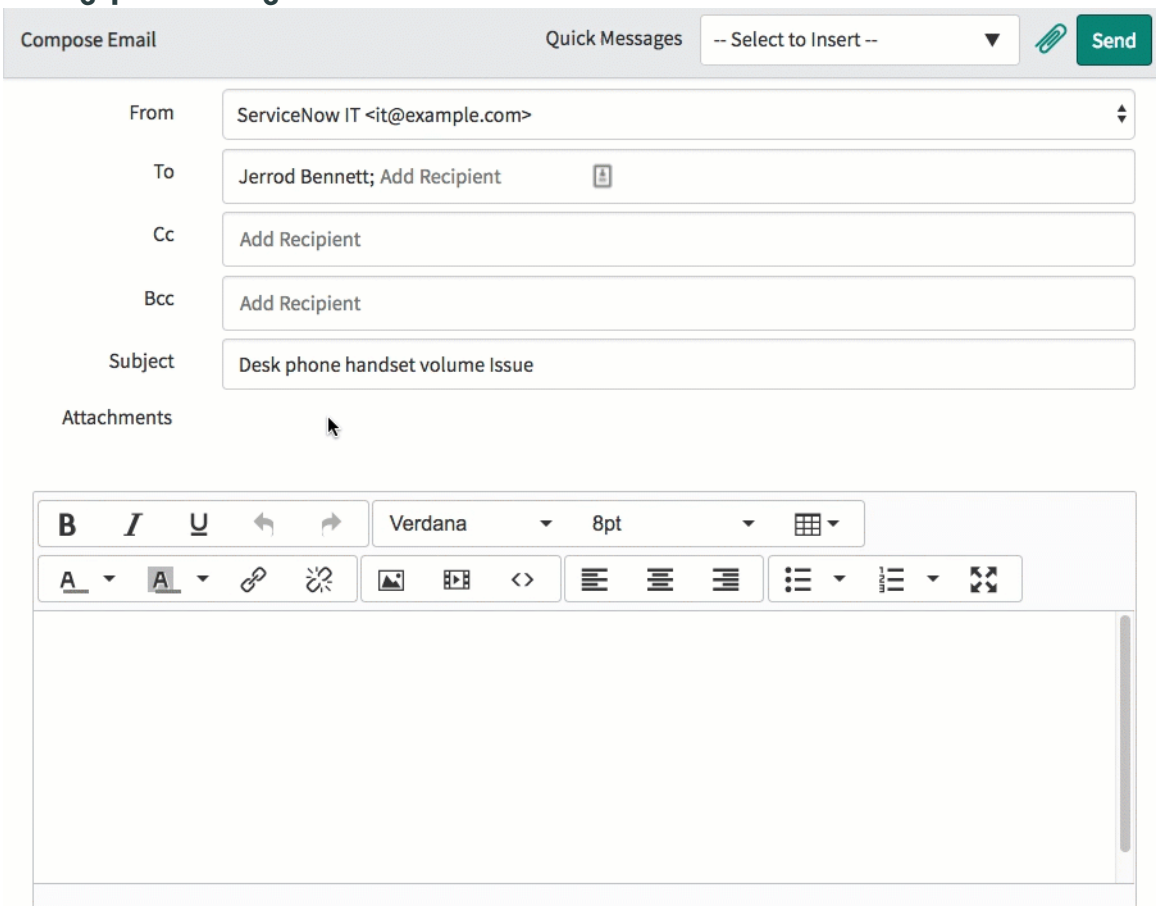
In the email client, you can select a quick message to fill the email body with the content that is specified in the quick message. After you define one or more quick messages, the Quick Message selector appears in the email client so that you can construct an email with multiple quick messages.

By default, the quick message content is inserted at the place of the cursor. It doesn't replace the content that you created before selecting the quick message. To replace message content with a quick message, highlight the text to replace and then select a quick message.

Note: To instead have quick message content replace all existing content in an email draft, set the *glide.email_client.quick_message.insert* property to **false**.

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Adding quick messages to an email



Creating quick message content

Define quick messages by creating records in the Email Client Canned Messages [sys_email_canned_message] table.

When you define a quick message, you can add any of the following types of content into the message body:

- Icons
- Logos
- Pictures
- Rich-text HTML
- Hyperlinks
- Variables
- Any other HTML constructs

Note: If you add attachments to the quick message, the attachments aren't sent as part of the email distribution.

Assign the email_client_quick_message_author role to business managers so that they can create quick messages for users in their group.

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Setting quick message conditions

When you define a quick message, you can limit the availability of the quick message according to:

- The user who launches the email client
- The group of the user who launches the email client
- The table of the record from which you launch the email client
- The target record from which you launch the email client

For example, if you designate Beth Anglin as the user for a certain quick message, the quick message is available in the email client only for Beth Anglin.

If you associate a quick message to the Incident [incident] table, the quick message is available in the email client only after you launch from an incident record. If you specify a target record from the Incident table for the quick message, the quick message becomes available in the email client only for matching incident records.

Define a quick message

Create predefined content to add in the email client so that users can write emails consistently and efficiently.

Before you begin

Role required: email_client_quick_message_author or admin

Procedure

1. Navigate to **Email Client** > **Quick Messages**.
2. Select **New**.
3. On the form, fill in the fields.

Field	Description
Title	Name that appears in the Quick Message selector.
Active	Option for activating the quick message. When selected, the quick message is available for selection in the Quick Message selector.
Application	Type of scoped application.
User	User who has access to this quick message. Selecting a user restricts access to that user only. Leave the field blank to have no user-based restrictions.
Group	Group whose members have access to this quick message. Selecting a group restricts access to members of that group only. Leave the field blank to have no group-based restrictions.
Table	Table to which the quick message applies. To make the quick message available for all tables, leave blank.
Conditions	Target record that must match the conditions before the quick message appears for selection in the email client.
Body	Content to insert in the **Message Text** field in the email client. By default, the field supports HTML format.

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Field	Description
	To reference field values, select variables from the variables list or manually type variable references using the syntax `${table_name.variable_name}`. To reference the user who launches the email client, enter the variable `${current_user}`. To reference the title of the user who launches the email client, enter the variable `${current_user.title}`. **Note:** To view and select the variables, you must select a Table. You can use these values to include a predefined signature in email responses from agents to customers. **Note:** Line breaks don't appear for multi-line fields such as ${description} and ${comments} in the email client template.

4. Select **Submit**.

Email address internationalization

Email address internationalization allows international character support for email addresses for non-English characters when sending and receiving emails. Email addresses can have non American Standard Code for Information Interchange (ASCII) characters.

Enable or disable International characters in an email by running a scheduled job.

The *glide.email_address.rfc6530.enabled* system property can be set to true only if the configured email SMTP server for the instance supports SMTP UTF8 extension. This property by default enables sending and receiving of inbound emails to and from international email addresses including processing of the emails received from encoded international email addresses.

Enable or disable email address internationalization

Enable email address internationalization by setting the *glide.email_address.rfc6530.enabled* system property to `true`.

Disable email address internationalization by setting the *glide.email_address.rfc6530.enabled* system property to `false`.

Customize email address internationalization

Customize email address internationalization to turn off processing of inbound and outbound emails, disable support for inbound emails or to add email address format for decoding international email addresses.

Before you begin
Role required: admin

Procedure

1. **Optional:** Turn off processing of inbound and outbound emails from or to RFC 6530 email addresses.

   a. In the navigation filter, enter `sys_properties.list`.

   b. Select **New** to create the *glide.email_address.inbound.rfc6530* property.

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c. On the form, fill in the details.

Fields	Input
Name	*glide.email_address.inbound.rfc6530*
Description	This property turns off processing of emails from RFC 6530 email addresses.
Type	true|false
Value	false
Ignore cache	Select the check box. **Note:** When Ignore cache check box is selected, the system flushes the server cache when the parameter is changed.
Read roles	Define the roles that have read access to this property.
Write roles	Defines the roles that have write access to this property.

d. Select **Submit**.

2. **Optional:** Disable support for processing inbound emails received from encoded email addresses.

a. In the navigation filter, enter `sys_properties.list`.

b. Select **New** to create *glide.inbound.rfc6530.support.encoded.from.address* property.

c. On the form, fill in the details.

Fields	Input
Name	*glide.inbound.rfc6530.support.encoded.from*
Description	This property disables support for processing emails received from encoded email addresses.
Type	String
Value	false
Ignore cache	Select the check box.

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Fields	Input
	Note: When Ignore the cache check box is selected, the system flushes the server cache when the parameter is changed.
Read roles	Define the roles that have read access to this property.
Write roles	Define the roles that have write access to this property.

d. Select **Submit**.
The encoded email addresses are received-ignored.

3. **Optional:** Add email address format for decoding international email addresses if the format isn't ISO-8859-1, ISO-8859-8, or ISO-8859-15.
   a. In the navigation filter, enter `sys_properties.list`.
   b. Open the *`glide.inbound.rfc6530.supported.encoding.formats`* system property.
   c. Add the required format to the value field, for multiple formats use comma-separated list.
   d. Select **Update**.

Components installed with the email client

Several types of components are installed with activation of the Email Client (com.glide.email_client) and Email Client Template (com.glide.email_client_template) plugins, including tables and user roles and tables.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

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

Tables installed

Table	Description
Email Client Configuration [sys_email_client_configuration]	Controls for the email client. There's only one Email Client Configuration record for each table that uses the email client.
Email Client From Address [sys_email_client_from_address]	Email addresses that users can select as the From address of an email client message.
Recipient Qualifier [sys_recipient_qualifier]	Email addresses that users can send email client messages to.

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Table	Description
Email Client Template [sys_email_client_template]	Templates that are applied automatically to qualified email client messages.

Email client administrator [email_client_admin]

Configures the email client to fit the needs of your organization and can read or write email client templates.

Contains Roles

List of roles contained within the role.

- email_client_quick_message_author
- email_client_template_write

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

Email composer [email_composer]

Creates email client messages and can read email client templates.

Contains Roles

List of roles contained within the role: email_client_template_read.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Read-only role for email client templates [email_client_template_read]

Reads email client templates.

Contains Roles

List of roles contained within the role: None.

Groups

List of groups this role is assigned to by default.

None.

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Special considerations

None.

Read/write role for email client templates [email_client_template_write]

Reads and writes email client templates.

Contains Roles

List of roles contained within the role: email_client_template_read.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Grant this role with care, as it is a special-privileged role that includes scripting capabilities.

Quick message author [email_client_quick_message_author]

Creates quick messages for users in their group.

Contains Roles

List of roles contained within the role: None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Reference

The reference section provides additional information about the email client.

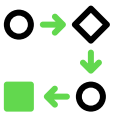
Generate an email reply based on the context of the conversation using Write with Now Assist context menu. This skill can help agents draft emails quickly and stay focused. For more information, see .

Inbound email

Save time from responding to emails manually when you configure your instance to send replies, create incidents, or update records automatically in response to inbound emails.

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Get started

Explore	Configure	Actions
 Explore automated system responses to inbound email	 Configure a processing order for inbound email actions	 Run Inbound actions by comparing the inbound email type and inbound action conditions
Use	**References and Examples**	
 Process inbound email actions	 See examples for inbound email actions, inbound events integration and details about email objects, email matching, user impersonation and redirecting emails	

Troubleshoot and get help

- Troubleshooting Notification emails
- Ask or answer questions in the Platform community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Explore inbound email

Learn about inbound emails.

Inbound email benefits

Inbound email benefits

Benefit	Feature
Save time from responding to emails manually by configuring your instance to send replies, create incidents, or update records automatically in response to inbound emails	Automating system responses to inbound email

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Inbound email benefits (continued)

Benefit	Feature
Define an inbound email action and processing to script how the system responds to an inbound email	Inbound email actions
Configure a processing order for inbound email actions and use the order to manage multiple filters in inbound email actions	Configure inbound email actions
Create inbound email actions and reprocess received emails.	Create an inbound email action
Redact sensitive data such as Social Security number, credit card details, email address, phone number, and other personal information from inbound emails to help protect data and privacy	Sensitive data redaction

What to explore next

To learn more about configuring and using inbound email, see:

- Automating system responses to inbound email
- Inbound email actions
- Configure inbound email actions
- Use Inbound email actions
- References for Inbound email

Automating system responses to inbound email

Save time from responding to emails manually when you configure your instance to send replies, create incidents, or update records automatically in response to inbound emails.

You can define system responses to inbound emails in two ways:

- Create an inbound email flow in Workflow Studio
- Script an inbound email action

Inbound email trigger in Workflow Studio

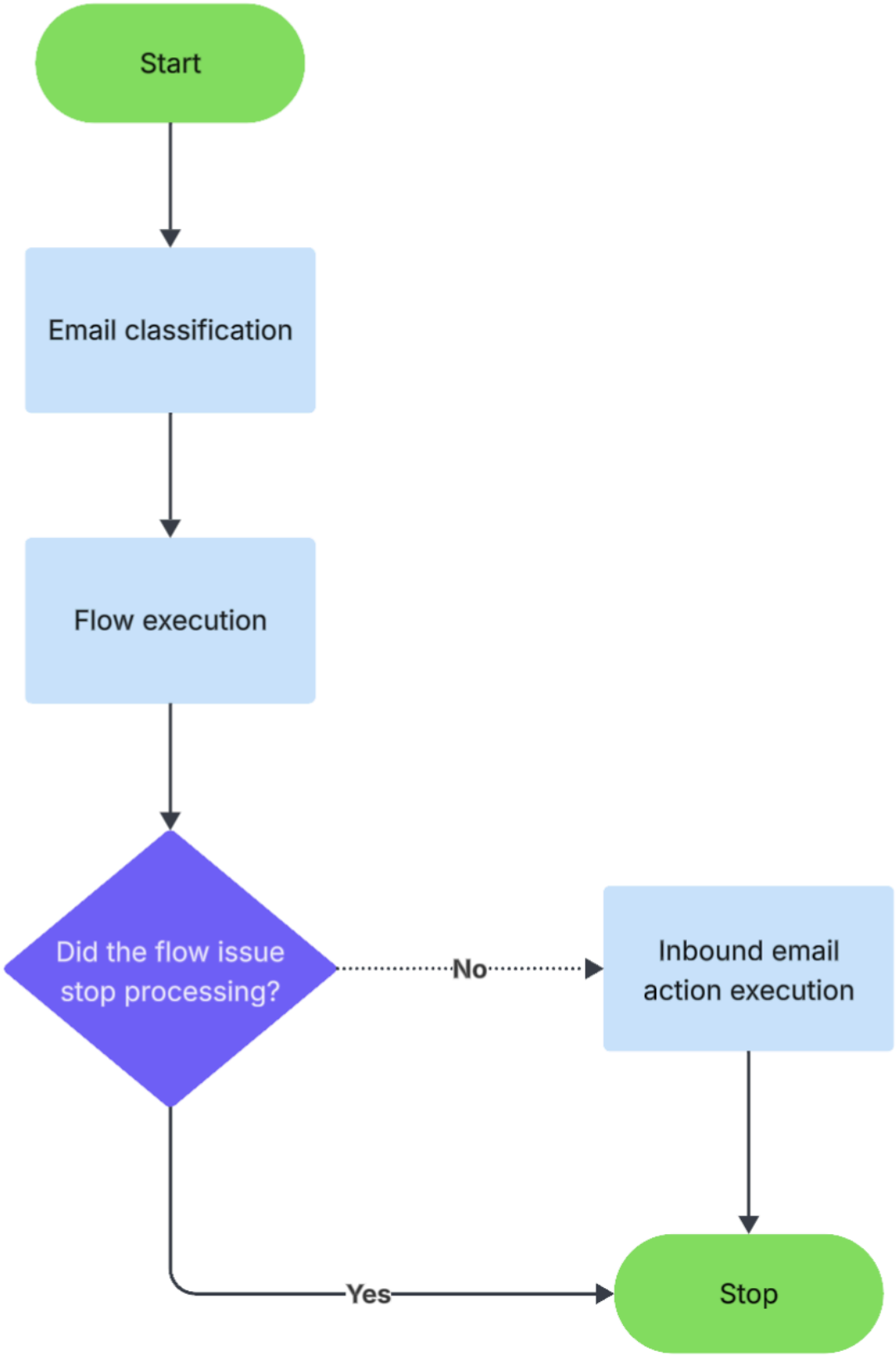
With the inbound email trigger in Workflow Studio, you can create flows that define the automated processes that your instance takes when it receives an email.

Inbound email flows take priority over inbound email actions. If you create flows with inbound email triggers, emails are first processed by the inbound email triggers before they are processed by inbound email actions.

The following diagram shows the processing order for inbound emails. When an email is sent to your instance, the system first classifies the email as a reply, forward, or new email. Then the system runs the inbound email through an inbound email flow. If the flow issues stop processing, the email is finished being processed. If the flow does not issue stop processing, the system tries to match the email to another inbound email flow. If at any point the email does not match with an inbound email flow, the system matches the email to an inbound email action instead.

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Processing order for inbound emails



The benefits to automating system responses to inbound emails in Workflow Studio are:

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- Provides an easy and accessible interface that uses natural language.
- Consolidates configuration and runtime information into a single environment so process owners and developers can create, operate, and troubleshoot flows from a single interface.
- Reduces upgrade costs, with upgrade-safe ServiceNow AI Platform logic replacing complex custom script.
- Reduces development costs by providing a library of reusable actions.

For more information on creating inbound email flows in Workflow Studio, see Workflow Studio flow trigger types or follow the steps in Create a flow with an inbound email trigger. To view or manage your inbound email flows, navigate to **Flow Designer** > **Inbound Email Flows**.

Column Level Encryption for email attachments

Secure attachments in inbound and outbound emails using Column Level Encryption.

Using Column Level Encryption for email attachments requires you to have Column Level Encryption configured on your instance. For more information, see Column Level Encryption.

For each inbound email action, when an email includes attachments and the target record table is Column Level Encryption-enabled, the attachments added to the target record are encrypted.

If an inbound email with attachments is received from an external user who does not have access to the target table, the attachments are not added to the target record such as an incident or case. Instead, the attachments are added to the sys_email record and the email logs.

When you send an outbound email from a workspace with attachments encrypted on the target table, the attachments are decrypted before sending the email so recipients can access them.

Note: To disable adding encrypted attachments to outbound emails, create a system property named *`glide.attachment.restrict_cle_attachments`*, and set it to **true**. By default, this property is set to **false**.

Inbound email actions

Define an inbound email action and processing to script how the system responds to an inbound email.

Inbound email actions

Define an inbound email action to script how the system responds to an inbound email.

Note: Inbound email flows take priority over inbound email actions. If you create flows with inbound email triggers, emails are first processed by the inbound email triggers before they are processed by inbound email actions.

Inbound email actions are similar to business rules: both use conditions and scripts that take action on a target table. An inbound email action checks the email for a watermark that associates it with a task and checks for other conditions. If the conditions are met, the system takes the inbound email action that you configure. The system can take two types of actions:

- Record action: setting a value for a field in the target table.
- Email reply: sending an email back to the source that triggered the action.

By default, if an email has no identifiable watermark, an inbound email action attempts to create an incident from the message. If the email has a watermark of an existing incident, an inbound email action updates the existing incident according to the action's script.

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Inbound email receive types

The system classifies all incoming email into one of three types: forward, reply, or new.

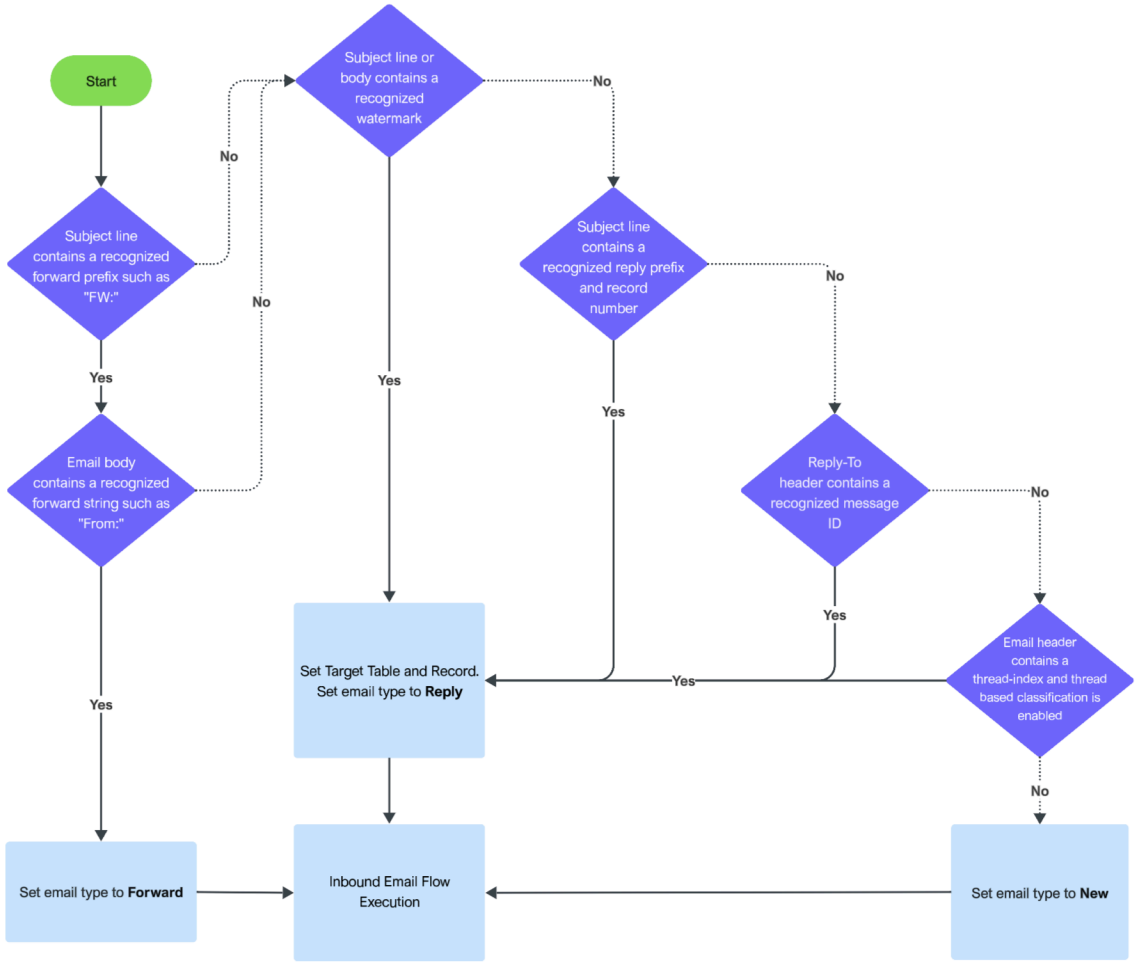
Inbound action classifications

Order	Type	Criteria
1	Forward	The system classifies an email as a forward only when it meets all these criteria: • The subject line contains a recognized forward prefix such as **FW:**. • The email body contains a recognized forward string such as **From:**. The system classifies any email that meets these criteria as a forward, even if the message contains a watermark or record number that otherwise classifies it as a reply.
2	Reply	The system classifies an email as a reply when it fails to match it to the forward receive type and it meets any one of these criteria: **1.** The subject line or email body contains a recognized watermark such as **Ref:MSG0000008**. **2.** There is no watermark and the subject line contains a recognized reply prefix such as **RE:** and a recognized record number such as **INC0005574** **3.** There is no watermark and the Reply-To header contains a recognized message ID of an email with watermark. **4.** If an email does not meet any of the previous criteria, the system checks the email header for a thread-index. When a thread-index is present, the system classifies the email as a reply and associates it with the relevant conversation or thread view. This functionality is supported only for emails originating from Microsoft Outlook. **Note:** To enable thread indexing, create the system property *glide.inbound.email.classify.by.thread_index* and set it to **true**.
3	New	The system classifies an email as new when it fails to match it to the forward and reply receive types.

Note: From Paris release and beyond, if an email body has multiple watermarks, the last watermark in the email body is considered.

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Determining the type of incoming email



Attachments

If an inbound email contains one or more email attachments, the inbound email action adds the attachments to the first record the action produces.

Character encoding

- If the email encoding is ASCII-7 or UTF-8, inbound email actions preserve the character encoding in any associated task records they produce.
- If the email encoding is ISO-8859-1, the inbound email action attempts to convert the email to Windows 1252.
- Inbound email actions convert any other encodings (for example, Mac OS Roman) to plain text, which may or may not be readable.

See the System email log and mailboxes for examples of what you might see if a notification or inbound email action is not processed.

Note: The state of all incoming emails that have been run against inbound email actions, even if there is no matching action, is changed to **Processed**.

Domain separation

The system ignores the domain that the inbound email action record is in when it creates a record based on the inbound email action. Keep inbound actions in the global domain. For

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example, if your inbound email action creates an incident, the system creates the incident in the same domain as the user in the **Caller** field. If that user is not in the User [sys_user] table, the incident is in the global domain.

Related topics

Notification variables

Watermarks on notification emails

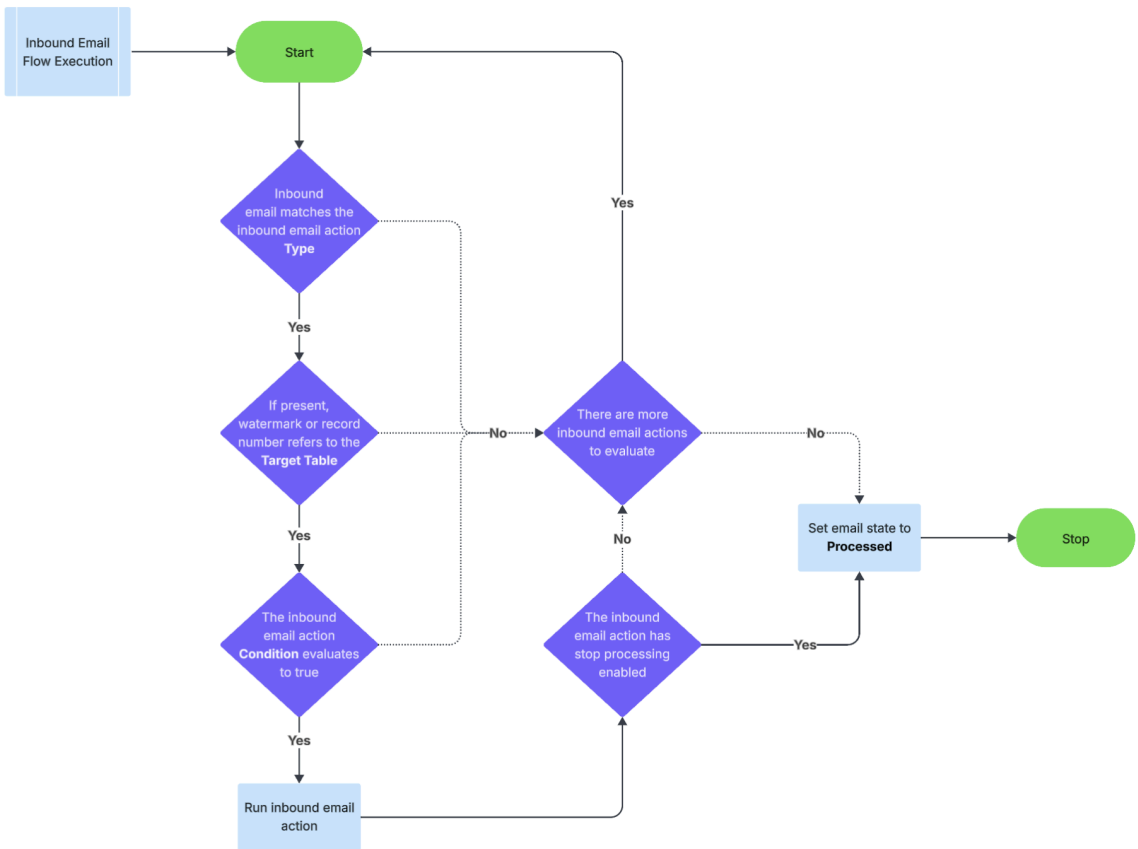
Inbound email action processing

The system determines which inbound actions to run by comparing the inbound email type and inbound action conditions to the incoming email message. Certain properties are available to set the reply and forwarding prefixes in the email subject lines that your instance recognizes when processing inbound emails.

Note: Inbound email flows take priority over inbound email actions. If you create flows with inbound email triggers, emails are first processed by the inbound email triggers before they are processed by inbound email actions.

The system follows this processing flow to determine whether to run an inbound action.

Inbound action processing work flow



The system only runs an inbound action when:

- The incoming email type matches the inbound action **Type**.
- If present, the watermark or record number refers to a record in the **Target table**.
- The inbound action **Conditions** evaluates to true.

If any of these criteria are not met, the system skips the current inbound action and evaluates the next active inbound action. The system processes inbound actions from the lowest to highest

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Order value. If the inbound action has **Stop processing** enabled, the system updates the **State** of the email record to **Processed** after running the inbound action **Script**.

The following video shows how an inbound action condition prevents an incident from being created.

Prefixes recognized in email subject lines

Email reply prefixes

When no watermark is present or the In-Reply-To email header is present, the instance recognizes email containing a prefix from the *glide.email.reply_subject_prefix* property as reply email. You can use this property to set non-standard reply prefixes in your email system.

Property	Description
glide.email.reply_subject_prefix	Specifies the comma-separated list of prefixes in the subject line that identify an email reply. • Type: string • Default value: re:,aw:,r:,Accepted:,Tentative:,Declined: **Note:** The case of the reply prefix in the email, for example RE:, must exactly match the case of the prefixes defined in this property. If, for example, an email contains the Re: prefix and only RE: is defined in the property, the email will not be recognized as a reply. Therefore, it is a best practice to define multiple versions of the prefix, including mixed-case versions, such as RE:, Re:, and so on.

Email forward prefixes

Emails with certain prefixes trigger the forward type of inbound email action. The instance recognizes any email whose subject line contains a prefix from the *glide.email.forward_subject_prefix* property as forwarded email. Emails with these prefixes trigger inbound email actions of the type forward. Use this property to set non-standard forward prefixes in your email system or you want email forwards to behave like replies. If the value of the system property is empty, then the system reverts to using the values **fw:** and **fwd:**.

Property	Description
glide.email.forward_subject_prefix	Specifies the list of prefixes (comma-separated) in the subject line that identify a forwarded email.

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Property	Description
	• Type: string • Default value: fw:,fwd: • Location: Add to the System Properties [sys_properties] table **Note:** Prefixes are case insensitive.

Email forwards as replies

Properties are available to force inbound actions to process forwarded mail as replied mail. These properties control the subject prefix that the inbound actions use.

Property	Value needed
glide.email.reply_subject_prefix	re:,Re:,RE:,aw:,r:,fw:,fwd:,Fwd:,FWD:
glide.email.forward_subject_prefix	[any text that is not a forward prefix]

These properties cause the Update Incident inbound action to process all forwarded and replied-to mail.

Note: The *glide.email.forward_subject_prefix* property must contain some text so that the forwarded email can be processed as a Reply. It can be any text except a forward prefix (that is, fw:,fwd:,Fwd:,FWD:).

Matching a sender email address to a user

The instance matches a senders email address to an active user in the User [sys_user] table using inbound actions.

When processing an email, the instance sets the current user to the user whose email address matches **email.from**. Inbound actions can then reference that current user. For example, the base system inbound action Create Incident sets the **caller_id** of the incident to the value returned by `gs.getUserID()`.

If multiple users have the same email address, the instance first searches for an active user with the email address. The instance does not match inactive users.

Note: Each user record must have a unique email address so that the instance can reliably match the email to the correct user.

If a unique email address for each user is not possible, assign a shared email address to only one active user so that the instance always matches incoming email from that address to the active user.

Matching watermarks in the Subject line or Body

The following examples illustrate how the instance matches randomized watermarks in an email subject line or body.

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Note: For instances upgraded from a release before Jakarta, the system can recognize both randomized and non-randomized watermarks during a watermark transition period.

Examples of matching watermarks in the Subject line or body

Subject Line or Body Contents	Matching Results
Ref:MSG0000008_ aLJc130zDhCVuh3spXmt	The instance recognizes this string as a watermark and searches the Email Watermarks [sys_watermark] table for a record with the number MSG0000008_ aLJc130zDhCVuh3spXmt. If this watermark exists, the instance matches the email to the associated record. If this watermark does not exist, the system processes inbound email messages as described in .
Ref:MSGWTR0000008_wfLLz42IxCgUvG2JlYnh	The instance recognizes this string as a watermark and searches the Email Watermarks [sys_watermark] table for a record with the number MSGWTR0000008_wfLLz42IxCgUvG2JlYnh. If this watermark exists, the instance matches the email to the associated record. If this watermark does not exist, the system processes inbound email messages as described in .

Matching record numbers in the Subject line or Body

The following examples illustrate how the instance matches record numbers in the subject line of an email to an existing record when no watermark is present.

Examples of matching record numbers in the Subject line

Subject line contents	Matching results
RE: Example INC0005574	The instance recognizes this subject line as a reply and recognizes the INC prefix as belonging to the Incident table. The instance searches the Incident table for an existing record `INC0005574`. If this incident exists, the email is associated with this incident. If this incident record does not exist, the instance uses the inbound action for new emails to create an incident and associates the new incident with the email.
RE: Example "INC0005574" RE: Example *INC0005574	The instance recognizes this subject line as a reply but does not recognize the `"INC` prefix as belonging to the Incident table because of the quotation mark. The same error occurs for any character other than a space before the record number. The instance instead uses the inbound action for new emails to create an incident and associates the new incident with the email.
RE: "Example INC0005574" RE: Example INC0005574*	The instance recognizes this subject line as a reply and recognizes the `INC` prefix as belonging to the Incident table. The instance searches the Incident table for an existing record `INC0005574"`, which it cannot find because of the quotation mark. The same error occurs for any character other than a space at the end of the record number. The instance instead uses the inbound

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Examples of matching record numbers in the Subject line (continued)

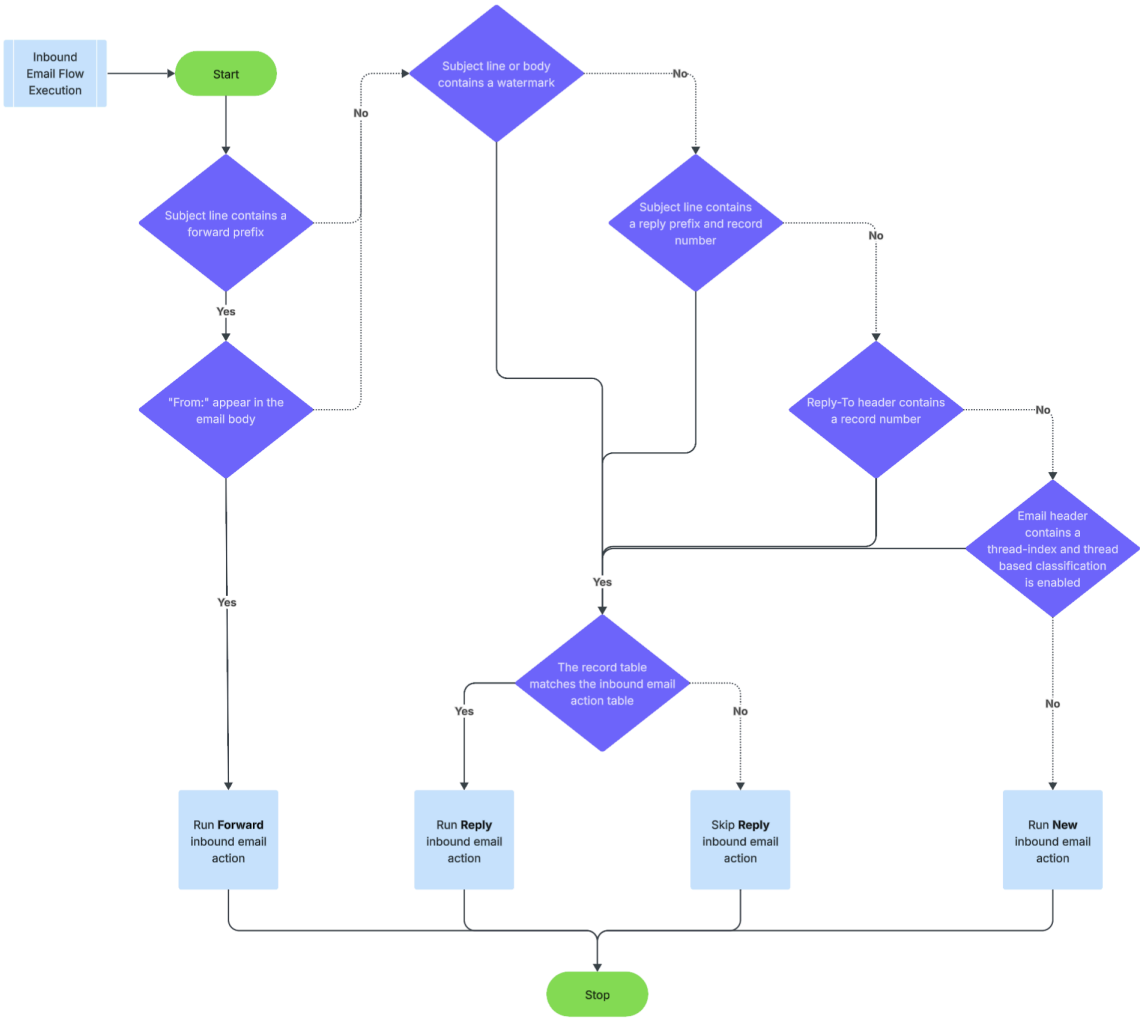
Subject line contents	Matching results
	action for new emails to create an incident and associates the new incident with the email.
RE: CHG0008593 and INC000576	The instance recognizes this subject line as a reply and recognizes one, but not both, of the number prefixes. There is no way to predict which prefix the instance matches first. Whichever prefix it matches, it searches the corresponding table for a matching record. If the record exists, the email is associated with the table. If the record does not exist, the instance uses the inbound action for new emails to create an incident and associates the new incident with the email. **Note:** The instance does not support processing email with multiple numbers in the subject line because there is no way to predict which record the instance matches first. For this reason, do not include more than one $number variable in your notifications.
FW: Example INC0005574	The instance recognizes this subject line as a forward because of the `FW:` prefix. It uses the inbound action for forwarded emails to create an incident and associates the new incident with the email.
Example INC0005574	The instance recognizes this subject as a new email because it does not contain a matching reply or forward prefix. It uses the inbound action for new emails to create an incident and associates the new incident with the email.

Criteria for matching email to inbound actions

Default conditions of active inbound actions are used to manage incoming email. Inbound email actions are classified as forward, reply, or new based on subject line, record matching, and email headers

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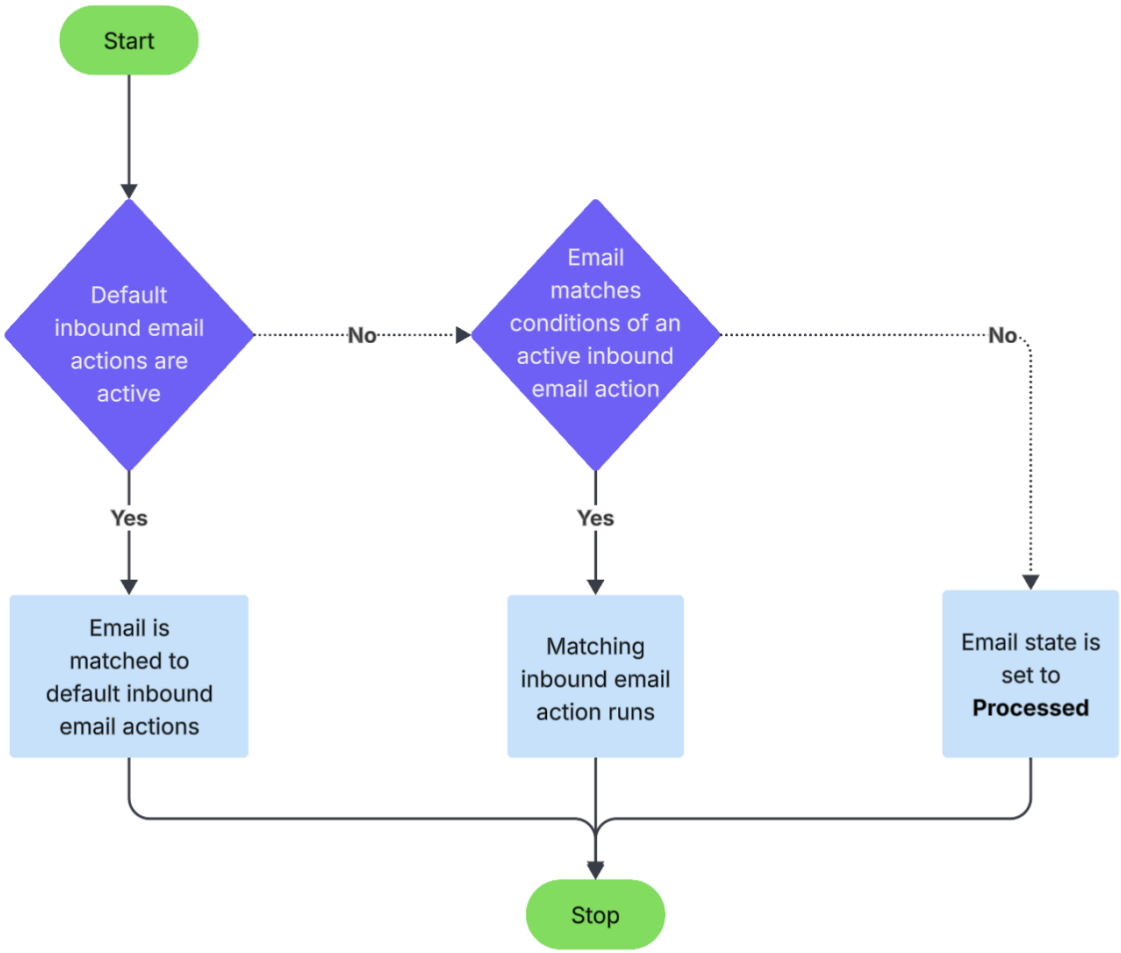
Default matching criteria



If you customize or deactivate the default inbound actions, the conditions of the active inbound actions are checked. If an inbound action with matching conditions cannot be found, the state is set to Processed.

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Custom matching criteria



Inbound action type criteria

Inbound email action type	Required matching criteria	Name of default action (Incident table)	Result of default action
Forward	The email contains the following conditions: • A subject starting with a recognized forward prefix even if a watermark or an In-Reply-To header is present • From <user email> appears anywhere in the email body.	Create Incident (Forwarded)	Create new record
Reply	The email contains one of the following conditions and the table specified in the email matches the table of the inbound action: **1.** A valid watermark that matches an existing record. **2.** A subject line starting with a recognized reply prefix when no watermark is present and a valid record number that matches an existing record.	Update Incident (BP)	Update existing record

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Inbound action type criteria (continued)

Inbound email action type	Required matching criteria	Name of default action (Incident table)	Result of default action
	3. An In-Reply-To email header when neither a watermark nor a valid record number is present that matches an existing record. **4.** A thread-index in an email header when the email does not meet any of the previous conditions that matches an existing record. **Note:** To enable thread indexing, create the system property *glide.inbound.email.classify.by.thread_index* and set it to **true**.		
New	The email does not meet the conditions for either a reply or forward type inbound email action	Create Incident	Create new record

If more than one inbound action is available for a particular type of email, the instance uses the Table field to match the email to a particular table. If there is also more than one action for the inbound action's table, the instance uses the **Order** field to determine the order in which the actions run.

Configure inbound email actions

Configure a processing order for inbound email actions and use the order to manage multiple filters in inbound email actions.

Enable automatic user creation

An administrator can set an email property to automatically create users from incoming email. The administrator provides a list of trusted domains to prevent untrusted users from being automatically created.

Before you begin

Role required: admin

About this task

For example, you can prevent email from users outside your company domain from creating incidents. When an instance receives a message and there is no matching email address from the sender, the instance can create a user with the User ID [sys_user.user_name] set to the sender's full email address.
Users in your instance must still have write and update access to the records that they create or update through inbound email actions.

Note: To learn more about the *glide.user.trusted_domain* property, which affects automatic email creation, see Restrict emails by domain for user creation (instance security hardening) in the Instance Security Hardening Settings.

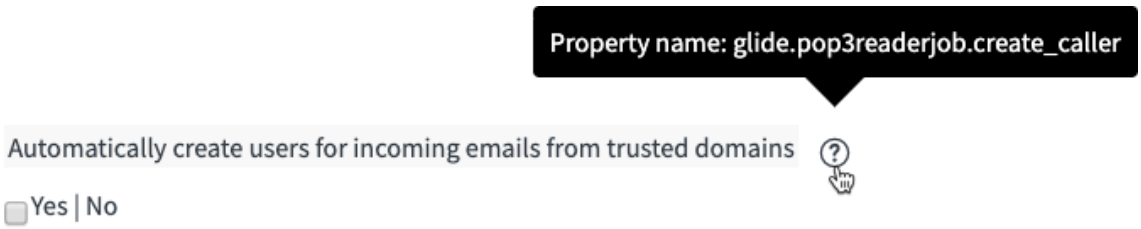
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Creating users from incoming email

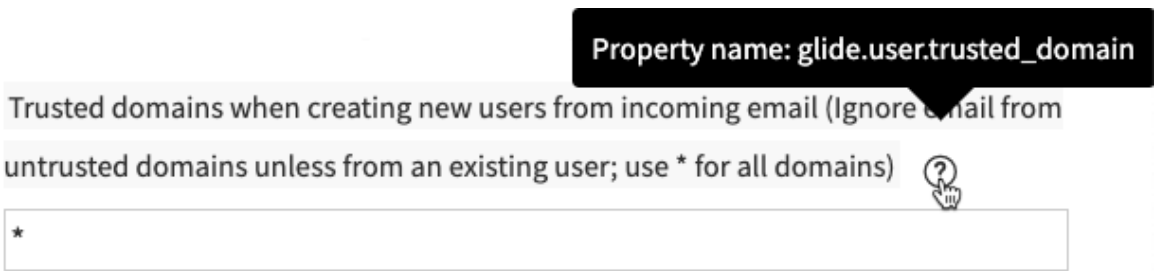
Value of email.from Variable	User ID Created	Email Address	Name
new.user@company.com	new.user@company.com	new.user@company.com	New User
"New User" <new.user@company.com>	new.user@company.com	new.user@company.com	New User
"User, New" <new.user@company.com>	new.user@company.com	new.user@company.com	New User
"User" <nuser@company.com>	nuser@company.com	nuser@company.com	User

Procedure

1. Navigate to **All** > **System Properties** > **Email Properties**.
2. Select the check box for **Automatically create users for incoming email from trusted domains** (*glide.pop3readerjob.create_caller*).



3. Enter the list of trusted domains in **Trusted domains for creating users from incoming emails** (*glide.user.trusted_domain*).



Note:

- The *glide.user.trusted_domain* property prevents user creation if the sender is not from a trusted domain. However, the system may still process inbound actions for emails that are received from the domain. To have the system ignore these emails, set up a system address filter. For more information on setting up system address filters, see System address filters. You can also prevent untrusted users from triggering inbound actions by locking out the guest user.
- The *glide.user.trusted_domain* property does not accept wildcarded domains or values such as:
  - *.edu
  - *.net
  - .edu
  - .net

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4. Click **Save**.
5. **Optional:** Complete the following steps to lock out the guest user.
   a. Navigate to **User Administration** > **Users** and select the user **guest**.
   b. Select the **Locked out** field to disable the guest account.

What to do next

When the property *glide.pop3readerjob.create_caller* is set to *false*, the instance runs inbound actions from users who do not match an existing user by impersonating the guest user.

If the property *glide.pop3readerjob.create_caller* is set to *true*, but a user has a valid email address associated with a non-primary device, the instance creates a new user record for that email address if there is no matching email address in the Users [sys_user] table. The instance does not validate non-primary email addresses against the Notification Devices [cmn_notif_device] table.

The method the instance uses to create users can be upgraded to use the full email address by activating the Email Automatic User Creation plugin.

The plugin sets the property *glide.email.create_userid_from_email* to **true** by default. After activating the plugin, enable automatic user creation from email.

Note: The *glide.email.create_userid_from_email* is not used by the system when the record is created using record producer or created manually.

Warning: Review your existing user records to reconcile any that contain identical email addresses. If you activate the plugin prior to reconciling email addresses, your instance cannot distinguish between users with identical email addresses and randomly selects one of the users with the matching email address.

Setting field values from the email body

Values in an inbound email can set field values in a task record.

Any name:value pair in an inbound email body gets parsed into a variable/value pair in the inbound email script. The name:value pair must be on its own line. Note that most email clients limit the number of characters allowed per line and may truncate excessively long name:value pairs.

Tip: To prevent unexpected parsing, ensure that all the names in the name:value pairs are unique.

See Redirecting Emails for an example of using *setDisplayValue()* in an inbound email action.

Note: The action always generates a lowercase variable name. Also, this functionality does not work on reference fields.

For example, if an email body contains this line:

```
Foo:bar
```

The inbound email script creates the variable *email.body.foo* with the value of **bar**. You can use these variables to create conditions such as:

```
if(email.body.foo!=undefined){
   current.[field]=email.body.foo;}
```

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In this example, the script sets the value of *[field]* to the value **bar**.

Note: Spaces are rendered as underscores when a name:value pair gets parsed into a variable/value pair. For example, if an email body contains a line with spaces like `my variable:data`, then the inbound email script creates the variable *email.body.my_variable*. The value of the variable is **data**.

Specifying the inbound email processing order

You can configure a processing order for inbound email actions and use the order to manage multiple filters in inbound email actions.

The Ordered Email Processing (com.glide.email_ordered_processing) plugin is enabled by default for new instances. Users with the admin role can activate the plugin for upgraded instances. The plugin adds the **Order** column to the Rules [sysrule] table, which the instance uses to determine when to process emails. Admins can also add a command to an action script that halts processing after the script runs.

Configure the processing order

Configure the processing order for inbound email actions to force them to run in a prescribed order.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Policy** > **Email** > **Inbound Actions**.
2. Open an existing inbound action or create one.
3. Complete the form and assign an order number to the **Order** field to establish when this inbound rule should run in relation to other rules.
   If you upgraded and activated the plugin, the **Order** field might be named **Execution Order**.

   Note: Ensure each inbound action has a unique **Order** value to ensure the system stops processing as expected. If multiple inbound actions have the same **Order** value, the system might evaluate all of the inbound actions, even if one of them contains the `event.state="stop_processing";` script or has the **Stop processing** option selected.

4. To stop rule processing when an inbound email action runs successfully: add the following line to the bottom of the script:
   - Select the **Stop processing** check box.
   - Add the following line to the bottom of the **Actions** script:

     ```
     event.state="stop_processing";
     ```

Manage multiple filters in an inbound email action

Use process ordering and the *stop_processing* command to manage multiple filters in inbound email actions.

Before you begin

Role required: admin

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About this task

In this example, you can create new problem records when `prb:` appears in the subject line and new change requests when `chg:` appears in the subject line. All other emails are used to create an incident. The actions are set up as follows:

Procedure

1. Create an action with a condition of `Subject > starts with > chg:` and the `event.state="stop_processing";` command appended to the script.
2. Assign this action an Order value of `100`.
3. Create an action with a condition of `Subject > starts with > prb:` and the `event.state="stop_processing";` command appended to the script.
4. Assign this action an Order value of `200`.
5. Create an action for incident with no conditions and an Order value of `300`.

   It is not necessary to add the *`stop_processing`* command to the script for the incident action unless you want processing to stop at this rule to avoid continuing to another action.

Result

If either a change request or a problem is created, the *`stop_processing`* command stops processing, and no incident record is created. If neither a change request nor a problem is created, the inbound email action for incident creates a record.

Use Inbound email actions

Create inbound email actions and reprocess received emails.

Create an inbound email action

Create inbound email actions to define the actions that the system takes when an email is received.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Policy** > **Email** > **Inbound Actions**.
2. Select **New**.
3. Fill in the fields as described in the table.

Note: You might need to configure the form to see all fields.

Inbound Email Actions form fields

Field	Description
When to run	
Name	Enter a descriptive name for this email action.
Target table	Select the table where the action adds or updates records.
Action type	Select the type of action the instance takes. Select **Record Action** to modify a record in the instance, or select **Reply Email** to have the instance send an email back to the source of the inbound email.

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Field	Description
Active	Select the check box to activate the inbound email action. Clear the check box to disable the action.
Stop processing	Select this check box to help prevent the system from running additional inbound email actions after this action runs.
Redact sensitive data	Select this to mask sensitive data such as personal details, SSN, credit card details. **Note:** Available only when Sensitive Data Redaction for Inbound Emails plugin is activated.
Type	Select the message type required to run the action. The action runs only if the inbound email is of the selected type. Available types are: ○ *New*: An email that is not recognized as a reply or forward. ○ *Reply*: An email with a watermark with an In-Reply-To email header, or whose subject line begins with a recognized reply prefix. ○ *Forward*: An email whose subject line begins with a recognized forward prefix, even if the email also contains a watermark or In-Reply-To header. **Note:** By default, inbound emails of the *Forward* type always generate new incidents regardless of the presence of a watermark. If this behavior doesn't match your business logic, you can change the recognized reply and forward prefixes to treat forwards like replies.
Required roles	Specify required roles that the sender must have to trigger the inbound action.
Order	Enter a number that specifies when this inbound action runs relative to other inbound actions that use the same target table. The instance processes the action with the lowest order number first.
From	Select the user required to run the action. If a user is selected, the action runs only when the email sender matches the user name. Leave this field empty to perform the action for all users. **Note:** If the selected user is later archived or deleted, the restriction is removed and anyone can trigger the inbound email action.
Condition	Specify the condition that must evaluate to true to trigger the inbound action. Build a condition with the choice lists or enter a statement that determines when the inbound email action runs. For example: `email.subject. startsWith ( "chg:" )`
Actions	
Field actions	This field appears if the **Action type** is **Record Action**. Specify how information in the email is inserted into the record. For example, select **[Created by] [From email] [Sender]**, so that when the request is inserted, you can see who it is for.
Reply email	This field appears if the **Action type** is **Reply Email**. compose the email message to send to the source that triggered the inbound email action.

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Field	Description

Script	Enter the script that the action runs. Typically, this script uses the validators script include and email variables.
	
	A template is provided:
	
	`(function runAction(/*GlideRecord*/ current, /*GlideRecord*/ event, /*EmailWrapper*/ email, /*ScopedEmailLogger*/ logger) {`
	
	`// Implement email action here`
	
	`})(current, event, email, logger);`
	
	The following objects are available:
	○ **current**: access the record referred to by the inbound email. For example, `current.assigned_to` accesses the person assigned to the task.
	○ **event**: access one of the parameters of the originating event. For example, `event.parm1` accesses the first parameter of the event or `event.parm2` for the second parameter. See Events for more information.
	○ **email**: access the inbound current email record. For example, `email.subject` accesses the content in the subject line of the email. See Accessing email object variables for more information.
	○ **logger**: add a message to the log file with the source set to `email.<Sys ID of incoming email>`. For example: `logger.log ("Some information")`

Description	
Description	Enter a detailed explanation of what this inbound email action does.
Other fields	
Order	Enter a number to define the order in which this email action should be processed. Actions with lower numbers are processed first. The Ordered Email Processing plugin does not activate this field.

Reprocess received emails

When a email has been processed incorrectly, fix the underlying problem, then reprocess the email. You can reprocess emails individually or in a batch.

Before you begin

Role required: admin

About this task

Various scenarios can result in improperly processed emails. After taking corrective action, reprocess the emails to get correct email records. Two of the most common scenarios are:

- The inbound action failed to trigger correctly. After you update or fix the inbound action, reprocess the affected emails to create the correct records.
- Emails have accidentally ended up on a development instance, usually due to the username or password of a production or test instance being reused on the development instance. In this

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case, you first export the emails from the development instance as XML and import them to the correct instance. On the correct instance, reprocess the imported emails to obtain correct email records.

You can reprocess emails with the types `received` or `received-ignored`. Such emails are processed to the system mailboxes **Received** and **Junk**, respectively.

Take the following steps only after fixing the underlying problem. This procedure only reprocesses the emails.

Procedure

1. Navigate to the relevant **System Mailbox** or navigate to **All** > **System Logs** > **Email**.
2. Decide whether to reprocess emails individually or in a batch.
   - To reprocess an individual email, open that email and click **Reprocess email**.
   - To reprocess several emails at once, select them from the mailbox or the email log and apply the **Reprocess received emails** action.

   Remember that you can reprocess only `received` or `received-ignored` emails.

Sensitive data redaction

Redact sensitive data such as Social Security number, credit card details, email address, phone number, and other personal information from inbound emails to help protect data and privacy.

When an inbound email is received, the sensitive data is masked. The sensitive data is redacted from the body, body_text, subject in the [sys_email] table after flows and inbound actions are executed.

Note: Data that has been redacted can't be recovered.

Redact sensitive data option is available in inbound email actions once the following is activated:

- Sensitive Data Redaction for Inbound Emails plugin
- Data Discovery application

Note: Data Discovery application does not require a paid subscription when used along with sensitive data redaction for inbound emails plugin.

To create inbound email actions, see Create an inbound email action.

Redaction time for the record can be viewed by checking the **Email Log**. For more information, see System email log and mailboxes.

Activate sensitive data redaction for inbound emails plugin

You can activate the Sensitive Data Redaction for Inbound Emails plugin (com.glide.email_inbound.redaction) for Notifications if you have the admin role. The application installs related plugins if they are not already installed.

Before you begin

Role required: admin

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About this task

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Sensitive Data Redaction for Inbound Emails plugin (com.glide.email_inbound.redaction) 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.

What to do next

Activating Data Discovery

Note: Data Discovery application does not require a paid subscription when used along with sensitive data redaction for inbound emails plugin.

Data Discovery **patterns**

Default data patterns are used to filter table entries for further classification. The Data Discovery pattern defines the regular expression used to match data against a target table. For more information, see Configure Data Discovery patterns.

Customize behavior for sensitive data redaction

Customize sensitive data redaction behavior by creating system properties for flows that are triggered by inbound emails, sys_email record, and inbound actions.

Before you begin

Role required: admin

Procedure

1. **Optional:** Create a system property to toggle redaction in flows.

   Note: When this property is enabled, then by default all inbound actions and sys_email record are redacted irrespective of the below property values mentioned in Step 2 and Step 3.

   a. In the navigation filter, enter `sys_properties.list`.

   b. Select **New** to create *glide.email.inbound.email_redaction.trigger_flow.enabled* property.

   c. On the form, fill in the details.

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Fields	Input
Name	*glide.email.inbound.email_redaction.trigge*
Description	This is a global property to toggle redaction in Workflow Studio
Type	true|false
Value	false

d. Select **Submit**.

2. Optional: Create a system property to toggle redaction in the sys_email record.

a. In the navigation filter, enter `sys_properties.list`.

b. Select **New** to create *glide.email.inbound.email_redaction.sys_email.enabled* property.

c. On the form, fill in the details.

Fields	Input
Name	*glide.email.inbound.email_redaction.sys_em*
Description	This property toggles redaction in sys_email record
Type	true|false
Value	true

d. Select **Submit**.

3. Optional: Create a system property to toggle redaction in all inbound actions.

a. In the navigation filter, enter `sys_properties.list`.

b. Select **New** to create *glide.email.inbound.email_redaction.email_wrapper.enabled* property.

c. On the form, fill in the details.

Fields	Input
Name	*glide.email.inbound.email_redaction.email_*
Description	This property toggles redaction in all inbound emails
Type	true|false

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Fields	Input
Value	false

d. Select **Submit**.

References for Inbound email

Email object variables, user impersonations and inbound actions and examples for processing inbound email actions.

Accessing email object variables

An inbound email action script contains the email object to access various pieces of an inbound email through variables. You can use the global variable *sys_email* with inbound email actions.

Accessing email objects with variables

Variable	Contents
email.to	Contains a comma-separated list of email addresses in the To: and Cc: boxes.
email.direct	Contains a comma-separated list of email addresses in the To: box.
email.copied	Contains a comma-separated list of email addresses in the Cc: box.
email.body_text	Contains the body of the email as a plain text string.
email.body_html	Contains the body of the email as an HTML string.
email.from	Contains an email address that depends on the following conditions: • If the address listed in the email **Headers** field matches an existing user's **Email address**, this variable contains the user's email address. • If the address listed in the email **Headers** field does not match an existing user's **Email address**, this variable contains the address listed in the email **Headers** field.
email.from_sys_id	Contains the Sys ID of the user who sent the email to the instance.
email.fromAddress	If system property *glide.email.inbound_action.extract_from_hea* property is set to true, *origemail* is computed from the headers. The default value is false if the property does not exist.
email.origemail	Contains the address of the email sender as listed in the email **Headers** field.

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Accessing email objects with variables (continued)

Variable	Contents
email.subject	Contains the subject of the email as a plain text string.
email.recipients	Contains a comma-separated list of recipient addresses as a plain text string, in the To: box.
email.recipients_array	Contains the recipient addresses as an array.
email.content_type	Contains the MIME content type of the email (for example, *text/plain; charset="us-ascii"* or *text/html; charset="us-ascii"*).
email.headers	Contains details about the sender, route, and receiver as a plain text string in the format of the sending email client.
email.importance	Contains an indication from the sender about how important a message is. The value can be **High**, **Low**, or empty.

Note: The instance follows RFC 2822 (Internet Message Format), which requires multiple email addresses in a group to be separated by commas, not semicolons. The instance can set the values of the *email.to*, *email.direct*, and *email.copied* variables only if emails addressed to groups follow the expected RFC format.

Inbound email.recipient variables

The recipients variables (*email.recipients*, *email.recipients-array*) allow processing of inbound email based on the email recipients. For example, you can create a script to process email based on the array values:

```
var rarray  = email.recipients_array ; for ( var i  = 0 ; i  <
 rarray.length ; i ++ ) { var recipient  = rarray [i ] ; // do
 something with it }
```

The sys_email variable

This variable lets you access the received sys_email record that triggered the inbound email action. It can be used to reference fields on the email record, such as **uid**, **sys_id**, **content_type**, and so on.

Email user matching

When the instance receives an email message, the system searches for an existing user record with the same email address as the sender.

Matching email to existing users

Value of email.from Variable	Matching User ID	Email Address	Name
michael.tossi@company.com	michael.tossi@company.com	michael.tossi@company.com	Michael Tossi
"Michael Tossi" <michael.tossi@company.com>	michael.tossi@company.com	michael.tossi@company.com	Michael Tossi

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Matching email to existing users (continued)

Value of email.from Variable	Matching User ID	Email Address	Name
"Tossi, Michael" <michael.tossi@company.com>	michael.tossi@company.com	michael.tossi@company.com	Michael Tossi
"Tossi" <mtossi@company.com>	mtossi@company.com	mtossi@company.com	Tossi

Note: This functionality requires that you activate the Email Automatic User Creation plugin.

Inbound Email Action scripts no longer support the `gs.createUser()` method. Use either the automatically-generated email variables or the `gs.GetUserID()` method instead.

User impersonations and inbound actions

When the instance receives an email, it can take a variety of actions by impersonating the sender.

If the sender of an incoming email matches an existing user, the instance impersonates the matching user to complete any inbound email actions. If the sender does not match an existing user, the instance impersonates the Guest user to complete any inbound email actions. If the impersonated user is locked out, the inbound email action fails.

Note: If inbound email comes from an untrusted domain, the instance impersonates the Guest user unless you explicitly prevent users from untrusted domains from triggering inbound actions. For more information on filtering domains, see Designate untrusted and trusted email domains.

Allowing locked out users to process inbound email actions

A property is available to allow locked out users to trigger inbound actions. For example, enabling the property can allow locked out users to reset their password and send email to the instance asking for assistance.

Property allowing locked out users to trigger inbound email actions

Property	Description
glide.pop3.process_locked_out	Enables (true) or disables (false) the ability for locked out users to trigger inbound actions. • Type: true | false • Default value: false • System Properties [sys_properties] table

Warning: Enabling this property (*glide.pop3.process_locked_out*) also enables users from untrusted domains to trigger inbound actions. The user must still be active.

Redirecting email to the instance POP3 account

Configure other mailboxes to forward email to the instance's POP3 account.

By default, the *POP Reader* scheduled job checks for new email every two minutes. It connects to the mail server and account specified in email properties. The *POP Reader*

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downloads any email waiting on the mail server and creates *email.read* events. After the instance processes the events, the inbound email actions run.

The *POP Reader* shows the number of emails processed during the reader's last run. The message shows the number of emails the reader processed or `0 processed` if no emails were available. The reader resets the status each time it runs.

It is not possible to specify more than one POP3 account for an instance, but you can forward other mailboxes to the designated POP3 account. This script can be added to the Create Incident inbound email action to differentiate the content based on the original recipient, and then set an *assignment_group* value.

There can be multiple active POP3 accounts with different email addresses but only one instance POP3 account.

```
if(email.direct.indexOf('facilities@anycorp.com')>-1)
current.assignment_group.setDisplayValue('Facilities
 Management');
```

Inbound email action examples

Various examples of inbound email actions are available to help you build your own inbound email actions. These examples show how to set up inbound email actions to handle email replies, create (log) a problem record, request a change, and update an incident.

Inbound email action example: handling email replies

This example shows you how to set up inbound email actions to handle replies that users send back to the instance.

Before you begin

Role required: admin

About this task

The inbound email action parses the email and responds using a script. By default, an email received by the instance creates a new incident, and the body of the email is added to the **Additional Comments** text box. More refined Inbound Email Actions can create incident tickets with more data, thus saving the incident management team valuable time.

Normally, when a user responds to an email sent by the instance, the inbound email action matches the watermark to an existing incident, and updates the incident rather than creating a new record. However, if the watermark is missing, this inbound email action attempts to match a reply to the original incident.

This inbound email action is replicated in Workflow Studio as the sample flow **Inbound Email Flow Example: handling email replies**. To view the sample flow, navigate to **Flow Designer** > **Designer**.

Procedure

1. Navigate to **System Policy** > **Inbound Actions** and click **New**.
2. Populate the form as follows:

Inbound action field values

Field	Value
Name	Update Incident
Type	Reply

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Field	Value
Target table	Incident [incident]

3. In **Script**, enter this code.

```
gs.include('validators');

//Note: current.caller_id and current.opened_by are already set
 to the first UserID that matches the From: email address

if (current.getTableName() == "incident") {
  current.comments = "reply from: " + email.origemail + "\n\n"
 + email.body_text;

  if (email.body.assign != undefined)
    current.assigned_to = email.body.assign;

  if (email.body.priority != undefined &&
 isNumeric(email.body.priority))
    current.priority = email.body.priority;

  if (email.body.category != undefined)
    current.category = email.body.category;

  if (email.body.short_description != undefined)
    current.short_description = email.body.short_description;

  current.update();
}
```

Inbound email action example: logging a problem

This example shows you how to set up inbound email actions to a create a problem record.

Before you begin

Role required: admin

About this task

Inbound email actions allow users to log or update incidents on an instance via email. The inbound email action parses the email and responds using a script.

This inbound email action is replicated in Workflow Studio as the sample flow **Inbound Email Flow Example: logging a problem**. To view the sample flow, navigate to **Flow Designer** > **Designer**.

Procedure

1. Navigate to **System Policy** > **Inbound Actions** and click **New**.
2. Populate the form as follows:

Field	Entry
Name	Log Problem
Type	New

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Field	Entry
Active	True
Target Table	Problem [problem]
Condition	`email.subject.indexOf("Problem: ") == 0`

Script	`current.description = email.body_text;`
	`current.short_description = email.subject.toString().substring(9);`
	
	`current.assignment_group.setDisplayValue("Development");`
	
	`if (email.body.assign != undefined)`
	`current.assigned_to = email.body.assign;`
	
	`current.insert();`

Inbound email action example: requesting a change

This example shows you how to set up inbound email actions to create a change request record.

Before you begin

Role required: admin

About this task

Inbound Email Actions allow users to log or update incidents on an instance via email. The inbound email action parses the email and responds using a script.

Procedure

1. Navigate to **All** > **System Policy** > **Inbound Actions** and click **New**.
2. Populate the form as follows:

Field	Entry
Name	Request Change
Type	New
Active	True
Target Table	Change Request [change_request]
Condition	`email.subject.indexOf("Change Request: ") == 0`

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Field	Entry

Script	`current.comments = email.body_text; current.short_description = email.subject;`
	
	`current.notify = 2;`
	
	`if (email.body_text.assign != undefined) current.assigned_to = email.body_text.assign;`
	
	`if (email.body_text.priority != undefined) current.priority = email.body_text.priority;`
	
	`if (email.body_text.category != undefined) current.category = email.body_text.category;`
	
	`current.insert();`

Values automatically set from incoming email

The default inbound action for the Incident table automatically sets the following field values when it receives an incoming email.

Values automatically set from incoming email

Field value set	Value used from incoming email
`current.caller_id`	User ID of the first user whose email address matches the `email.from` variable.
`current.opened_by`	User ID of the first user whose email address matches the `email.from` variable.

If multiple users have the same email address, the instance first searches for an active user with the email address. Use unique email addresses for each user record whenever possible. If not, having only one active user with the shared email address guarantees that the instance always matches incoming email from this address to the active user.

Integrate inbound events

This example illustrates how to create a notification from an inbound JSON request.

Before you begin
Role required: admin

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About this task

When complete, you will be able to:

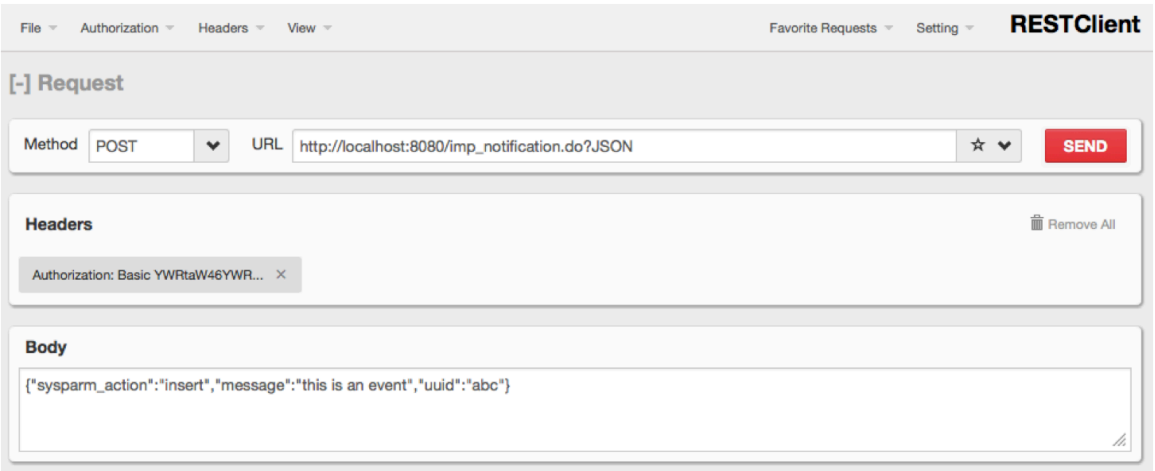
- Send a JSON request to the [imp_notification] web service import set with the JSON processor
- Create a new import set in the [imp_notification] table in the instance using data from the JSON request

The following example steps assume you have your own demonstration instance.

Procedure

1. Activate the JSON Web Service plugin.
2. Install the RESTClient Firefox plugin.
3. Open the RESTClient.
4. Create the following JSON request.
   - **Method**: *POST*
   - **URL**: `http://<instance name>.service-now.com/imp_notification.do?JSON`
   - **Headers**: Authorization: Basic
   - **Body**:

```
{"sysparm_action":"insert","message":"this is an
 event","uuid":"abc"}
```

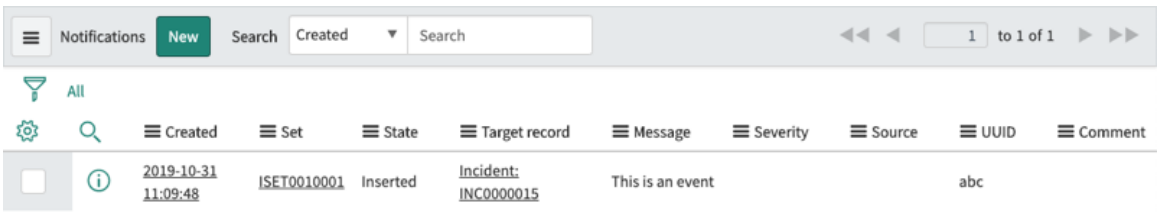


5. Click **Send**.
6. Navigate to **Response** > **Response Body (Raw)**.
7. Verify that the instance sends back a response with a `sys_id`.

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8. Login to your development instance.
9. In Navigation filter, enter `imp_notification.list`.
10. Verify that the import set table has an event matching your JSON request.



Notification Preferences

With notification preferences you can manage and choose the notifications you want to receive.

Get started

Explore	Notification Preferences in Next Experience	Notification Preferences in Core UI
Learn about preferences and choose the notifications you want to receive	Manage and set notification preferences, including customized notifications and channels	Set notification preferences, including personal subscriptions and channels

Troubleshoot and get help

- Troubleshooting Notification emails
- Ask or answer questions in the Platform community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

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Exploring preferences

With notification preferences you can manage and choose the notifications you want to receive. Notification preferences enable you to set global preferences, search for notifications, enable and disable notifications, and customize the way you receive system notifications.

Notification preferences for Next Experience

You can manage your own notification preferences for Next Experience, including personal notifications and channels for receiving them. With **Advanced Preferences** managing notification preferences in Next Experience is more efficient and also supports provider notifications.

For more information, see System and custom notification and delivery channel preferences in Next Experience.

Notification preferences for Core UI

In the Core UI, you set personal notification preferences, including personal subscriptions and channels for receiving them, through the **Notifications** tab of the System Settings window.

Note: To switch to the Core UI from the Next Experience UI, set the property *glide.ui.polaris.core.notification_preference.enabled* to true.

For more information, see Setting notification preferences in Core UI.

Notification preferences benefits

Notification preferences benefits

Benefit	Feature
Manage and set your own notification inNext Experience preferences, including customized notifications and channels for receiving them	System and custom notification and delivery channel preferences in Next Experience
Set your own notification preferences in Core UI, including personal subscriptions and channels for receiving them. All users can set these preferences through the Notifications tab of the System Settings window.	Setting notification preferences in Core UI

What to explore next

To learn more about configuring and using notification preferences, see:

- System and custom notification and delivery channel preferences in Next Experience
- Setting notification preferences in Core UI

System and custom notification and delivery channel preferences in Next Experience

You can manage and set your own notification preferences, including customized notifications and channels for receiving them.

With notification preferences, you can control the system notifications and custom notifications that you receive and apply conditions to restrict notification delivery and choose how the notifications are delivered to you.

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Note: Standardized forms across custom notification preferences and delivery channels have been enabled from Yokohama onwards. To use standardized forms, set the property *glide.notification.preference.sn_form_enabled* to `true`.

Search notifications

You can also search for notifications under both system and custom notifications. There are 2 types of searches, search on preferences that only searches if it matches the notification name and AI search.

With AI search, the search functionality now goes beyond just looking for notification names. It can also search within fields of notification records, offering a broader and more accurate search experience. To use the AI search, the AI Search for Notifications plugin must be installed and index sources **Platform Notifications V1** and **Platform Notifications V2**, for more information see Activate AI Search for Notifications and Index AI Search for notifications.

System notifications

System notifications alert you of record changes that might concern or interest you. You can be notified via email, SMS text messages, push notifications, or messaging applications.

With system notifications, you can:

- Set your preferences for specific notifications by searching in the list of your notifications or by filtering them by category.
- Set preferences at a global level.
- Easily enable or disable all notifications or individual notifications.
- Use advanced filter options based on categories, delivery channels, active or inactive notifications, email digest, and subscribable notifications.
- Add or modify a notification schedule for individual delivery channels for each system notification.
- Set a schedule for all notifications, individual system notifications, or delivery channels.

  For more information, see Apply notification conditions

Custom notifications

A custom notification is a system notification that you can subscribe to and customize by adding conditions.

With custom notifications, you can:

- Search for a specific notification in the list of your notifications to be able to set your preferences for that notification.
- Use advanced filter options based on categories, delivery channels, active or inactive subscriptions, and email digest.
- Create and modify custom notifications, which are subscriptions to notifications that are important to you.
- Set preferences at a global level.
- Easily enable or disable all notifications or individual notifications.
- Enable or disable notification channels.
- Add or modify a notification schedule for individual delivery channels for each system notification.

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- Set a schedule for all notifications, individual system notifications, or delivery channels.

  For more information, see Apply notification conditions

Note:

Custom notifications for Next Experience do not support notifications that require a related affected record. For these notifications, you have to set the preference in the Core UI. For more information, see Setting notification preferences in Core UI.

Note: Subscription-based notifications are not domain aware and cannot support domain-specific settings.

Delivery Channels

Delivery channels is a list of your chosen channels such as email, SMS, instant message and voice channels for receiving notifications.

With Delivery Channels, you can:

- Enable or disable a particular channel for receiving notifications.
- Create, edit, or delete notification channels for instant messages, email, SMS, and voice.

  Note: Only admins can delete channels from the cmn_notif_device table.

- Choose how notifications are delivered.
- Set a schedule for the record in the channel and apply to the notifications you want to receive.

Activate AI Search for Notifications

You can activate the AI Search for Notifications plugin (com.glide.notification.ais) for Notifications if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

Role required: admin

About this task

The following items are installed with Notifications:

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the AI Search for Notifications plugin (com.glide.notification.ais) 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.

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

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

What to do next

Index AI Search for notifications

Index AI Search for notifications

Make content from multiple internal indexed sources searchable by performing a full table index. This procedure indexes existing records from the source tables and any child tables configured for indexing.

Before you begin

Your indexed sources must be active and internal (referring to ServiceNow AI Platform tables). To index content from indexed sources for external documents, see Indexing and searching external content in AI Search.

Role required: ais_admin

About this task

Once you define an indexed source, AI Search begins automatically indexing to reflect changes to records in the selected source table and its specified child tables. The results of all record create, update, and delete operations in these tables are reflected in the search index. AI Search doesn't index content from unmodified records in these tables until you perform a full table index

Follow these steps to index searchable content from existing records in indexed sources. Use the same steps to manually reindex content for indexed sources that have already been indexed.

If an indexed source contains unindexed records, the Indexed Sources list displays an informational message and marks the new source with an alert triangle icon. A similar informational message appears on the Indexed Source form. Make sure to perform a full table index for each indexed source that displays the alert triangle icon.

Procedure

1. Navigate to **All** > *AI Search* > *AI Search* **Index** > **Indexed Sources**.
2. Search for **Platform Notifications V1** and **Platform Notifications V2**.
3. In the **Actions on selected rows...** menu, select **Index All Tables**.
   The Indexed Source History page for the last selected index appears. A message reports that AI Search has queued an indexing task for the indexed source.
4. **Optional:** Refresh the Indexed Source History form page to monitor the progress of the indexing task.
   When the task completes, the **Ingestion State** field shows *indexed*.

Set notification preferences

View, enable, and disable general settings for notification preferences, and delivery channels.

Before you begin

Role required: none

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Note: Standardized forms across custom notification preferences and delivery channels have been enabled from Yokohama onwards, to use standardized forms set the property *glide.notification.preference.sn_form_enabled* to `true`.

Procedure

1. From your user profile, navigate to **Preferences** > **Notifications**.
2. Select the **General** tab.
3. Set global notification preferences.

Option	Description
Allow Notifications	Enable or disable all notifications.
Advanced Preferences	Customize notification preferences for sys tem notifications, custom notifications, and delivery channels.
System notifications	Enable or disable system notification cate gories, for example, Approval or Connect noti fications.
Custom notifications	Enable or disable custom notifications.
Delivery Channels	Enable or disable individual delivery chan nels.

Customize system notifications

Create custom notifications, which are subscriptions to notifications of importance to you, and apply conditions that control specific content included in your custom notification. You can also enable or disable the channels for delivery.

Before you begin
Role required: none

About this task

Note: Custom notifications for Next Experience do not support the setting for the affected record the notification is based on. For notifications that require an associated affected record, see Create personal notifications.

Procedure

1. From your user profile, navigate to **Preferences** > **Notifications** and then select **Advanced Preferences**.
2. Select the **Custom Notifications** tab.
3. Select **Create notification**.
4. Select the notification you want to receive.
   a. Enter a name for the notification in the **Personal notification name** field.
   b. Select the system notification you want to receive from the **Notification** drop-down.
   c. Select **Next**.

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5. Select the channels from the delivery channels through which you want to receive the notifications.
6. Select **Next**.
7. Set a schedule or conditions for receiving notifications.

   a. Choose to have notifications delivered only during weekday working hours by selecting **Monday thru Friday (9 to 5)**.

   b. **Optional:** Set a filter with as many conditions as desired to limit the notifications you receive.

   (Optional) For example, you can choose to be notified only when an incident communication plan is created for a specific configuration item.

   Note: All conditions are set to **[Active][is][true]** by default.

8. Select **Save**.

Modify a notification

Modify a notification by establishing a schedule or setting conditions to control the notifications you receive.

Before you begin

Role required: none

Procedure

1. From your user profile, navigate to **Preferences** > **Notifications** and then select **Advanced Preferences**.
2. Determine the type of notification you want to modify by selecting either the **System Notifications** or **Custom Notifications** tab.
3. Access the Add/Edit Schedule dialog box.
   - In the **System Notifications** tab, select and expand the notification and select **Schedule**.
   - In the **Custom Notifications** tab, select **Schedule** in the notification entry.
4. Choose to have notifications delivered 24x7 by selecting **None** or only during weekday working hours by selecting **Monday thru Friday (9 to 5)** in the **Schedule** field.
5. **Optional:** Set a filter with as many conditions as desired to limit the notifications you receive.
   - In the **System Notifications** tab, select the **Advanced Filter** checkbox and set the filter in the **conditions** field.
   - In the **Custom Notifications** tab, set the filter in the **conditions** field.

   (Optional) For example, you can choose to be notified only when an incident communication plan is created for a specific configuration item.

   Note: All conditions are set to **[Active][is][true]** by default.

6. Select **Save**.

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Create notification filter configuration for notification preferences

Control the list of notifications that are displayed to the users under the advanced notification preferences page. This capability can help narrow down and show only relevant notifications based on user criteria.

Before you begin
Role required: admin

Procedure

1. In the **Filter Navigator**, enter `sys_properties.list`.
2. Create a property named `glide.notification.preference.apply_filter_config` and set it to **true**.
3. Navigate to **All** > **System Notification** > **Emails** > **Notification Filter Configuration**.
4. Select **New**.
5. Enter the **Name** and the **Order**, the notification filter configuration with the lowest order will take precedence.
6. Select the User Criteria from the list of target records or create a new user criteria.
7. Select **Notification filters** tab to create and submit filter conditions for the selected user criteria.
8. Specify filters for Classic Notifications and Provider Notifications to control which notifications appear on the preferences page.
9. Select **Submit**.

Delete a custom notification

Delete custom notifications that you don't need any more.

Before you begin
Role required: none

Procedure

1. From your user profile, navigate to **Preferences** > **Notifications** and then select **Advanced Preferences**.
2. Select the **Custom Notifications** tab.
3. In the notification entry, select the more actions icon and select **Delete**.

Add a new notification delivery channel

Add new channels for email, instant message, SMS, and voice to receive notifications and set a schedule for the channel for the notifications you want to receive.

Before you begin
Role required: none

Procedure

1. From your user profile, navigate to **Preferences** > **Notifications** and then select **Advanced Preferences**.
2. Select the **Delivery Channels** tab.
3. In the relevant delivery channel type, select **+Add**.

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4. In the dialog box, select the **Channel Info** entry.
5. Enter a channel name and the relevant details.
6. Select **Set Schedule** and select a schedule from the **Schedule**drop-down list to schedule notifications for the channel.
7. Select **Save**.

Edit a delivery channel

Edit an email, instant message, SMS, or voice channel for receiving notifications, and schedule when the channel can receive notifications.

Before you begin

Role required: none

Procedure

1. From the user profile, navigate to **Preferences** > **Notifications** and then select **Advanced Preferences**.
2. Select **Delivery Channels**.
3. Expand the delivery channel that you want to edit.
4. Select the more actions icon for the channel and select **Edit**.
5. Make the changes to the channel name, email address, or schedule.
6. Select **Save**.

Setting notification preferences in Core UI

You can set your own notification preferences, including personal subscriptions and channels for receiving them. All users can set these preferences through the **Notifications** tab of the System Settings window.

With the **Notifications** tab, you can:

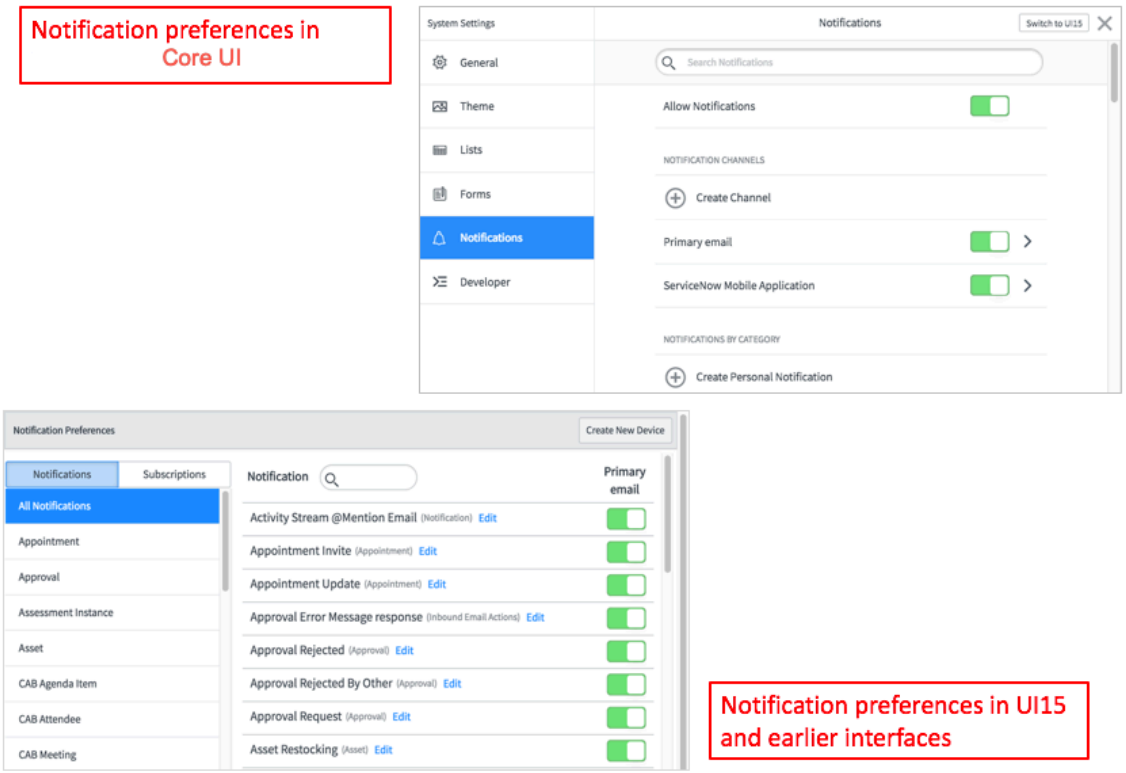
- Search for a specific notification in the list of your notifications.
- Use a global switch to enable or disable all your notifications.
- Enable or disable a particular channel for receiving notifications, as well as create, edit, or delete channels.
- Control the notifications that you receive and apply conditions to restrict notification delivery.
- Create personal notifications, which are subscriptions to notifications that are important to you.

Comparison between notification preferences in Core UI and earlier interfaces

In new and upgraded instances that use the Core UI interface, the System Settings window is the central location for managing your notification preferences for Next Experience. The Notification Preference User Interface plugin (com.glide.notification.preference.ui) is activated by default.

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Notification preferences in Core UI and UI15



In UI15 and earlier interfaces:

- Users set notification preferences through the **Notification Preferences** link in the User form (**Self service** > **My Notification Preferences**).
- Admins created user devices and set notification preferences for users through the **Notification Preferences** link in the User form, accessed through the User Administration module (**User Administration** > **Users**).

Note:

Admins can revert to the UI15 notification preferences interface by setting the *glide.notification.preference.UI.enabled* property to false.

Manage your notification preferences in Core UI

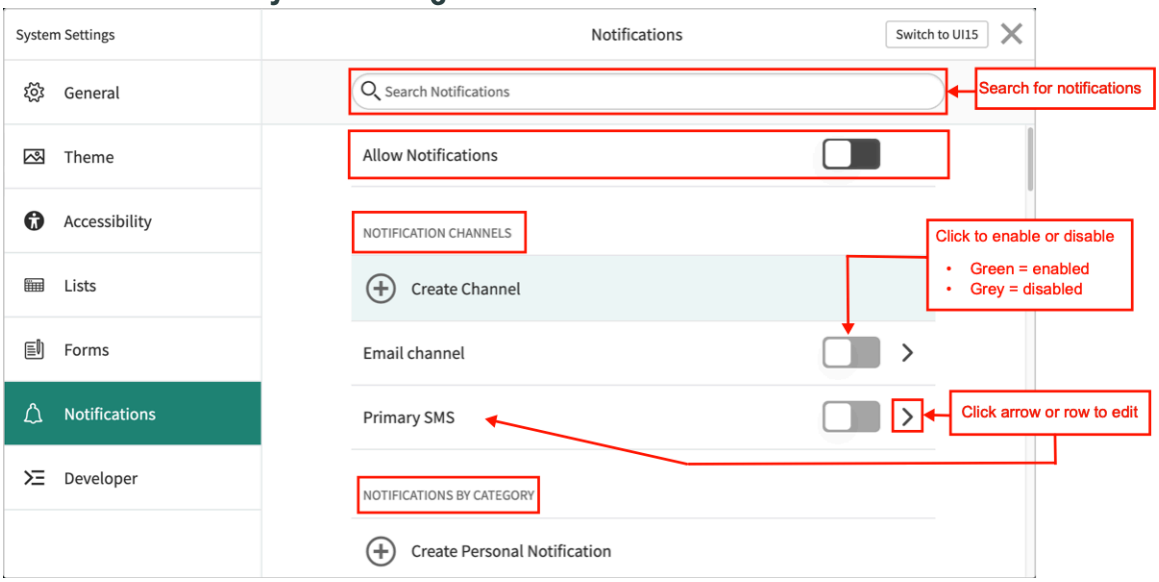
Note:

To switch to the Core UI from Next Experience, set the property *glide.ui.polaris.core.notification_preference.enabled* to true.

To access your notification preferences, click the gear icon (⚙) in the banner frame, and in the System Settings window, click the **Notifications** tab. You can also access the System Settings by navigating to **Self Service** > **My Notification Preferences**.

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Notifications tab in System Settings window



In the **Notifications** tab, use the settings in the following table to manage your notifications.

Setting	Description
Search	Search bar for finding notifications. To find a notification: • Enter the name of the notification you are searching for. When you type the first three characters, the system automatically returns a list of notifications matching the characters entered. • Enter two asterisks to return a list of all notifications in alphabetic order (the notifications are not organized by category).
Allow notifications	Global switch for enabling or disabling all notifications.
Notification channels	List of your channels for receiving notifications. Use this section to: • Enable or disable a channel by using its toggle switch. If you disable a channel, notifications are not delivered through that channel. • Add channels using the **Create Channel** option. • Modify channel information. Click the channel row or the right arrow (**>**) next to the appropriate channel to edit or delete it.
Notifications by category	List of notification categories that identify and group related notifications. Each category contains the notifications that you can subscribe to. To view the notifications in a given category, click the category row or the right arrow (**>**) next to the appropriate category. You can:

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Setting	Description
	• Edit settings for a notification: ○ Enable or disable channels for the selected notification. ○ Apply notification conditions, such as schedules and filters, that affect the delivery of the notification. • Create personal notifications, which are subscriptions to specific notifications that matter to you.

Note: Subscription-based notifications are not domain aware and cannot support domain-specific settings.

Subscription-based notifications

Subscription-based notifications enable users to proactively subscribe to items that interest them and unsubscribe from messages that are not mandatory.

Users can also specify additional notification channels that each of their notifications can be configured to use.

Before users can manage the notifications that are sent to them, administrators must create email notifications to which users can subscribe. Administrators can also make subscription-based notifications mandatory so users cannot unsubscribe to them. Then users can subscribe or unsubscribe to the notifications, and add schedules and filters to the subscription to limit the notifications that can be received.

Notifications that administrators mark as subscribable are automatically available in user notification settings. Users are limited to one subscription per notification.

Administrators should create subscription-based notifications when they do not want to specify users for a notification and want to let users proactively subscribe to the notification.

Note: Subscription-based notifications are not domain aware and cannot support domain-specific settings.

Subscriptions 2.0 plugin

The Subscription Based Notifications 2.0 plugin must be active to use subscribable notifications. This plugin is active by default on all new and upgraded instances.

The plugin installs the Notification Subscription [sys_notif_subscription] table, which holds user subscriptions to all notifications.

Subscriptions and notification preferences

Users can subscribe to notifications available to them through their notification preferences. In the Core UI interface, all users can set and modify their notification preferences through the **Notifications** tab of the System Settings window.

Create personal notifications

Create personal notifications, which are subscriptions to notifications of importance to you. You can apply conditions that control specific content included in your personal notification, and also enable or disable the channels for delivery.

Before you begin
Role required: none

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Note:

To switch to the Core UI from Next Experience, set the property *glide.ui.polaris.core.notification_preference.enabled* to true.

About this task

A personal notification is a subscribable notification that you can customize by adding conditions. You can assign the notification a name that is meaningful to you and filter the information received in that notification.

Note: Users are limited to one subscription per notification.

Procedure

1. Navigate to **User menu** > **Preferences** > **Notifications**.
2. Select **Create Personal Notification**.
3. Complete the New Personal Notification form (see table).

Field	Description
Name	A descriptive name for your personal notification. Use a meaningful name to distinguish it from system notifications.
Notification	The notification to subscribe to. You can subscribe only to notifications that are configured to allow subscriptions. Depending on the notification you select, the **Table**, **Affected record**, and **Send when** fields are displayed.
Table	The database table that the notification is linked to.
Affected record	The specific record that the notification is based on. This field appears when you select a notification that has an affected record (for example, a notification for a problem record that has multiple affected CIs). Click the lookup icon, select the table and specific document (record) in that table, and click **OK**.
Send when	Another condition that must be met to send the notification. For example, you might create a filter whose conditions send notifications when an incident with a priority of **1 - Critical** is opened for a network issue.

4. Select **Save**.
   In the following example, notice the category in which the system placed the personal notification.
   The system creates the personal notification and adds it to the appropriate notification category.
5. Enable or disable the channels for your personal notification.
6. Navigate back to the list of notifications for the category by selecting the left back arrow (**<**) at the top of the form.
   Notice that your Personal Notifications are listed above the System Notifications in the given category.
7. Navigate back by selecting the left back arrow (**<**) at the top of the form or by selecting the **Notifications** tab.

Create a service provider

Administrators can configure service providers for devices that use SMS.

Before you begin

Role required: admin

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About this task

Important: Service providers such as AT&T and Verizon may soon be deprecating the **email-to-text** functionality. See Using Notify with SMS for SMS delivery.

Administrators also have the option of configuring how a device's service provider affects the construction of the device's email address.

Procedure

1. Navigate to the Notification Service Provider [cmn_notif_service_provider] table by entering `cmn_notif_service_provider.list` in the application navigator filter.
2. Fill out or change the fields on the form (see table).
3. Select **Update**.
4. Select **Save** on the Notification Preferences page.

Notification Service Provider form fields

Field	Description
Name	Configured name of the service provider.
Type	Type of device, in this case **SMS**.
Active	Enables or disables this notification device.
Advanced notification	Removes all the previous options and displays the **Advanced script** field.
Advanced script	Used for custom notifications that run a script rather than construct a traditional SMS/email. This is used when all outbound SMS messages must run through a central SMS hub, as opposed to being sent directly from the instance to the SMS provider. Advanced users can construct a script in this field that will send a notification to an old style numeric pager that can't receive SMS communications. This field is rarely used and employs advanced scripts. Contact your representative to assist you with any advanced SMS scripting.
Construct address manually	Removes the prefix and suffix options and displays the **Construction script** field.
Construction script	Enables you to script the email address construction as you would in a business rule. For example, `abc + current.phone_number + def@text.att.net` would construct an email address of `abc2223334444def@text.att.net`. **Note:** `Current` is a reference to the device, not the service provider, therefore the *`current.phone_number`* variable that uses the device's `phone_number` value.
SMS Provider Email Prefix	Places the provided text before the device's specified phone number; for example: `PREFIX2223334444@text.att.net`
SMS Provider Email Suffix	Places the provided text after '@' sign; for example: `2223334444@SUFFIX`

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Field	Description
Notification Device Variables	Optional attributes of an SMS device used inside an SMS service provider's **Advanced script**. This is used to deliver SMS notifications to an internal SMS distribution technology. This is an advanced scripting procedure and isn't necessary for configuring external SMS providers.

Select a service provider

You can configure how a device's service provider affects the construction of the device's email address.

Before you begin

Role required: admin

Procedure

1. From the user menu, navigate to **Preferences** > **Notifications** and then select the **Advanced Preferences** link.
2. Select the **Delivery Channels** tab.
3. If no devices are configured, follow these steps to add an SMS device and select a service provider.

   a. In the SMS channel section, select **+Add**.

   b. Expand the **Channel Info** section and provide the Channel Name and Phone number in the fields.

   c. From the **Service provider** drop-down list, select the appropriate service provider.
   The service providers are stored in the Notification Service Provider [cmn_notif_service_provider] table. Only active service providers are visible.

   d. Select **Save**.

SMS notification advanced scripting

You can use these objects and their attributes in your advanced notification scripts on the SMS Notification Service Provider form.

Objects and attributes

Object	Example attributes
current	• current.number • current.assigned_to • current.company • current.state
email	• email.notify • email.sourceTable • email.contentType • email.attachments

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Objects and attributes (continued)

Object	Example attributes
	• email.HTML • email.dataVersionHeader • email.UID • email.allowSavingNoRecipientEmail • email.recipients • email.ignore • email.save • email.headers • email.sysID • email.attachmentLimits • email.class • email.sysId • email.textBody • email.hashCode • email.weight • email.equals • email.logEmail • email.reset • email.wait • email.body • email.SMSText • email.watermark • email.textBodyLegacy • email.sourceHeader • email.subject • email.instance • email.importance
device	• device.service_provider • device.group • device.order • device.sys_id • device.sys_updated_by • device.sys_created_by • device.primary_email • device.schedule

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Objects and attributes (continued)

Object	Example attributes
	• device.name • device.sys_created_on • device.email_address • device.active • device.phone_number • device.sys_mod_count • device.sys_updated_on • device.user • device.sys_meta • device.type

Make a notification mandatory

To prevent users from turning off or deleting a subscription to a notification, make the notification mandatory.

Before you begin

Role required: admin

About this task

When you make a notification mandatory, the notification is locked in user notification preferences, preventing the user from removing or unsubscribing to the notification, filtering it, or changing the schedule.

Users receive mandatory notifications even if they disable notifications.

Note: Mandatory notifications apply to only the primary device of the user. You cannot make a notification mandatory for secondary devices.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Open the appropriate notification.
3. Configure the form and add the **Mandatory** field.

   Note: This field does not display by default.

   a. Select the context menu icon ( ) and select **Configure** > **Form Layout.**

   b. Select the **Mandatory** field and the order in which you want the field to appear.

   c. Select **Save**.
   For more information about configuring the form layout, see Configuring the form layout.

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4. Select the **Mandatory** check box.

   When a user checks their notification preferences, the control button for the mandatory notification is on and is read only.

Force a notification to be sent

To force a notification to be sent to the specified users, enable forced delivery.

Before you begin
Role required: admin

About this task
Forcing a notification means that the relevant users receive the notification, even if they have not subscribed to the notification or have turned off the subscription. In addition, the users receive the notification even if the **Notification** field is set to **Disable**.

Note: Forced delivery applies to only the primary device of the user. You cannot force a notification to be sent to secondary devices.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Open the appropriate notification.
3. Configure the form and add the **Force delivery** field.

   Note: This field does not appear by default.

   a. Select the context menu icon ( ) and select **Configure** > **Form Layout.**

   b. Select the **Form delivery** field and the order in which you want the field to appear.

   c. Select **Save**.
   For more information about configuring the form, see Configuring the form layout.

4. Select the **Force delivery** check box.
5. Select **Update**.

   Unlike using the **Mandatory** option, forcing the delivery does not lock the user's preference or prevent the user from unsubscribing from the notification.

Create a notification filter

Notification filters enable a user to control the delivery of messages by creating special conditions on multiple tables in a single, reusable filter.

Before you begin
Role required: admin

About this task
For example, you can create a filter that controls message delivery when active incidents, problems, and change requests for network issues reach a critical state. For Core UI, filters for notifications or channels are set through the Notifications tab of the System Settings window. For details, see Apply notification conditions.

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Note: The system applies the user's filter conditions after the administrator's conditions have been evaluated. If the administrator's conditions fail, the system ignores notification filters.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notification Filters** and create a record.
2. In the *Notification conditions* related list of the new record, create and submit filter conditions on one or more tables.
3. Repeat the procedure to create additional conditions on other tables for this filter.

Filter device notifications using a schedule

You can associate devices, such as Email, SMS, and Voice, to schedules that define when the devices can and cannot receive notifications.

Before you begin
Role required: admin

About this task
Notifications that are triggered outside of the scheduled days and times for the device are not queued up for delivery at a later time. For example, if an administrator selects the **Weekdays** schedule for an email device, the device receives email notifications triggered between Monday and Friday. If notifications are triggered on Saturday, they are not delivered to the device.

Procedure

1. Define schedules as needed using **System Scheduler** > **Schedules** > **Schedules**.
2. Add or edit a device.
3. Configure the New Device for System Administrator form and add the **Schedule** field.
4. In the **Schedule** field, select the schedule for the device.
5. Select **Submit**.

Edit the schedule or filter of an existing notification message

You can update a schedule or filter that was previously created for an email notification.

Before you begin
Role required: admin

About this task
To edit the schedule or filter of an existing notification message:

Procedure

1. In the Notification Preferences screen, select the notification message to edit.
   You cannot edit any attributes of a mandatory message.
2. Make the appropriate changes in the form.
3. Select **Update**.

Create notification channels

You can add channels to receive your notifications. A notification channel is an email account or voice message system that you have access to.

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Before you begin
Role required: none

About this task
Notification channels include email addresses, service providers for SMS messages, and mobile applications. You can create voice notification channels to support applications like Notify.

Note: If you are using the ServiceNow mobile application or a custom push application, you do not need to create a push channel for your mobile device. The system automatically creates a channel for the mobile app after you initially log in to your instance from your mobile device.

Procedure
1. Navigate to **User menu** > **Preferences** > **Notifications**.
2. Select **Create Channel**.
3. Complete the fields on the New Channel form.

Field	Description
Name	A descriptive name for the channel, such as the device or email account.
Type	The type of channel: ○ **Email**: for email messages. **Note:** All users with an email address have a primary email channel, which is created automatically after a notification is sent to them. ○ **SMS**: for SMS messages. ○ **Voice**: for phone messages. ○ **Instant Message**: for instant messages. If you are using the ServiceNow mobile application or a custom push application, the system automatically creates a channel for the mobile app after you initially log in to your instance from your mobile device.
Email address	The email address of the channel.
Phone number	The phone number for SMS messages or for voice messages.
Service provider	The service provider for SMS messages.

4. Select **Save**.
   The system creates and enables the channel, and adds it to the list of notification channels.

What to do next
To receive notifications on your new notification channel, you must enable the channel for individual notifications. After you enable the channel for a notification, you can set conditions to further control the notifications that you receive on the channel. For more information, see Apply notification conditions.

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Modify notification channels

You can update channel information for your notifications.

Before you begin
Role required: none

Procedure

1. Navigate to **User menu** > **Preferences** > **Notifications**.
2. In the Notification Channels section, select the channel row or the right arrow (**>**) next to the channel name.
3. In the Edit Channel form, update the fields (see Create notification channels for descriptions of the form fields).
4. Select **Save**.

Result
The system updates and saves the channel information that you modified.

Delete a notification channel

Delete a notification channel so that you no longer receive notifications through the channel.

Before you begin
Role required: admin

Procedure

1. Navigate to **User menu** > **Preferences** > **Notifications**.
2. In the Notification Channels section, select the channel row or the right arrow (**>**) next to the channel name.
3. On the Edit Channel form, select **Delete**.

Result
The system deletes the channel from the list of notification channels and no longer delivers notifications to that channel.

Apply notification conditions

Set various conditions and filters to control the notifications you receive. You can also enable or disable an email digest and the delivery of individual notifications by channel.

Before you begin
Role required: none

About this task

- Enable or disable an email digest if a digest is available for the notification. An email digest is a single email that summarizes the activity for the notification during a time interval that you specify. Admins configure the email digest content for a notification.
- Enable or disable a channel on which the notification is received.
- Set preconfigured schedules and filters that determine when you receive your notifications.
- Set more advanced filter conditions to limit the notifications delivered to you.

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Procedure

1. Navigate to **User menu** > **Preferences** > **Notifications**.
2. Select the notification:
   a. In the Notifications By Category section, select the row or right arrow (**>**) of the category that you want to view.
   b. In the list of notifications for the category, select the row or right arrow (**>**) next to the notification that you want to edit.
3. **Optional:** Enable or disable an email digest for the notification, if an email digest is available:
   a. Select the **Email Digest** switch.
   The email digest is enabled when the switch is green and turned off when the switch is grey.
   b. To enable the digest, select the **Interval** (length of time) during which the notifications are accumulated.

   The interval begins with the first occurrence of notification activity during the specified interval. For example, if you selected the Daily interval and the first notification occurs at 07:00, the system begins accumulating notifications at 07:00 and stops at 07:00 the next day. Soon after the interval ends, the system sends the email digest instead of sending the individual notifications that were triggered during the digest interval. If you turned off the digest, the system immediately stops accumulating the notifications and doesn't send the email digest.
4. Toggle the channel switch enable or disable a channel on which the notification is received.
5. To apply conditions for notification delivery, select the row or the right arrow (**>**) next to the channel for the notification.
   a. Fill the Apply Conditions form.

Field	Description
Schedule	Determines when the notification can and can't be received.
Filter	Preconfigured filter with the criteria that determines when the notification can be sent. For example, you might select a filter whose conditions send notifications when an incident with a priority of **1 - Critical** is opened for a network issue.
Advanced filter	Check box to use the condition builder to create additional criteria. When you select the check box, the **Table** and **Conditions** fields are displayed.
Table	Table for the notification. For example, if you selected an incident-related notification, you might select the Incident [incident] table.
Conditions	Define as many conditions as needed to limit the notifications you receive. For example, you can choose to be notified only when an incident communication plan is created for a specific configuration item.

   b. Select **Save**.

Notification agent and agentic workflows in Notifications

Use the Notification agent and agentic workflows to automate inbound emails processing and to create and modify email notifications, templates, and layouts.

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Get started

Explore	Use agentic workflow
	
Explore AI agents and agentic workflows in Notifications	Use agentic workflows for Notifications

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 case information (for chat summarization, resolution notes generation, knowledge generation, call summarization), chat transcripts (for chat recommendation), and email information (for email response). 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.

Explore AI in Notifications

Automates inbound email processing and enables the creation and modification of email notifications, templates, and layouts.

Overview of the Notification agent and agentic workflows in Notifications

Email Agents help automate the triage of tasks that are created via inbound emails by identifying intent, executing actions, & drafting appropriate email responses. The Email Agentic Workflow is designed to intelligently process and respond to various inbound email requests.

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Users

Users

User	Role	Description
Admin	sn_notif_agents.notification_ai_admin	Admins activate, enable, and create intents for email agents.

Benefits

Benefit	Feature	Users
Automate inbound email processing by intelligently understanding requests, extracting information, performing necessary actions, and drafting responses.	Use email agentic workflow	Admin
Create and modify email notifications, templates, and layouts through conversation instead of navigating complex forms and scripts.	Notification agent	Admin

What to explore next

To learn more about configuring and using the Notification agent and agentic workflows with email notifications, see:

- Configure email agentic workflows in Notifications
- General guidelines for creating and mapping an intent

Use email agentic workflow

Use email agentic workflow to intelligently analyze inbound emails, extract information, perform necessary actions, and draft responses.

Email agentic workflows in email notifications

Available email agentic workflows

Agentic workflow name	Description	Available AI agents
Intent to action	Triages tasks that are created via inbound emails by identifying intent, executing actions, and drafting appropriate email responses.	• Intent Identification Agent • Intent Executor Agent • Email Generator Agent

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Role permissions and access

The execution role provides the minimum required permissions to execute intents. Additional intent execution roles can be added as needed to extend permissions for specific actions. Without these, the execution may fail due to insufficient permissions.

Roles for action execution

Role	Description
sn_notif_agents.notification_ai_admin	Has permission to read and create intents, actions and map actions.
sn_notif_agents.notification_ai_reader	Has permission to read intents and actions.
sn_notif_agents.intent_executor	Has permission to execute intents.

Note: When an action runs, it uses the sender's permission, guest users use the **guest_email_agent** role which is limited by default to **sn_notif_agents.intent_executor**. If the execution action needs more access, those permissions must be added under the **sn_notif_agents.intent_executor** role as a child role so it can run properly. The system masks the role based on user permissions, revealing only the roles common to both the user and the **sn_notif_agents.intent_executor** roles.

Email Generation for Reply Email Action

After you connect an AI Search profile to the reply-email action, users can submit queries that can be answered using the profile's content. AI Search check the sender's permissions and returns only the information permitted for their role.

Email Intent to Action Agentic Workflow

Email agentic workflow automates inbound emails by intelligently interpreting requests, extracting information, performing necessary actions, and drafting responses.

Email request types

The Email agentic workflow is designed for intelligently processing and responding to various inbound email requests. It categorizes these requests into two types for appropriate automated handling:

- Workflow executions: These emails contain requests where the system identifies a specific intent that triggers a predefined, automated workflow. This enables for the execution of custom processes based on the email's content.
- Information queries: For these requests, the system acts as an intelligent assistant, answering questions by leveraging default AI search profile that can be mapped to existing information sources.

Intent to action driven email processing

The foundation of an intelligent email automation system lies in its ability to accurately interpret the purpose of an incoming email and execute the appropriate action. This process is driven by Intent to Action mapping.

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- Intent: The underlying purpose or request expressed in an incoming email. It's what the sender wants to achieve (for example "approve my leave," "answer my question"). Admins define these intents. The system's framework attempts to match incoming emails to these predefined intents.
- Action: The specific task or process that the system executes in response to a successfully identified intent.

An Intent represents the underlying purpose or request conveyed in an inbound email. These intents are predefined and configured by administrators, enabling the system to recognize specific types of requests, such as a "leave approval" or a "query about a specific topic." The system uses a framework to match incoming emails to these configured intents.

Once an intent is identified, a corresponding Action is triggered. An action is the specific task or process that the system performs to fulfill the email's request. Actions can take various forms:

- Subflows: These are predefined workflows that execute a series of steps relevant to the matched intent. For example, a "leave approval" intent might trigger a subflow to initiate an approval process.
- Reply Emails: In some cases, the action involves sending an automated email response back to the sender. For example, an acknowledgment or a direct answer containing extracted information.

Note: A crucial aspect of this system is handling emails that don’t match any preconfigured intents. For such cases, a Default Intent Action (also referred to as a no intent action) is executed. This default action can be configured by administrators. This fallback process is designed so that every email gets a response, whether it's a generic one like making a note for later manual review or sending a standard confirmation or an acknowledgment

Basically, the system's framework continuously analyzes incoming emails, identifies their intent, and performs the associated action, providing a structured and automated approach to managing diverse email requests.

Email Agents

Email agents help automate triaging of tasks that are created via inbound emails by identifying intent, executing actions, and drafting appropriate email responses.

The email agentic workflow is powered by specialized AI agents, each responsible for intelligently processing and responding to inbound emails. These agents work together to understand and manage requests, execute actions, and generate appropriate communications.

1. **Intent Identification Agent**

   This agent acts as the initial brain of the workflow and identifies the intent of inbound email requests using LLM (LLMs). It uses these advanced LLM (LLMs) to analyze the content of an inbound email, deciphering its underlying intent. Once identified, this intent is then mapped to a preconfigured and customized intent within the system.

   The Intent Identification Agent functions include:

   - Intelligent Intent Recognition: Using LLMs to understand natural language and identify the user goal.
   - Custom Intent Mapping: Linking recognized intents to specific, user-defined categories or actions. This enables flexibility and tailors it to the unique business needs.
   - Action Association: Identifying intents with a variety of subsequent actions.

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2. Intent Executor Agent

Once the Intent Identification Agent has determined the email's purpose, the Intent Executor Agent takes over. Its role is to carry out the instructions associated with the identified intent, this involves extracting any crucial data points from the email (for example order numbers, customer IDs, specific requests) and then executing the corresponding actions or workflows.

The Intent Executor Agent functions include:

- Input Extraction: Identifying and extracting critical information from the email content needed for subsequent actions.
- Action Execution: Triggering and managing the execution of the predefined workflows or actions linked to the identified intent.
- Default Action Handling: Providing a fallback mechanism by executing a default action if an email's intent can't be matched to any specific custom intent, confirming no request goes unaddressed.

Note: Once the intent is finalized, this information will be used to retrieve any relevant actions.

3. Email Generator Agent

The Email Generator Agent is responsible for crafting clear, concise, and relevant email responses. It takes inputs from the inbound email, including the identified intent, and extracted information to formulate a suitable reply. The context, tone and goals for drafting emails can be configured by administrators.

The Email Generator Agent functions include:

- Contextual Response Generation: Using all available information and context to create highly relevant and personalized email responses.
- Draft Creation (Supervised): Generating email drafts that can be reviewed and approved by a human agent before sending, enabling oversight and quality control.
- Automated Sending (Unsupervised): For routine or low-risk requests, the agent can be configured to automatically send emails without human intervention, significantly boosting efficiency.

General guidelines for creating and mapping an intent

By following some general guidelines for creating email intents and mapping actions to intents, you can create clear and effective instructions that help maximize the efficiency and effectiveness.

Overview of creating and mapping an intent

AI agents and agentic workflows rely on LLMs, so the language that you use for their instructions is important. There are many steps that you can take to help improve the quality and consistency of your agentic AI solutions.

Intent Guidelines

The discussion highlights several crucial guidelines for defining and configuring intents to ensure accuracy, help prevent misinterpretation, and optimize the performance of the LLM-driven system:

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- Be clear, specific, and avoid vagueness
  - Use instructions that are concise, clear, and precise. Simple language can help remove ambiguous situations that could stall or disrupt an agent's progress.
  - Intents should be highly specific and not overlap with other intents.
  - Avoid using just keywords or topic names instead, describe the user's full intention.
  - Vague intents can confuse the LLM and lead to incorrect matches.
  - Clarify boundaries and limitations.

Example of clear intents

Example	Weak intent	Specific and strong intent	Notes
Subscription Cancellation	User requesting to cancel subscription	User requesting to cancel music subscription	If your system handles various types of subscriptions for example, music and video streaming, software licenses, a vague intent like cancel subscription could lead to the LLM incorrectly identifying which service the user wants to cancel. A specific intent like cancel music subscription ensures the LLM understands the exact service, allowing the correct workflow to be triggered.
Leave Approval	Leave approval	User requesting for a leave approval	Leave approval is a topic, not an action or a user's intent. The LLM needs to understand the user's intention. By stating User requesting for a leave approval, you clearly communicate that the user is initiating a request, not just mentioning a topic.
Leave Approval including recipient	User requesting for a leave approval	User requesting for a leave approval for their colleague	While the system might default to assuming the request is from the email sender, explicitly stating for their colleague provides

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Example	Weak intent	Specific and strong intent	Notes
			crucial context. This prevents scenarios where a request made on behalf of someone else is incorrectly processed for the sender, highlighting the need for intelligence in understanding the subject of the request.

- Context and coherence:
  - The intent should clearly articulate what the user is asking for or requesting.
  - Distinguish between a user merely mentioning something and explicitly requesting an action.
  - Design instructions that serve the overall objective. All of your tools and AI agents work together to solve problems.

Example of intents for user's explicit request

User email	Incorrect Intent match	Notes
I just bought a car, my father was insisting me on getting a car insurance quotation	Requesting for a car insurance quotation	In this scenario, the user is talking about getting a quotation because their father insisted, but they haven't explicitly requested one from the system. If an intent designed to generate a quotation matches this email, the user would receive an unsolicited quotation, leading to a poor and potentially confusing experience. The system should only act when the user's intent is a direct request for that action.
Marketing email, maybe I should just unsubscribe already	Requesting to unsubscribe from emails	Marketing emails, just unsubscribe. This statement is sarcastic or a casual expression of frustration, not a direct request to unsubscribe. If the intent is configured too broadly like just "unsubscribe email", it might incorrectly trigger an unsubscribe action. The intent should be precise enough to differentiate

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User email	Incorrect Intent match	Notes
		between a casual remark and a clear, actionable request.

- Include critical details:
  - Ensure the intent description contains all critical details that differentiate it from any similar requests.
  - Use consistent formatting. Similar instructions should use similar language patterns.
  - Missing critical details can lead to false positives or false negatives.
  - If a detail can change the meaning or appropriate action, it must be included in the intent.
  - Use consistent terminology throughout.

Examples of intents that include critical details

Weak intent	Strong Intent	Notes
Requesting for an insurance quotation	Requesting for a car insurance quotation	If a company offers multiple insurances, and the associated workflow is specifically designed for car insurance, the intent must include car. Without this critical detail, an email requesting a different kind of insurance might incorrectly match the insurance quotation intent, leading to a failed or inappropriate workflow.
User requesting for money for house	User requesting for a home loan	Requesting for money is extremely broad. An email like "I gave you money last week, give me my money back" (a request for repayment) could incorrectly match this vague intent, even though it's not a home loan request. Including home loan as a critical detail clarifies the specific financial transaction.

- Differentiate between action requests and informational queries:
  - Clearly define whether an intent is for executing an action or for providing information.
  - This helps prevent the system from taking an action when only information is sought, or vice versa.

Example for intent type

User email	Intent type	Note
"My team needs writing software installed on our new	Action request intent	This email clearly asks for an action to be performed

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User email	Intent type	Note
machines. Please arrange this.		(software installation). An intent configured as "User requesting installation of Adobe Creative Suite" would correctly match, triggering a workflow to provision and install the software.
I need to install writing software on my personal device for a project. Can you tell me how to do it?	Informational query intent	The user is not asking for the system to perform the installation, but rather for guidance or instructions. If only the action request intent existed, it might incorrectly trigger an installation workflow, or fail to provide the user with the requested information. A separate intent for user asking for instructions on how to install writing software would correctly match and provide a link to a knowledge base article or a step by step guide.

- Help the LLM – Don't Make It Guess:
  - The overarching principle is to make intents as clear and unambiguous as possible to guide the LLM effectively.
  - The system is a framework; its effectiveness depends on how wisely intents are configured.

For more general guidelines, see General guidelines for writing prompts for agentic AI.

Important Considerations

It’s recommended not to configure workflows to produce final artifacts directly. Instead, workflows should create drafts or intermediate artifacts that require human review and confirmation.

- Target Record for drafting and email: If using the email drafting capability, a target record must be attached to the email by the time the agent workflow triggers. Without a target record, generated email drafts can't be access.
- Order of Execution: When enabling the agentic workflow either via Inbound Action or Inbound Email Trigger, consider its order relative to existing inbound actions. The default order 999 places it last to avoid interfering with other processes, but this can be adjusted.
- Human Oversight: The system aims to remove bottlenecks and increase efficiency, but it doesn’t eliminate the need for human involvement. It's designed to augment, not fully replace, human agents.

Configure email agentic workflows in Notifications

Configure email agentic workflow in Notifications for email agentic workflow.

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Activate Notifications Email Agents plugin

You can activate the Notifications Email Agents plugin (sn_notif_agents) for Notifications if you have the admin role.

Before you begin

Now Assist for Notifications requires a separate subscription from the rest of the ServiceNow AI Platform.

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

Note:

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

Role required: sn_notif_agents.notification_ai_admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Notifications Email Agents plugin (sn_notif_agents) 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.

What to do next

Enable intent to action from Inbound email actions or Inbound email triggers in Workflow Studio.

Enable intent to action workflow from inbound actions

Enable and configure intent to action workflow to invoke the agentic workflow from inbound actions.

Before you begin

Role required: sn_notif_agents.notification_ai_admin

Important: If intent to action has been enabled from the Workflow studio flow for Inbound email trigger then do not enable intent to action from inbound actions.

Procedure

1. Navigate to **All** > **System Policy** > **Email** > **Inbound Actions**.
2. Search for **Trigger Intent to Action**.
3. Select the **Active** check box to activate the inbound email action.

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4. In the **Order** field, enter the desired order number, the default value mentioned is **999**.

   Note: You can modify the order number to determine the point at which the agentic workflow is invoked.

5. Select **Update**.

What to do next

Create email intents

Enable intent to action workflow from triggers

Enable and configure intent to action workflow to invoke this agentic workflow from triggers.

Before you begin

Role required: sn_notif_agents.notification_ai_admin

Important: If intent to action has been enabled from Inbound email actions then do not enable intent to action from triggers.

Procedure

1. Navigate to **All**, in the search filter, enter `sys_flow_email_trigger`.
2. Select the filter icon to search based on **Sys ID**.
3. Enter `e856ae0bff24f210359bfffffffff07` as the Sys ID and select the **Run** button.
4. Open the record, select the **Active** check box to activate.

   Note: In the Email Triggers table, for **Stop condition evaluation** when the trigger is set to **true**, it prevents the system from evaluating trigger conditions after this one. If you want trigger conditions after this, select **true** and set it to **false**.

5. **Optional:** Run the flow on an incoming email.

   a. Navigate to **All** > **Process Automation** > **Workflow Studio**.

   b. Select the **Flows** data pill filter

   c. Search and open the **Trigger Intent to Action** flow.

   d. Select the **Edit** button to edit the trigger.

   e. Select **Inbound Email** trigger and set the desired email conditions that need to be met to run the flow.

   f. Select **Activate**.
   For more information, see Edit a flow, Test a flow, and Activate a flow.

What to do next

Create email intents

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Create email intents

Create and define an email intent for analyzing and identifying the primary purpose for an inbound email. Understanding the email's intent helps guide the tone, context, and call-to-action for effective responses.

Before you begin
Role required: sn_notif_agents.notification_ai_admin

About this task
Follow the General guidelines for creating and mapping an intent

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Email Intents**.
2. Select **New**.
3. On the form, fill in the fields.

Notification Intent form

Name	Name of the intent.
Description	Brief description of the intent along with the goal of the intent.
Active	Option that indicates that the configuration is active. The configuration is active by default.
Conditions	The conditions on the inbound record that will be evaluated to fetch the list of intents available for an inbound email.

Note: The default action is executed if an email's intent cannot be matched to any specific custom intent, ensuring no request goes unaddressed.

4. Select **Submit**.

What to do next
Create and associate actions for intent

Create and associate actions for intent

Create and map actions to an intent for executing appropriate actions once the intent match happens.

Before you begin
Role required: sn_notif_agents.notification_ai_admin

About this task
Subflows must be created to invoke subflows to associate an action to the intent. For more information, see Create a subflow in Workflow Studio.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Email Intents**.
2. From the table, select the intent.
3. From Notification Intent Actions, select **New** to add actions to the intent.

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4. Enter the **Name**.
5. Select the **Type** based on the criteria defined for the intent.

Type	Action
Subflow Invocation	Select the **Subflow** tab and select the sub flow that must be triggered when the intent is matched. To create subflows see, Create a
Reply Email	**Note:** **Reply Email** type will not work if the target record is not attached to the email. **a.** Select the **Reply Email** tab **b.** Enter the **Email Content Guidelines** and **Recipients**. **c.** Enter the **Recipients** if it's a new recipient aside from the original recipient **d.** Select **Email Delivery Mode**, select **Auto** to send the email to the user, select **Draft** to draft a reply. **Note:** If the **Assigned to** field in target record is not populated then the user won't be able to review the draft or draft a reply. **e.** In **Search profile**, select or add a profile that can be used for generating a reply for the email when the intent is matched.

6. Enter the **Order** number for processing once the intent is identified, the system retrieves the associated actions according to the sequence specified in the action record.
7. **Optional:** Select **Stop processing** check box to stop processing after a certain action.
8. **Optional:** Select **Default** check box if there are no matching intents for the email.

   Note: For such cases, a Default Intent Action (also referred to as a no intent action) is executed. This ensures that every email gets a response, whether it's a generic mail or sending a standard confirmation or an acknowledgment.

9. In the **Action Execution Criteria** tab, specify the conditions needed to execute the action.
10. Select **Submit**.

Notification agent

Use the Notification agent to create and modify email notifications, templates, and layouts through conversation, reducing the need of navigating complex forms and scripts.

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Notification agent capabilities

The Notification agent is an agentic AI feature that simplifies the process of creating and modifying email notifications, template, and layouts using natural language prompts.

Describe your notification requirement, and the agent handles configuration, templates, layouts, and duplicate detection.

Example: End to end notification creation using the Notification agent

The following table shows how a platform administrator creates, applies email templates, tests, and activates a P1 incident notification using the agent chat interface.

Example	Scenario	Action	Agent output
Creating a notification from a natural language prompt.	A platform administrator needs to notify users when a P1 incident is assigned to them without navigating the Notifications module.	Create a notification whenever a P1 incident is assigned to a user from the sys_user [sys_user] table. Set the email template to **incident.ess.resolve**.	The agent checks for duplicates and generates a notification record with the name, table, trigger, template, and recipients populated for review.
Modifying preview content.	After previewing the generated notification, the administrator wants to adjust the email template content.	Add the incident priority to the email body.	The agent updates the email template to include the incident priority field and presents it for review.

Create an email notification using the Notification agent

Create an email notification using the Notification agent by describing your requirements in natural language, without navigating forms or writing scripts.

Before you begin

Confirm the notification details before deployment.

Note: The Notification Agent requires the Implementation Agent (IA) Orchestration framework and is not supported as a standalone feature.

Role required: admin

Procedure

1. Navigate to **Admin** > **Admin Home**.
2. In the **Manage your products** section, select **View product overview** on the relevant product card.
3. In the **Configuration insights** section, select **Configure**.
   The configure page opens in the Configuration Console.
4. Select **Notifications** under the business unit you want to configure (for example, Legal, Workplace Services, or Finance for Core Business Suite).
5. Select **Configure with Now Assist**.

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

6. Select **Create a new notification**, or enter a natural language prompt.
   Example prompts:
   - `Notify the approver when an [application] request is pending approval.`
   - `Notify the assignee when an [application] task is due.`
   - `Create a new notification that sends an email when a new incident is created. The notification should be sent to both the caller and the assigned user on the incident. Set the notification category to IT Service Management. Set the email template to 'incident.ess.resolve'.`

   Note:

   The agent supports two intents, creating a new notification or editing an existing notification. If the intent is unclear, the agent prompts you to select one.

7. If the agent asks clarifying questions, provide the requested details to help it generate accurate notifications.
8. Review the notification details that are displayed.
9. Select one of the following options:
   - **No, looks good** to create notification with the current details
   - **Yes, I'd like to make changes** to modify the notification details
10. **Optional:** If you selected **Yes, I'd like to make changes**, enter the updates when prompted.
    Now Assist revises the notification and displays the updated details.
11. Review the updated notification details and select **Confirm**.
    Now Assist creates the notification and displays a success message.

Edit an email notification using the Notification agent

Edit an email notification using the Notification agent by describing your requirements in natural language, instead of navigating forms or writing scripts.

Before you begin

Confirm the notification details before deployment.

Note: The Notification Agent requires the Implementation Agent (IA) Orchestration framework and is not supported as a standalone feature.

Role required: admin

Procedure

1. Navigate to **Admin** > **Admin Home**.
2. In the **Manage your products** section, select **View product overview** on the relevant product card.
3. In the **Configuration insights** section, select **Configure**.
   The configure page opens in the Configuration Console.
4. Select **Notifications** under the business unit you want to configure (for example, Legal, Workplace Services, or Finance for Core Business Suite).

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5. Select **Configure with Now Assist**.
   The conversational panel opens, detects the current page context, and invokes the Notification Agent.
6. Select **Edit an existing notification**.

   Note:

   The agent supports two intents, creating a new notification or editing an existing notification. If the intent is unclear, the agent prompts you to select one.

7. When prompted, enter the name of the email notification.
   Now Assist loads the notification record and displays a link for review.
8. Enter the changes you want to make.
   Example prompts:
   - `Modify the condition to trigger when priority is High.`
   - `Trigger the notification when the record is updated.`

   Now Assist processes your updates and displays the revised notification details.
9. Review the updated notification details and confirm.
   Now Assist saves the changes and displays link to the updated notification.
10. **Optional:** If further modifications are needed, specify any additional changes.

System Events

System Events in ServiceNow are crucial for automating processes and maintaining platform efficiency. They act as triggers for business rules, notifications, work-flows, and other actions, ensuring timely and consistent execution of tasks. By monitoring and responding to these events, organizations can streamline operations, improve response times, and enhance user experiences.

Get started

Exploring system events  Learn about how system events function as triggers for actions and enable process automation.	Configuring System events  Set up and manage system events to trigger actions and automate processes.	
Managing system events 	System events reference 	

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Connect system events with external systems and applications to enable seamless data exchange and automated work-flows.	More information about the predefined system events available and their usage.	

Troubleshoot and get help

- Ask questions and explore other resources for System events in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring system events

Events are special records that the system uses to log when certain conditions occur and to take some kind of action in response.

System events overview

Learn about how system events function as triggers for actions and enable process automation.

Realize the benefits of leveraging system events by doing the following tasks in your instance:

- Create events
- Log events
- Implement automated job scheduling
- Move an event
- Register events
- Reprocess events
- Pass event parameters from a work-flow to a notification

System events users

Users

User	Description
Administrator	Administrators leverage system events to trigger automated actions and work-flows based on specific occurrences in the platform, enabling asynchronous processing and responsive automation. They can generate events via scripts or business rules, register them in the Event Registry, and handle them using notifications, script actions, or flows.
Business analysts	Business analysts analyze trends and processes by leveraging events to capture specific system activities, generate logs, or send data to analytic tools for better decision-making and process improvement.
Compliance officers	Compliance officers help to ensure adherence to regulatory requirements by using events to log critical activities, generate

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Users (continued)

User	Description
	compliance reports, or initiate corrective actions when deviations from standards are detected.
Customer support	Customer support employees use system events to enhance customer service by triggering automated responses to customer requests, creating follow-up tasks, or escalating unresolved cases to appropriate teams.
Developers	Developers create and manage system events to integrate modules, trigger work-flows, and implement custom logic in response to user actions or record changes, helping to ensure extensibility and dynamic system behavior.
HR administrators	HR professionals use system events to automate HR processes, such as notifying employees of updates, generating on-boarding work-flows when a new hire is recorded, or triggering document reviews during off-boarding.
ITOM/ITSM	IT service managers use system events to monitor and automate ITSM processes, such as sending notifications for SLA breaches, escalating incidents, or triggering task work-flows, helping to ensure efficient IT service delivery and compliance with SLAs.
Marketing teams	Marketing teams automate customer engagement by using events to trigger campaign actions, such as sending promotional emails or updating CRM systems when specific conditions (e.g., customer interaction) are met.
Operations teams	Operations teams monitor and respond to operational alerts or system changes by triggering events that initiate corrective actions, such as restarting services, updating CMDB records, or notifying relevant teams of maintenance schedules.
Project managers	Project managers use system events to trigger notifications for project updates, create task dependencies automatically, or update stakeholders when milestones are achieved, enabling better project tracking and communication.
Security analysts	Security analysts leverage system events to trigger immediate responses to security incidents, such as creating alerts, generating logs, or initiating containment work-flows in response to detected threats or vulnerabilities.

System events benefits

System events benefits

Benefit	Feature	Users
Allows users to define new events that can be triggered by specific conditions or actions, enabling customized work-flows and automated responses.	Create an event	Developers, Administrators, IT Service Managers

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System events benefits (continued)

Benefit	Feature	Users
Captures event activity in logs for auditing, debugging, and monitoring system behavior, providing insights into event performance and bottlenecks.	Event logs	Administrators, Compliance Officers, Security Analysts
Schedules jobs to be executed automatically at specific times or intervals, ensuring routine tasks are performed without manual intervention.	Implement automated job scheduling	Operations Teams, IT Service Managers, Administrators
Transfers events between queues or categories, helping optimize processing priority and load balancing in event-driven systems.	Move an event	Administrators, Developers
Registers custom or system-defined events in the platform to make them available for triggering specific actions or work-flows.	Register an event	Developers, Administrators
Provides the ability to reprocess failed or incomplete events, ensuring system reliability and minimizing the impact of errors.	Reprocess an event	IT Operations Teams, Developers, Administrators
Enables seamless transfer of contextual data from work-flows to notifications, ensuring messages contain relevant and actionable information for recipients.	Pass event parameters from a work-flow to a notification	Developers, IT Service Managers, HR Professionals

What to explore next

To learn more about configuring and using System events, see:

- Configuring system events
- Managing system events
- System events reference

System Events

Events are special records that the system uses to log when certain conditions occur and to take some kind of action in response to the conditions.

The system uses business rules to monitor for system conditions and to generate event records in the Event [sysevent] table, which is also known as the event log or event queue.

Event-generating business rules typically use this script logic:

If [some condition is true for the current record], then [add a specific event to the queue].

For example, here are some of the conditions in the **incident event** business rule:

- If a user adds a comment to an incident record, add an *`incident.commented`* event.
- If a user adds an incident record, add an *`incident.inserted`* event.
- If a user updates an incident record, add an *`incident.updated`* event.

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Event-generating business rules use the GlideSystem `eventQueue` method to insert event records, which typically contain this information:

Event fields

Field	Description
Name	Unique name of event. Baseline event names include the record affected and the triggering action, such as `incident.commented`.
Parm1	Event-specific parameter the system uses to pass record information to other parts of the system, such as a record Sys ID or a field value.
Parm2	Event-specific parameter the system uses to pass record information to other parts of the system, such as a record Sys ID or a field value.
Table	Table to which the event applies. This is the same table on which the business rule ran.
Instance	Sys ID of the record to which this event applies.

Scheduled jobs periodically read the event queue and forward them to the appropriate handler for processing. The handler uses information from event records to take some kind of action such as:

- Run a script action
- Send a notification
- Trigger a workflow activity
- Trigger an inactivity monitor

By default, the system provides events covering a broad view of application activity. If existing events do not meet your needs, you can create your own events to watch for specific changes to records.

For developer training, see Scheduled Script Executions and Events Objectives on the ServiceNow® Developer Site.

Use the System Events and Jobs Dashboard to monitor the system event processing system and the scheduled jobs processing system.

Event processing during platform upgrade

Determine which events are to be processed during a platform upgrade by configuring the following properties:

- **glide.event_processor.all_events_upgrade_safe**: Set to **true** to process all events during platform upgrade. Default = **false**.
- **glide.event_processor.upgrade_safe_events**: Configure a comma-separated list of event names to indicate that only specified events are processed. Default = <empty>.

  This property is relevant only when `glide.event_processor.all_events_upgrade_safe = false`.

Event registry

The events registry lists the events the system recognizes. Use registered events to automate other activities, such as script actions or notifications.

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After you create a new event and a business rule that uses the event, you must register it.

Registration lets other parts of the system, such as Email and SMS notifications and Script Actions, see the event in their list of available events and react to the event when it occurs.

Related topics

Register an event

Configuring System events

Plan, configure, and implement system events without having to complete any extra configurations first. Follow the task listed in the configuration overview to implement automated job scheduling.

Configuration overview

Implement automated job scheduling

Implement the message processing framework (automated jobs scheduling) by using the Queue Registration link on the Event Registration form.

Implement automated job scheduling

Implement the message processing framework (automated jobs scheduling) by using the Queue Registration link on the Event Registration form.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Policy** > **Events** > **Registry**.
2. Select **New** to register a new event.

   Note: You can also select an existing event to update the configurations.

3. Click the Queue Registration link in the banner message on the Event Registration form.

   Note: You can also disable automated job scheduling by selecting **Disable Automatic Job Scheduling** button on the Queue Registry list page.

   If you have started a new event, the Queue Registry list shows up. If you have selected an existing event, the Queue Registration new record shows up.
4. Select **New** to create a new queue.
   The Queue Registration form shows up.
5. On the form, fill in the fields.

Field	Description
Queue	Name of the queue
Application	Scope of the application
Automatic Job Scheduling	Option to implement automated job scheduling
Event Processing Order	Option to select the way of processing events

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Field	Description
	○ Parallel: Process multiple events simultaneously ○ Sequential: Process only one event at a time. The events are inter-dependent and can process only after the previous event is completed **Note:** Once you have configured the processing order and submitted the queue, it can't be edited. You can delete the queue and create a new queue.
Job configuration type	Type of job configuration **Note:** This field is disabled when you select Sequential as the Event Processing Order. If you select Parallel as the Event Processing Order, you have 2 options. ○ Constant: Creates the required number of jobs ○ Scale with node: Multiplies jobs by the number of nodes. You can use this option if you are unaware of the number of available nodes
Scale factor	Total number of jobs based on the Job configuration type selected
Poll interval	Determines how frequently jobs should poll and process events of this queue
Description	Optional field to describe about this queue related information

6. Click **Submit**.
   The Queue Registry list shows up. It also shows the update made to the recent queue.
7. Select the recently added queue.
   The Queue Registration form shows up.
8. Scroll down to the Related lists section.
9. Select the **Status** entry in the Queue Details related list.

   Note: Since the new queue has been submitted, the Status entry is Active.

   The Queue Details form shows up.
10. **Optional:** Update the number of jobs for this queue as per the requirement.
    You can now manually scale up or down as per the requirements without having to configure everything and can eventually avoid misconfiguration.
11. **Optional:** Click Rollback related link on the Queue Registration form if you want to roll back a queue to its previous configurations without automated job scheduling.

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Note: The Rollback related link shows up only if you are in an automated jobs scheduling configuration.

12. **Optional:** Select **Retrieve Configurations** if you want to retrieve any existing job configurations for this queue.

    Note: This process is possible only if you are in an automated jobs scheduling configuration.

    If any queue with your suggested queue name already exists in the manual jobs scheduling configuration, the configurations of the existing queue are retrieved. You can then validate and update them as required.

Managing system events

Managing system events involves creating, monitoring, and handling events to drive automation and streamline processes. Administrators and developers can define custom events, register them in the system, and set up actions or work-flows that respond to these events. This functionality helps ensure efficient task execution, helps improve system monitoring, and enables more robust error handling for enhanced operational reliability.

Overview of managing system events

- Create an event

  Create custom system events.

- Move an event

  Accelerate the execution process by moving high priority events from the default queue to an isolated queue.

- Pass event parameters from a work-flow to a notification

  Pass two event parameters that send information about a record or related records from a work-flow to a notification.

- Register an event

  Register an event for a specific table and a business rule that fires the event.

- Reprocess an event

  Re-fire an event for testing or diagnostic purposes.

System events reference

For more information, see System events reference.

Create an event

If you do not find a suitable existing event, you can create your own.

Before you begin
Role required: admin

About this task
The gs.EventQueue function works directly with the backend and therefore business rules that are called by gs.EventQueue() are not invoked.

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Procedure

1. Navigate to **All** > **System Policy** > **Events** > **Registry**, and then select **New**.
2. On the form fill in the fields.

Event Registration Form Completion

Field	Description
Event name	Name of your new event.
Table	Database table for this event. **Note:** Only tables and database views that are in the same scope as the event appear on the listing.
Queue	Name of the queue that the event is placed into when triggered. Use only lowercase letters, no spaces, and no special characters except underscore (_). For example, `my_queue`. See Using custom queues to process events.
Priority	Order in which messages will be processed. Lower values have higher priority. **Note:** The com.glide.sysevent.priority.enabled system property is enabled by default. If you disable it, events processing is not done by priority.
Caller Access	Restricted caller access settings. ○ Caller Restriction: calls to the resource must be manually approved. ○ Caller Tracking: Calls to the resource are automatically approved.
Fired by	Name of the business rule that runs the event. This field is for reference only and is not used by any process. Make sure that there is enough information to locate your event again.
Description	Short description of the purpose of the event.

3. Click the **Business Rules** related link.
4. If you are creating an event for a base system table, select the existing event business rule for the table.

   Example
   For example, select the *sc request events* business rule to create a custom Request event.
5. If you are updating an existing event business rule, add a new condition to the **Script**.

   Example
   The following sample script adds a *request.commented* event with the user's Sys ID as parm1 and the user's user name for parm2.

```
if (current.operation() != 'insert' &&
 current.comments.changes()) {
```

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```
gs.eventQueue('request.commented', current, gs.getUserID(),
 gs.getUserName());
}
```

6. If you are creating an event for a custom table, create a new business rule that runs after database operations.

Example
For example, this business rule defines several events for a custom application called Marketing Events.

Sample event business rule

Field	Value
Name	Attendee Events
Table	Attendee [x_snc_marketing_ev_attendee]
Application	Marketing Events
Advanced	Selected
When	after
Insert	Selected
Update	Selected
Delete	Selected
Script	Add custom script that: ○ Checks for one or more conditions on the current record. ○ Calls the gs.eventQueue() method and specifies an event name. See code sample.

Note: If you add **Filter Conditions**, **Role conditions**, or a **Condition** value, verify it runs the business rule when expected.

```
(function executeRule(current, previous /*null when async*/) {
   //This function will be automatically called when this rule
 is processed.
        //Add event when attendee inserted
        if(current.operation() == 'insert' &&
 current.marketing_event.changes()) {

 gs.eventQueue('x_snc_marketing_ev.attendee.added', current,
current.marketing_event, current.email);
        }
        //Add event when marketing event changes
        if(current.operation() == 'update' &&
 current.marketing_event.changes()) {

 gs.eventQueue('x_snc_marketing_ev.attendee.deleted', previous,
previous.marketing_event, previous.email);

 gs.eventQueue('x_snc_marketing_ev.attendee.added', current,
current.marketing_event, current.email);
```

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```
        }
        //Add event when attendee deleted
        if(current.operation() == 'delete') {

 gs.eventQueue('x_snc_marketing_ev.attendee.deleted', current,
              current.marketing_event, current.email);
}
})(current, previous);
```

7. Register the event.

What to do next
Create a script action or notification to process the event.

Related topics

Register an event

Script actions

Move an event

Accelerate the execution process by moving high priority events from the default queue to an isolated queue.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Event registry**.
   A list of registered events shows up.
2. Select the event you want to move.
   The Event Registration form of the selected event shows up.
3. Select **Move to Default Queue** to move the event from the current queue and accelerate its execution.

   Note: If you are currently in the default queue, you will have the **Move to Adaptive Event Queue** option to select.

   The processor can execute only one event at a time. So, if you move an event to a queue, it gets executed only when the processor is available.

4. **Optional:** Navigate to **System Diagnostics** > **Stats** > **Adaptive Events** to track the average execution time of the events.
   You can select any slow moving event and change the queue as required. You can also register an event to show up on the event registry list.

Pass event parameters from a work-flow to a notification

Pass two event parameters that send information about a record or related records from a work-flow to a notification.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Policy** > **Events** > **Registry** and define a new event to call.
2. Create the activity step that calls the event from your workflow and assign the two possible parameters.
   These parameters can be references or fields on the record that triggered the workflow, such as *current.number* for the request item number. You can also dot-walk to records in other tables. The event then sends the parameters information to the notification that it triggers.
3. Retrieve the parameters in the notification with email scripts by using *event.parm1* and *event.parm2*.
   For example:

```
var string = event.parm1.toString();
template.print(string);
```

Example:

Another example using Sys IDs gives you access to anything in the record that triggered the workflow. Use a script like this to send information about a change or request to support personnel, for example.

```
var id = event.parm1.toString();
var gr = new GlideRecord('sc_req_item');
gr.get('sys_id', id);
if (gr.next()){
   // Do something.
}
```

Related topics

Scripting for email notifications

Register an event

You can register an event for a specific table and a business rule that fires the event.

Before you begin

Role required: admin

Procedure

1. To register an event, browse to **System Policy** > **Events** > **Registry**, and then click **New**.
2. On the form fill in the fields.

Event Registration Form Completion

Field	Description
Event name	Name of your new event.
Table	Database table for this event. **Note:** Only tables and database views that are in the same scope as the event appear on the listing.
Queue	Name of the queue that the event is placed into when triggered.

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Field	Description
	Use only lowercase letters, no spaces, and no special characters except underscore (_). For example, `my_queue`. See Using custom queues to process events.
Priority	Order in which messages will be processed. Lower values have higher priority. **Note:** The com.glide.sysevent.priority.enabled system property is enabled by default. If you disable it, events processing is not done by priority.
Caller Access	Restricted caller access settings. ○ Caller Restriction: calls to the resource must be manually approved. ○ Caller Tracking: Calls to the resource are automatically approved.
Fired by	Name of the business rule that runs the event. This field is for reference only and is not used by any process. Make sure that there is enough information to locate your event again.
Description	Short description of the purpose of the event.

Reprocess an event

You can fire the event again for testing or diagnostic purposes.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Logs** > **Events**.
2. Open an event.
3. Under **Related Links**, click **Reprocess Event**.
   The event returns to the event queue.

System events reference

Reference topics provide information about system events.

Event logs

The event log records all system events that occur within the ServiceNow AI Platform.

This log provides the following information for all events that occur:

Event log

Field	Description
Created	Date and time of the event for the locale of the machine running the instance.
Name	Name of the event as listed in the Event Registry.
URI	HTTP query that generated the event.
Parm1	Event-specific value that depends on the event and the recipient.

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Event log (continued)

Field	Description
Parm2	Event-specific value that depends on the event and the recipient.
Table	Database table acted on for this event.
Processed	Date and time the event started processing. This time reflects the locale of the machine running the instance.
Processing time	Time taken to process this event, in milliseconds.
Queue	Processor queue name.

Event states

The event state describes where in the life cycle the event is.

Event states

State	Description
Ready	The system created the event and it is in the queue waiting to be processed.
Processed	The event successfully ran. An event does not necessarily trigger any further action when processed. Additional functionality must make use of the event.
Error	The event encountered an error during processing. This state is often caused by invalid event parameters. Reprocessing the event may resolve the error.
Transferred	The event was rotated to a different shard of the Event [`sysevent`] table. When an event is rotated, a duplicate record is created in an active shard to be processed. A scheduled job processes the event when it is next in the queue, but it is not possible to predict when this will happen as because several events may need to be processed before it. Therefore, you can reprocess the event. See Reprocess an event.

The incident events business rule

The incident events business rule comes with the system and defines a number of events that can be triggered by different actions in the Incident table.

This business rule defines several events, three of which are triggered after a record in the Incident table is inserted or updated. The first script is:

```
if (current.operation() != 'insert' &&
 current.comments.changes()) {
gs.eventQueue("incident.commented", current, gs.getUserID(),
 gs.getUserName());
}
```

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The condition in this script requires that a change be made to the **Comments** field in an existing (not inserted) incident record. If this condition is true, then the platform adds the `incident.commented` event to the event queue.

The second condition requires that a record be inserted before the event is added to the queue.

```
if (current.operation() =='insert') {
```

The third condition is true whenever the incident record is updated (including updates to the **Comments** field, as specified by the first script).

```
if (current.operation() == 'update')
```

The then part of each script, the *`gs.eventQueue`* function, adds the event to the event queue. This statement uses the following syntax, set off with braces:

```
gs.eventQueue("incident.updated", current, gs.getUserID(),
 gs.getUserName());
```

The *`gs.eventQueue`* function takes the following parameters:

gs.eventQueu parameters

Field	Input Value
Name	The name of the event triggered, set in quotation marks.
Record	The record referenced when the condition in the script evaluates to *true*. Usually this is expressed as *current*, meaning the current record the business rule is working on. If the business rule is being triggered as part of a scheduled job, use a GlideRecord argument in its place.
Parm 1	An optional parameter you can use to pass system or record information with the event. For example, the GlideSystem API call *`gs.getUserID()`* passes the Sys ID of the user who acted on the current record as a string value. Other scripts can reference this string value as parm1 using the format `${event.parm1}`.
Parm 2	An optional parameter you can use to pass system or record information with the event. For example, the GlideSystem API call *`gs.getUserName()`* passes the user name of the user who acted on the current record. Other scripts can reference this string values as parm2 using the format `${event.parm2}`.

Note: The gs.EventQueue function works directly with the backend and therefore business rules that are called by gs.EventQueue() are not invoked.

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Global events

Your instance has a global function called `global_events()` that triggers from a business rule when certain conditions occur.

This function triggers when your instance is:

- Inserting new records
- Updating existing records
- Adding comments to an existing record
- Assigning a record to a user
- Exceeding a record's inactive timer

For example, if you add the script global.events(current) to a business rule on the `change_request` table, the instance automatically configures the following events:

- change_request.inserted
- change_request.updated
- change_request.commented
- change_ request.assigned
- change_ request.inactive

Script actions

You can use script actions to create server-side scripts that perform a variety of tasks, such as modifying a configuration item (CI), or managing failed login attempts. Script actions are triggered by events only.

Role required: sysevent_script_action_admin or admin

To create a new script action, navigate to **System Policy** > **Events** > **Script Actions** and click **New**.

Script actions

Field	Description
Name	Unique name for your script action.
Application	Application that contains the script.
Event name	Event to use for this script. If you do not find an event for your script action that suits your purpose, you can create a new one.
Active	Check box that enables or disables the script action. Select **true** to enable the script action.
Execution order	Order in which the script will be executed.
Condition script	Statement for a condition under which this script should execute. The system only parses the **script** field if the condition evaluates to true. If you decide to include the condition statement in the script, leave this field blank.
Script	Script that runs when the condition you define evaluates to true. Two additional objects are available in this script:

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Script actions (continued)

Field	Description
	• *event*: a GlideRecord - the sysevent that caused this to be invoked. If you want this first parameter on the event, use *event.parm1* or *event.parm2* for the second parameter. For the date/time of the event, use *event.sys_created_on*. To get the user ID that created the event (if there was a user associated), use *event.user_id*. • *current*: a *GlideRecord* - the event scheduled on behalf of (incident for example).

Sample scripts from the change events business rule

Several scripts are found in the baseline change events business rule.

This business rule defines events that fire after a change request is inserted or updated.

```
if (current.operation() == 'insert') {
 gs.eventQueue("change.inserted", current, gs.getUserID(),
 gs.getUserName());
}

if (current.operation() == 'update') {
 gs.eventQueue("change.updated", current, gs.getUserID(),
 gs.getUserName());
}

if (!current.assigned_to.nil() && current.assigned_to.changes())
 {
  gs.eventQueue("change.assigned", current,
 current.assigned_to.getDisplayValue() ,
 previous.assigned_to.getDisplayValue());
}

if (current.priority.changes() && current.priority == 1) {
  gs.eventQueue("change.priority.1", current, current.priority,
 previous.priority);
}

if (current.risk.changes() && current.risk== 1) {
  gs.eventQueue("change.risk.1", current, current.risk,
 previous.risk);
}

if (current.start_date.changes() || current.end_date.changes()
 || current.assigned_to.changes()) {
  if (!current.start_date.nil() && !current.end_date.nil()
 && !current.assigned_to.nil()) {
    gs.eventQueue("change.calendar.notify", current,
 current.assigned_to, previous.assigned_to);
  }

  // Remove from previous assigned to, due to assigned_to
 changing
  if (!previous.assigned_to.nil()) {
```

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```
      if (!current.assigned_to.nil() &&
 current.assigned_to.changes() &&
         (!previous.start_date.nil()
 && !previous.end_date.nil())) {
        gs.eventQueue("change.calendar.notify.remove", current,
 current.assigned_to, previous.assigned_to);
      }
   }
  // Remove old calendar from current assigned to, due to date
 changing
  else if (!current.assigned_to.nil()) {
     if ((current.start_date.changes()
 && !previous.start_date.nil()) ||
         (current.end_date.changes()
 && !previous.end_date.nil())) {
       gs.eventQueue("change.calendar.notify.remove", current,
 current.assigned_to, current.assigned_to);
     }
  }
}
```

State Management

State Management enables an administrator to define State Models and State Transitions that control how a record is allowed to transition through a predefined list of states.

An example of a state transition is when the **State** field in a facilities request is moved from the **Assigned** state to the **Work In Progress** state.

State Management is active for all instances.

What is a state model?

A state model is a list of states that describe an expected record workflow through the lifecycle of the record. State models can be defined for any table that extends the task table. State models simplify defining the state transitions allowed for a specific task type.

In the State Model [sys_state_model] table, define the name of the state model and which task table the state model is applied to. Use the condition builder to specify any conditions for applying the state model to records and any required condition for moving between states.

For example, you could define a state model for a new custom application for airline reservations. The custom application has a Reservation Request [reservation_request] table with 4 states: **Held**, **Confirmed**, **Completed**, and **Canceled**. You could define the state model to target the Reservation Request table, and then define the state transitions for each of the 4 states. When you enable the state model, the choice list for the **State** field includes only the choices allowed by the conditions in the state transitions.

Note: State Management includes example state models that are copies of the normal, emergency, and standard change request state models. By default, these examples are not enabled. Use them only as examples to develop a state model and transitions for a task table that does not have a state model. Do not enable these example state models for change requests and then make changes to them. Doing so breaks existing transitions for change requests.

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What is a state transition?

State transitions are a list of conditions for entering or exiting each state defined for a table. In the State Transitions [sys_state_transition] table, use the condition builder to build a list of conditions required for entering or exiting each state.

To prevent users from choosing an invalid state, any attempt to update a record's state is denied if it violates the state transitions, whether the attempt is through user input, a script, a Web API such as REST or SOAP, or any other source.

State transitions control the choice list for the **State** field on the target task table and prevent you from choosing any state value that does not adhere to the underlying process or does not meet the defined conditions for the transition.

For example, if the enter condition for the **Completed** state is **State is Confirmed**, only records in the Confirmed state can transition to the Complete state. When a record is in the Confirmed state, the only choice in the **State** field choice list is **Completed**.

Add a state model and transitions

Add a state model and transitions to specify conditions for moving between states.

Before you begin

Role required: state_model_admin or admin

About this task

Develop and test your state model in a non-production instance before deploying it in the production instance.

Procedure

1. Navigate to **All** > **State Management** > **State Models**.
2. Click **New**.
3. Fill in the fields on the form.

State model fields

Field	Description
Name	Descriptive name for this state model.
Table	Table this state model applies to.
Application	Defaults to **Global**.
Order	Order in which this state model is evaluated for the target table. State models are evaluated in numerical order, from the lowest number to the highest number. Leave space between the numbers so that you can insert a new state model later, if necessary. For example, enter 10 for the first state model to be evaluated, 20 for the next state model to be evaluated, and so on.
Active	Indicates that this state model is enabled. Clear this check box until you define the state transitions for the state model.

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Field	Description
Description	Description of this state model.
Condition	Condition builder that sets the conditions for applying this state model to records. For example, you could add the condition **Category is Networking** versus **Category is Security** if there are different state models for networking requests and security requests.
Common Exit Condition	Condition builder that sets any common condition required for moving from one state to another.

4. Open the form context menu and click **Save**.
   The **State Transitions** related list appears.
5. Click **New** on the **State transitions** related list.
6. Fill in the fields on the form.

State transition fields

Field	Description
State Model	State model that uses this state transition.
State	State this transition controls, for example **Ready** or **In Progress**.
Application	Defaults to **Global**.
Order	Order in which this state transition is evaluated. State transitions are evaluated in numerical order, from the lowest number to the highest number. For example, if the first predefined state is **New**, give that state the lowest order number so that the conditions for entering and leaving the state are evaluated first. Leave space between the numbers so that you can insert a new state transition later, if necessary. For example, enter 10 for the first state transition to be evaluated, 20 for the next state transition to be evaluated, and so on.
Terminal State	Selected if there are no transitions from this state.
Description	Description of this state transition. For example, the **Description** for the Assess state could be `New state can move only to Assess state`.

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Field	Description
Enter Condition	Condition builder that sets the conditions for entering this state.
Exit Condition	Condition builder that sets the conditions for exiting this state.

7. Click **Submit**.
   The state model form reopens, and the new transition is added to the related list.
8. Continue adding state transitions for the remaining states.
9. When finished adding state transitions in the state model form, select the **Active** check box and click **Update**.

Implement process flow and UI actions with a state model

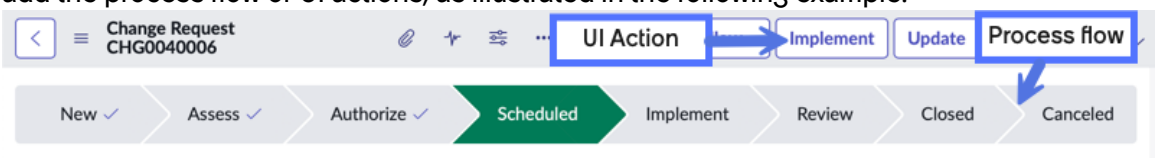
You can implement a process flow and UI actions with a state model.

Before you begin

Role required: state_model_admin or admin

About this task

State models provide a way to limit the choices for moving between states in a form. If you set up only a state model, users manually change states in the form. Additional steps are required to add the process flow or UI actions, as illustrated in the following example.



Procedure

1. Verify the choices for the **State** field for the table and ensure that you created transitions for them.
   For more information about how to add **State** field choices, see Best practices for state field choice values.
2. After creating the state model, define the process flow.
   For more information about process flows, see Process flow formatter.
3. Define UI actions as desired to move between states.
   For more information about UI actions, see UI actions.

Result

After the state model is enabled, only the defined state transitions are included in the choice list for the **State** field, and the process flow and UI actions are implemented.

Installed with State Model

Several types of components are installed with the State Model.

Tables installed with State Model

State Model adds the following tables.

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Table	Description
State Model [sys_state_model]	Defines the name of the state model and which table the state model targets. Also defines the condition for applying the state model to records and any common condition for moving from any state to any other state.
State Transition [sys_state_transition]	Defines how each record in the target table transitions to (the enter condition) and/or from (the exit condition) each state predefined for that table.

Roles installed with State Model

State Model adds the following role.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

State Model Administrator	Description	Contains roles
[state_model_admin]	Allows users to add, modify, and delete state models for task tables.	None

State model Administrator [state_model_admin]

Add, modify, and delete state models for task tables.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Note: Avoid granting an admin role when more specialized roles are available.

Script includes installed with State Model

State Model adds the following script include.

Script include	Description
TableChoiceUtils	Utility class to get the choice list of a table field.

Client scripts installed with State Model

State Model adds the following client script.

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Client script	Table	Description
Populate State Choices	State Transition [sys_state_transition]	Populates the **State** field choices in the targeted record.

Business rules installed with State Model

State Model adds the following business rules.

Business rule	Table	Description
Set the display value for state	State Transition [sys_state_transition]	Sets the **State** field value based on the state model for the table.
Set the table to pick choices	State Transition [sys_state_transition]	Caches the **State** field value from the first table in the hierarchy for further rule processing.

Metrics

A metric measures and evaluates the effectiveness of IT service management processes.

For example, a metric could measure the effectiveness of the incident resolution process by calculating how long it takes to resolve an incident.

A metric can often be easily obtained from the data. To find the number of incidents created today, a report counts the number of incidents in the incident table with a Created date of today. However, metrics must be gathered as data is updated. For example, determining how long an incident was assigned to a certain group requires collecting information about assignment changes and calculating the duration of each assignment.

The Metric plugin provides an easy, declarative way of defining metrics. Once defined, the data for the metric is gathered, and instances of the metric are calculated and stored. For example, the "Assigned to Duration" metric measures the amount of time an incident is assigned to an individual. To define this metric, you create a metric definition of the type "Field value duration" and select the "Assigned to" field from the Incident table. A metric instance is created for each incident assignment showing its duration. Reporting on the duration of incident assignments becomes easy.

You can report on a metric by using a Working with database views for reporting that links the metric to the table on which it is defined.

To install the Metric Definition plugin (com.glide.metrics), navigate to **System Definition** > **Plugins**, search for Metric Definition, and click **Install**.

Define a metric

Create a metric definition for a task table.

Before you begin

Role required: metric_admin

About this task

Metric definitions do not generate values for time periods before they were created. They only apply to events that occur after the metric definition has been established.

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Procedure

1. Navigate to **All** > **Metrics** > **Definitions**.

> **Important:** Don't confuse these metric definitions with the metric definitions for the Assessments feature. The Assessments feature is concerned with questionnaires. It isn't related to the Metrics feature.

2. Select **New**.
3. Complete the Metric definition form then select **Submit**.

> **Note:** In the base system, metrics are configured to work on the task table only. To apply metrics to cmdb_ci tables, duplicate the metric events business rule that currently runs on the task table for the cmdb_ci table. Without the events created, no metric processing can occur.

New metric definitions

Field	Description
Number	The system generates a unique record number for the metric definition.
Name	Enter a unique name to describe what metrics are collected.
Table	Select the table that you want to collect metrics for. A metric can only apply to one table. **Note:** The list shows only tables and database views that are in the same scope as the metric definition
Field	Select the table column that you want to monitor for changes. Metrics only work on audited fields. Creating a metric for a non-audited field produces unreliable metrics. **Note:** Fields starting with 'sys_' don't work for a metric definition, except for 'sys_domain'.
Type	Select what values this metric generates. ○ **Field value duration**: This type of metric measures the duration of time from when the value of the specified field is set until it's changed. A Field value duration metric can optionally specify a script. The script can either return a duration value or set the answer variable to false to stop processing the metric. For example, the baseline incident metrics stop calculating duration when the Active field of an incident is set to false. The script can also carry out any other action such as closing the duration of other metrics defined on the same record. For more information, see Sample field value duration script. ○ **Script calculation**: This type of metric creates a metric instance using a script. The script has access to the current row in the table (for example an incident) and the metric definition. The script must perform metric calculations and insert data into the metric_instance table. The calculation doesn't have to result in a duration. It can calculate any type of value and store it in the metric instance value.
Timeline	Check this box to display the metric on a timeline page. For more information, see Timeline pages.

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Field	Description
Active	Check this box to monitor changes for this metric.
Description	Specify what data the metric monitors and its conditions. A good description helps other metrics administrators understand the purpose of your metric.
Script	Enter the script that you want the metric to run to either calculate a duration or perform some calculation on the metric_instance table.

Sample field value duration script

Review the existing Incident Open metric definition to see how you can create your own custom metric.

This script either provides a duration value or stops processing durations (sets the answer variable to *fal*se) when an incident is closed.

```
// script can set answer to false to terminate processing of the
 metric
    // mi - MetricInstance
    // answer
    if (!current.active) {
    answer = false;
    mi.endDuration();
    gs.log("Closing field durations");
    closeDurations(mi.current);
    }

    function closeDurations(current) {
    var now_GR = new GlideRecord('metric_instance');
    gr.addQuery('id', current.sys_id);
    gr.addQuery('calculation_complete', false);
    gr.addQuery('definition.type', 'field_value_duration');
    gr.query();
    while (gr.next()) {
    gs.log("closing: " + gr.definition.name + " for: " +
 current.number);
    var definition = new GlideRecord('metric_definition');
    definition.get(gr.definition);
    var mi = new MetricInstance(definition, current);
    mi.endDuration();
    }
    }
```

Metric instance

A metric instance is a record in the metric_instance table. A record holds one instance of a metric.

Metric instance records get created and updated in one of two ways:

- If the metric is a duration, the system automatically populates the metric instance table with duration values.
- If the metric is calculated from a script, the script itself must populate the metric_instance table.

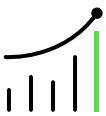
Some of the notable fields in the metric_instance table are:

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- Metric definition: the metric definition for which this metric instance was gathered.
- Value: For a "Field value duration" metric this is the value of the table field for which duration is calculated. For example, for the "Assigned to Duration" metric, the Value is the name of the person assigned to the incident. For other metrics, the value can be any value calculated by the metric.
- ID: Identifies the specific record for which the metric is gathered. For example, the specific incident.
- Duration: Time duration for a Field value duration metric.

Maintaining and monitoring the ServiceNow AI Platform

Keep your instance running smoothly, improve performance, and find issues before they arise, all with this suite of tools.

Instance Scan	Platform performance	System Diagnostics
		
Find potential health issues and opportunities for best practice improvement in your instance.	Optimize your application with diagnostics and performance monitoring.	Monitor health and performance of your instance.

Instance Scan

Get detailed analysis of your instance configurations, and stop potential system health issues before they arise. Use ServiceNow's Instance Scan any time and ensure system stability, whether you are developing, releasing, or upgrading your application. Schedule, execute, and track scans from single-point to full-suite tests, and review the data they provide with dashboards.

See Instance Scan.

Events

Track every occurrence in your app, from screen loads to user clicks. Usage Insights provides detailed charts and tables for every event, to show you where the most activity goes on in your app. Analyze core processes in your business and improve user efficiency and workflow.

See System Events.

Platform performance

Keep your system optimized and running smoothly. Use diagnostics to track processing and response times, network speeds and behaviors, and browser settings. Monitor platform performance, set quotas and control system bandwidth to ensure stable operations for users, set up test modules, and more.

See Platform performance.

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Instance Scan

Use ServiceNow® Instance Scan to interrogate your instance for configurations that indicate health issues and identify opportunities to address best practices. Instance Scan checks your existing configurations and helps you avoid creating future configuration issues. Instance Scan is a tool that can be used as a part of your development operations, release management as well as pre- and post-upgrades.

Get started

Explore  Learn about Instance Scan records and components.	**Configure**  Execute scans to keep a track on the health of your instance.
Use  Use Instance Scan dashboard for a system wide visual representation of the health of your instance.	**References**  Learn additional information about Instance Scan.

Troubleshoot and get help

- Ask or answer questions about Instance Scan in the ServiceNow Community
- Search the Known Error Portal for known error articles

Exploring Instance Scan

If you are new to Instance Scan, read this overview to learn what the tool can do. Follow the tutorial to create checks and execute scans that uses most basics of Instance Scan features.

Note: Instance Scan doesn't fully support domain separation. Findings are visibly domain separated based on the domain of the source record. For more information see Domain separation.

Instance Scan overview

Instance Scan uses the following records, components and scan types.

Checks

Checks are singular focused rules that detect anomalies or opportunities in an instance. These checks can run against tables, records, or metadata. Checks are defined to identify security, upgrade best practices, manageability, user experience and performance vulnerabilities. See Getting started with checks for more information.

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Results

An Instance Scan result reports the status and type of the scan. See Results for more information.

Findings

A finding is a reference to a record that has violated a rule from a check on the instance. See Findings for more information.

Dashboard

The Instance Scan dashboard is a system-wide visual representation of the health of your instance. The dashboard helps you manage and analyze the full scan results against your instance. See Instance Scan dashboard for more information.

Quota rule

A quota rule determines the execution threshold of a scan. The quota rule prevents the instance from running long scans. For example, any scan running longer than the threshold set by the quota rule will result in a failure. See Quota rules for more information.

Full scan

Execute a scan for the entire instance by selecting **Execute Full Scan**. Implementing a full scan runs all the active checks present in your instance.

Point scan

Execute all applicable checks against a single record, update set, or an application by selecting **Run Point Scan**. For example, if you execute a point scan against a business rule, only the checks that are applicable to the business rule table run, and only that single target record is scanned. If you execute an update set scan or an application scan, all records related to that update set or application are scanned. See Execute an app scan and Execute an update set scan for more information.

Test scan

Execute a test scan to verify if the check works as expected. The test scan enables you to test a single check instead of a full scan by selecting a single check and selecting **Test Check** on the Check form.

Note: Instance Scan can scan tables that are extended by sys_metadata.

Instance Scan users

Instance Scan has the following roles.

Users	Description
scan_user	The scan_user role can run different types of scans, read checks, execute checks, and view the findings and results.
scan_check_writer	This role includes the scan_user role and provides permission to create new checks.

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Instance Scan benefits

Benefit	Feature	Users
Create checks and check suites to know the health of your instance	• Getting started with checks • Create a check • Create a check suite	scan_user
Execute scans on the created checks to review the instance health	Executing a scan	scan_user
Scheduling of scans and suite scan	• Schedule a full scan • Schedule a suite scan	scan_user
Monitor your scans to ensure no health issues of your instance	Monitoring a scan	scan_user
Manage and analyze the results of full scan against your instance	Instance Scan dashboard	scan_user

What to explore next

To learn more about using Instance Scan, see:

- Configuring Instance Scan
- Using Instance Scan
- Instance Scan references

Getting started with checks

Checks are singular focused rules that detect anomalies or opportunities in an instance. These checks can run against tables, records, or metadata. Checks are defined to identify security, upgrade best practices, manageability, user experience and performance vulnerabilities.

Check types

You can create your check by selecting one of these types.

Table Check

Create a check by selecting **Create a new Table Check** if you know which specific table and conditions you want to test. This check type is applied on only one table at a time. You can also include your own script for more complex capabilities by selecting the **Advanced** option on the form.

Column Type Check

Retrieve all records containing a specific column field type from all tables in an instance by selecting **Create a new Column Type Check**. The **Column Type Check** type implements the rule you created to iterate all records matching the target column field type.

Script Only Check

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Create a check without specifying a table or a column type by selecting **Create a new Script Only Check**. You can verify meta data, configurations, and execute complex checks by writing your own script.

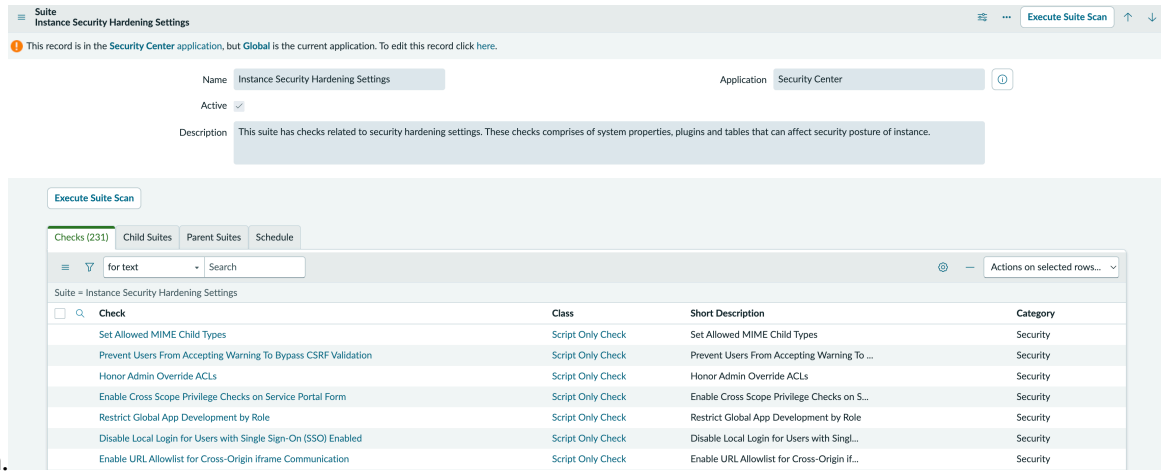
Linter Check

Create a linter check to identify any issues in a script. When a linter check is run on a record, an abstract syntax tree for its code is generated. You can use the abstract syntax tree to analyze issues with the code.

Suites management

A suite is a collection of individual checks and suites that can be used for a scan. Suites can be created for specific business needs. All child suites are executed when a parent suite is used in a scan.

Navigate to **Instance Scan** > **Suites**. Select one of the suites from the list. Select **Execute Suite Scan** to run a suite scan. See Execute a suite scan for more information.



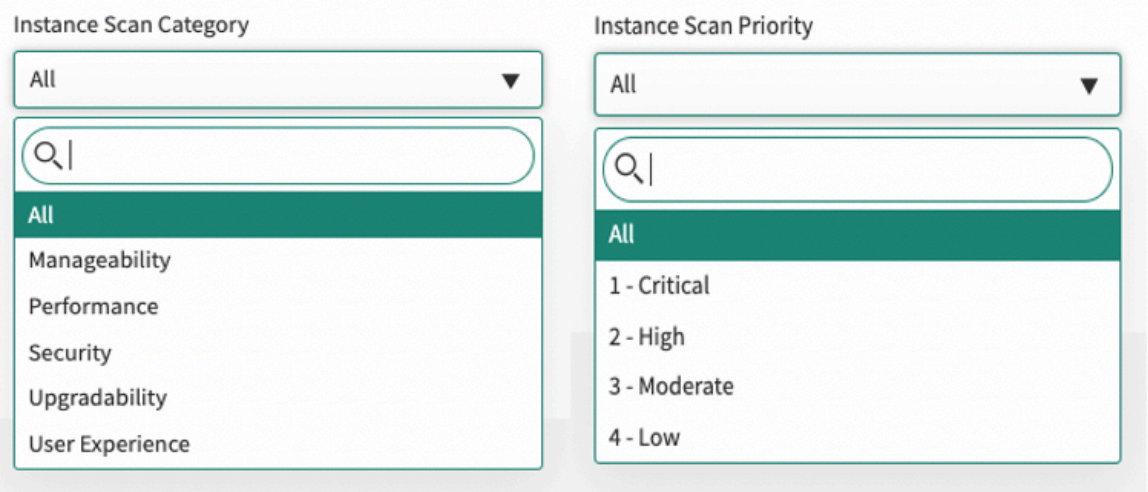
Note: Some ServiceNow provided suites are protected suites and the checks in the suite are not modifiable. For example, if you have a suite from the app store, the suite is unmodifiable. You can't add a child suite to the unmodifiable suite. But you can add a parent suite because it doesn't affect the suite.

Instance Scan dashboard

The Instance Scan dashboard is a system wide visual representation of the health of your instance. The dashboard helps you to manage and analyze the results of full scan against your instance.

The dashboard offers several options to filter your search results to find the exact check finding that might be causing some issues. The **Instance Scan Category** is the filter picker that shows all the categories of all the checks that were scanned. You can select the type of scan category that you want the dashboard to display as a part of the scan results. **Instance Scan Priority** helps you to select the priority level of the results to decide which scan results must be addressed first. This priority level is often referred to as the rating level of the scans.

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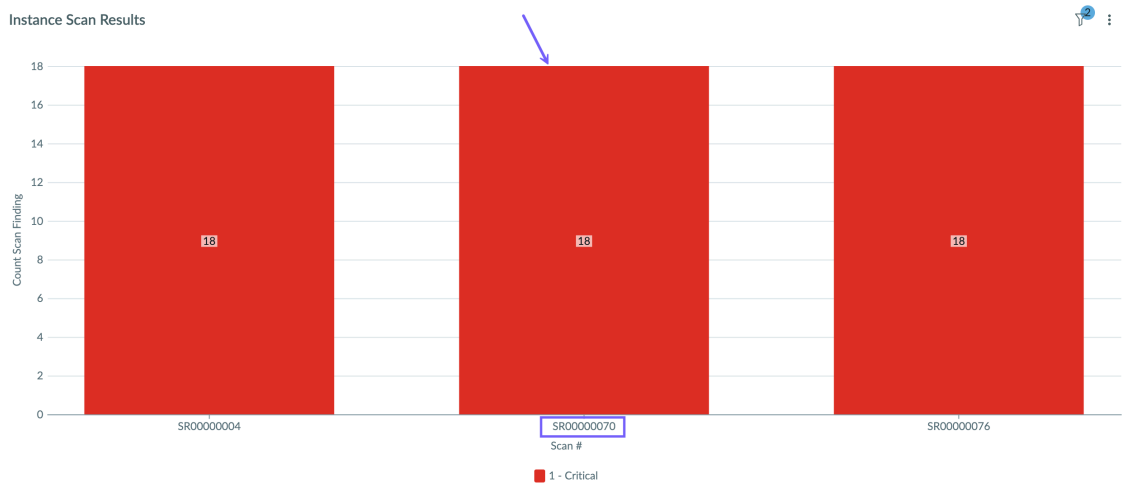
Note: The dashboard is only applicable for full scans. The **Instance Scan Category** is only available if you have data or a finding in the result set that are applicable to the categories.

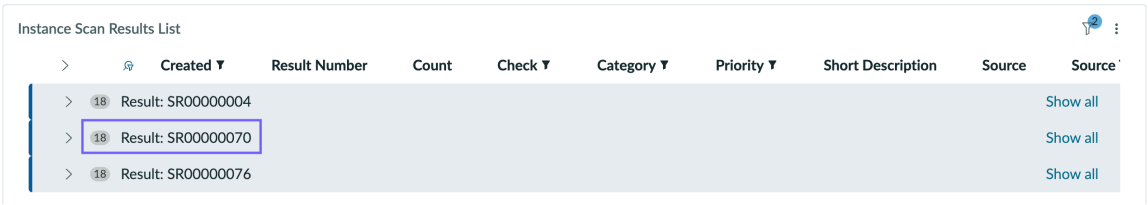
For example, you can use the dashboard to compare the results of the check findings. If you see a sudden change in the number of check findings, select the particular scan result from the Scan Results List.



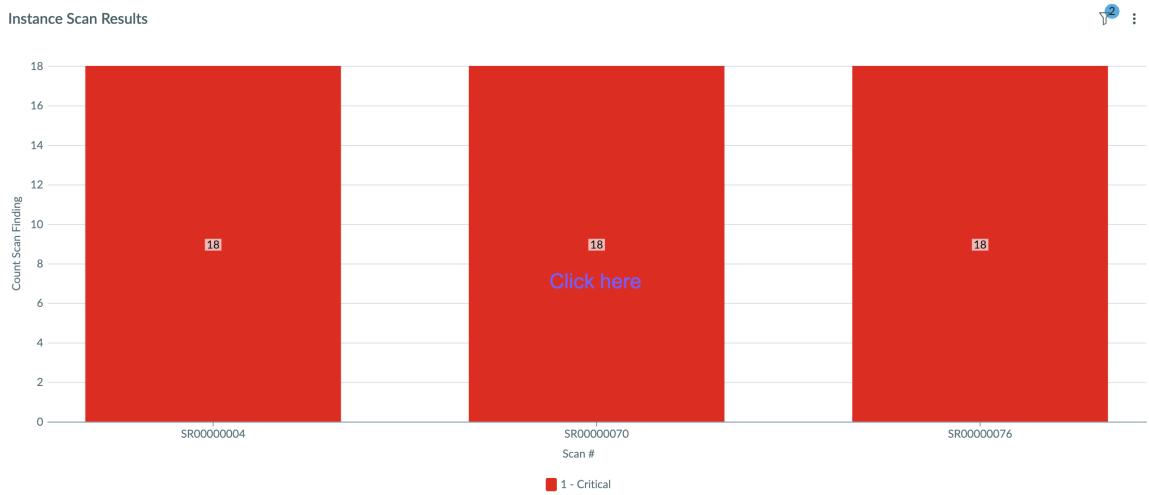
You can review all the findings for the scan that generated an unexpected number of findings. This list displays all the findings that are related to one or more of all the scans.

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You can also directly select the column with the required findings to display the related list for a particular scan.

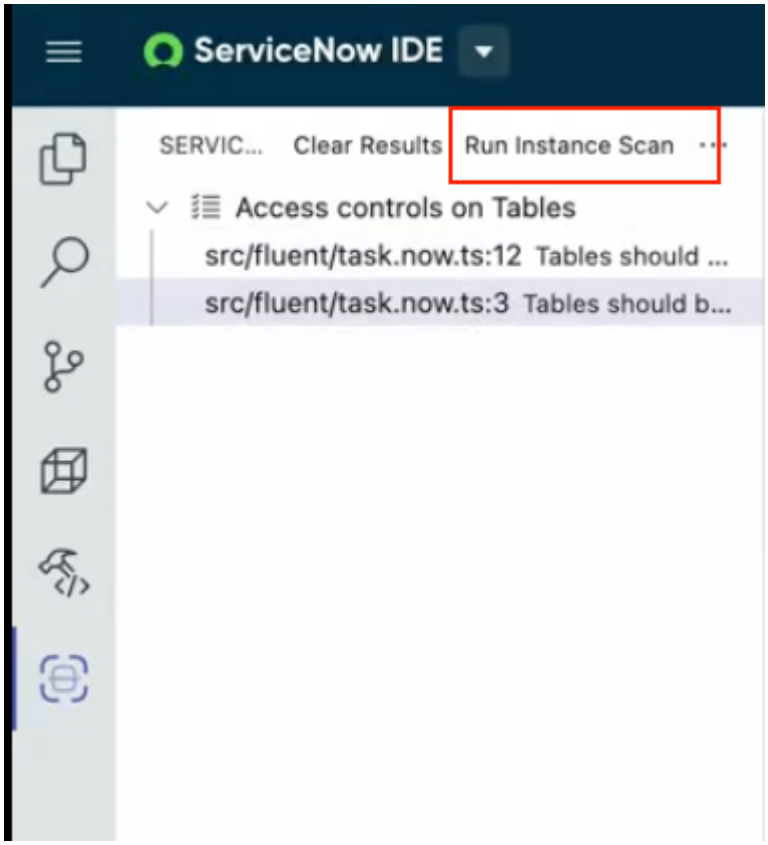


The list also indicates the source from which the finding has been retrieved. You can export the list view data to an external source such as a .csv file or an .xlsv file for further performance comparison and analysis.

Instance Scan extension for IDE

Access Instance Scan directly from your integrated development environment (IDE) on the ServiceNow AI Platform.

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See ServiceNow IDE for more information.

Configuring Instance Scan

Execute the different kinds of scans that Instance Scan offers to keep a check on the health of your instance. You can also schedule a full scan so you can ensure the health of your instance even without an active session.

Note: Instance Scan scans only customized records, but point scan scans all records including the default records.

1. Execute scans: Execute the different types of scans available as per your requirements.
2. Schedule scans: Create a schedule to regularly trigger either a full or a suite scan even when you don't have an active session.
3. Monitor scans: Track the progress status of the executed and scheduled scans.
4. Review scans: Review your executed scans with the findings and results components.

Instance Scan table cleanup policies

Instance Scan offers table cleanup policies to erase previous scan results.

The cleanup policies are based on the time that the scans are created. The timer starts when you run a scan. **Table Cleanup** is run against the Auto Flushes [sys_auto_flush] table and cleans up the previous scan results.

- If the result records are older than 90 days (**7,776,000** seconds), the first policy clears all scan result records and related records.
- If the following conditions are true, the second policy deletes all scan result records and related records.

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- The **Scan type** is **Test Scan**.
- The records are older than 14 days, and **Age in seconds** is equal to or greater than **1,209,600** seconds.

You can also modify these policies by entering any customized time period. See Customize table cleanup policies for more information.

Customize table cleanup policies

Clean up previous scan results at a regular interval by customizing the table cleanup time period.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Instance Scan** > **Table Cleanup**.
2. Select one of the cleanup policies from the Auto Flushes list.
3. Customize the **Age in seconds** field as required.
4. To save the customized table cleanup policy, select **Update**.

Timeout threshold

A timeout determines the execution threshold of a scan from running long scans. For example, any scan running longer than the set time period results in a failure.

If the scan or the check takes longer than the set time period set by the quota rule, an error message appears.

Note: By default the scans are limited to three hours and individual checks are limited to 10 minutes.



To learn how to configure these thresholds, see Implement a scan timeout threshold and Implement a check timeout threshold.

Implement a scan timeout threshold

Set the execution time of a single scan by implementing **Transaction Quota Rules**. Setting of a quota rule prevents your instance from running a long scan.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Transaction Quota Rules**.
2. To set a definite execution time, select **Scan timeout**.

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3. Enter the definite execution time in the **Maximum Duration (seconds)** field and select **Update**.

   Note: The minimum allowed timeout threshold is 5 seconds. If you set the timeout to anything less than 5 seconds, the system still considers it to be 5 seconds. By default, it has been set to 10,800 seconds.

   The scan fails if the execution time exceeds the set timeout. For more information on the type of scan you want to run, see Configuring Instance Scan .

Implement a check timeout threshold

Set the execution time of an individual check by implementing timeout system property. Setting of a timeout threshold prevents your instance from running a long check.

Before you begin
Role required: admin

Procedure

1. In the navigation filter, enter *sys_properties.list*.
2. From the System Properties list, select *glide.scan.process_check.time_out*.

   Note: If *glide.scan.process_check.time_out* is not present in the list, see Create a new check timeout system property for more information.

3. In the **Value** field, set the execution time for the check in seconds.

   Note: The minimum allowed timeout threshold is 5 seconds. If you set the timeout to anything less than 5 seconds, the system still considers it to be 5 seconds. By default, it has been set to 600 seconds.

Result
A timeout threshold for a check is set by the user. Individual checks will be cancelled after the set time threshold exceeds.

Create a new check timeout system property

Create a new timeout threshold property for a check if the *glide.scan.process_check.time_out* system property is not present. Setting of a timeout threshold prevents your instance from running a long check.

Before you begin
Role required: admin.

Procedure

1. In the navigation filter, enter *sys_properties.list*.
2. Click **New** to create a new timeout system property.
3. In the **Name** field, enter *glide.scan.process_check.time_out*.
4. In the **Value** field, enter the check execution time in seconds.

   Note: The minimum allowed timeout threshold is 5 seconds. If you set the timeout to anything less than 5 seconds, the system still considers it to be 5 seconds. By default, it has been set to 600 seconds.

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Using Instance Scan

Execute and schedule the following scans within Instance Scan. You can also analyze the results of the scans in your instance on a dashboard.

Create a check

Create your own checks by implementing the following procedure.

Before you begin

Role required: scan_admin

Procedure

1. Navigate to **All** > **Instance Scan** > **Checks**.
2. Select **New** from the Checks context menu.
   The Check Interceptor list appears.
3. Select one of the available types of checks.
   See Check types for more information.

> **Note:** If you want to update an existing check, the **Version** field increments itself. The new version provides you a change history. You can also know which particular version of the check ran with a given scan.

Create a table type check

Create a check by selecting **Create a new Table Check** if you know which specific table and conditions you want to test. This check type is applied on only one table at a time. You can also include your own script for more complex capabilities by selecting the **Advanced** option on the form.

Before you begin

Role required: scan_admin

```
Before performing this task you must complete Create a check.
```

Procedure

1. Select **Create a new Table Check**.
2. On the form, fill in the fields.

Fields	Description
Name	Name of the check record.
Application	Application that has the check record.
Category	Category of the check record.
Priority	Priority at which the findings should be resolved.
Version	Current version of the check record. **Note:** If you want to update an already existing check, the **Version** field increments itself.

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Fields	Description
Active	Option to activate this check record.
Short Description	Mandatory description about the check records.
Description	Additional information about the check records.
Resolution Details	Guideline to avoid check to go off against one or more tables.
Table	Table queried for this check.
Conditions	Conditions that filter records on a table. Only the records that meet the criteria are scanned.
Advanced	Option to execute the defined script against each record that matches the condition and control when a finding is generated if **Advanced** is true. If **Advanced** is false, a finding is generated for every record that matches the condition in the defined table.
Documentation URL	Documentation link for the check details. **Note:** A scan_user can't edit the **Documentation URL** field.
Run Condition	Boolean field that determines if the check should be run.
Table	Table from which records will be scanned
Conditions	Conditions that determine which records will run
Script	The script that executes against each record that matches the condition in the defined table. **Note:** This field shows up only if the **Advanced** check box is selected.

Create a column type check

Retrieve all records containing a specific column field type from all tables in an instance by selecting **Create a new Column Type Check**. The **Column Type Check** type implements the rule you created to iterate all records matching the target column field type.

Before you begin

Role required: scan_admin

```
Before performing this task you must complete Create a check.
```

Procedure

1. Select **Create a new Column Type Check**.
   A New record form appears.

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2. On the form, fill in the fields.

Fields	Description
Name	Name of the check record.
Application	Application that has the check record.
Category	Category of the check record.
Priority	Priority at which the findings should be resolved.
Version	Current version of the check record. **Note:** If you want to update an already existing check, the **Version** field increments itself.
Active	Option to activate this check record.
Short Description	Mandatory description about the check records.
Description	Additional information about the check records.
Resolution Details	Guideline to avoid check to go off against one or more tables.
Column Type	Column type queried for this check.
Documentation URL	Documentation link for the check details. **Note:** A scan_user can't edit the **Documentation URL** field.
Run Condition	Boolean field that determines if the check should be run.
Column Type	Type of columns that will run.
Script	Script that executes against each record in a table containing a field of the defined column type.

Create a script only check

Create a check without specifying a table or a column type by selecting **Create a new Script Only Check**. You can verify meta data, configurations, and execute complex checks by writing your own script.

Before you begin

Role required: scan_admin

```
Before performing this task you must complete Create a check.
```

About this task

The script only check runs only during a full scan and executes only once during a scan.

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Procedure

1. Select **Create a new Script Only Check** from the **Check Interceptor** list.
2. On this form, fill in the fields.

Fields	Description
Name	Name of the check record.
Application	Application that has the check record.
Category	Category of the check record.
Priority	Priority at which the findings should be resolved.
Version	Current version of the check record. **Note:** If you want to update an already existing check, the **Version** field increments itself.
Active	Option to activate this check record.
Short Description	Mandatory description about the check records.
Description	Additional information about the check records.
Resolution Details	Guideline to avoid check to go off against one or more tables.
Documentation URL	Documentation link for the check details. **Note:** A scan_user can't edit the **Documentation URL** field.
Run Condition	Boolean field that determines if the check should be run.
Script	Option to write a custom script to generate findings.

Create a linter check

Create a linter check to identify any issues in a script. When a linter check is run on a record, an abstract syntax tree for its code is generated. You can use the abstract syntax tree to analyze issues with the code.

Before you begin

Role required: scan_admin.

```
Before performing this task you must complete Create a check.
```

Procedure

1. Select **Create a new Linter Check**.
2. On the form, fill in the fields.

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Linter Check form

Fields	Description
Name	Name of the check record.
Application	Application that has the check record.
Category	Category of the check record.
Priority	Priority at which the findings should be resolved.
Version	Current version of the check record. **Note:** If you want to update an already existing check, the **Version** field increments itself.
Active	Option to activate this check record.
Short Description	Mandatory description about the check records.
Description	Additional information about the check records.
Resolution Details	Guideline to avoid check to go off against one or more tables.
Documentation URL	Documentation link for the check details. **Note:** A scan_user can't edit the **Documentation URL** field.
Run Condition	Boolean field that determines if the check should be run.
Script	The script that executes against each record that matches the condition. By default, this field has an engine object to use. This engine object contains other objects like `engine.finding` which you can call `engine.finding.increment()` to manually increment the **Count** field on that specific finding. Another object is `engine.current` which is the current GlideRecord that the check would be viewing when running. **Note:** This is new to Quebec release, where previously you would call `finding` and `current` directly.

Advanced linter check scripts

Linter check scripts helps you in writing checks that look for issues in scripts. When a linter check is run on a record, it provides an abstract syntax tree for its code. You can use this abstract

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syntax tree to analyze issues with the code such as too many nested if statements or usages of slow API in a while loop.

Linter check usage

Linter checks have a unique object to use called `rootNode`. This is the root node of the parsed abstract syntax tree (AST) for the script of the current record. This object has many functions, but the `visit` function is the most important. The `visit` function takes a callback function as a parameter which gets called on every node of the tree. The callback function then takes a node as a parameter which represents the current node during its iteration. You can return false from the callback function to stop iterating the tree early, otherwise it keeps visiting every subnode in the tree of the node you called `visit` on.

For example, if you want to scan for a deprecated API called `badFunction()`. You can write a Linter Check with a script in the following example:

```
(function(engine) {
 engine.rootNode.visit(function(node) {
  if (node.getTypeName() === "NAME" &&
    node.getNameIdentifier() === "badFunction" &&
    node.getParent().getTypeName() === "CALL") {
   engine.finding.incrementWithNode(node);
  }
 });
})(engine);
```

When you run a scan with this Linter Check, it checks every record in the scan with a script field. For example, if a record in that scan has a script that looks like the following, the scan picks up a finding for this record.

```
/*
badFunction()
*/
// badFunction()
function badFunction() {
 return;
}
var GoodClass = Class.create();
GoodClass.prototype = Object.extendsObject(Object, {
 badFunction: function() {
  // actually good
 }
});
var badFunction = ["badFunction", "badFunction()"];
badFunctionButSometimesGood();

badFunction();
```

Node functions

The following is a list of available functions to call on the node object.

- `getRootNode()`: Get the root node of the tree for this node
- `getParent()`: Get the parent of this node
- `getLineNo()`: Get the line number location for this node
- `getColumnNo()`: Get the column number location for this node
- `toSource()`: Get the source for this node. The source is based on this node and its children

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- `getTypeName()`: Get the node type name of this node. For example, a function call in source is tokenized as a node with the type name of "CALL"

  Note: The values of `node.getTypeName()` are from different types of nodes in an Abstract Syntax Tree (AST). The possible values come from Rhino's AST parser itself.

- `getNameIdentifier()`: If the node type of this node is "NAME", then return the identifier, which is the string value of the name itself. A "NAME" node represents a simple name that is not a keyword, like a function name or a variable name.

  Note: If this node is not a NAME node, then the result is null.

- `getAbsolutePosition()`: Get the absolute position of this node. The absolute position is the number of characters from the start of the script to this node
- `compareTo(other)`: Compare this node with another node. The node with a greater absolute position and length will be the larger in comparison. `other` is a node to compare with this node
- `visit(callbackFunction)`: Visit each node in the subtree starting from this node and execute the given callback function on each node. `callbackFunction` is a function that will be executed on each node in the subtree of this node. This callback function takes a LinterCheckAstNode as a parameter which is will be the node being visited
- `debugPrint()`: Returns a string representation of the abstract syntax tree, starting from this node. Each line contains information about a node, and the indentation represents the hierarchy relationship between the nodes. The information in each line is arranged as follows
  1. Absolute position
  2. Node type name
  3. Position relative to parent
  4. Length
  5. Name identifier (if a NAME node)

For more information, see LinterCheckAstNode API - Scoped, Global.

Create a check suite

Create a check suite to bundle a group of checks into a suite and execute it.

Before you begin

Role required: admin.

Procedure

1. Navigate to **All** > **Instance Scan** > **Suites**.
   A list of suites shows up.
2. Select **New** to create a new suite.
3. Fill in the details on the new suite record.

Fields	Description
Name	Name of the suite
Application	Scope of the suite

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Fields	Description
Active	Option to activate this suite
Description	Information about the suite

4. Select **Submit** to create a new check suite.

> **Note:** The suites that you create are completely modifiable. You can modify the checks in the suite and can also add child and parent suites.

Executing a scan

Use the following types of scans to execute checks, a scan or a suite scan.

Execute a point scan

Execute all applicable checks against a single record, update set or an application by selecting **Run Point Scan**.

Before you begin

Role required: admin

About this task

For example, if you execute a point scan against a business rule, only the checks that are applicable to the business rule table run, and only that single target record is scanned. If an update set scan or an application scan is executed, all records related to that update set or application are scanned.

Procedure

1. Navigate to **All** > **Instance Scan** > **Checks**.
2. Navigate to the record in a table applicable for point scan.

> **Note:** The **Run Point Scan** related link appears in the UI only for applicable records.

3. Scroll down to the **Related Links** section.
4. Select the **Run Point Scan** related links.

> **Note:** The **Run Point Scan** related link is available only if all the following conditions are true.
>
> - Available checks that are applicable to the record
> - The record is active
> - The user has read access to the record
> - The record is on a table that extends sys_metadata
> - The role of the user must be scan_user
> - The system property *glide.scan.enable_point_scan_ui_action* must not be false

The progress tracker appears showing the status of the scan.

5. Select **Go to Result**.
   The Scan Result record appears.
6. Select **Checks** related list to look at the findings.
   If you want to review the failure reasons, select the **Failures** related list.

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Result
A scan of all applicable checks against only a single record is executed.

Execute an update set scan

Use an update set scan to run applicable checks against the current versions of records that have updates in the update set. If a record has been modified since it was added to the update set, the scan reflects those later changes. Issues that exist only in the update set version of a record aren't detected.

Before you begin
Role required: admin

About this task
The scan runs all active checks that apply to the record types in the update set. Applicable checks are determined by matching the tables of the records in your update set against the check definitions in Instance Scan. The following check types run during an update set scan:

Table Check

Create a check by selecting **Create a new Table Check** if you know which specific table and conditions you want to test. This check type is applied on only one table at a time. You can also include your own script for more complex capabilities by selecting the **Advanced** option on the form.

Column Type Check

Retrieve all records containing a specific column field type from all tables in an instance by selecting **Create a new Column Type Check**. The **Column Type Check** type implements the rule you created to iterate all records matching the target column field type.

Linter Check

Create a linter check to identify any issues in a script. When a linter check is run on a record, an abstract syntax tree for its code is generated. You can use the abstract syntax tree to analyze issues with the code.

Procedure

1. Navigate to **All** > **System Update Sets** > **Local Update Sets**.
2. Select the update set from the list.
3. Select **Scan Update Set** from the **Related Links** list.

Result
The scan runs applicable checks against the current versions of records that have updates in the update set. To review findings, open the result record and select the Checks related list.

Example:
For example, if your update set contains a business rule, checks that target the business rules table run against that record.

Execute an app scan

Scan the installed files of an application as well as the application record itself with applicable checks by executing an application scan.

Before you begin
Role required: admin

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About this task

For example, if the application installs a business rule, checks that are relevant to sys_script table are executed against that business rule. To trigger an application scan, go to the record of the application you desire to scan and select **Scan Application** form link UI action.

Procedure

1. Navigate to **System Application** > **All Available Applications** > **All**.
   A list of all available applications and plugins appears.
2. Select the menu icon of the desired application.
3. Select **Go to application** option from the menu icon.

   Note: The **Go to application** option appears only if the selected application is not a plugin.

4. Select **Scan Application** to run app scan.

Execute a test scan

Execute a test scan to verify if the check works as expected. The test scan enables you to test a single check instead of a full scan by selecting a single check and selecting **Test Check** on the Check form.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Instance Scan** > **Checks**.
   A list of checks appears.
2. Open the check record you want to test from the list.
3. To start the test, select **Test Check**.
   The status of the scan appears in the progress tracker. The **Findings**module in the application navigator shows the number of records found from running the check test.

Execute a full scan

Execute a scan for the entire instance by selecting **Execute Full Scan**. Implementing a full scan runs all the active checks present in your instance.

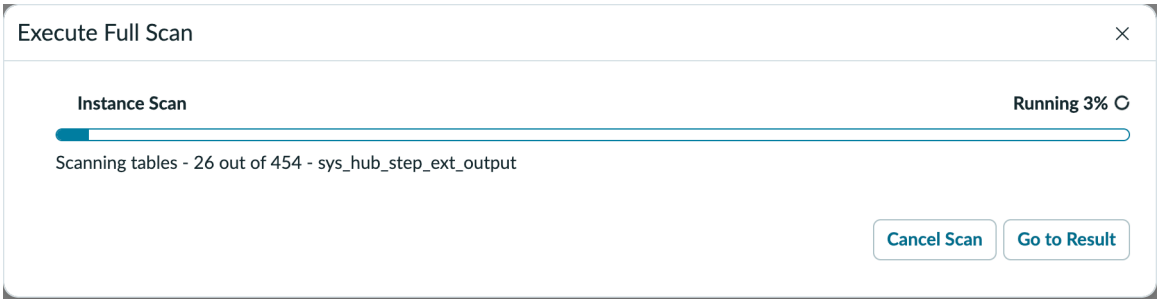
Before you begin

Role required: admin

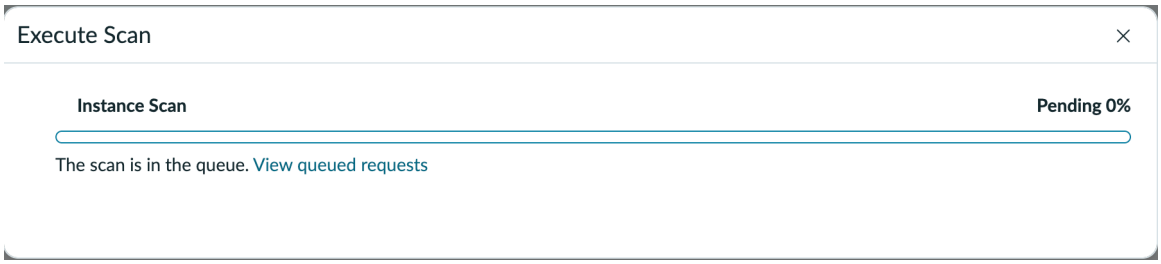
Procedure

1. Navigate to **All** > **Instance Scan** > **Checks**.
   A list of all the checks on the instance shows up.
2. Select **Execute Full Scan** to execute full scan on all the checks.
   The progress tracker shows the status of the scan.

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Note: You can now execute multiple full scans simultaneously if you have enabled glide.scan.parallel_scan_enabled system property. You can also set the maximum number of scans that can run concurrently by setting the value for glide.scan.max_parallel_scans property. See Instance Scan properties for more information.



Select View queued requests link to see all the queued requests on the Scan Queue Operations page.

Note: This modal shows up only when the number of parallel scans exceeds the set value for concurrent scans.

3. **Optional:** Review the results and other information about the scan execution on the Scan Queue Operations page.

   Note: This step is applicable only when you are executing multiple full scans in parallel.

4. To find the **Result Number** and the number of checks that ran as part of the full scan, select **Go to Result**.
5. **Optional:** From the related list, select **Checks** to view the list of all the checks that ran as a part of the full scan.
6. **Optional:** From the related list, select **Errors** to review the errors encountered during the full scan.

Result

A scan of the whole instance is executed.

Execute a suite scan

Execute suites of available checks against a specific target to have targeted scan results by selecting **Execute Suite Scan**.

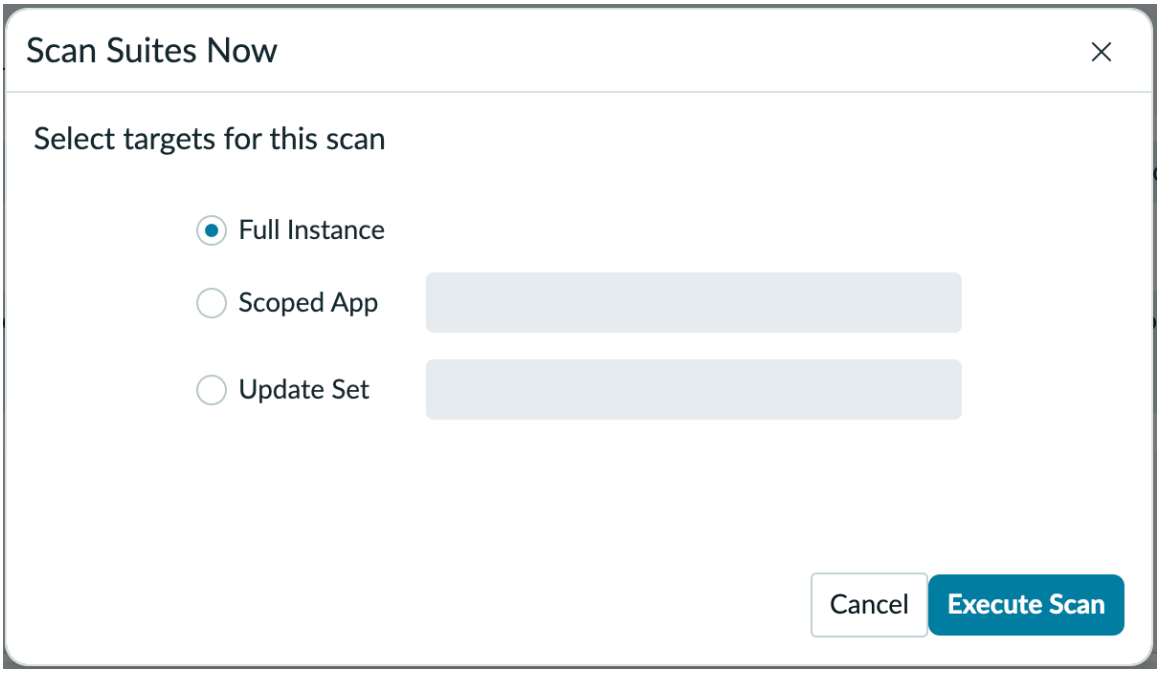
Before you begin

Role required: admin.

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Procedure

1. Navigate to **All** > **Instance Scan** > **Suites**.
   A list of all suites displays.
2. Select one of the suites from the list.
   The form for the selected suite displays.
3. Select **Execute Suite Scan**.
   The **Scan Suites Now** modal displays.
4. Select a target for the scan.



   - **Full Instance**: Scans all the available records in the instance.
   - **Scoped App**: Scans selected scoped apps. You can select multiple scoped apps.
   - **Update Set**: Scans multiple update sets.
5. Select **Execute Scan**.

Note: If a record is inactive, the checks don't generate any findings for that record.

Execute a reactive scan

Execute a reactive scan to set up a scan that runs automatically on an execution tracker failure.

Before you begin

Role required: admin.

About this task

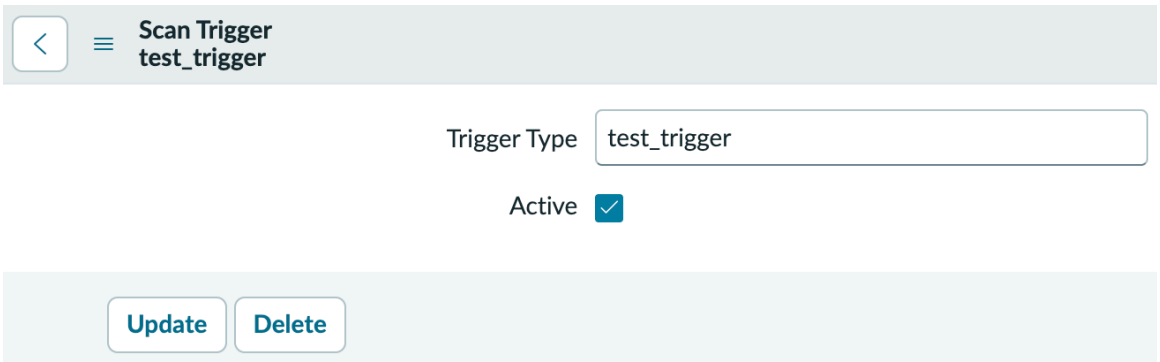
For many failed processes on your instance, you can find a corresponding record on the execution tracker. The progress window shows the status of the test. If a process fails on an execution tracker, Instance Scan can watch for that failure on the progress status and run a scan automatically.
The **Trigger Type** in the Scan Trigger form should match the **Source Table** field on the sys_execution_tracker record of the failed process to enable the connection between the two. For example, if the failed test is in the Update Sets list, you can set up the **Trigger Type** as sys_update_set. This enables Instance Scan to be connected to the execution tracker test failure.

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Procedure

1. Enter `scan_trigger_list.do` in the navigation filter.
   A list of scan triggers shows up.
2. Select the required trigger from the list to update it.

Note: The **Trigger Type** is based off of table names. You can also create a custom trigger type in your codes.



The reactive scan is now set up to automatically scan the execution tracker of the failed process which appears on the scan results table.

Schedule a full scan

Create a schedule to regularly trigger a full scan even when you don't have an active session. A schedule creates an established baseline for the health of the instance and provides a comparison to configuration and instance health over time.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Instance Scan** > **Checks**.
2. Select **Schedule Full Scan**.
3. On the Trigger full scan form, fill in the fields.

Field	Description
Name	Name of the check record.
Active	Option to execute the scan at a scheduled time.
Application	Application where the job belongs.
Conditional	Option to select conditions under which the scan runs.
Run	List used to select the scheduling of full scan.
Run this script	Selection to run the default script.
Update	The script that is updated for full scan.
Execute Now	The default script that is executed for full scan.

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Field	Description
Delete	The script is deleted for full scan.

4. To run the full scan, select **Execute Now**.
   A list of findings is displayed.
5. From the application navigator, select **Results**.
   The status of the execution is displayed along with the **Result Number**.
6. To display the list of findings, select the **Result Number**.
7. **Optional:** From the application navigator, select **Dashboard** to display data about the findings.

Result
A schedule to trigger a full scan regularly even without an active session is created.

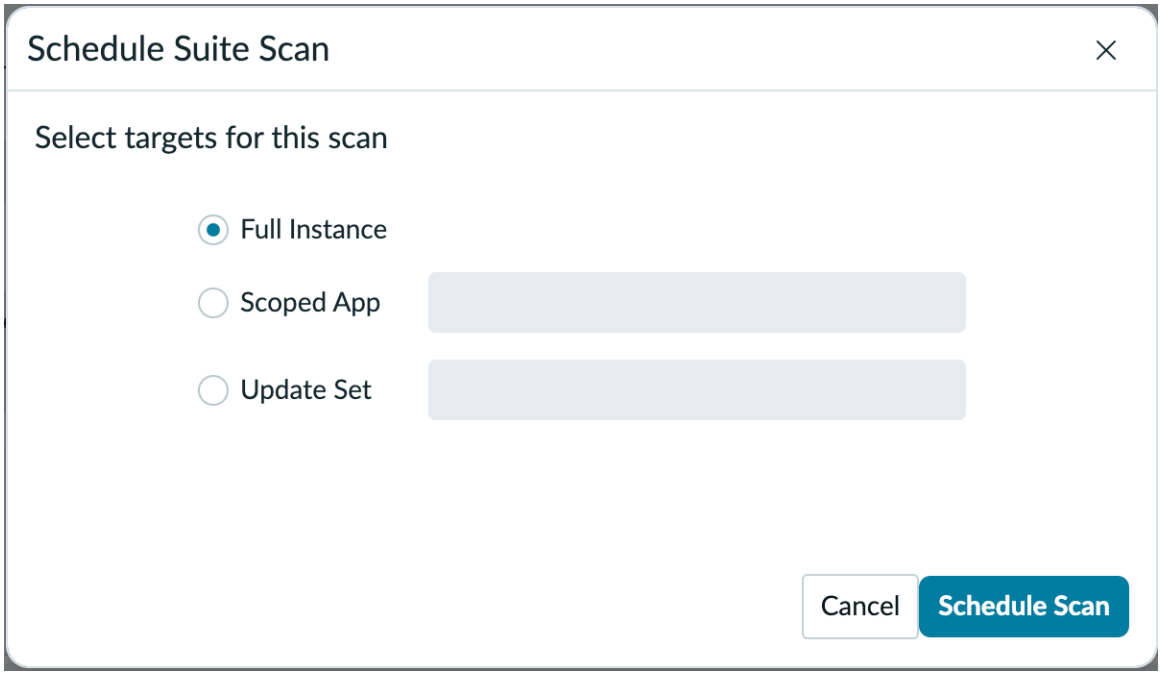
Schedule a suite scan

Create a schedule to regularly trigger a suite scan even when you don't have an active session.

Before you begin
Role required: admin.

Procedure
1. Navigate to **All** > **Instance Scan** > **Suites**.
   A list of suites displays.
2. Select a suite from the list to schedule a suite scan.
3. Select Schedule related list.
   A list of scheduled scans displays.
4. Select **New** to create a schedule for the suite scan.
   The **Schedule Suite Scan** modal displays.
5. Select a target for the scan.
   - **Full Instance**: Scans all the available records in the instance.
   - **Scoped App**: Scans selected scoped apps. You can select multiple scoped apps.
   - **Update Set**: Scans multiple update sets.
6. Select **Schedule Scan**.

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Note: If a record is inactive, the checks don't generate any findings for that record.

The **Scheduled Scan** form displays.

7. On the form, fill in the fields.

Linter Check form

Fields	Description
Name	Name of the scheduled scan.
Application	Application that has the record.
Combo	References a record which has a list of sources and a list of targets to run the scan against.
Run	Frequency at which the scan should be scheduled to run. ○ Daily: Scan is scheduled to run daily. Time: The time at which the scan is scheduled to start daily. ○ Weekly: Scan is scheduled to run weekly. ▪ Day: The day in the week on which the scan is scheduled to start weekly. ▪ Time: The time at which the scan is scheduled to start. ○ Monthly: Scan is scheduled to run monthly. ▪ Day: The day in the month on which the scan is scheduled to start monthly. ▪ Time: The time at which the scan is scheduled to start.

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Fields	Description
	○ Periodically: Scan is scheduled to run periodically. ▪ Starting: Date and time at which the scan is scheduled to start. ▪ Repeat interval: Date and time at which the scan has been scheduled to repeat. ○ Once: Date and time at which the scan is scheduled to start. ○ On Demand: Scan is not scheduled to run and runs only manually when **On Demand** option is chosen for the **Run** field. ○ Business Calendar: Business calendar time of the user to schedule the scan run either at the beginning of that period or at the end, depending on their selection.
Active	Option to activate the record.
Conditional	Option to write your own script condition, which is always verified before scheduled scan runs.
Run as	User role used to run the scan.
Run as tz	Timezone used to run the scan.

8. Select **Submit**.
   The scan that has been scheduled displays under Schedule related list.

Monitoring a scan

You can check the progress status of a scan by checking the progress tracker.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Instance Scan** > **Checks**.
   A list of checks appears.
2. Run the required scan.
   The progress tracker displays the status of the scan run. You can close the progress tracker and view it later without having to stay in the modal for the execution to complete. To see the status later, go to **Results** in the application navigator. Select the required scan results record to review its status.
3. To see the status of the scan, select **Go to Result**.
   If the scan completes, a list of findings is displayed. You can also find all the checks that ran as a part of the scan by selecting the Checks related list. If any of the checks fails, click Failures related list to review them. If the full scan takes some time to complete, you can check the status by selecting **Results** from the application navigator.

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Parallel scans

Parallel scan is a functionality in Instance Scan that allows multiple scans to run in parallel instead of sequential execution. This improves efficiency and reduces wait times when several scans are executed concurrently.

Use parallel scan to reduce wait times and improve throughput when multiple scans are triggered at the same time. Parallel execution is especially useful in environments with large development teams or frequent scans, where running scans sequentially can delay feedback and slow development and validation workflows. By enabling concurrent execution, parallel scan reduces delays caused by sequential processing and helps teams receive faster feedback when multiple scans are triggered across scripts, tables, update sets, or large code and configuration changes.

Parallel scan uses a queue-based execution model when `glide.scan.queue.enabled` property is enabled. If queuing is enabled, the request is placed in the queue and later picked up for execution. If queuing is not enabled, the scan starts immediately when selected.

Note: Scans can run in parallel only when both queuing and parallel scan properties are enabled.

System properties for parallel scan

- glide.scan.parallel_scan_enabled: This property enables or disables parallel scan execution for Instance Scan. The default value for this property is `true`, allowing multiple scan requests to execute concurrently, subject to the configured maximum parallel scan limit. If set to `false`, scans run sequentially, even if queuing is enabled.

  For example, if the maximum parallel scan value is configured as 5, the first five scans are executed simultaneously. Any subsequent scans are added to a queue and run after the initial scans complete.

- glide.scan.queue.enabled: This property controls whether Instance Scan uses the queue-based execution model. The default value is `true` allowing scan requests to be sent to NowMQ and processed through the queue. This property must be enabled to allow scans to run in parallel, as queued execution is required for concurrent processing. When disabled, scan execution starts immediately when a scan is selected, bypassing the queue.
- glide.scan.max_parallel_scans: This property defines the maximum number of instance scans that can run concurrently. The default value for parallel scan limit is 5, with a supported minimum value of 1 and a maximum value of 15.

Note: Parallel scan is applicable on full scan, test scan, suite scan, and reactive scan. It is not applicable with point scan.

See Instance Scan properties for more information.

Reviewing of scans

After the scans have been executed, you can review them with the findings and results components.

- Results: An Instance Scan result reports the status and type of scan. You can also see all the checks that ran as part of the scan and all other information related to the scan such as errors and scan logs. Use Scan Results dashboard to get detailed information about an executed scan.
- Findings: A finding is a reference to a record that has violated a check which was used in a scan. You can also mute a finding if you don't want a finding to be reported in the next scan.

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Results

An Instance Scan result reports the status and type of scan. You can also see all the checks that ran as part of the scan and all other information related to the scan such as errors and scan logs.

On selecting **Go to Result** from the progress tracker of a scan, the Scan Result is identified by a **Result Number**. Select **Results Dashboard** to view the scan results.

The **Scan Type** field states the type of scan that was executed. The **Status** field shows the status of the scan which can either be **In progress**, **Complete** or **Failed**. The **Execution Time** field shows the duration of the scan in milliseconds.

There are the following related lists in the **Scan Result** form.

Scan Findings

The Scan Findings related list shows up all the findings encountered during the execution of the checks.

Suites

The Suites related list shows up all the suites that ran as part of the scan.

Checks

The Check related list shows all the checks that ran as part of the scan.

Failures

The Failures related list shows up all the checks that failed during the execution of the scan. It also shows up the reason of its failure in the form of an error message.

Scan Log

The Scan Log related list shows up messages encountered during the entire scan.

Scan Statistics

The Scan Statistics related list shows up

Target

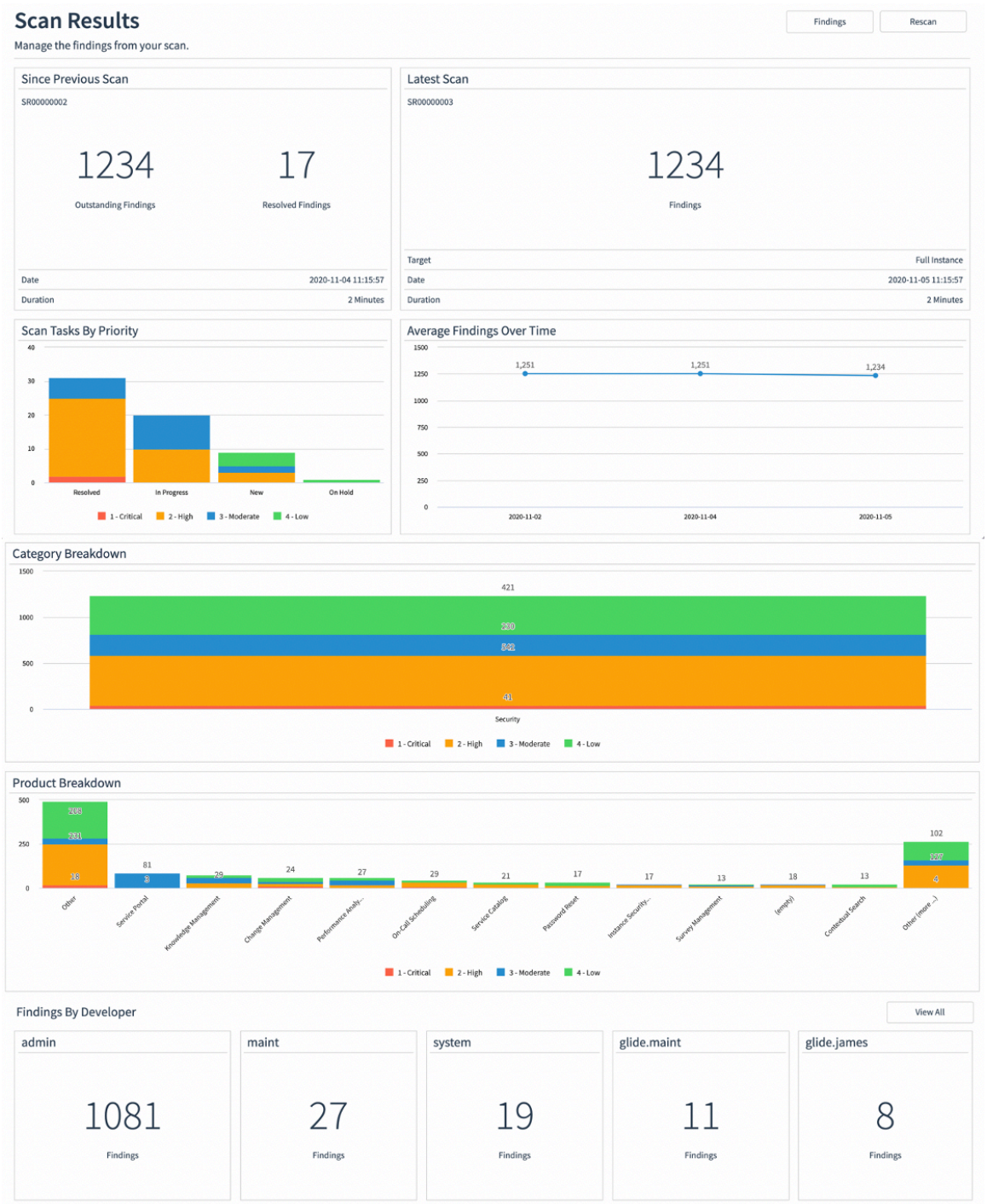
The Target related list shows all the targets against which the checks have executed.

Scan results

Scan Results dashboard helps you with an overview of all details of an executed scan.

Navigate to **All** > **Instance Scan** > **Results**. Select a scan result from the Scan Results list. Click Results Dashboard link on the Scan Result form.

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Select **Rescan** to execute the same scan again. If you want to see all the findings grouped by checks, select **Findings** at the top right corner.

Fields	Description
Previous Scan	Details about the previous scan. • Result number: Link to the previous scan result record • Outstanding Findings: Total findings whose status has not been marked as Resolved.

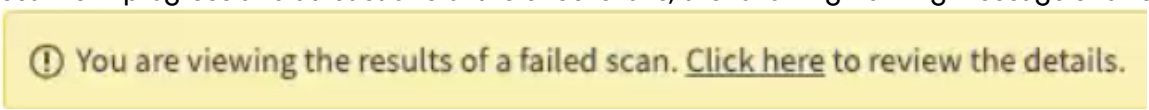
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Fields	Description
	• Resolved Findings: Total findings whose status has been marked as Resolved. **Note:** Not all findings that have been marked Resolved are fixed. If a finding has not been fixed and has been marked Resolved, it still adds to the count of total findings. • Date: Date and time on which the previous scan started • Duration: Total time needed to complete the previous scan
Latest Scan	Details about the recent completed scan. • Result number: Link to the latest scan result record • Findings: Total number of findings found in the latest scan • Target: Target against which the scan is executed ○ Full Instance: Scans all the available records in the instance ○ Scoped App: Scans selected scoped apps. You can select multiple scoped apps. ○ Update Set: Scans multiple update sets. • Date: Date and time on which the scan started • Duration: Total time needed to complete the scan
Scan Tasks By Priority	Scan tasks sorted by priority. The priority comes from the checks to which these tasks belong. **Note:** The states come from the states of the tasks associated with the findings.
Average Findings Over Time	Reporting of the average number of findings in a day.
Category Breakdown	Category breakdown of the checks that have run as part of the scan
Product Breakdown	Product family of each of the scan findings records.

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Fields	Description
	Note: Incident records don't have product family.
Findings By Developer	Name of the user whose changes generated the findings. **Note:** Only the top 5 user names appear on the list. Click **View All** to view all the findings grouped by users.

If a scan is in progress and at least one of the checks fails, the following warning message shows up.



Findings

A finding is a reference to a record that has violated a rule from a check on the instance. You can find the source record and the number of times the record triggered rules of a given check.

Each finding is specific to a result and each result is specific to a scan that has been executed.

Note: When you run a scan, you definitely get a result of the scan but might not get any findings. There might be no findings encountered during the execution of the checks.

Note: If a record is inactive, the checks don't generate any findings for that record.

The Scan Finding gives information about the check that has been violated by a record. The **Source Table** and **Source** fields point to the record that has violated a rule from a check during the execution. You can find more information about the record by clicking the information icon. The **Count** field shows the number of times the record has violated the check rules. The finding also shows the version of the check that generated the finding. The **Product Family** field shows you the product family for each check. The **Task** field helps you to assign a task to an individual or a group. See Creating scan tasks for more information. If you want to avoid a finding from being generated from any future scans, use the **Mute Rule**.

Note: If you use the **Mute Rule**, you must also select a reason for muting the finding.

Mute a finding

Mute a finding on the Scan Finding form to avoid the finding from being reported in the later scan results.

Before you begin

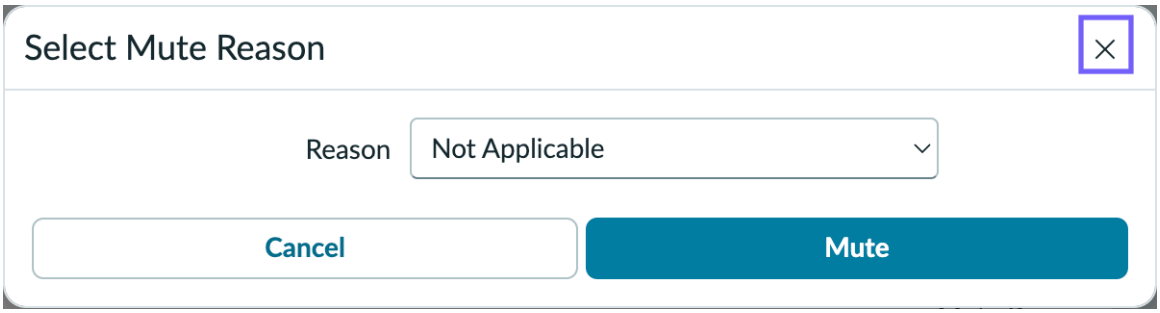
Role required: admin.

Procedure

1. Navigate to **All** > **Instance Scan** > **Results**.
   A list of Scan Results shows up.
2. Select the scan result you ran from the list.
   The Scan Result form for the scan shows up.
3. Select the Scan Findings related list.
   A list of findings for the scan shows up.

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4. Use the information icon to open the finding you want to mute.
5. Select **Mute** to avoid the finding from being reported in the next scan.



Note: The Select Mute Reason modal shows up only if you select **Mute** on the Scan Finding form.

6. Select the reason for muting the finding and then select **Mute** on the modal.

Note: Select **Unmute** if you want the finding to be reported in the later scans. The **Unmute** button is visible only when you have muted a finding.

Creating scan tasks

Create a scan task to facilitate task assignments from the finding of a record.

Before you begin

Role required: scan_user

Procedure

1. In the navigation filter, enter `scan_task_list.do`.
2. Select **New** to create a new scan task.
   The **Scan Task** form appears.
3. Fill in the following fields in the form.

Scan Task form details

Field	Description
Number	Auto-generated task number
Assigned to	Person responsible to work on the task
Assignment group	Group responsible to work on the task
Active	Option to activate task
State	State of the task. ○ **New** ○ **In Progress** ○ **On Hold** ○ **Resolved**
Short description	Brief description about the task
Description	Additional information about the task

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Field	Description
Work notes	Additional notes

Note: The scan_user can assign the task only to a non-scan_user. The user to which the task has been assigned also gets the same privilege as the scan_user.

Queue your scan

Leverage the scan queue feature to line up your scans for automatic execution following the current scan.

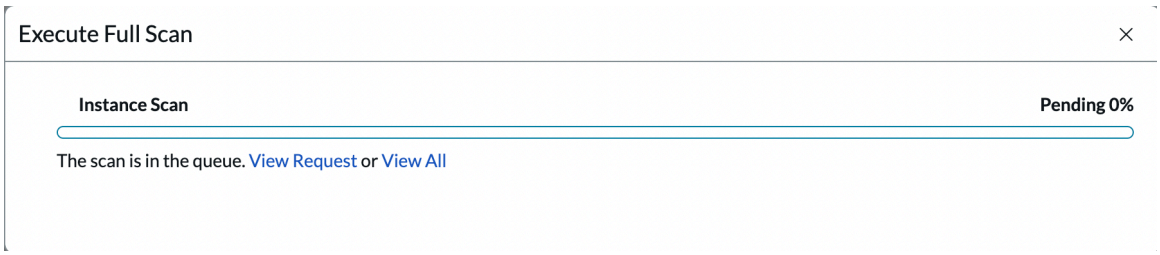
Before you begin

Role required: admin

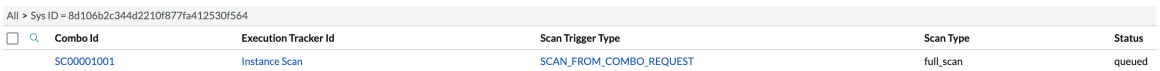
Procedure

1. Navigate to **All** > **Instance Scan** > **Checks**.
   The list of checks shows up.
2. Select a scan to run it on the selected check.
   The scan execution modal shows up.

   Note: If another scan is ongoing, the modal gives a message that the current scan is in the queue. You will also see View Request and View All links in the scan modal.

   If you select the View All link, the list of all queued scans shows up. If you select View Request, it only shows the status of the selected scan.

   Note: If a scan is already in progress and you select another scan, it gets queued to be executed. If you select the same scan again, it doesn't create duplicate records in the queue. Once the ongoing scan completes (successful or failed), the next scan in the queue starts executing automatically.

   If there is no ongoing scan, the selected scan starts the execution process. You will see the execution modal with **Cancel Scan** and **Go to Results** options.

3. **Optional:** Implement the following steps to view the status of the ongoing scan or any other scans.
   a. Go to **All** > **Instance Scan** > **Scan Results**. The list of all scan results and their status shows up.
   b. Select a scan record to see more details. The Scan Results form for the selected scan record shows up.

      Note: If the scan is ongoing, the status is In progress. If the scan is queued, the status is Pending.

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c. Select Show Progress related link.

(Optional)



Note: This related link is visible only if the selected scan is currently executing.

d. Select either the Cancel Scan related link or the **Cancel Scan** button on the scan execution modal if you want to cancel the ongoing scan.

Note: These options are visible only if the scan is currently executing and is not yet completed (successful or failed).

Cancel a scan

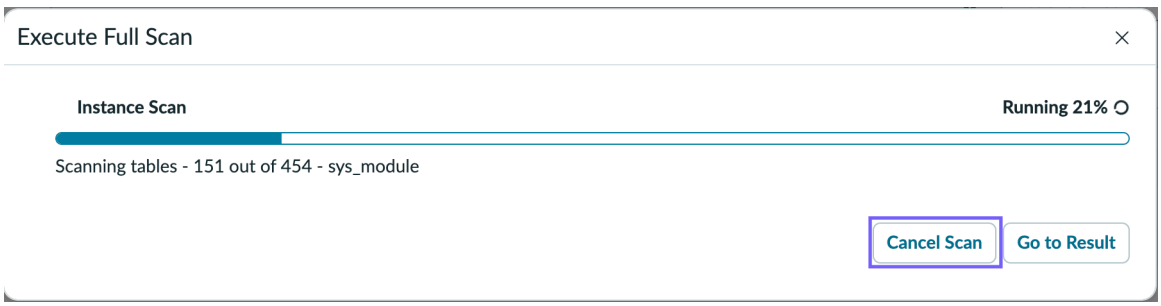
Cancel or abort an ongoing scan by either selecting Cancel Scan in the scan execution modal or the Cancel Scan related link in the results record.

Before you begin

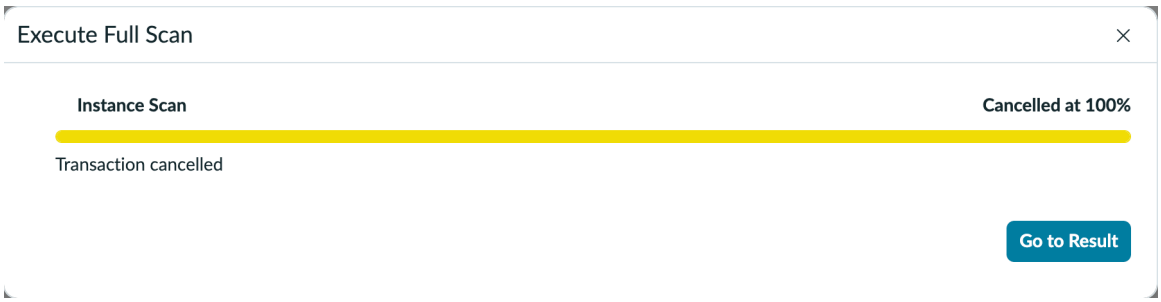
Role required: admin

Procedure

1. Navigate to **All** > **Instance Scan** > **Checks**.
   The list of checks shows up.
2. Select a scan to run it on the selected check.



   The scan execution modal shows up.
3. Select **Cancel Scan** to cancel the ongoing scan.
   The Cancel Scan modal shows up with the status of the cancelled transaction. You can also select **Go to Results** to see the results record of the selected scan.

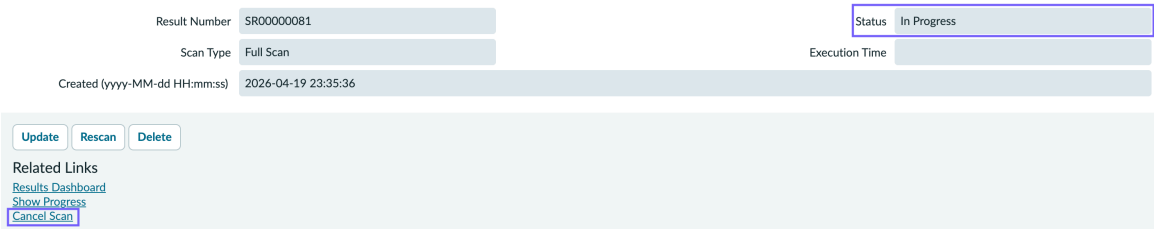


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Note: The **Cancel Scan** button won't show up if the scan is complete (successful or failed).

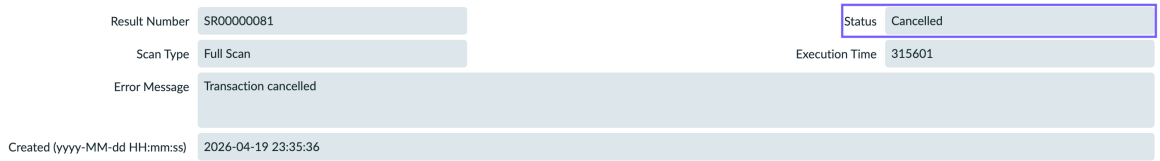
4. **Optional:** Select **Cancel Scan** related link to cancel the scan, if you have selected **Go to Results** in the previous step.

(Optional)



Note: The **Cancel Scan** related link is visible only if the scan is still running. The **Status** field in the Scan Results form say In Progress if the scan is still ongoing.

5. Close the Cancel Scan modal or select **Go to Results** in the Cancel Scan modal.



The Scan Result record is updated. The **Status** field now says Cancelled.

6. Scroll down to the **Scan Findings** related list.
It generates the findings of the scan till the point it was cancelled.

Note: Since the scan is already cancelled, the Cancel Scan related link doesn't show up.

Using the Instance Scan dashboard

Compare and analyze the results of the scans in your instance by representing it on the premium Performance Analytics (PA) dashboard.

Before you begin

You've created some checks to execute the full scan. See Create a check and Execute a full scan for more information.

Role required: admin.

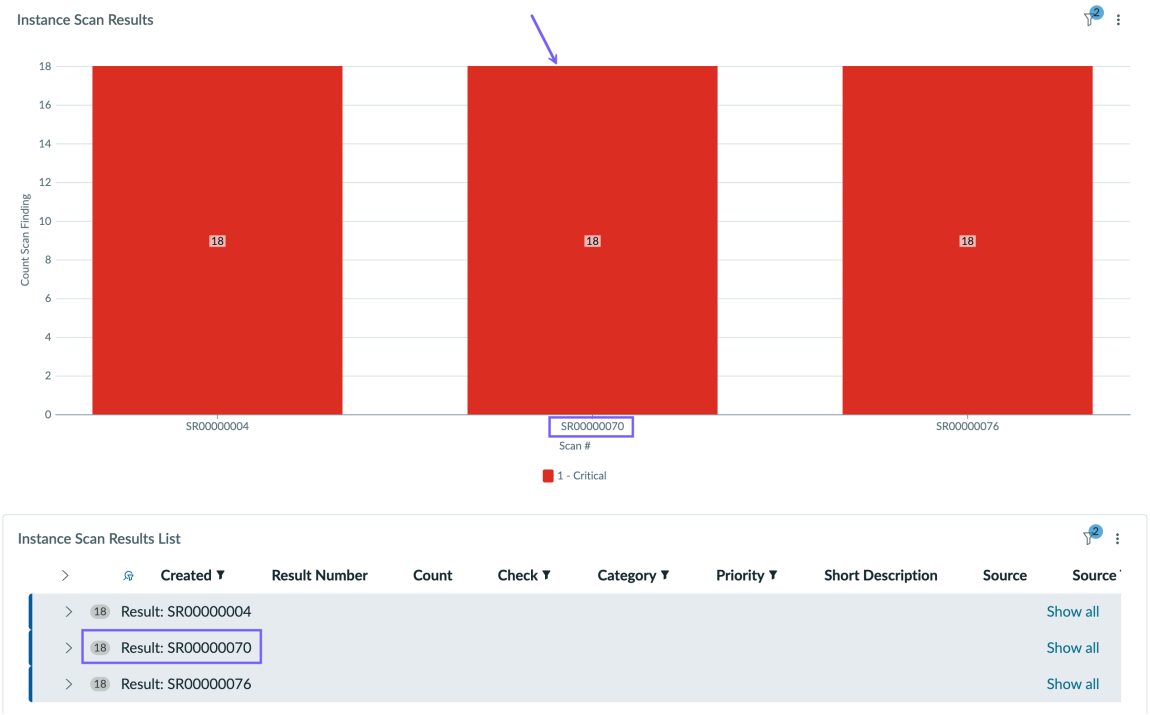
Procedure

1. Navigate to **All** > **Instance Scan** > **Dashboard**.
2. Select an option from the **Instance Scan Category** or **Instance Scan Priority** list.

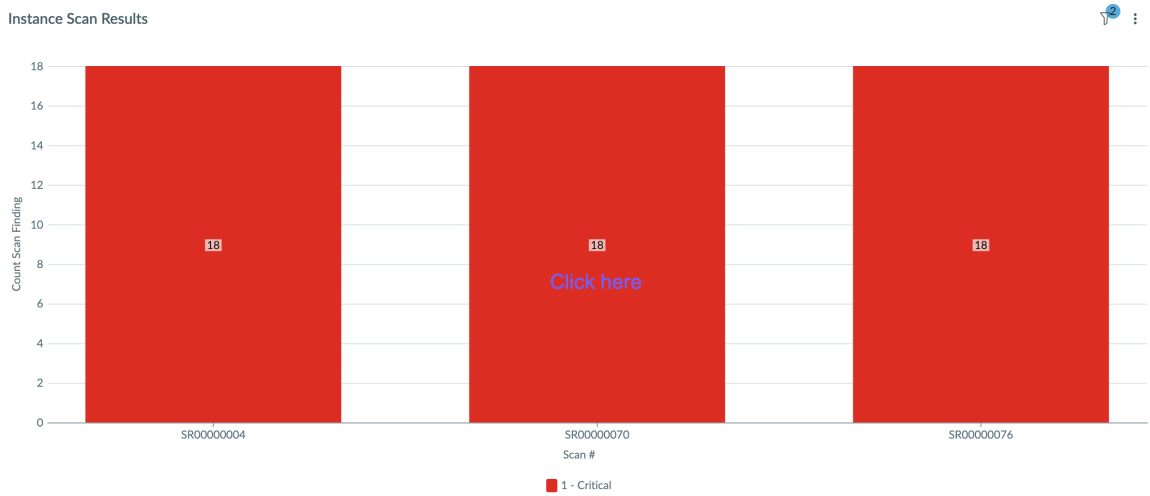
Note: The dashboard is applicable only for full scans. The **Instance Scan Category** appears only if you have data or a finding in the result set that are applicable to the categories.

3. Select the scan result from the Scan Results list that generates an unexpected number of check findings.
A related list of findings related to only that scan is expanded.

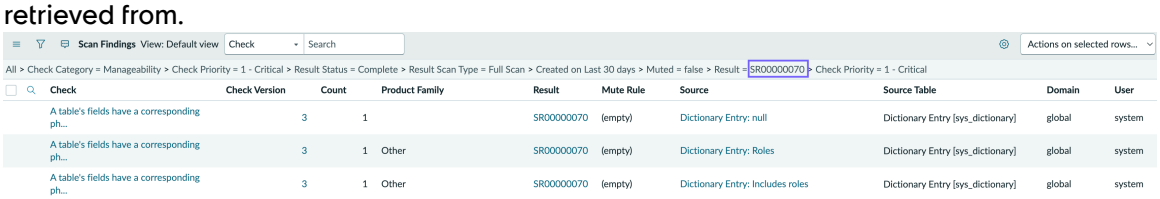
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4. **Optional:** Select the scan column directly from the dashboard to display the related list of checks.



The related list of checks appears. The list also indicates the source that the finding has been retrieved from.



Result

A dashboard showing the results of scans is created.

Instance Scan references

The reference topics provide additional information about Instance Scan.

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Instance Scan roles

Instance Scan is installed with these roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

Instance Scan user [scan_user]

The scan_user role can run different types of scans and view the findings and results.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Instance Scan properties

On the properties form, you can set parameters that control how the instance executes.

Property	Description
glide.scan.inactive_records	• Controls whether instance scan considers inactive records, where active=false • The default value is false. Instance Scan scans only the active records • When enabled, scans will include inactive records in the health check evaluation
glide.scan.max_parallel_scans	• Defines the maximum number of instance scans that can run concurrently • The default value is 5 • Used by the scan queue system to limit parallel scan execution
glide.scan.parallel_scan_enabled	• Enables or disables the parallel scan feature • The default value is true • When enabled, it allows multiple scans to run simultaneously based on the max_parallel_scans limit

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Property	Description
glide.scan.queue.enabled	• Enables or disables the instance scan queue system • The default value is true • When enabled, scan requests are queued and processed based on available capacity
glide.scan.base_system_records	• Controls whether instance scan checks out-of-box (base system) records • The default value is false. The Base system records are skipped **Note:** The Base system records are determined by checking if they would be replaced during an upgrade using the CollisionAPI. • When enabled, scans will include records that would be replaced on upgrade (non-customized ServiceNow delivered records)
glide.scan.sn_non_standard_scopes_list	• Comma-separated list of ServiceNow scopes that shouldn't be treated as third-party scopes • The default value is "" • Used to exclude specific non-standard ServiceNow scopes from being classified as ISV/ third-party applications during scan classification

Monitor System Events and Scheduled Jobs dashboards

Use the **System Events and Jobs Dashboard** module to monitor the system event processing system and monitor the scheduled jobs processing system in the **Scheduled Jobs** dashboard tab.

You need to install the dashboard application to view information about events and queues. See Understand your System Events Dashboard for more information. There are two ways of representing the information about the events and queues in the event processing system.

- Scores
  - Scores-System Event processing health checks
  - Scores-Current Scores
  - Scores-Trends
- Details: See Details-Configure an alert for more information.

In order to view the completed jobs details, select the **Scheduled Jobs** tab. See Understand your Scheduled Jobs dashboard for more information.

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See System Events and Jobs dashboard roles if you want to know about the required roles for the System Events and Jobs dashboard access.

System Events and Jobs dashboard roles

Events and Jobs dashboard is installed with these roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

System administrator [admin]

To learn more about managing per-user subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

The admin can access all information on the events and jobs dashboard. They can also setup an alert on an instance level.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevate to a privileged role .

No.

Special considerations

None.

Understand your System Events Dashboard

Use the System Event Processing dashboard to set the filters to display information about events and queues.

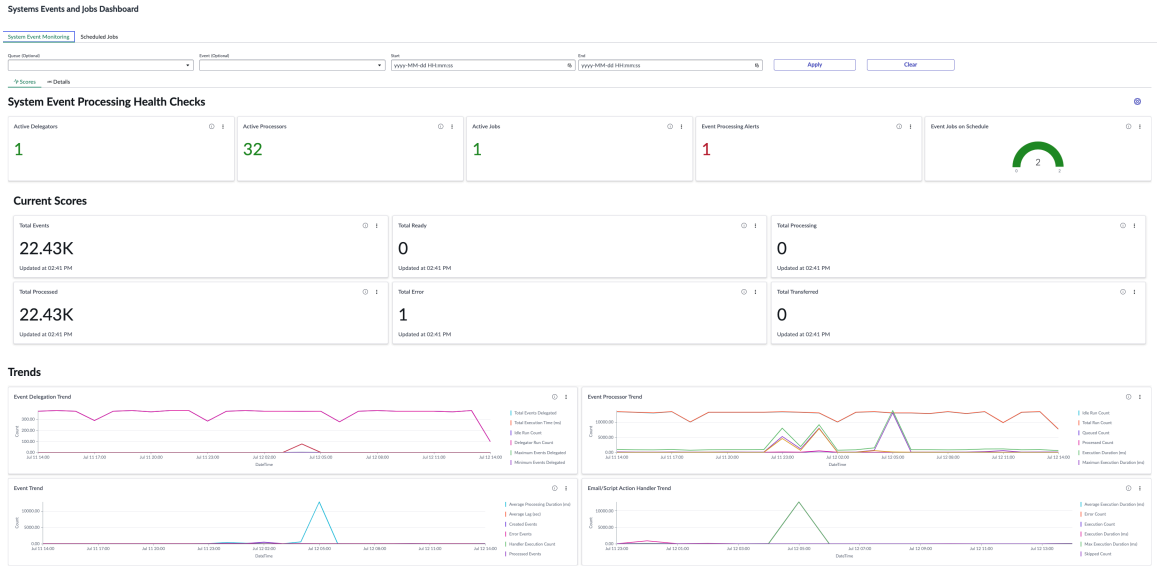
Before you begin

Role required: admin

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Procedure

1. Go to **All** > **System Diagnostics** > **System Events Dashboard**.



   The System Event Monitoring dashboard shows up.

2. Select the Queue and Event you want to view the information about.

   Note: By default, the default queue is selected. You can also select other queue and event types.

3. Set the Start and the End dates for which you want to view the queues and events information.
4. Select Apply to apply the filter set using the above steps.

   Note: You can also clear the filter using Clear and make new selections.

   The Scores and Details sections show up based on your selections.

Scores-System Event processing health checks

The Scores and tab shows what's going on in the event processing system.

Field	Description
Active Delegators	Indicates whether there is an event delegator enabled. The event delegator is responsible for delegating out events to queues that use the delegated event functionality. Clicking on the card will take you to the list of delegators. Number of delegators in green is positive. **Note:** This card shows up only if the **Queue** uses the delegator model. If this card shows up, the **Active Jobs** card doesn't show up. If no queue is selected, **Active Delegators**, **Active Processors**, and **Active Jobs** cards show up simultaneously.

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Field	Description
Active Processors	The number of active event processors in the event system. Click on the card to take you to the list of active processors (if any). Number in red indicates that the processor needs to be configured. **Note:** This card shows up only if the **Queue** uses the delegator model. If this card shows up, the **Active Jobs** card doesn't show up. If no queue is selected, **Active Delegators**, **Active Processors**, and **Active Jobs** cards show up simultaneously.
Active Jobs	Number of jobs associated for a queue in processing framework. These jobs are different than the earlier jobs used in the delegator model. In processing framework based on the configuration and checks, the processing jobs are created automatically. **Note:** This card shows up only if the **Queue** doesn't use the delegator/ dedicated model and is backed by processing framework. If this card shows up, the **Active Delegators** and **Active Processors** cards don't show up. If no queue is selected, **Active Delegators**, **Active Processors**, and **Active Jobs** cards show up simultaneously.
Event Processing Alerts	The number of event processing alerts in the last 5 hour. Clicking on the card takes you to the Events Alerts table that has all the corresponding alerts.
Event Jobs on Schedule	Number of scheduled jobs events that are on schedule.

Scores-Current Scores

Use the Current Scores section to have a direct check on the sysevent table and shows the current states of the events.

Field	Description
Total Events	Total events in the system within the set time period
Total Ready	Total events that are ready to be processed
Total Processing	Total events that are processing
Total Processed	Total events that are already processed

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Field	Description
Total Error	Total errors in the events
Total Transferred	Total events transferred from previous shard to the current shard

Scores-Trends

Use the Trends section to have a metric-based graphical understanding of the activities in the event processing system.

Note: By default, the trends are set to 24 hours. You can set it up to 15 days.

Field	Description
Event Delegation Trend	Metric collected related to the delegation of events
Event Processor Trend	Metric collected for the various events processor
Event Trend	Metric for specific events
Email/Script action Handler Trend	Metric collected for event handlers

Details-Configure an alert

Review the details of an alert set every 15 minutes mostly on an instance level. By default, five alerts are provided along with the application. The alerts are setup based on a set of conditions, including what queue it applies to.

Before you begin

Role required: admin

Procedure

1. Go to **All** > **System Policy** > **Events** > **Configure Alerts**.
   The Events Alert Configurations list shows up.
2. Select one of the available alerts to make changes to the conditions that will trigger an alert.

   Note: You receive a notification in the notification icon when the alert is created.

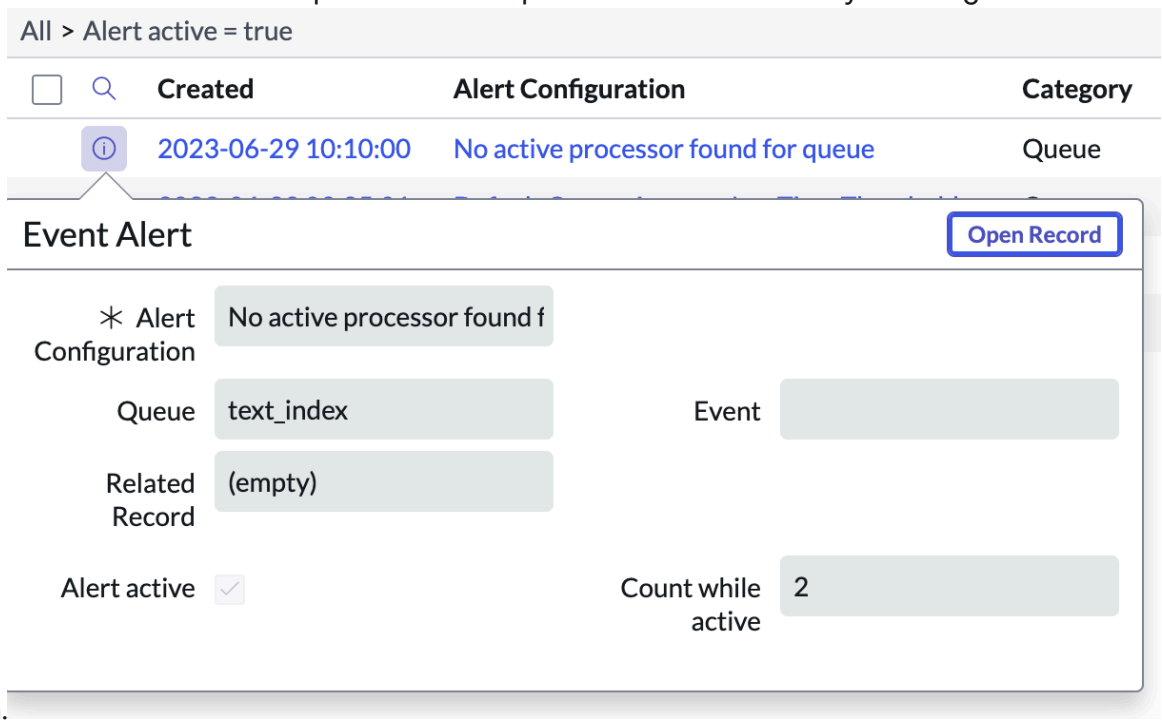
3. Go to **All** > **System Policy** > **Events** > **Alerts**.
   The Event Alerts list shows up.

   Note: The alert conditions are validated every 15 mins approximately.

4. Select the alert you just updated.

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Note: You can open the Event Alert form for the selected alert by selecting the Created column. If you select the Alert Configuration column, the Event Alert Configuration form for the selected alert shows up. You can also open the Event Alert form by selecting the 'i'



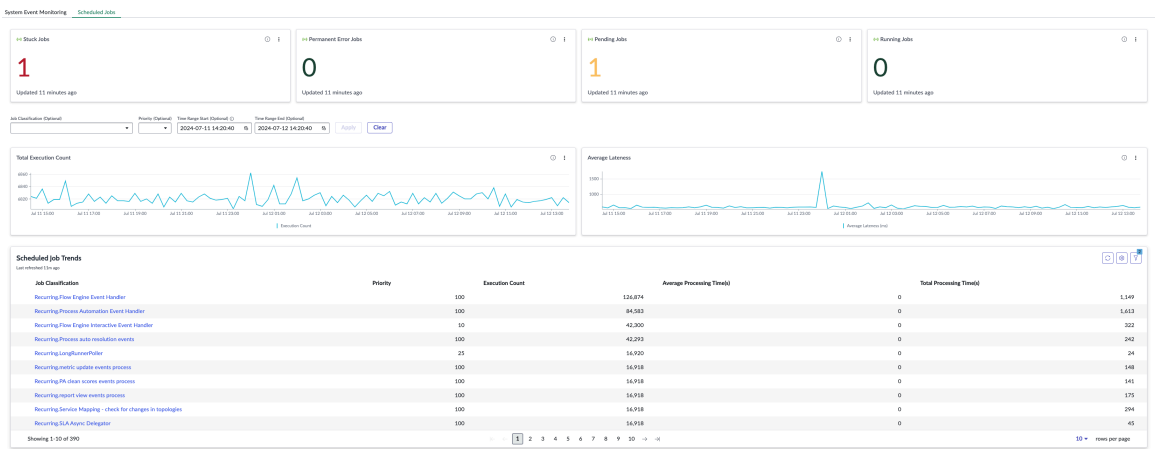
icon.

5. **Optional:** Select **Reset alert** if the alert notification is no longer required.

Understand your Scheduled Jobs dashboard

Visit scheduler dashboard to learn about key health metrics and insights of scheduled jobs.

Navigate to **All** > **System Diagnostics** > **System Events and Job Monitoring** > **Scheduled Jobs Dashboard**.



The following cards show up on the dashboard

Field	Description
Stuck Jobs	The scheduled jobs that are pinned to a non-existent node show up here. If a scheduled job

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Field	Description
	is assigned to run on a non-existent node and is a parent job that doesn't have Startup as the **Trigger Type**, it is classified under **Stuck Jobs**. The System ID column states the node that the job was assigned to run. One of the reasons of a job being classified as **Stuck Jobs** is if an instance was cloned from another instance and now there are jobs pinned to run on the old instance's nodes. You can take the following actions on the stuck jobs: • You can delete it to remove the job from sys_trigger permanently. • You can recover these jobs which clears the**System ID** column data and allows it to run again based on its **Next Action** time.
Permanent Error Jobs	The scheduled jobs which have a **State** of **Permanent Error** show up here. If you have upgraded from a pre-Utah version to a more recent version, a fix script is executed and it sets the scheduled jobs to **Permanent Error** state if the job was a parent job or a standalone job and picked up to run on a specific node that no longer exists. You can also set the job state to **Permanent Error** manually. You can take the following actions on the permanent error jobs: • You can delete it to remove the job from sys_trigger permanently. • You can recover these jobs which set the state back to **Ready**. It can again run based on its **Next Action** time.
Pending Jobs	Jobs that are to be executed soon.
Running Jobs	Jobs that are actively running.
Jobs Classification (optional)	Optional way to group certain jobs based on filter conditions to collect job completion history by the defined group/classification. You can set up these classifications in the Job Classification Rules table. The default classification is TriggerType.JobName.
Total Execution Count	Graphical representation of the total number of scheduled job executions on your instance over a period of time. The default time period is last 24 hours. You can view the data only from last 7 days. The data originate from the sys_scheduler_job_history table.

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Field	Description
	Note: When you click on an execution count in the graph, the Scheduled Job History list shows up. The list of jobs have been grouped using Jobs Classification concept with Trigger Type as either Run Once or Recurring.
Average job wait time	Graphical representation of the average wait time in milliseconds of all scheduled jobs on your instance over a period of time. The default time period is last 24 hours. You can view the data only from last 7 days. The data originates from the sys_scheduler_job_history table. **Note:** When you click on a wait time average data in the graph, the Scheduled Job History list shows up. The list of jobs have been grouped using Jobs Classification concept with Trigger Type as either Run Once or Recurring.
Scheduled Job Trends	List of completed jobs grouped by Job Classification concept. The default time period is last 24 hours. You can view the data only from last 7 days. The data originate from the sys_scheduler_job_history table.

Note: For both **Stuck Jobs** and **Permanent Error Jobs** tiles, the data and columns originate from the sys_trigger table. Both the tiles are used to cleanup jobs and keep the scheduled jobs in a positive state. Select the required tile to see the list view of the jobs. The **Wait time** column on both the lists refers to how late the job is based on the time it was supposed to run. If **Next Action** is in the past, the wait time is calculated as the current time minus the next action time. For example, if the job was scheduled to run two minutes ago, then the wait time is two minutes. If the job is scheduled to run in the future, then the wait time is 0.

Scheduled Job Trends

This table provides details on the history of completed jobs by classifications. Default view provides the data for last 24 hours.

Field	Description
Job Classification	Provides a way of grouping similar type of jobs based on job name, trigger type (recurring, run once, etc.).
Priority	Priority at which the jobs are processed.

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Field	Description
	Note: The lower the number, the higher is the priority. For example, priority of 10 is higher than 100.
Execution Count	Number of times the job has been executed within a timeframe.
Average Processing Time(s)	Average time in seconds needed to process the jobs.
Total Processing Time(s)	Total time in seconds needed to process the jobs.

Platform performance

Monitoring and optimizing ServiceNow AI Platform performance is an important part of maintaining your instance. Optimizing platform performance supports a smooth and consistent user experience, and enhances the platform's scalability and reliability.

Get started with ServiceNow AI Platform performance

Explore



Learn the fundamentals of optimizing platform performance.

Configure



Learn how to configure the ServiceNow AI Platform to optimize performance.

Monitor



Monitor key metrics and transactions in the ServiceNow AI Platform to track performance trends and identify potential issues.

Resolve issues



Take necessary steps to address performance issues when they arise.

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Reference



Get details about form, methods, and properties related to platform performance.

Exploring platform performance

The ServiceNow AI Platform provides configurations, monitoring, and diagnostics that administrators can use to support optimized system performance.

ServiceNow AI Platform performance overview

Managing platform performance is important for enabling a smooth and reliable user experience, and for enhancing your instance's scalability. Instance administrators can use various tools to improve, monitor, and troubleshoot ServiceNow AI Platform performance. These proactive measures help maintain optimal functionality and avoid potential disruptions.

Users that manage ServiceNow AI Platform performance

Users

User	Description
Instance administrator	Configure the instance to optimize performance, monitor the instance for performance issues and degradation, and troubleshoot performance issues.

Platform performance optimization workflow

Instance administrators can optimize ServiceNow AI Platform performance by taking the following steps:

1. Configure key ServiceNow AI Platform components to support optimized performance.
2. Monitor platform performance to identify performance degradation.
3. Resolve platform performance issues when the arise.

What to explore next

To learn more about improving ServiceNow AI Platform performance, see:

- Configuring the ServiceNow AI Platform to optimize performance
- Resolving platform performance issues
- Monitoring platform performance

Import set performance

The algorithm transforms import sets from their staging table into their final destination.

Importing data via an import set requires two phases:

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1. The data is loaded from a data source into a staging table
2. The data is transformed from the staging table into a target table

The transform algorithm operates in "blocks" of 100 records at a time as opposed to the previous algorithm which transformed a single record at a time. The newer approach allows the application server to pre-fetch a variety of information relevant to each block of records, reducing the number of unique interactions with the database and improving throughput.

Who should expect to see a performance improvement?

Any customer using import sets should expect to see a performance improvement in large transformations.

What kinds of transformations benefit the most from these changes?

Transformations with a large number of reference or choice type columns see the largest improvement.

What kind of transformations benefit the least?

Transformations that with complex or unkeyed coalesce conditions see a proportionately smaller benefit.

Configuring the ServiceNow AI Platform to optimize performance

Configure browser settings, transaction and application quotas, and operational toggles options to optimize performance. Optimizing ServiceNow AI Platform performance supports a smooth a responsive user experience.

Configuration overview

Most configuration for platform performance optimization is completed by instance administrators in each instance of the ServiceNow AI Platform. Any user can verify browser configuration to optimize performance.

- Set transaction quotas

  Instance administrators set transaction quotas to help prevent poorly performing queries and scripts from consuming system resources. After determining normal parameters for transactions, you can create a transaction quota rule that defines when a long-running transaction should be canceled.

- Set application quotas

  Instance administrators can set application quotas in addition to global transaction quotas. Application quota rules limit the number of events or jobs that can run within an application's scope during a specified amount of time, helping optimize bandwidth use.

- Set operational toggles

  Instance administrators can control how much bandwidth an application uses in the instance by mapping system run levels to operational toggles.

- Verify browser settings for performance optimization

  Verify that your browser supports data compression to support optimal performance. Any user can verify that their browser's settings.

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Transaction quotas

Transaction quotas allow you to define a quota policy for different types of transactions. A transaction quota cancels any transaction in violation of the policy and notifies the user of the cancellation.

Administrators can set transaction quotas to prevent poorly performing queries and scripts from consuming system resources. This ensures that no transaction consumes enough resources to prevent other transactions from running. Administrators can also view cancellation log messages to identify transactions that might consume excessive resources.

The Transaction Quotas plugin is active by default on all new and upgraded instances.

How transaction quotas work

Transactions use the Quota Manager, which is a background thread that cancels transactions according to transaction quota rules. The Quota Manager performs the following actions.

1. Obtains a list of active transactions, similar to the list under **User Administration** > **Active Transactions**.
2. Cycles through each transaction and checks all quota rules with conditions matching the transaction. The first occurrence that exceeds any of the quota limitations triggers a transaction cancellation. If a transaction changes or there is a new quota rule, the Quota Manager re-evaluates the transaction.

   Note: The **Order** field on a quota rule affects the order in which the quota rules are checked. The Quota Manager checks lower-order rules first (for example, order 80 before order 90), but ultimately checks all rules. This might have marginal performance implications, depending on the conditions of the rules involved.

3. Cancels the transaction if it has been running longer than the specified quota maximum.
4. Logs the running transactions.
5. Sleeps until the next heartbeat, which is controlled by the *glide.quota.manager.heartbeat* system property.

Transaction cancellation from exceeded quotas

When a transaction runs longer than the maximum duration specified by a quota rule, the user is notified of the cancellation and the reason.

Additionally, a warning is logged in the Transaction Cancellation Log whenever a transaction is cancelled due to exceeded quotas. To view the Transaction Cancellation Log, navigate to **All** > **System Logs** > **System Log** > **Transaction Cancellation Log**.

Transaction cancellation examples

Transactions can be canceled for more than one reason. Look for the following indicators.

- **maximum execution time exceeded**: This message appears when the glide.quota.manager threads cancels the transaction.
- **canceled by other transaction**: This message appears when the transaction was canceled by the session thread that initially issued it, and not by the glide.quota.manager thread.
- **canceled by user request**: This message appears when the user selected the red X button to cancel the running transaction.

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If you are looking for transactions that were canceled by glide.quota.manager, search for the **[Message] [Contains] [maximum execution time exceeded]** combination. For example:

```
Cancelling transaction /home.do - Default-thread-11.0
 (maximum execution time exceeded): Thread Default-thread-11.0
 (Default-thread-11.0, F530DD111B11111111FC031767DA158E), after
 30000ms
```

.

Configure a transaction quota rule

Transaction quota rules allow you to define a quota policy for different types of transactions.

Before you begin

Role required: admin

About this task

Transaction quota rules allow you to specify the following conditions.

- The conditions under which the policy applies.
- The order in which transaction quotas apply.
- The maximum duration of a transaction before the quota manager cancels it.

Before setting transaction quotas, navigate to **All** > **User Administration** > **Active Transactions** to review the normal transaction activities for your instance. You can view and terminate long-running transactions if necessary. Over time, you can determine the normal transaction load for your instance and set your quotas to match these norms.

⚠ **Warning:** Setting transaction quotas too low can severely impact your users and prevent normal instance operations. Test your transaction quotas rigorously before implementing them in production.

Procedure

1. If necessary, activate the Transaction Quotas plugin.
   To verify whether the Transaction Quotas plugin is already active, navigate to **Admin** > **Application Manager** and search for Transaction Quotas in Application Manager. If the plugin is included in the **Installed** tab, it is already activated.
2. Navigate to **All** > **System Definition** > **Quota Rules**.
3. Click **New**.
4. On the Transaction Quota Rule form, fill in the fields.
   For a description of the field values, see Transaction quota rule form.
5. Set a condition to specify when the transaction quota should take effect.
   The transaction quota rule condition builder displays conditions that are only applicable to transactions. For a description of the condition builder options, see Transaction quota rule condition builder.
6. Select **Submit**.

Related topics

Optimize widget rendering time on responsive dashboards

Add or modify a transaction cancellation message

The Quota Manager uses a UI page to control the contents of the transaction cancellation message.

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Before you begin
Role required: admin

About this task
Knowledge of Apache Jelly is highly recommended when modifying the UI page. See Extensions to Jelly syntax for more information.

Procedure
1. Navigate to **All** > **System UI** > **UI Pages**.
2. Open the UI page with the name **transaction_canceled_quota**.
3. In the **HTML** field, add or modify the new cancellation message.
   To add variable information to the cancellation message, see Methods to add variable information to the cancellation message.
4. Click **Update**.

View a transaction cancelled because of a quota rule

The Quota Manager logs each canceled transaction as a warning message in the system log.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Logs** > **System Log** > **Warnings**.
2. Edit the filter to add the condition **[Message] [starts with] [Cancel]**.
3. Select **Run**.

Enable transaction quota debugging

You can enable the logging of transaction quota debugging information by enabling the system property.

Before you begin
Role required: admin

Procedure
1. Add the `glide.quota.manager.debug` system property, and set the value to true.
2. Navigate to **System Diagnostics** > **Session Debug** > **Debug Quotas**.
   The Debug Quota script runs to enable debugging.

What to do next
After setting the above system property to **true**, go to your system log to see messages from the Quota Manager.

Related topics
Add a system property

Application quotas

You can set a limit on the number of events or jobs that can run in an application's scope within a specified time. Limiting the number of events or jobs running at the same time can help optimize bandwidth usage.

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Application quota rules limit the number of events or jobs that can run within an application's scope during a specified amount of time. Each scoped application can have one application quota rule. When an application exceeds the quota limit, all transactions running in the application scope are canceled. Until the next update period, new transactions within the application scope are cancelled as soon as they're initiated. These actions effectively block transactions from an application scope from running for the update period.

An application quota rule applies to transactions created by all instances of an application and all transactions created by methods of the application called by other applications. If two users are running the same application, the application quota rule does not distinguish between transactions for each instance of the application. If, together, they violate the quota, all transactions in the application's scope are canceled.

If you check the **Log Only** option, transactions are not canceled by a quota violation. Instead, entries are added to the local host log that indicate the transactions are running under violation.

Transaction and application quota rules are evaluated separately. By defining an application quota rule, you simply introduce another restriction. A transaction is canceled if it violates a transaction quota rule, or if collectively with other application transactions, it violates its application quota rule.

You cannot define an application quota rule for the global application.

Configure an application quota rule

Configure an application quota rule to limit the number of events or jobs that can run in an application's scope within a specified time.

Before you begin
Role required: admin

About this task
You must be in the application scope of the application for which you want to create a rule.

Procedure

1. Navigate to **All** > **System Definition** > **Application Quota Rules**.
2. Select **New**.
3. On the Application Quota Rule form, fill in the fields.
   For a description of the field values, see Application quota rule form.
4. Set a condition to specify when the application quota rule should take effect.
   The application quota rule condition builder displays conditions that are only applicable to transactions. For a description of the condition builder options, see Application quota condition builder.
5. Select **Submit**.

Operational toggles

You can control how much bandwidth an application uses on your system by mapping system run levels to operational toggles. An excessive bandwidth could impact your system performance and your users' experience.

Operational toggles overview

You can use system run levels to map descriptive names to operational toggle levels. System run levels define the operational state of your system based on the toggles and toggle levels

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you have configured. These levels help you manage the system's performance and resource allocation.

Operational toggles can be used to throttle application performance during high-use periods. By adjusting operational toggles, you can limit the number of events or jobs running within an application's scope to help prevent system overload.

You can also create operational toggles to enhance user experience. For example, a type-ahead search polling toggle might help users complete searches more quickly. You could add this toggle to enable users to perform type-ahead searches based on keystroke values, providing real-time search suggestions as they type.

Operational toggle levels

You can create different levels of your desired toggle. For example, you might want to perform a type-ahead search every keystroke or every fifth keystroke. For more information about toggle levels, see Create an operational toggle level.

Run level toggle mapping

You can associate the system run level to the toggle level with toggle mapping. Depending on your instance health, the API returns the appropriate toggle level value and exception roles. For information about how to create run level toggle mapping, see. Create run level toggle mapping.

Create an operational toggle

Create an operational toggle to maintain system run levels that throttle the application operation. Operational toggles enhance your users' experience by tailoring resource consumption to system run levels.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Run Level** > **Operational Toggles**.
2. Select **New**.
3. On the Operational Toggles form, fill in the fields.
   For a description of the field values, see Operational toggles form
4. Select **Submit**.

Create run level toggle mapping

Create run level toggle mapping so that you can associate the system run level to the toggle level.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Run Level** > **Run Level Toggle Mapping**.
2. Select **New**.
3. On the Run Level Mapping form, fill in the fields.
   For a description of the field values, see Run level toggle mapping form.
4. Select **Submit**.

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Create an operational toggle level to define thresholds

Create operation toggle levels so that you can define the threshold limits that your application can function within.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Run Level** > **Operational Toggle Levels**.
2. Select **New**.
3. On the Operational Toggle Level form, fill in the fields.
   For a description of the field values, see Operational toggle level form.
4. Select **Submit**.

Browser settings and performance

Enable data compression through your web browser to avoid slow performance on pages with large data sets.

Web pages in your instance might include large data sets, especially in tables with many rows and columns. To improve speed on pages that require large amounts of data, most browsers can accept compressed data. Data compression reduces the size of data transmitted between the server and the client to improve transfer speed and bandwidth use.

Compression is enabled by default on all ServiceNow application servers and in many web browsers. Review your specific browser settings to verify that data compression is supported and enabled.

Monitoring platform performance

The ServiceNow AI Platform includes tools that administrators can use to monitor platform performance. Monitoring platform performance enables administrators to proactively identify and solve issues.

Overview of monitoring platform performance

Administrators have access to various logs and dashboards that can be used to monitor how a ServiceNow AI Platform instance is performing. These logs and dashboards can be accessed and reviewed at any time to identify indicators of performance degradation. If you notice abnormally slow response times or an unusually high volume of cancelled transactions, you might have performance issues that need to be resolved.

Reviewing transaction logs

The instance automatically logs the vital statistics of every transaction that it processes, and that information is available to you as an administrator. Reviewing transaction logs can help identify latency and performance issues.

To view the transaction log, log in to your instance and navigate to **All** > **System Logs** > **Transactions**.

To see the average response time of all listed transactions, select and hold (or right-click) the column **Response time**. Select **Configure** > **List Calculations**, and then select the **Average value** check box.

You can limit the list to those transactions that took place during the time period of interest. The default filter returns transactions from today.

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For each completed transaction, available information includes the following (times are in milliseconds):

- Date/time, User ID, IP address, and URL of the transaction.
- Total response time, which doesn't include the browser time because the server doesn't have that information.
- **Output length**: how many bytes the transaction returned, after any compression.
- **SQL time**: time spent executing SQL commands.
- **SQL count**: number of SQL commands executed.
- **Business rule time**: time spent processing business rules.
- **Business rule count**: number of business rules executed.
- **Network time**: network transmission time, both from and to the user.

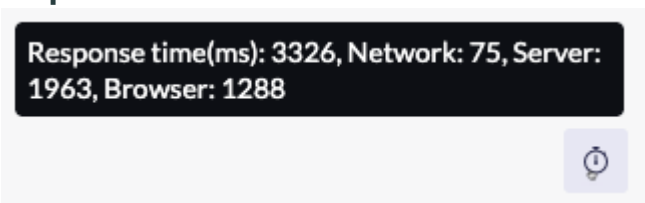
Note: You can change which columns are shown and their order by selecting the Update Personalized List icon ( )

Reviewing response time on forms

A response time indicator (clock) appears at the end of many forms and lists.

This indicator provides the processing time for a completed transaction, including the total time and the time for each step. Select the icon to show and hide the response time details. Hover over the icon to see a tooltip with the details. The following example shows the response time for retrieving a filtered list in a demo instance.

Response time



In this example, the transaction took the following amount of processing time:

- 3326 milliseconds total time
- 75 milliseconds moving data across the network
- 1963 milliseconds on the server

Note: Server time is calculated using the following formula:

```
server time = (client response time - browser time - client
 network time)
```

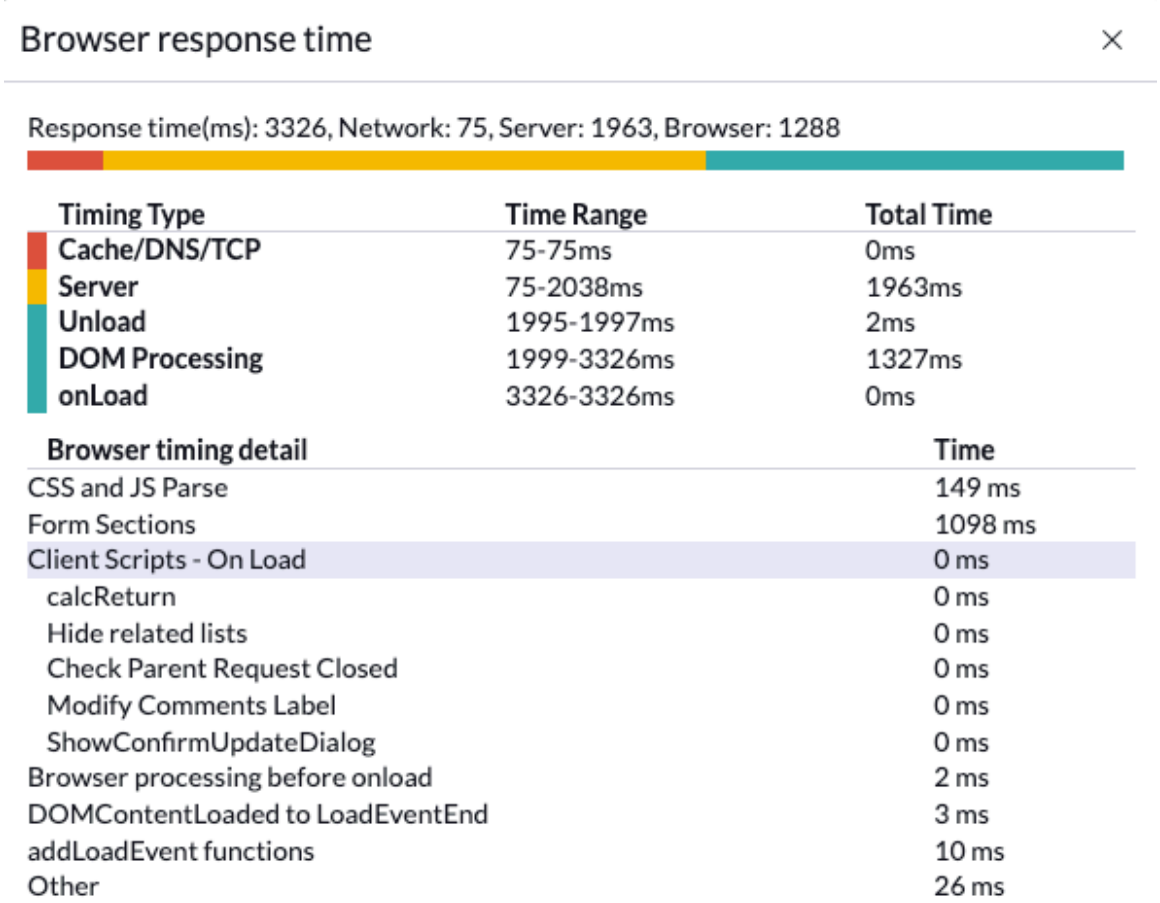
- 1288 milliseconds in the browser, rendering the HTML and parsing and executing JavaScript

A response time indicator doesn't appear for simple operations, such as paging or changing a list sort order. The response time indicator also doesn't appear for the first transaction in a session.

To view a detailed breakdown of the processing time on forms, select the response time indicator icon.

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Response time details



Administrators can disable the response time by setting the *glide.ui.response_time* property to **false** in the System Properties [sys_properties] table. In the navigation filter, enter `sys_properties.list` and search for *glide.ui.response_time*.

Reviewing response times from system logs

You can use the system logs to review a list of response times for different transactions. To view the log, navigating to **All** > **System Logs** and select the relevant log type. When you review response times, look for the following issues.

1. A period where all transactions took an unusually long time. For example, transactions that normally took 1 second took 15 seconds between 11:00 AM and 11:20 AM. This issue can indicate that an unusual load, such as a large report, ran on that app server during that time.
2. A specific transaction which repeatedly took an unusually long time. For example, the list of closed incidents sorted by short description took 30 seconds each time it was displayed. This issue can indicate that a particular transaction put an unusual database load on the system, such as sorting 500,000 records on an unindexed field.

If you notice issues with form response times, see Improving response times on forms.

Client transaction timings

The Client Transaction Timings plugin provides extra information about the time spent on both the client and server sides, by the browser and the network. This feature not only helps find long-running processes, but also provides information about where in the process the performance issue is caused.

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For more information, see Client transaction timings.

Transaction call chains

Identify and debug the root causes for a problematic transaction by recording, and then reviewing, its call chain. A call chain consists shows the ordered series of scripts executed during the life cycle of a transaction.

With Transaction Call Chain tracking, an administrator can register the URL of a problematic transaction. The call chain is then recorded during the next occurrence of the registered URL. Transaction call chains can help diagnose transaction performance issues.

The following shows the workflow for enabling and using transaction call chain tracking.

1. When you find a problematic transaction on the Transaction Log or Slow Transaction list that requires debugging, select it to view its detail record. To aid in debugging, filter and group these lists by application scope, limiting transactions that appear to only those transactions originating in specific scopes.

   Note: To learn more about these lists, see Transaction logs and Slow transactions log record detail.

2. In the record detail form, select **Record call chain of next occurrence**. Doing this designates that the next occurrence of the transaction URL should be persisted with all of its call chain information.

   Optionally, you can designate a user ID so call chain recording only takes place during the next transaction occurrence for a specific user.

3. The next time a user accesses the URL, the Transaction Call Chain Register record is updated to contain a list of the script resources executed to service the request. This list of resources is available for administrators to view by navigating to the Transaction Call Chain Record and selecting the Transaction Call Chain related list.
4. In Transaction Call Chains, review the recorded call chain for the transaction, and then take the needed actions required to debug it.

Create a transaction call chain register

Create a call chain register to record call chain information for a problematic (or slow) transaction during the next occurrence of that URL. You specify that the next occurrence of the transaction URL should be persisted with all of its call chain information.

Before you begin

Role required: admin

Procedure

1. Navigate to the Transaction Log or Slow Transactions list, select the problematic transaction, and enable recording of the call chain.

Type of Log	Steps
Transaction Log	**a.** Navigate to **System Logs** > **Transactions** **b.** To aid in debugging, filter and group the Transaction Log by application scope, limit ing transactions that appear to only those transactions originating in specific scopes.

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Type of Log	Steps
	c. Select the problematic transaction. **d.** In the Transaction Log Entry form, select **Open Record**, then select **Record call chain of next occurrence**.
Slow Transactions	**a.** Navigate to **System Diagnostics** > **Stats** > **Slow Transactions** **b.** To aid in debugging, filter and group the Slow Transactions list by application scope, limiting transactions that appear to only those transactions originating in specific scopes. **c.** Select the problematic transaction. **d.** In the Slow Transactions form, click **Open Record**, then select **Record call chain of next occurrence**.

2. On the Transaction Call Chain Register form, fill in the fields.
   For a description of the field values, see Transaction call chain register form.
3. Select **Submit**.

Result

A call chain register is created to designate that the next occurrence of the transaction URL should be persisted with all of its call chain information.

Note: Once the call chain is recorded (**true** appears in the **Recorded** field), you can view it in the Transaction Call Chain Register form itself.

What to do next

Review a transaction call chain

Review a transaction call chain

Use Transaction Call Chains to review the resulting call chain for a selected transaction. You can use the information in Transaction Call Chains can help debug performance issues.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Diagnostics** > **Transaction Call Chain** > **Transaction Call Chains**.
2. To view call chain detail, select the **Created** field for the desired call chain component or script.
   For a description of the field values in the Transaction Call Chain form, see Transaction call chain form.

Note: You can view transaction log detail by selecting the **Transaction Log** field for the selected call chain component or script. To learn more, see Transaction logs.

Thread performance monitoring

The instance tracks the performance of individual threads, which administrators can view in the transaction log.

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The amount of time a thread waits for an available semaphore or session synchronization is included in the **Response Time** field in the transaction log. To view the transaction log, navigate to **All** > **System Logs** > **Transactions**.

Monitoring instance usage

You can track application usage on your instance through the Application Usage Overview and the ServiceNow Store Usage overview dashboards.

The usage analytics process collects data on all your instances and regularly updates the reports in the Usage Overview and ServiceNow Store Usage Overview dashboards. Application usage data is collected whenever an application is opened, and counts on tables are collected once a day. Data is collected on:

- The number of active users in the system
- The hardware CIs discovered (for instances that use Discovery)
- The number of cloud management service catalog items available to users in instances that use Cloud Management

Users with the admin or usage_admin role can view the Application Usage Overview and ServiceNow Store Usage Overview dashboards.

Application Usage Overview

The Application Usage Overview dashboard contains information about ServiceNow applications.

To view the Application Usage Overview, navigate to **Self-Service** > **Dashboards**. From the available dashboards, select **Usage Overview**.

ServiceNow Store Usage Overview

The ServiceNow Store Usage Overview dashboard contains information about applications procured from the ServiceNow Store.

To view the ServiceNow Store Usage Overview, navigate to **Self-Service** > **Dashboards**. From the available dashboards, select **ServiceNow Store Usage Overview**.

Application usage overview dashboard

The Application Usage Overview dashboard displays reports on the use of ServiceNow applications on your instance.

Application Usage Overview reports

Chart or report	Description
Usage of ServiceNow Applications	Shows the number of views or operations performed for each of the listed applications, grouped by month.
Users of ServiceNow Applications	Shows the number of active users who have used the instance, grouped by month. An active user is any user who could have accessed the applications, not only users who actually did access the applications.

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Application Usage Overview reports (continued)

Chart or report	Description
Usage of Custom Applications	Shows the number of views or operations performed for each of the listed custom applications, grouped by month.
Users of Custom Applications	Shows the number of active users who have used custom applications, grouped by month. An active user is any user who could have accessed the custom applications, not only users who actually did access the applications.
Google **Maps Usage By Month**	Shows the number of views or operations performed for the Google maps application.
Additional Metrics	Shows any of the following items, depending on your licensing agreement: • Primary database size of this instance in megabytes • ServiceNow® Performance Analytics of all indices • NotifyNow conference calls • ServiceNow® Cloud Provisioning plugins active • ServiceNow® Discovery plugin active • ServiceNow® Password Reset plugin active • ServiceNow® Cloud Management — VMware instance • Vendor custom applications • Custom applications • ServiceNow® Event Management plugin active • Active benchmark indicators • Customer updated PA indicator • Active users • ServiceNow® Cloud Management — EC2 instances • ServiceNow® Orchestration core plugins active • Custom tables extending base system tables other than Task • Virtual node count • Active users for subscriptions • NotifyNow Messages • ServiceNow® Edge Encryption plugin active • Number of Google map page hits during the current month - as of yesterday • Physical node count

ServiceNow Store usage overview dashboard

The ServiceNow Store Usage Overview dashboard displays reports on the use of ServiceNow Store applications on your instance.

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ServiceNow Store Usage Overview reports

Chart or report	Description
Usage of ServiceNow Store Applications	Shows the number of views or operations performed for each of the listed applications, grouped by month.
Users of ServiceNow Store Applications	Shows the number of active users who have used the instance, grouped by month. An active user is any user who could have accessed the applications, not only users who actually did access the applications.

Resolving platform performance issues

If platform performance issues are identified, administrators can resolve problems and improve performance.

Overview of resolving platform performance issues

Even if you have configured your ServiceNow AI Platform instance to optimize performance, performance issues might still be identified through continued monitoring. The following topics can help you address common kinds of platform performance issues as they arise.

Instance cache effects on performance

Minimize actions that purge and rebuild the instance cache during core business hours to avoid performance degradation during peak hours.

Performance degrades whenever you purge and rebuild the instance cache. During core business hours, avoid or minimize any of the following actions that purge and rebuild the instance cache.

- Adding or updating system properties
- Adding or updating dictionary entries
- Committing update sets
- Adding or updating translations

Improving response times on forms

Learn the techniques that can be used to improve form response times. If you notice latency or slow response times on forms, using these techniques can help improve performance.

1. If you notice one or more transactions that span the entire form response time window, try adding additional indexing to the database to make the transaction faster. Even with indexing, some queries might still take longer than others.

   For more information about indexing, see Resolving slow queries.

2. Verify that a cache flush isn't being run during business hours.

   Cache flushes are intended to help prevent older data from interfering with changes and updates, and are performed automatically when using update sets. Scheduled cache flushes, using cache.do, can affect overall performance and degrade system response times. Don't run cache flushes or trigger automatic cache flushes during business hours.

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For more information about actions that trigger automatic cache flushes, see Instance cache effects on performance.

3. If you can't find any specific issues leading to slow response times on forms, contact Customer Service and Support to see if there are global issues with the application server hardware.

Resolving slow queries

Identifying and resolving slow queries is an important aspect of improving platform performance. The ServiceNow AI Platform generates index suggestions to help resolve slow queries.

Database queries that take an unusually long time to execute might be caused by inefficient query design, high data volume, and lack of proper indexing. The best way to resolve slow queries depends on the combination of factors that contribute to the issue.

Causes and possible solutions for slow queries

Cause	Possible solution
Inefficient query design	Review and modify query structures to enhance performance. Query modifications might include verifying that you're fetching only the necessary data, or implementing pagination at the query level. You can use a slow query log to determine which queries might need to be enhanced. For more information about how to use a slow query log, see Use a slow query log.
High data volume	Verify that necessary transaction quotas, application quotas, and operational toggles are set to optimize bandwidth use. For more information, see Configuring the ServiceNow AI Platform to optimize performance.
Lack of proper indexing	Use the Index Suggestion Engine (ISE) to generate index suggestions for selected slow queries.

Overview of using the Index Suggestion Engine

The Index Suggestion Engine (ISE) can help generate index suggestions for slow queries. If you modify query design and manage data volume but still notice slow queries, you can use the ISE to generate indexes for slow queries.

Use the following steps to resolve slow queries with the ISE:

1. Use the slow query log to identify slow queries that might benefit from improved indexing.
2. Generate an index suggestion for a slow query using the ISE.
3. Review the index suggestion and decide whether to move forward.
4. Export a query suggestion from a production instance to a non-production instance for evaluation before adding the index in your production instance.
5. Create an index from the suggestion or schedule index creation once you're satisfied with the effects of the index suggestion.

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6. Test index performance to evaluate query speed improvement.
7. If an index isn't needed anymore, drop the index or schedule it to be dropped. If an index isn't being used or isn't performing well, the ISE might display a suggestion to drop an index.

Additional info

For more information about how the ISE generates index suggestions, see Index suggestions for slow queries.

Index suggestions for slow queries

The Index Suggestion Engine (ISE) can generate an index suggestion for a selected slow query. When you request an index suggestion for a slow query, the ISE analyzes the query and recommends an index that can improve the query execution time.

In new and upgraded instances, the Index Suggestion Engine plugin (com.glide.index_suggestion) is activated by default.

Note: The ISE supports MySQL databases only.

Administrators use the ISE to:

- Generate an index suggestion for a slow query.
- Review index suggestions for slow queries in your instance.
- Export an index suggestion to a non-production instance for evaluation and testing.
- Schedule an index for creation.
- Monitor the effectiveness of an index during the index evaluation period.
- Test index performance (this test is an immediate performance assessment of the index).
- Drop an index that does not optimize query performance, as recommended by the ISE.

If you choose to use the index suggestion and create the index, the ISE continues to review the effectiveness of that index during a 14-day evaluation period. The ISE provides details on the index during the evaluation, including recommendations for managing the index.

How index suggestions work

You start the index suggestion process by requesting an index suggestion for a selected slow query. The ISE runs a daily job that collects column statistics from tables in the slow query, gathering data such as cardinality (unique columns in a table) and null/not null count.

Next, the ISE aggregates and analyzes the information collected, applies a weighted column ranking algorithm to the slow query, and generates an index suggestion for the query.

After an index suggestion is generated, you review the suggestion and determine whether to create the index for the slow query. When you create the index, the ISE provides information on the index as it moves through its life cycle. You can track the index suggestion through three main processing stages:

Index suggestions to review

During this initial stage, you can review index suggestions that the ISE generated for your slow queries. You can choose to ignore a suggestion, export the index suggestion to a non-production instance for further testing, or schedule the index for creation. If the ISE successfully generates an index suggestion and you choose to schedule the index for creation, the index suggestion moves to the next processing stage. However, if the database cannot use the suggestion or the

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suggestion degrades query performance, the ISE recommends that you drop the index suggestion.

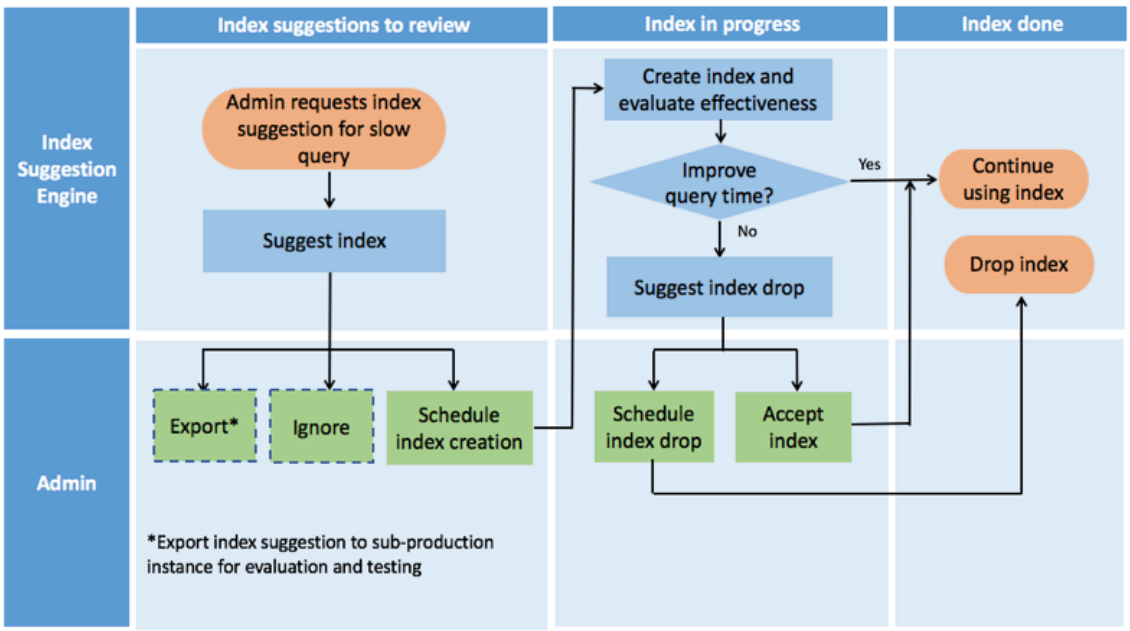
Index in progress

In this stage, the ISE creates the index and the 14-day evaluation period begins. The ISE does an hourly evaluation to determine whether the index improves or degrades the query execution time. The ISE updates the index state, including recommended actions that you can take. For example, if the index does not improve the performance of the slow query, the ISE advises that you drop the index. You can then schedule the index to be dropped from the database. During this stage, you can also choose to test index performance or accept an index, even if the ISE recommends dropping it.

Index done

In the last processing stage, the ISE describes the final state of the index and related processing activity. If the index improved the slow query time, the ISE changes the index state to Created and the database continues to use the index. If the index did not improve the query time and you chose to drop the index, the ISE drops the index from the database and changes the index state to Dropped.

Index suggestion life cycle



Processing states for index suggestions

The Index Suggestions [sys_index_suggestion] table provides state information on your indexes as they move through the three main processing stages:

- **Index Suggestions > To review**
- **Index Suggestions > In Progress**
- **Index Suggestions > Done**

The ISE uses the following states to describe the processing activity for an index.

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Index suggestion states

State	Description
Index suggestions to review	
Suggested	ISE generated an index suggestion for the slow query.
Drop Suggested—Unused	ISE recommends that you drop the index, since the database is not using the index for the slow query.
Drop Suggested—Performance Degradation	ISE recommends that you drop the index because the index did not improve the query time or made the performance worse.
Index in progress	
Creation Scheduled	You scheduled the index for creation.
Creation in Progress	ISE is creating the index.
Creation Failed	ISE could not create the index.
Evaluating Effectiveness	ISE created the index and is assessing index performance during the 14-day index evaluation period.
Drop Suggested—Unused	ISE recommends that you drop the index from the table for which the index was created, since the database is not using the index for the slow query.
Drop Suggested—Performance Degradation	ISE recommends that you drop the index because the index did not improve the query time.
Drop Scheduled	You scheduled the index to be dropped from the database.
Drop in Progress	ISE is dropping the index from the database.
Drop Failed	ISE could not drop the index. Contact Customer Service and Support for assistance.
Index done	
Created	After the 14-day evaluation period, the ISE determined that the index improved query performance. Indicates that the database continues to use the index.
Ignored	You chose to ignore the index suggestion.
Dropped	ISE successfully dropped the index.
Accepted	You chose to keep the index even though the ISE recommended dropping it.
Superseded	A recent index suggestion replaced the index for the same table and slow query.

Use a slow query log

Administrators can use slow query logs to gain insight into how queries are affecting platform performance. The Slow Queries log aggregates data for similar queries. Use slow query data to evaluate the need for new indexes, changes to existing indexes, or changes to frequent queries.

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Before you begin
Role required: admin

About this task
Queries are similar when they select from the same table and query the same field in the where clause, but search for different values in the field. For example, these queries are aggregated as similar queries.

```
SELECT * FROM sys_user WHERE name="ITIL User"
SELECT * FROM sys_user WHERE name="System Administrator"
```

Aggregating similar query data allows administrators to monitor the performance impact of slow queries and of queries that occur frequently. The log reports data for similar queries where the total execution time exceeds 5 seconds.

Procedure
1. Navigate to **All** > **System Diagnostics** > **Stats** > **Slow Queries**
2. Open a query record for more details.

   For a description of the field values in the query record, see Query record form fields.
3. To see what the database is doing to retrieve the data, click **Explain Plan**.
   The query plan is reported in the **MySQL Explain Plan** related list. Use the query plan to evaluate the need for new indexes or changes to existing indexes. For more information, see MySQL explain plan documentation.

   This feature works on other supported databases, including MongoDB and Oracle.
4. To generate an index suggestion for a slow query, click **Index Suggestion**.
   For details, see Generate an index suggestion for a slow query.

Generate an index suggestion for a slow query

Use the Index Suggestion Engine (ISE) to generate an index suggestion for a slow query. The ISE analyzes slow queries and provides index recommendations to improve execution time when possible.

Before you begin
Role required: admin

About this task
When the ISE generates an index suggestion for a slow query, it reviews query metrics and information from tables in the query. If the ISE doesn't have the information required to generate an index suggestion, the system displays messages informing you about the data needed. These messages typically provide links for obtaining more information, such as updated query metrics or gathering column statistics from tables in the query. Sometimes the ISE might be unable to provide a recommended index for the query and lets you know why the suggestion can't be generated.

Procedure
1. Navigate to **All** > **System Diagnostics** > **Stats** > **Slow Queries**.
2. In the Slow Queries table, select the query record for which you want to generate an index suggestion.
3. In the Slow Queries record, select **Suggest Index**.

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If more information is needed to generate a suggestion, the system might display one or more messages with details for obtaining that information. After you respond to each message, select **Suggest Index**. Repeat this process until the ISE has the information required to generate the index suggestion.

For example, the following information might be needed to generate a suggestion:

- Recent metrics—If the system displays a message indicating that query metrics are outdated, the message provides a link for obtaining the most recent metrics.
  - Select the link to get the updated query metrics.
  - Select **Suggest Index**.
- Column statistics—If the column statistics don't exist for the query, the system displays a message asking you to schedule the Collect Column Stats job. You can choose to run the job at the default time when the system is less busy, or you can have the system collect the statistics immediately.
  - If you schedule the Column Stats job to run later, the ISE generates the index suggestion after it collects the column statistics. After the column stats job runs, return to the Slow Queries record and select **Suggest Index**.
  - If you choose to collect column stats immediately, the system displays the Collect Column Statistics progress indicator while it gathers column statistics. In the Slow Queries record, select **Suggest Index**.

When the ISE successfully generates an index suggestion, the Index Suggestion record for the query shows the index **State** as **Suggested**.

4. If you want to continue working with the index suggestion, select the next processing step.

Option	Description
Export	Downloads the index suggestion as an .xml file so that you can export it to a non-production instance for testing and evaluation.
Ignore	Sets the index suggestion state to Ignore, which indicates that the index suggestion isn't to be used. Index suggestions with an Ignore state are listed in the **Index Suggestions > Done** view of the Index Suggestion table.
Schedule creation	Opens the Schedule Index Creation window for scheduling index creation.

Review index suggestions for slow queries

You can review index suggestions and indexes created by the Index Suggestion Engine (ISE). The ISE provides three main views of index suggestions as they move through their life cycle: index suggestions in review, index in progress, and index done.

Before you begin

Role required: admin

About this task

Access index suggestions from the Application Navigator or the Performance homepage.

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Procedure

1. Access the index suggestions for your instance by navigating to **System Diagnostics** > **Index Suggestions** > **Index Suggestions > To review**.
2. In the Index Suggestions table, select the table associated with the index suggestion you want to view from the **Table Name** column.
3. Review the index suggestion for the selected table.
   For a description of the field values in the index suggestion, see Index suggestion form fields.
4. Choose the next processing step for the index suggestion.

Option	Description
Export	Downloads the index suggestion as an .xml file, which can be exported to a non-production instance for testing and evaluation.
Ignore	Changes the index suggestion state to ignore, which indicates the index suggestion is no longer active and available for index creation. Index suggestions with an Ignore state are listed in the **Index Suggestions > Done** view of the Index Suggestion table.
Schedule creation	Opens the Schedule Index Creation window to schedule an index suggestion for creation.

Export a slow-query index suggestion to a non-production instance

You can export an index suggestion from a production instance to a non-production instance for creation, evaluation, and testing before implementing the index on your production instance.

Before you begin
Role required: admin

About this task
This task involves exporting an index suggestion as an .xml file from your production instance and importing it to a non-production instance. You can then create the index and evaluate its performance on the non-production instance.

Procedure

1. In your production instance, navigate to the index suggestion to be exported:
   a. Navigate to **System Diagnostics** > **Index Suggestions** > **Index Suggestions > To review**.
   b. In the Index Suggestions table, select the table associated with the index suggestion you want to open from the **Table Name** column.
2. In the Index Suggestions form, click **Export**.
   The index suggestion is downloaded as an .xml file with the file name `sys_index_suggestion_<alphanumeric identifier>.xml`. The file name has a unique alphanumeric string to differentiate it from other index suggestions.
3. In your non-production instance, navigate to **System Diagnostics** > **Index Suggestions** > **Index Suggestions > To review**.
4. In the Index Suggestions table under Related Links, click **Import Suggestions**.
5. In the Import XML form, choose the index suggestion file that you exported and click **Upload**.

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After the import, the imported index suggestion appears in the Index Suggestions table on your non-production instance.

6. To continue the index evaluation process on your non-production instance, you can schedule the index suggestion for creation and test index performance.

Schedule a slow-query index suggestion for creation

Use the Index Suggestion Engine (ISE) to schedule an index suggestion for creation.

Before you begin

Role required: admin

Procedure

1. Navigate to **System Diagnostics** > **Index Suggestions** > **Index Suggestions > To review**.
2. In the Index Suggestion table, select the table associated with the index suggestion you want to create from the **Table Name** column.
3. In the Index Suggestion form, select **Schedule Creation**.
4. In the Schedule Index Creation window, select the time that you want the index to be created and select **Create**.

   Note: If the index you want to create involves large tables, such as the Incident or CMDB table, index creation may take up to one hour or longer.

   - **Create now** —The Schedule Index Creation progress indicator window shows the progress of the index creation. When index creation is complete, click **Close**.
   - **Create later** —If you select this option, the state changes to Create Scheduled, and the index is created at the scheduled time. After the index is created, the index state changes to Evaluating Effectiveness.

   When the ISE creates the index at the selected time, it assigns an index name based on the tables used in the slow query.

5. Verify that the index was created by reviewing the index **State** in the Index Suggestion record or in the Index Suggestion table (**System Diagnostics** > **Index Suggestions** > **Index Suggestions > In Progress**).
   The Index Suggestion record shows the state, Evaluating Effectiveness. The ISE begins the 14-day index evaluation period.
6. During the evaluation period, you can monitor the index **State** in the Index Suggestion record or in the Index Suggestion table (**System Diagnostics** > **Index Suggestions** > **Index Suggestions > In Progress**).

Test index performance for slow queries

After the Index Suggestion Engine (ISE) generates an index suggestion for a slow query, you can test the index to see if it improves execution time. If you're evaluating an index suggestion on a non-production instance, you can run this test after creating the index to get immediate results on index performance.

Before you begin

Role required: admin

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About this task

This test is an optional assessment of the index. The test isn't part of the 14-day index evaluation process that automatically occurs after you create an index.

Note: Index test results from your non-production instance might not necessarily predict similar performance results on your production instance.

Procedure

1. Open the Index Suggestion record for the index that you want to test:
   a. Navigate to **System Diagnostics** > **Index Suggestion** > **Index Suggestions > In progress**.
   b. In the Index Suggestions table, select the table associated with the index suggestion you want to view in the **Table Name** column.
2. In the Index Suggestion record, select **Test Performance** to start the performance test.
3. When the Test Index Suggestion progress indicator shows that testing is complete, select **Go to Result**.
4. In the Query Performance Test Results form, compare the **Average with index** and **Average without index** fields to see if the index improved the query time.

Query Performance Test Results

Field	Description
Index Suggestion	Name of the index suggestion.
Created	Date and time this performance test was run.
Average with Index (ms)	Query time using the index suggestion.
Average without Index (ms)	Query time before using the index suggestion.
Forced	Check box indicating whether the database is using the index. If this box is selected, the database is forced to use the index suggestion, but only for this test. If the box is cleared, the database is using the index.

5. Select the back arrow to navigate back to the Index Suggestion record for the table.
   The result of this index performance test doesn't change the index state recorded in the Index Suggestion record.

Drop a slow query index

You can drop an index for a slow query when the index isn't used by the database or doesn't improve query performance. You can drop the index immediately or schedule the drop for a later time.

Before you begin

Role required: admin

About this task

During the index evaluation period, the Index Suggestion Engine (ISE) might generate a recommendation to drop the index. A recommendation to drop an index is generated in the following cases:

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- The database doesn't use the index
- The index doesn't improve query execution time

Note: If you want to retain an index even though the ISE generates a recommendation to drop it, you can use the **Accept** option in the Index Suggestion record to continue using the index. Before using this option, contact Customer Service and Support for guidance.

Procedure

1. Navigate to **All** > **System Diagnostics** > **Index Suggestions** > **Index Suggestions > In Progress**.
2. In the Index Suggestions table, select the table associated with the index suggestion you want to drop in the **Table Name** column.
3. In the Index Suggestion record, select **Schedule Drop**.
4. In the Schedule Index Drop window, select the time when you want the index dropped and select **Drop**.

   Note: If the index you want dropped involves large tables, such as the Incident or CMDB table, dropping the index may take up to one hour or longer.

   - **Drop now** —The Schedule Index Drop progress indicator window shows the progress of the index drop. When the index drop completes, select **Close**. If the drop is successful, the Index Suggestion record shows the index state as Dropped.
   - **Drop later** —When you schedule the drop, the index state changes to Drop Scheduled. When the system drops the index at the scheduled time, the index state changes to Dropped.
5. Verify that the index was dropped by reviewing the index state in the Index Suggestion record or in the Index Suggestion table (**System Diagnostics** > **Index Suggestions** > **Index Suggestions > Done**).

Transaction cancellation

You can cancel transactions that take longer than expected to load. Canceling long-running transactions can help prevent excessive resource consumption.

Causes of slow-loading transactions include the following scenarios.

- Sorting a large number of records by an unindexed string field.
- Grouping a large table on a field that has predominantly distinct values.
- Exporting all rows from a large table.
- Testing a poorly scripted business rule that has an infinite JavaScript loop.

Transaction cancel timer

Note: You can’t cancel an import with these controls.

During a long-running transaction, a timer and a cancellation option appear in an alert banner.

To cancel the transaction, select the **Cancel** button. The alert message displays when a transaction cancellation is in progress and when the cancellation is completed.

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Note:

Selecting **Cancel** stops only the transaction associated with the window or tab where the alert appears. It doesn't cancel transactions running in your other open windows or tabs.

If a slow transaction completes successfully, the timer indicates how long it took for the transaction to complete.

Canceled transaction logs

Canceled transactions appear in the transaction log with **CANCELLED** appended to the URL. Transactions canceled by a user are logged differently from transactions canceled by transaction quotas. For more information about canceled transaction logging, see Canceled-transaction logging to a table. For more information about transaction quotas, see Transaction quotas.

Properties for transaction cancellation

Administrators can configure the behavior of the transaction cancellation capability using the following properties.

Property	Definition	Location
com.glide.request_manager.active	Let users cancel long-running transactions (enabled by default).	Open the sys_properties table by navigating to **All** and entering `sys_properties.list`.
glide.ui.transaction.long_response.time	Delay in seconds before the cancel transaction button appears for a long-running transaction.	Navigate to **All** > **System Properties** > **UI Properties** and locate the field labeled **Delay in seconds before the Transaction Cancel button is displayed for a long-running transaction**.

View and kill active transaction

Administrators can view active transactions and kill long-running transactions.

Before you begin

Role required: admin

About this task

This action is intended to stop background processes, such as scheduled jobs, and not user-initiated transactions.

Procedure

1. If High Security Settings are enabled, elevate privileges to security_admin.
2. Navigate to the appropriate **Active Transactions** module.
   - To view and kill transactions on the current node for your instance, navigate to **User Administration** > **Active Transactions**.
   - To view and kill transactions on all nodes for your instance, navigate to **System Diagnostics** > **Active Transactions (All Nodes)**.
3. Find the transaction that you want to stop.
   The process to display the transactions is included in the list. Don't kill that process.

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4. Kill the transaction in one of the following ways:
   - Select and hold (or right-click) the record and select **Kill** from the available options.
   - Select the check box next to one or more records and select **Kill** from the **Actions on selected rows** drop-down menu.

Canceled-transaction logging to a table

The system logs canceled transactions to a table in addition to the transaction log.

Transactions canceled manually or by a quota rule are logged to the Transaction Cancellation Log [syslog_cancellation] table. The Transaction Cancellation Log is an extra debugging feature, and doesn't contain information on all cancellations.

Note: There are safeguards in place to help prevent infinite loops and issues related to synchronicity. Because of this, it's not always possible to log a cancellation to a database table.

You can find the Transaction Cancellation Log by selecting **System Logs** > **System Log** > **Transaction Cancellations**.

You can turn off canceled-transaction logging to a table by changing a property.

Canceled-transaction log property

Property	Description
glide.quota.manager.log.cancellation	Indicates whether canceled transactions are to be logged to the Transaction Cancellation Log table. Type: Boolean Default value: true Location: Add to the System Properties [sys_properties] table

Add a module to test connection speed

A connection test can indicate the connection speed between your computer and your instance. A connection speed test (/connection_test.do) is available as a UI page.

Before you begin

Role required: admin

Procedure

1. Perform the appropriate action for your version of the UI.

UI version	Steps
Core UI	**a.** Navigate to **System Definition** > **Application Menus**. **b.** Open the application menu to which you want to add the module, for example, **System Diagnostics**.

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UI version	Steps
UI15	Select and hold (or right-click) an application menu, such as **System Diagnostics**, and se lect **Edit Application Menu** or the pencil icon.

2. Select **New** in the list of modules.
3. Complete the Module form using the following values:
   - **Title**: Unique name such as `Connection Test`
   - **Link type**: **URL (from Arguments)**
   - **Arguments**: `connection_test.do`
4. Select **Submit**.

Platform performance reference

Reference topics provide additional information about the forms that you use to manage performance for the ServiceNow AI Platform.

Default quota rules

Various transaction quota rules are available in the base system.

Fix Script Processor

Allows the fix script processor to run for four hours.

Presence

Cancels presence requests quickly when the system is busy.

REST Import Set API request timeout

Prevents inbound REST Import Set API transactions from running for longer than 60 seconds.

REST Table API request timeout

Prevents inbound REST Table API transactions from running for longer than 60 seconds.

AMB Transactions

Cancels AMB transactions lasting longer than the specified maximum duration. Applies to all AMB transaction types: message send and message receive.

Reference Completer

Stops the reference completer transaction after five seconds.

REST Aggregate API request timeout

Prevents inbound REST Aggregate API transactions from running for longer than 60 seconds.

Homepage Widgets

Prevents all homepage widgets from running longer than 30 seconds.

REST Attachment API request timeout

Prevents inbound REST Import Set API transactions from running for longer than 60 seconds.

UA Count Persistor Quota

Prevents UA count persistor scheduled jobs from running for more than one hour.

UI Transactions

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Cancels UI transactions that are two seconds away from the 5-minute server disconnect. ServiceNow datacenter load balancers display an internal server error (HTTP Error 500) to users after five minutes. This quota rule returns a transaction canceled page instead of an error. This rule includes an exception to prevent the cancellation of background scripts.

PA Diagnostics All

Prevents any Diagnostics transaction that originates outside the scope of the Diagnostics application from running longer than 30 minutes. Diagnostics transactions refer to executing a diagnostic, opening a Diagnostics form, or opening a Diagnostics list.

Normal transaction activities

Before setting transaction quotas, navigate to **User Administration** > **Active Transactions** to review the normal transaction activities for your instance. You can view and terminate long-running transactions if necessary. Over time, you can determine the normal transaction load for your instance and set your quotas to match these norms.

Transaction quota properties

An administrator can add the following system properties to manage transaction quotas.

Configuring Transaction Quota Properties

Property	Description
glide.quota.manager.heartbeat	The number of seconds between the start of each Quota Manager heartbeat. This value determines how often the Quota Manager checks for transactions that exceed a quota and how often it writes status in the log file. Type: Integer Default value: 1 Location: Add to the [sys_properties] table
glide.quota.manager.minimum_transaction_time	The minimum number of seconds a transaction must run before the Quota Manager matches it to a transaction quota. ServiceNow recommends setting this value to at least 1 second to avoid performance issues. For optimal performance, set this value to the value of your most restrictive quota. For example, if your most restrictive quota cancels transactions longer than 1 minute, set the minimum transaction time to 60 seconds. Type: Integer Default value: 1 Location: Add to the [sys_properties] table
glide.quota.manager.debug	Controls whether to display (true) or hide (false) additional debugging information

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Configuring Transaction Quota Properties (continued)

Property	Description
	related to the Quota Manager. Debugging information includes running transactions, canceled transactions, and what quotas are matched to transactions. Type: True | False Default value: True Location: Add to the [sys_properties] table

Related topics

Add a system property

Transaction quota rule form

A description of the fields on the Transaction Quota Rule form.

Transaction quota rule fields

Field	Description
Name	A unique name to identify the rule.
Active	A check box that determines if this rule is active (selected).
Maximum Duration	The number of seconds a transaction has to complete before the quota cancels the transaction.
Maximum Business Rules	The number of business rules executions allowed.
Maximum Database Time	The total number of seconds for all SQL requests.
Maximum SQL Statement Time	The number of seconds a SQL statement can run.
Maximum Outbound Requests	The number of outbound HTTPs requests allowed.
Order	A number that represents the priority of the quota transaction in relation to other quotas. The transaction quota with the lowest timeout, the lowest order value, and matching conditions determines the applied quota policy.
Maximum Events	The number of sysevent inserts allowed.
Maximum Jobs	The number of sys_trigger inserts allowed.

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Transaction quota rule fields (continued)

Field	Description
Maximum SQL Queries	The number of SQL queries allowed.
Maximum Outbound Request Duration	The number of seconds for an outbound HTTP request.
Description	A description of the transaction quota rule.

Transaction quota rule condition builder

A description of the options available in the condition builder for the Transaction Quota Rule form.

Field	Description
URL	The URL of the page.
Thread Name	The name of the execution thread that is running the transaction. Foreground threads have names like http-bio-8080-exec-1. Background threads can have various names, and are useful where the URL is not sufficiently descriptive.
Foreground	Whether the transaction was completed in the foreground or background: • **True**: a foreground transaction. • **False**: a background transaction.
Type	The type of transaction: • **List**: Any list transaction, such as incident_list.do. • **Form**: All forms, UI pages, CMS pages, and so on. • **XMLHttp**: Transactions that run through GlideAjax, where the URL is xmlhttp.do. • **Report**: The page `sys_report_template.do`. • **SOAP**: SOAP transactions. • **Export**: When a list is exported in a format such as XML or Excel. • **Scheduler**: When a scheduled job is performed. • **Text Search**: The text search transaction or any of its related operations. • **Other**: Any type that does not meet the qualities of another type. **Note:** Match the transaction quota **Type** to the transaction type listed in the Quota Manager log entry for the transaction.
User	The user performing the transaction.
Homepage	The homepage that is running. This condition is populated only if the URL is `home.do`.
Homepage Widget	The widget that is rendered in the transaction. When a homepage or non-responsive dashboard renders, each widget renders in parallel.

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Field	Description
	When a responsive dashboard renders, each widget renders in sequence. When the quota is exceeded, users see the message: `Widget cancelled - maximum execution time exceeded`. Increase the quota value if you don't want to show this message.
Attributes	Miscellaneous attributes that are related to the transaction.

Example system log messages

An example of system log messages for transactions.

- At every heartbeat interval, which is one second by default, the Quota Manager prints the running transactions:

```
2012-02-13 12:34:08 (096) glide.quota.manager SYSTEM
 URL= /incident_list.do?
sysparm_userpref_module=b55fbec4c0a800090088e83d7ff500de&active
=true&sysparm_query=active=true^EQ,
THREAD= http-bio-8080-exec-3, FG= true, TYPE= 1, STATE= 2,
 USER= null, TIME= 8,807, MEM= 0, ATTRIBUTES= {}
```

- Every time the Quota Manager matches a quota to a transaction, it prints a message similar to the following example:

```
2012-02-13 13:25:31 (900) glide.quota.manager SYSTEM
 QuotaFinder: Assigning quota
"TEST PROBLEM FORM" with filter:
 type=form^urlLIKEsys_id=46fb9e31a9fe198101492060c2a4f8cb^EQ to
transaction:
 URL= /problem.do?sys_id=46fb9e31a9fe198101492060c2a4f8cb,
 THREAD= http-bio-8080-exec-1,
FG= true, TYPE= 1, STATE= 4, USER= null, TIME= 1,121, MEM= 0,
 ATTRIBUTES= {}
```

- Every time the Quota Manager cancels a transaction, it prints a message similar to the following example:

```
2012-02-13 13:25:33 (930) glide.quota.manager SYSTEM WARNING
 *** WARNING ***
Transaction: Cancelling transaction /problem.do (maximum
 execution time exceeded):
Thread http-bio-8080-exec-1
```

Methods to add variable information to the cancellation message

You can use the following methods of the *jvar_transaction* variable to add information to the cancellation message.

Adding Variable Information to the Cancellation Message

Method	Description
getURL()	Returns the URL for the transaction.
getReason()	Returns the reason for page cancellation, localized to the user's language.

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Adding Variable Information to the Cancellation Message (continued)

Method	Description
getQuotaId()	Returns the sys_id of the quota rule.
getQuotaName()	Returns the name of the quota rule.
getRunTime()	Returns the total run time for the page up to this point.
getType()	Returns the type of transaction, such as form, list, report, other.
getUser()	Returns the sys_id of the user.
getHomepage()	Returns the sys_id of the homepage.
getHomepageWidget()	Returns the name of the homepage widget.

Application quota rule form

A description of the fields on the Application Quota Rule form.

Application quota rule fields

Field	Description
Name	A unique name to identify the rule.
Application	The scoped application's name. To change this field, use the application picker to change the application. This field cannot be Global.
Order	A number that represents the priority of the quota transaction in relation to other quotas.
Active	A check box that determines if this rule is active (selected).
Log only	When checked, transactions are not canceled by a quota violation, but entries are added to the local host log that indicate the transactions are violating the quota rule. An entry is added to the Transaction Cancellation Log where the log only field is set.
Maximum Events	The maximum number of events allowed during the update period.
Maximum Jobs	The maximum number of jobs allowed during the update period.
Condition	The conditions that determine when the transaction quota applies. The condition builder displays conditions that are only applicable to transactions. For example, Foreground is true.
Description	A description of the transaction quota.

Application quota condition builder

A description of the options available in the condition builder for the Application Quota Rule form.

Field	Description
Attributes	Miscellaneous attributes that are related to the transaction.

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Field	Description
Created	When the transaction was created.
Created by	Who created the transaction.
Foreground	Whether the transaction was completed in the foreground or background: • True: a foreground transaction. • False: a background transaction.
Homepage	The homepage that is running. This value is populated only if the URL is `home.do`.
Homepage Widget	The homepage widget that is rendered in the transaction. When a homepage is rendered initially, each homepage widget is rendered in parallel.
Initial Scope Name	Scope where the method that created the transaction is defined. Setting this name to anything other than the selected application means that the rule is never used. The rule only looks at transactions of the selected application, and this value has the rule look for a different application, so the condition is never satisfied.
Scope Name	Scope of the application that called the method that created the transaction.
Sys ID	A sys_id of the transaction.
Thread Name	The name of the execution thread that is running the transaction. Foreground threads have names like `http-bio-8080-exec-1`. Background threads may have various names, and may be useful where the URL is not sufficiently descriptive.
Type	The type of transaction: • **List**: Any list transaction, such as incident_list.do. • **Form**: All forms, UI pages, CMS pages, and so on. • **XMLHttp**: Transactions that run through GlideAjax, where the URL is xmlhttp.do. • **Report**: The page `sys_report_template.do`. • **SOAP**: SOAP transactions. • **Export**: When a list is exported in a format such as XML, Excel. • **Scheduler**: When a scheduled job is performed. • **Text Search**: The text search transaction or any of its related operations. • **Other**: Any type that does not meet the qualities of another type. **Note:** Match the transaction quota **Type** to the transaction type listed in the Quota Manager log entry for the transaction.
URL	The URL of the page.
Updated	When the transaction was updated.
Updated by	Who updated the transaction.
Updates	What was updated.
User	The user performing the transaction.

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Application quota property

An administrator can add a system property to specify how often application quota rules are evaluated.

Application quota property

Property	Description
glide.quota.manager.cluster.update.seconds	Indicates the application quota update period in seconds. If this value is less than the glide.quota.manager.heartbeat property, the glide.quota.manager.heartbeat value is used. Type: Number Default value: 300 (5 minutes) Location: Add to the System Properties [sys_properties] table

Operational toggles form

A description of the fields in the Operational Toggles form.

Field	Description
Toggle Name	Unique name for the operational toggle.
Toggle ID	Toggle ID field that is inactive.
Short Description	Description of what function the toggle performs. **Note:** An example of this is a type-ahead search polling toggle that performs a type-ahead search every 10th keystroke.
Application	Scope that is to a specific application or is a global scope.

Run level toggle mapping form

A description of the fields in the Run Level Toggle Mapping form.

Run level toggle mapping form

Field	Description
System Run Level	Toggle level to associate the system run level with.
Toggle	Behavior of the toggle.
Toggle Level	Degree that the toggle operates.
Application	Scope of the toggle level to specific application or global.

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Run level toggle mapping form (continued)

Field	Description
Value	Behavior of the run level. **Note:** An example of a value is as follows: 1 or every keystroke that the system performs a type-ahead search.
Exception Roles	Exception roles that the restrictions don't apply to. **Note:** An example of these exception roles is as follows: • activity_admin • activity_creator • admin

Operational toggle level form

A description of the fields in the Operational Toggle Level form.

Operational toggle level form

Field	Description
Toggle	The preexisting toggle that you want to create levels for.
Short Description	A brief description of the desired level's function.
Application	The scope that the toggle level will apply to. This could be either a specific application or the global scope.
Value	Behavior of the toggle level.

Transaction call chain register form

A description of the fields in the Transaction Call Chain Register form.

Transaction Call Chain Register form

Field	Description
URL	URL for the selected transaction.
Transaction Log	Transaction log ID created during the next occurrence of the URL. This field is empty when you first create the call chain register for a transaction.
Recorded	Check box that indicates if call chain recording has already taken place for this transaction.

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Transaction Call Chain Register form (continued)

Field	Description
	• This field is clear (**false**) when you first create the call chain register for a transaction. • **true** appears when the call chain is recorded during the next occurrence of the URL.
User	(Optional) If call chain recording should only take place when a specific user executes the next transaction occurrence, select the user ID. Leave it empty if you want call chain recording to occur regardless of user.

Transaction call chain form

A description of the fields in the Transaction Call Chain form.

Transaction Call Chain form

Field	Description
Source Table	Source table for the script resource executed in the call chain.
Source	Script resource executed in the call chain.
Persisted Sequence	Order in which the script executed in the call chain.
Call Depth	Depth of the executed call chain. For example, a script calling a script include, which in turn calls another script include would have at least three rows. One row has a depth of 1, the second row has a depth of 2, and the third row has a depth of 3.
Trigger Table	Name of trigger table, if any, for the executed call chain component.
Duration(ms)	Observed duration of the script execution, in milliseconds.
Transaction Log	Transaction log ID created for the recorded call chain.

Query record form fields

A description of the fields in the query record form.

Query record fields

Field	Description
Example	An SQL statement for an individual query, before being canonicalized to aggregate it with similar queries.

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Query record fields (continued)

Field	Description
Hash	The hash value for this record.

Example stack trace	A stack trace for an individual query. Lines referencing script code (includes both custom and base system code) appear in the following format:
	`table name.sys_id:line number`
	For example, this stack trace indicates a function call from line 119 of a script include.
	`sys_script_include.105f70abc0a8010300d4d79ed1b93eb0:119`
	For more information, see stack traces.

Example URL	The URL for an individual query, depending on how the query was called. • User transactions: lists the transaction parameters. For example, if a user navigates to the incident list, the URL is `/incident_list.do sysparm_query=active=true` • Scheduled jobs: lists the name of the scheduled job. • Any other method: lists an empty field.
First sighting	The first occurrence of a similar query.
Last sighting	The last occurrence of a similar query.
Total execution time	Total execution time.
Execution Count	The number of similar query occurrences that are aggregated.
Average execution time (ms)	The average duration to execute one of these similar queries.

Index suggestion form fields

A description of the fields in the index suggestion form.

Index Suggestion fields

Field	Description
Slow query	The slow query for which the index suggestion was generated.
Example	An actual SQL statement for an individual query, before being canonicalized to aggregate it with similar queries.

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Index Suggestion fields (continued)

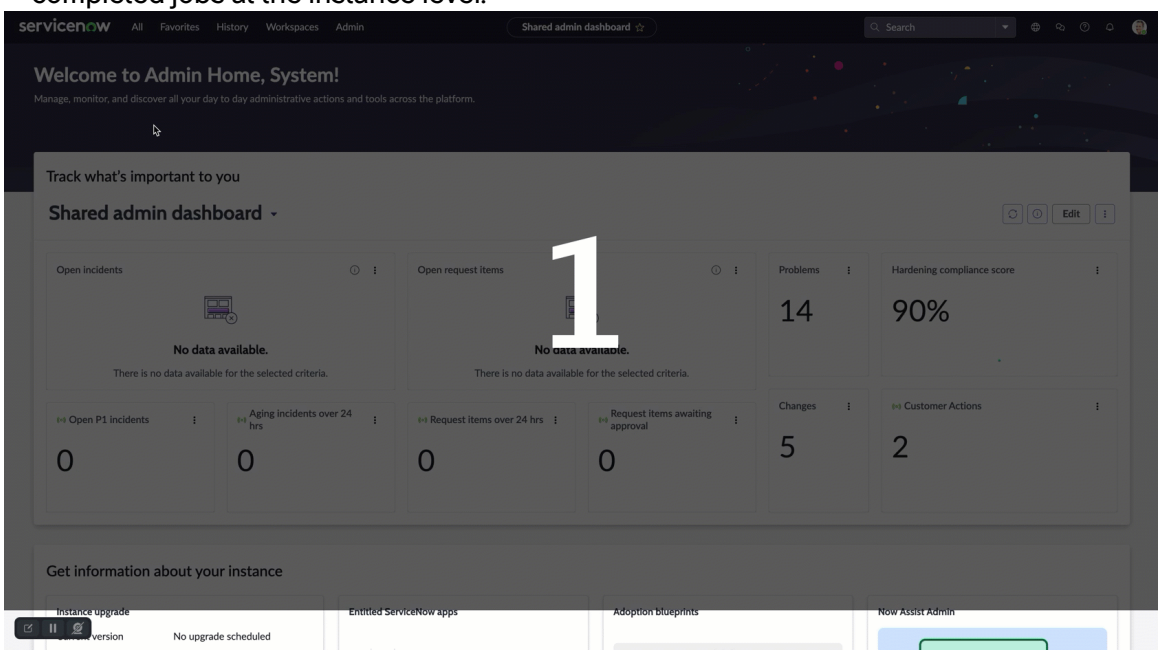
Field	Description
Table name	Name of the table used in the query.
Column names	Names of the columns used in the query.
Index name	Name of the index, assigned by the ISE after the index is created.
State	Processing state of the index. For details, refer to Index suggestions for slow queries to see index suggestion states and table.
Imported	This box, if checked, indicates that the index suggestion was imported from a different instance for evaluation and testing.

System Diagnostics

Review System Diagnostics to monitor the health and performance of your instance.

Use the following tools and modules to diagnose the health of your instance:

- System Events and Jobs Dashboard
  - System Events dashboard: Use the System Events dashboard to set the filters to display information about events on your instance.
  - Scheduled Jobs dashboard: Use the Scheduled Jobs dashboard to view the details of the completed jobs at the instance level.



- Stats Tools: Use Stats tools for performance evaluation by accessing the system activities statistics.

Stats Tools

To aid in performance evaluation, the Stats Tools records statistics for system activities that affect performance such as the execution of queries, scripts, and transactions.

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Note: The Stats Tools plugin is activated by default. It requires the admin role to activate or upgrade, and it requires the com.snc.jrobin.

Stats Tools adds modules under **System Diagnostics** > **Stats**, including **Slow Queries**, **Slow Scripts**, and **Slow Transactions**. Each module accesses a table of activity patterns [sys_query_pattern], [sys_script_pattern], [sys_transaction_pattern]. Each pattern table represents a collection of unique activities. Each collection is an aggregation of executions of that unique activity over all time. Each record provides basic timing analysis with example identifiable details of the activity.

Note: To aid in debugging, you can filter most of these logs by application scope, limiting the transactions (for example, slow scripts or events) to only those transactions originating in specific scopes.

Activity patterns are immediately recorded to a cache and are later persisted to their pattern table. If you flush server caches, then recorded activities that have not been persisted are cleared. The following are examples of pattern records.

- Each time a query is executed that meets the recording and persistence threshold it is aggregated and stored as a query pattern record.
- Each time a particular business rule is executed it aggregates to a script pattern record.
- Each time a particular background job runs it aggregates into a unique transaction pattern record.
- Each click of the **New** button on the Incidents list counts as a list type transaction pattern with specific form action.

Metrics

Metrics include total and average times of interest per unique execution pattern over the total execution count. Metrics are aggregated with each new instance of the unique activity and persisted to the pattern record.

Metadata

Example data from specific executions are included on each pattern to identify execution details.

Characterizations of each activity type

Transactions	Any transaction type includes server-side and related client-side transactions. Metrics include **Total server load time**, which aggregates the total server-side time excluding semaphore and session wait times. It also aggregates relevant server transaction times that are found on the syslog_transaction table. Transaction types:

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(continued)

	• An HTTP Request transaction is identified by a URL, transaction type, processor, form/list action, URL query (filters), and related table name. • Any other transaction is identified by its transaction URL/page/name, transaction type, and processor or thread name.
Scripts	Any script activity type includes scripts evaluated by GlideScopedEvaluator. Script Types: • A Jelly Script is identified by the sys_jelly_file table, jelly file path, line number, and script that was executed. • Any other script is identified by the table and sys_id.
Queries	Any query activity includes prepared statements executed by GlideDBI. Query Types: All queries are identified by MongoDB query or insert, update, or select statements, as well as other components of the statement like selected columns, where clause, unions, column sets, and limits.

Slow mutex locks record detail

Administrators can use slow mutex logs to gain insight into how mutex locks are affecting platform performance.

Field	Description
Mutex name	The name of the mutex lock for this record.
Is Fast Lock	If **false**, the lock was placed on a record in the ServiceNow platform. If **true**, the lock was placed on a record in the underlying database.
Average execution time	The average time for which the mutex lock was held.

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Field	Description
2-hour moving average (ms)	The average of the moving average values of execution time, calculated over periods of two hours.
Day moving average (ms)	The average of the moving average values of execution time, calculated over periods of one day.
Month moving average (ms)	The average of the moving average values of execution time, calculated over periods of one month.
Execution count	The number of similar occurrences that are aggregated.
Last sighting	The time and date the last occurrence was noted.
First sighting	The time and date the first occurrence was noted.
Example stack trace	A stack trace for an individual mutex lock.
Total execution time	The sum of execution time for the aggregated occurrences.
Has	The hash value for this record.
Label	The mutex lock label.
Example URL	The URL for an individual mutex lock.
Event Execution Time / Event Count Trend graphs	The Mutex Execution Time Trend graphs show the total execution time of these mutex locks over the most recent period of two hours, one day, or one month. The Mutex Count Trend graphs show the mutex lock counts over the most recent period of two hours, one day, or one month.

Slow events log record detail

As an administrator, you can use Slow Events logs to gain insight into how events are affecting platform performance. To aid in debugging, you can filter slow event log detail by application scope, limiting events to only those events originating in specific scopes.

Field	Description
Event name	Name of the event for this record.
Queue	Event queue containing this event.

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Field	Description
Event application	Application scope the slow event originated in. Global appears if the slow event originated in the global scope.
Execution count	Number of similar occurrences that are aggregated.
Average execution time (ms)	Average duration to execute the event in a single occurrence, in milliseconds.
Day moving average (ms)	Average of the moving average values of execution time, calculated over periods of one day.
Last sighting	Time and date the last occurrence was noted.
First sighting	Time and date the first occurrence was noted.
Hash	Hash value for this record.
Month moving average (ms)	Average of the moving average values of execution time, calculated over periods of one month.
Label	Label for the event.
Example URL	URL for an individual event.
Example stack trace	Example stack trace for an individual event.
Total execution time	Total sum of the event execution times for the aggregated occurrences.
Event Execution Time / Event Count Trend graphs	Event Execution Time Trend graphs show the total execution time of these events over the most recent period of two hours, one day, or one month. Event Count Trend graphs show the event counts over the most recent period of two hours, one day, or one month.

Slow scripts log record detail

As an administrator, you can use Slow Scripts logs to gain insight into how events are affecting platform performance. To aid in debugging, you can filter a slow script log by application scope, limiting scripts to only those scripts originating in specific scopes.

Field	Description
Label	Label assigned to the script.
Script source	Source of the script.

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(continued)

Field	Description
Script application	Application scope the slow script originated in. Global appears if the script originated in the global scope.
Average execution time (ms)	Average duration to execute the script in a single occurrence, in milliseconds.
Execution count	Number of similar occurrences that are aggregated.
Day moving average (ms)	Average of the moving average values of execution time, calculated over periods of one day.
Original application	Total sum of the script execution times for the aggregated occurrences.
Last sighting	Time and date at which the script was last executed.

Slow interactions log record detail

Administrators can use Slow Interactions logs to gain insight into how interactions are affecting platform performance.

Field	Description
Label	Label assigned to the interaction.
Average execution time (ms)	Average duration to execute the interaction, in a single occurrence, in milliseconds.
Execution count	Number of similar occurrences that are aggregated.
Total execution time	Total sum of the execution times for the aggregated executions of the interaction.
First sighting	Time and date the first occurrence was noted.
Hash	Hash value for this record.
Last sighting	Time and date the last occurrence was noted.
Example Java stack trace	Example stack trace for an individual event.
Window start	Start time
Window end	End time

Slow transactions log record detail

As an administrator, you can use Slow Transactions logs to gain insight into how transactions are affecting platform performance. To aid in debugging, you can filter transaction log detail by application scope, limiting transactions to only those transactions originating in specific scopes.

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Field	Description
Average execution time (ms)	Average duration to execute the transaction, in a single occurrence, in milliseconds.
Execution count	Number of similar occurrences that are aggregated.
Total execution time	Total sum of the execution times for the aggregated executions of the transaction.
Average client time (ms)	Average duration to execute the transaction on the client, in a single occurrence, in milliseconds.
Total client time (ms)	Total sum of the transaction execution times for the aggregated occurrences on the client, in milliseconds.
Origin application	Application scope the transaction originated in. Global appears if the transaction originated in the global scope.
Example type	Example transaction type executed.
Example processor	Example processor for an individual transaction.

Daily Slow Patterns

Daily Slow Patterns takes a daily rollup of platform performance-pattern data and computes day-over-day trend and anomaly signals for each pattern. You can then determine whether a query, script, or transaction pattern is increasing in frequency or duration over time.

Requirements

Accessing Daily Slow Patterns requires the admin role.

Daily Slow Patterns requires the Daily Stats Snapshot (com.glide.stats.daily_snapshot) plugin, which is not active by default. To activate it, navigate to **All** > **System Diagnostics** > **Plugins**, search for the plugin by its ID, and install it.

Access Daily Slow Patterns

To access Daily Slow Patterns, navigate to **All** > **System Diagnostics** > **Stats** > **Daily Slow Patterns**.

Note: There is no dedicated dashboard for daily slow patterns data. To analyze patterns across types, query the individual snapshot tables directly or build a custom report. For a list of the available tables, see Daily Slow Patterns tables and fields.

Processing overview

The platform tracks performance patterns in memory, including slow queries, scripts, transactions, mutex contention, events, and table I/O. The live pattern aggregates reflect only the totals accumulated since each pattern last reset, which can be minutes or months earlier.

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Daily Slow Patterns runs once per day. Rather than capturing a single live total, it computes what changed since the previous day and stores the result as a daily record. This lets you compare a pattern against its own history and identify whether its frequency or duration is shifting over time.

The feature also provides an on-demand comparison that computes a difference between any two points in time. For example, you can capture pattern state before a Discovery run starts and compare it against the state when the run completes.

Note: An on-demand comparison reflects all activity on the instance during the selected window, not the activity of a single process. Use it in controlled conditions where other instance activity is limited.

What data is stored

The daily snapshot tables store performance telemetry only. This telemetry describes how the platform performs, not the data that your users work with. Stored values include execution counts, durations, timing breakdowns, table and script identifiers, mutex and event names, query hashes, and the running-statistics values used to compute trends.

Important: The daily snapshot tables contain performance telemetry only. They don't contain business data or customer record data. This distinction supports audit and compliance responses, including FedRAMP and SOC responses, that classify these tables as operational telemetry rather than customer data.

Two fields are an exception to the telemetry-only classification, because both capture diagnostic samples verbatim from live traffic. The following table describes these fields.

Fields that can contain literal values from live traffic

Field	What it can contain
`daily_query_pattern.executable_sql`	A reconstructed, runnable copy of a sampled slow query. Placeholder values are replaced with the values passed at run time. If a query filtered on a literal value, such as a caller name or a case number, that value appears in this field.
`daily_pattern.url`	The request URL and the full dumped request parameters for the sampled transaction. Submitted form or record field values can appear here.

Access to all daily snapshot tables requires the admin role, which limits who can read these values. The values in these two fields are still real customer data after an admin can read them. If your compliance posture prohibits retaining literal record or parameter values, treat `executable_sql` and `url` as sensitive. Scope retention for them separately, even in admin-only tables.

Trend and anomaly signals

For each pattern, the daily snapshot computes a z-score, a significance value, and a deviation value, along with a percentile rank for each. These values help you find and confirm patterns whose behavior changed. The following list describes what each value tells you:

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- Z-score: how statistically unusual today's value is for a pattern, measured as the number of standard deviations from that pattern's running mean. A value near 0 is typical, and values further from 0 are more unusual.
- Significance: an operational impact score that combines the z-score with how much of the metric happened that day. Sort or filter on significance to find what changed today.
- Deviation: how far today's value falls from the pattern's running mean, expressed in the metric's own units.

Each of these values comes in three variants that track different questions about the same pattern: a per-call average, a daily total, and a daily count. The variants can move independently. For example, a pattern that runs far more often than usual changes the count variant. If each run takes its typical time, the average variant stays near 0.

Data accumulation and reliability

The reliability of z-scores, deviation, and significance rankings increases as more daily snapshots accumulate for a pattern.

Note: Z-scores, deviation, and significance rankings aren't meaningful until enough daily snapshots have accumulated after installation. On a newly installed instance, no history exists yet, so these values can't describe a pattern's real variability.

The following points describe how the values behave over time:

- On the first day a pattern is seen, no variance can be measured yet, so deviation is 0 and the z-score is 0 by definition.
- For the first several days, the running standard deviation is based on very few samples and is statistically noisy. A single unusual day can move the mean and deviation disproportionately.
- The platform doesn't enforce a fixed warm-up period. As a practical guideline, treat z-scores and significance rankings as informational rather than actionable until a pattern has accumulated at least several weeks of daily snapshots.

Daily Slow Patterns tables and fields

Tables and fields that Daily Slow Patterns populates with per-day performance telemetry, including trend, anomaly, and I/O tracking data.

Daily slow patterns tables

Daily Slow Patterns populates a set of tables that store performance telemetry. For an overview of how the snapshot works, see Daily Slow Patterns. The following table describes each table.

Daily slow patterns tables

Table	Description
Daily Pattern [daily_pattern]	Base table for daily pattern snapshots. Includes the running-statistics values used to compute trends.
Daily Query Pattern [daily_query_pattern]	Daily snapshot of slow query patterns.
Daily Script Pattern [daily_script_pattern]	Daily snapshot of slow script patterns.

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Daily slow patterns tables (continued)

Table	Description
Daily Transaction Pattern [daily_transaction_pattern]	Daily snapshot of slow transaction patterns.
Daily Mutex Pattern [daily_mutex_pattern]	Daily snapshot of mutex contention patterns.
Daily Event Pattern [dailyevent_pattern]	Daily snapshot of event patterns.
Daily IOStats [daily_iostats]	Per-table daily changes for gets, inserts, updates, deletes, and selects, and their timings. This table is turned off by default.

Table I/O tracking property

The Daily IOStats [daily_iostats] table is turned off by default. It's controlled by the *`com.glide.stats.daily_snapshot.diff_iostats`* system property, which defaults to `false`.

Table I/O tracking property

Property	Description	Default
`com.glide.stats.daily_snapshot.diff_iostats`	Turns daily table I/O trend and anomaly tracking on or off. Set this property to `true` to populate and analyze `daily_iostats`.	`false`

While the property is `false`, daily snapshot runs skip `daily_iostats` entirely. No rows are created or compared, and any rows left over from a period when it was turned on are cleaned up automatically. The z-score, significance, and running-counter fields apply to `daily_iostats` only after you turn the property on.

Average, total, and count variants

Each trend value comes in three variants, distinguished by a field-name suffix. The following table describes each variant and the question it answers.

Trend value variants

Field suffix	Column label	Tracks	Question it answers
None	(avg)	Per-call average duration	Did each run get slower or faster than usual?
`_total`	(no modifier)	Total duration for the day	Did this pattern consume more or less total time today?
`_count`	(count)	Execution count for the day	Did this pattern run more or less often today?

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Note: The field-name suffix and the column label are inverted by design. The field with no suffix carries the **(avg)** label, and the field with the `_total` suffix carries the unqualified label. When you build a report or filter on these columns, check both the field name and the column label rather than assuming one from the other.

The Daily Transaction Pattern [daily_transaction_pattern] and Daily IOStats [daily_iostats] tables repeat this three-way split once for each tracked dimension, such as `business_rule_time`, `sql_time`, and `cpu_time` for transactions, or `gets`, `inserts`, and `selects` for I/O. Each column is a combination of a dimension and a variant, not a separate metric to understand on its own.

Internal running counters

To compute deviation and z-score across days, the platform carries forward internal running counters from the previous snapshot. These fields include `welford_weight_sum`, `welford_day_count`, `welford_m2_accumulator`, and `overall_average`, along with their total, count, and per-dimension variants.

Note: The running-counter fields are intermediate values that the platform uses to compute the next day's snapshot. Their raw values aren't meaningful on their own, so don't surface them on dashboards or reports. The values meant for use are deviation, z-score, significance, and their percentile ranks.

Using ServiceNow AI Platform upgrade tools

Get the latest in ServiceNow® products and services on the ServiceNow AI Platform®. The system helps you plan for updates, and monitor and work with your applications before, during, and after upgrading.

Upgrade Center	Upgrade Console
	
Plan and manage all your upgrades in one place, past and present, with data visualizations, upgrade histories, and more.	Streamline upgrades with a single destination for tools, insights, and progress tracking.

Upgrade Center

Plan for all your upgrades on the ServiceNow AI Platform, and get clear oversight of the process at every step. The Upgrade Center includes multiple options for each aspect of your upgrading plan. Explore various updates available to your infrastructure with Upgrade Preview, including detailed insights before actually upgrading. Visual task boards (VTB) in the Upgrade Center give you all the necessary info to manage your workflow post-upgrade, and past updates are detailed with the Upgrade History module. Tie it all together with the Upgrade Monitor to plan, schedule, observe, and debug upgrades.

See Upgrade Center.

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Upgrades and Conversions

Keep your instance running smoothly during and after upgrading. ServiceNow AI Platform® Upgrades and Conversions tools make the process easy, with information on upgrades, patches, and releases, as well as options for backups, post-upgrade instance testing, and migration from ServiceNow® Express List to the Service Management platform.

See Upgrade Console.

Upgrade Center

Use ServiceNow® Upgrade Center

Get started

Explore  Learn about Upgrade Center	**Use**  Preview, schedule, monitor and review your upgrade
Administer  Administering Upgrade Center	**Reference**  Learn miscellaneous information about Upgrade Center

Troubleshoot and get help

- Ask or answer questions about Upgrade Center in the ServiceNow Community
- Search the Known Error Portal for known error articles

Exploring Upgrade Center

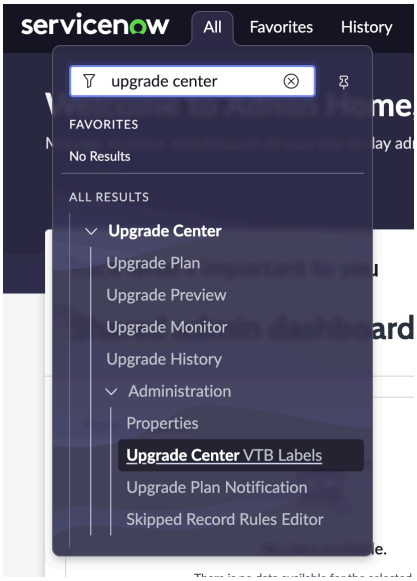
Get an overview of Upgrade Center so you can plan your upgrade ahead.

Upgrade Center overview

One-stop experience

Streamline your upgrade process with Upgrade Center. Explore upcoming releases and preview their features without impacting your current instance. Monitor active upgrades and review past upgrade history. Use the visual task board (VTB) to manage post-upgrade tasks efficiently.

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Upgrade Center users

Upgrade Center has the following users.

Users	Description
System Administrator [admin]	The System Administrator user is required to access and use Upgrade Center.

Upgrade Center benefits

Benefit	Feature	Users
Preview your upgrade	Upgrade Preview module	System administrator
Monitor your upgrade	Upgrade Monitor module	System administrator
Review previous upgrade detail	Upgrade History module	System administrator
Build an upgrade plan	Upgrade Plan overview	System administrator
Create and execute skipped record rule	• Create a skipped record rule • Execute a skipped record rule	System administrator

What to explore next

To learn more about using Upgrade Center, see:

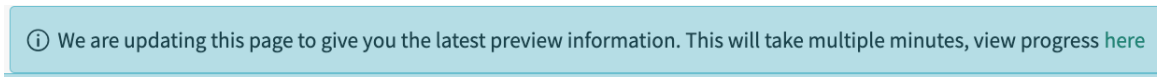
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- Using Upgrade Center
- Administering Upgrade Center
- Upgrade Center references

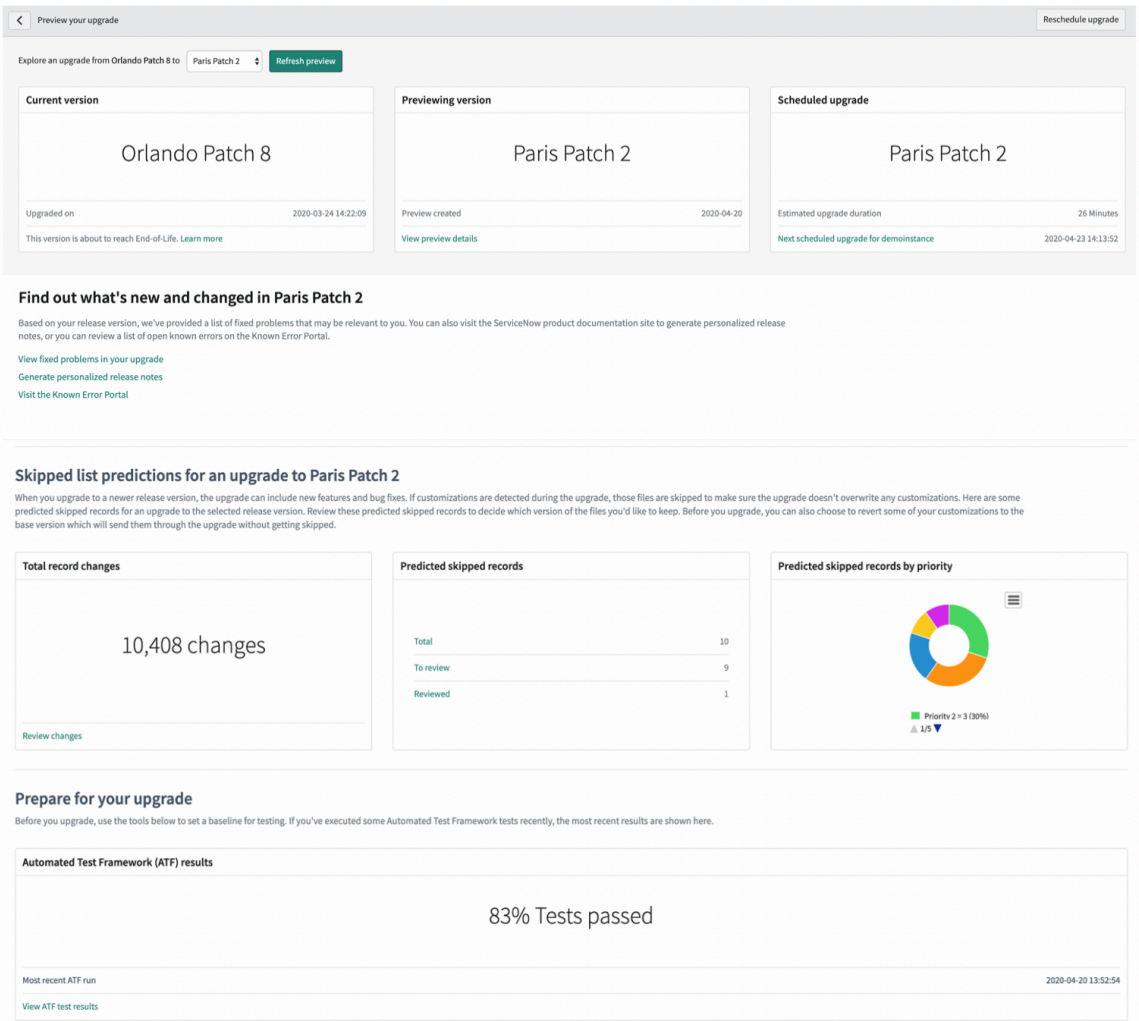
Upgrade Preview module

The Upgrade Preview module enables you to have an unprecedented insight to an instance prior to an actual upgrade. You can explore and preview upgrades to different ServiceNow release versions and see how your instance might be impacted with your current configurations. The Upgrade Preview utility helps you to plan, schedule, and prepare for an upgrade.

The preview status info and link in the message displayed on top of the Upgrade Preview page states the current status of the ongoing preview process. Because you can get an accurate prediction on the new and existing applications and their skipped records, the preview execution time has increased considerably. Select the link in the message to see the status of the preview process.



The Execution Tracker record displays when you select the progress link in the message. Select Show status related list to show the current status of the executed preview process.



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Note: Depending on the eligibility of your instance, the list of available target versions for preview varies. Only versions that are allowed for a particular instance to be upgraded to, show up on the list. If your instance is not eligible to be upgraded to any version, the drop-down menu is empty.

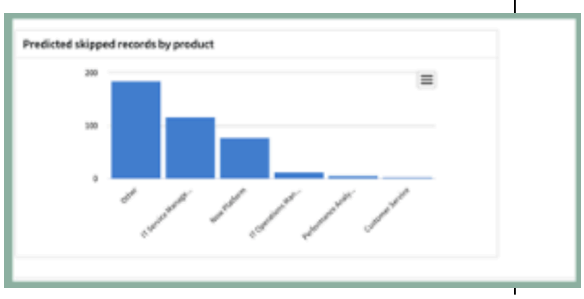
The following cards display with more information.

Card names	Description
Current version	Name of the current version. • Upgraded on: Date on which the instance got upgraded to the current version • End of life: Link to KB0610454 for more information about end of life
Previewing version	Information about the previewing version displays. If you haven't previewed any version, you are expected to select a version for preview and select **Go**. If you have already previewed a version, the following information displays. • Preview created: Date on which the preview was created • View preview details: Link to the Upgrade Preview form **Note:** Select **Refresh preview** if you want to regenerate a new preview of the same target version. Although selecting **Refresh preview** regenerates the skipped list, the reverted records won't get skipped. If you have reviewed and retained some records, they get replaced as soon as you select **Refresh preview**.
Scheduled upgrade	Name of the next upgrade that has been scheduled to start. If there is no currently scheduled upgrade, the card shows No upgrade scheduled. **Note:** This card can have different messages depending on the schedule of the upgrade. If there is an upgrade scheduled, the following information displays.

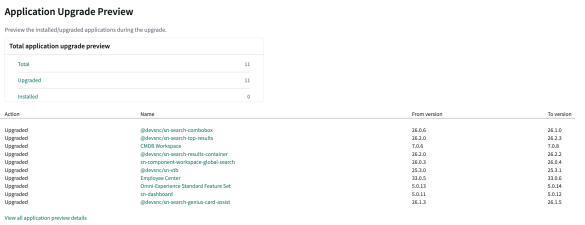
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Card names	Description
	• Estimated upgrade duration: Estimated duration needed to complete the scheduled upgrade. **Note:** If this is your first upgrade, there will be no information about estimated upgrade duration. • Next scheduled upgrade: Date and time on which the next upgrade has been scheduled to start.
Find out what's new and changed	Links to view the new and changed features in the current upgrade version. The following three links show up when you select **Go** to preview the upgrade version. • Problem fixes: Fixes that have been made since the last upgrade version • Personalized release notes: Release notes summary for the previewed version • Known error articles: Errors that have been identified but not yet resolved **Note:** These links don't show up if you haven't previewed any upgrades.
Skipped list prediction **Note:** If you are using Upgrade Plan, the card name changes to Skipped list prediction with plans.	Information about the predicted skipped records. See Preview predicted changes for more details. • Total record changes: Total number of records that are predicted to change when the upgrade occurs. Total record changes also include possible predicted skipped files known as Predicted skipped records. Review changes: Link to the list of records that have changed and can be reviewed. • Predicted skipped records: Total number of records that have been predicted to be skipped. ○ Total: Total predicted skipped records ○ To review: Predicted skipped records to be reviewed ○ Reviewed: Predicted skipped records that have been reviewed

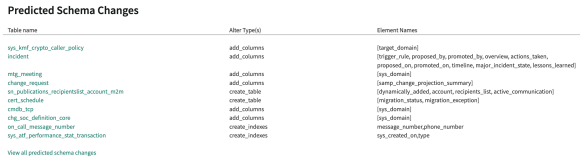
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Card names	Description
	○ Resolved: Predicted skipped records that have been resolved by implementing the rules **Note:** This entry shows up on the card only when rules are executed on the skipped records. You will also see a link to create a skipped record rule if either there are no existing rules or the existing rules aren't executed. **Note:** Skipped record rules and upgrade plans can't be implemented together. See Execute a skipped record rule automatically for more information. • Predicted skipped records by priority: Pie chart to represent the predicted skipped records by priority. **Note:** Select the pie chart to see the list of predicted skipped records. ServiceNow prioritizes the skipped records based on the importance of the file types. The prioritization is done as follows: ○ Priority 1 (highest priority): UI pages, UI macros, and more ○ Priority 2: Business Rules, Security ACLs, and more ○ Priority 3: Reports and more ○ Priority 4: Form Sections, Choice Sets, and more ○ Priority 5 (lowest priority): everything else
Predicted skipped records by product	Records that have been predicted to be skipped and are sorted as per their product families. 

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Card names	Description
	Note: The products sorted under the Other category don't have any specific product family.
Application Upgrade Preview	Accurate prediction on the installs and upgrades for new and existing applications and for their specific skipped records. It states the total number of applications that have been either upgraded or installed. **Note:** The skipped records prediction is reflected on the Predicted skipped records by product card.  By default, 10 applications preview details show up. Select View all applications preview details link to view the entire list. It states the name of the application and the following information: • Action: The action taken on the specific application. It can either be upgraded for the existing applications or installed for the new applications. • From version: States the previous version of the upgraded application (existing application). **Note:** This field is empty if the application is a newly installed application. • To version: States the current version to which the existing application has been upgraded. **Note:** This field shows the current version of the newly installed application.
Predicted Schema Changes	Prediction about the kind of changes in the database based on the upgrade on your instance.

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Card names	Description
	 By default, 10 predicted schema changes show up. Select View all predicted schema changes link to view the entire list. Changes like new columns, new tables, and new indexes are captured in this section.
Automated Test Framework (ATF) results	Percentage of passing ATF tests that ran in the last 30 days. • Most recent ATF run: Date and time on which the recent ATF tests ran • View ATF results: Link to show more information about the recent ATF results **Note:** Only the tests which are finished and have passed are considered for the ATF results. If one test runs more than once, only the recent execution is considered in the results.

Upgrade Monitor module

Schedule an upgrade and monitor the status of an ongoing upgrade using the Upgrade Monitor module. You can also view the upgrade summary and the list of records causing conflicts in your instance once the upgrade is complete.

Access Upgrade Monitor

If you log in with the admin role while an upgrade is underway, the system automatically displays the Upgrade Progress screen. If no upgrade is in progress, you can navigate to **All** > **Upgrade Center** > **Upgrade Monitor**.

How the Upgrade Monitor fits into the upgrade process

Note: For detailed information about the upgrade process, see Upgrade your instance.

The Upgrade Monitor concerns only part of the larger upgrade process:

1. Clone the production instance to a test instance and a non-production instance.
2. Apply the upgrade to the non-production instance.
3. On the upgraded non-production instance, process the skipped list.
4. Test the non-production instance to confirm that the instance still works and performs adequately. Compare to benchmark data from pre-upgrade production instance.

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5. Apply the upgrade to the test instance. Import the update sets created on the non-production instance when you processed the skipped list. Repeat the testing to make sure that the process is working.
6. Apply the upgrade to the production instance. Import the update sets created on the non-production instance when you processed the skipped list. Test to confirm that the instance works and performs adequately.

Within this larger process, the Upgrade Monitor helps you upgrade individual instances:

- During the upgrade, it shows where in the process the system is
- After the upgrade, it reports what the upgrade did and for how long
- As you upgrade the first non-production instance, it helps you resolve conflicts between customizations and changes that are part of the upgrade
- On non-production instances, it provides information that can help you estimate how long the upgrade might take on the production instance

Monitoring an individual instance as it upgrades

While the upgrade is in progress the Upgrade Progress shows what the upgrade process has done, what it is doing, and what remains to be done.

When the upgrade completes, the system displays the Upgrade Summary Report. The Upgrade Summary Report provides information about conflicts between customizations versus changes in the upgrade and provides a link to reconcile these conflicts. For information about understanding and resolving these conflicts, see Process the skipped records list.

When you upgrade a non-production instance, the Upgrade Summary Report can help you estimate how long the same upgrade might take on a production instance. For details about the elements on this report and how to use this information, see Upgrade Details form.

Resolving conflicts

To prevent losing customizations, the system skips upgrading records you have customized and provides you with a list of these skipped records.

As you upgrade your first non-production instance, go through the Skipped Changes to Review related list and resolve these conflicts. The system records the changes you make during this process in update sets. See Review skipped records using related lists, for more information.

You do not need to reconcile the skipped list on any instances you later upgrade. Instead, you can apply the upgrade then import the update sets containing your changes.

For details on reconciling conflicts, see Process the skipped records list.

Factors affecting upgrade duration

Various factors affect how long the system takes to perform an upgrade. The Upgrade Monitor on non-production instance can help you understand those factors and estimate how long the upgrade to your production instance takes.

Many factors can affect the duration of the upgrade process:

- The number of records in the database
- The number of customizations in the database
- The number of nodes in the instance

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- The size of tables in the instance that require a schema-change in the instance
- The number of fix scripts required and the size of the tables those fix scripts manipulate

Upgrading a non-production instance can help you estimate how long the upgrade takes on production, but differences between the instances can significantly affect the duration:

- When you cloned the production instance to the non-production instance, you may have clone-excluded some tables. This reduces the size of the database and makes the non-production instance upgrade faster than the production instance.
- The production instance may have more memory and processing power.
- The production instance may have more nodes than the non-production instance.

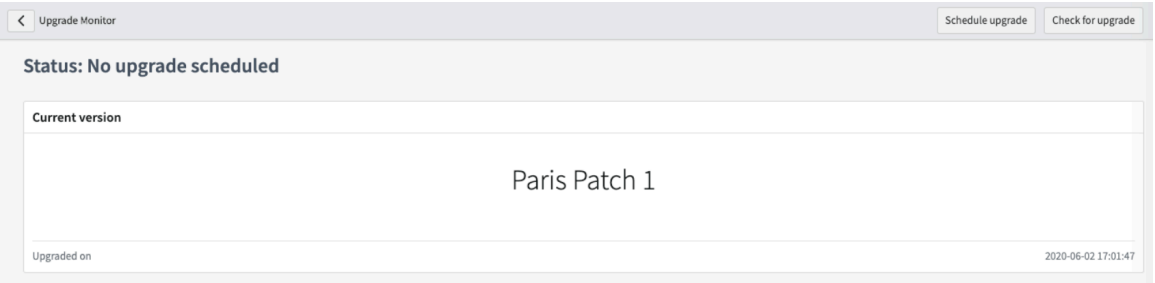
After upgrading the first non-production instance, examine the Upgrade Summary Report for data to help estimate the impact of these factors.

Upgrade Monitor schedule states

When an upgrade is scheduled, the Upgrade Monitor displays information about the next scheduled upgrade. It displays the date and time when the next scheduled upgrade will start. If there is no upgrade scheduled, the Upgrade Monitor displays **Status: No upgrade detected**.

No upgrade scheduled

There is no upgrade that has been scheduled currently.

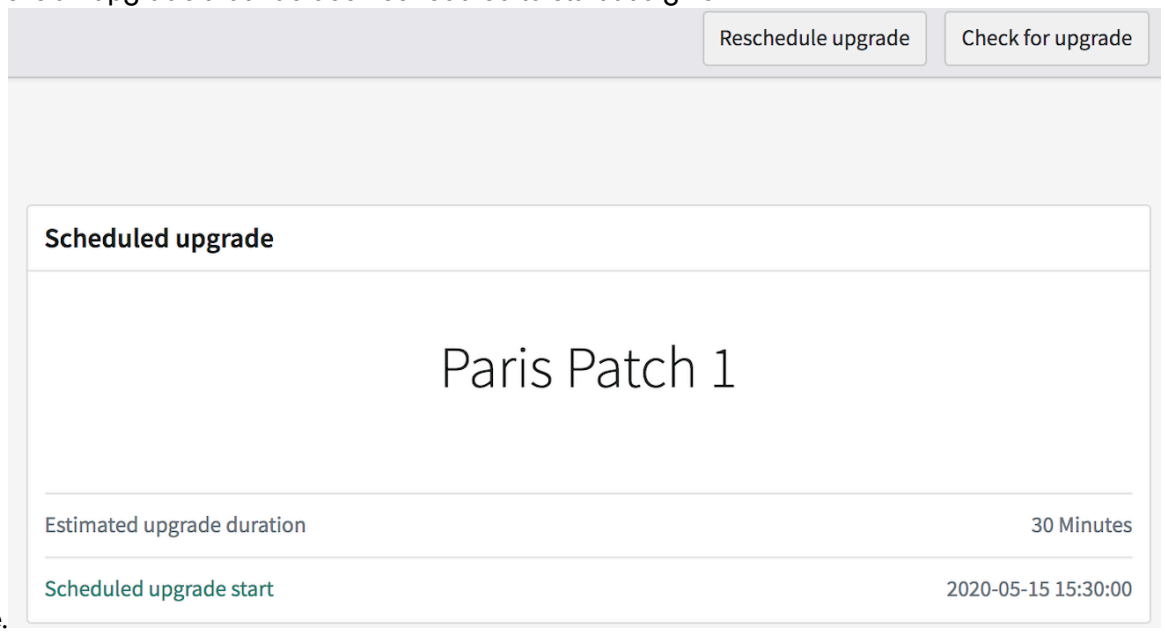


You can also schedule an upgrade by selecting **Schedule upgrade**. To check for an immediately available upgrade, select **Check for upgrade**. It also shows the current version of your upgrade and the date it was upgraded on.

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Upgrade scheduled

There is an upgrade that has been scheduled to start at a given time.

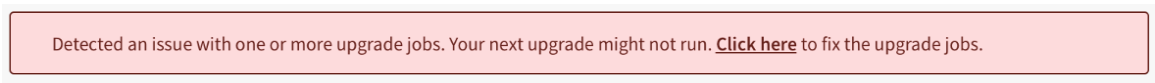


You can also reschedule the upgrade by selecting **Reschedule upgrade**. To check for an immediately available upgrade, select **Check for upgrade**. By selecting either **Reschedule upgrade** or **Schedule upgrade**, you will be directed to HI Upgrade Wizard.

Upgrade monitor with issue detected

If one or both of the triggers for upgrading the system ('Check distribution for possible upgrade' and 'Check database for possible upgrade') have been customized or are missing, the Upgrade Monitor displays a warning and provides a button for resolving the issues.

Note: If your instance is self-hosted (not hosted by ServiceNow) this message may not necessarily indicate a problem. If you have customized or disabled the upgrade job and want to keep that customization or disabled state, do not select the button to fix the upgrade issue.



To resolve the issues with the upgrade jobs, select the link in the message. This action reverts both upgrade triggers ('Check distribution for possible upgrade' and 'Check database for possible upgrade') to their base versions.

Note: 'Upgrade' job has been renamed to 'Check distribution for possible upgrade' starting Paris. 'Check Upgrade Script' job has been renamed to 'Check database for possible upgrade' starting Paris.

Upgrade Plan overview

Accelerate your upgrades using the Upgrade Plan that automates the installation of applications during upgrades, giving you a seamless upgrade experience. It helps you define applications and target versions to be installed in your instance.

Navigate to **All** > **Upgrade Center** > **Upgrade Plan**.

You will need the following instances to use Upgrade Plan.

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- Builder instance: Build your upgrade plan
- Consumer instance: Implement your created upgrade plan

Note: Ensure that you have upgraded your instance to the latest available version to build the upgrade plan. It is recommended to configure your dev instance as your builder instance. You are required to install the upgrade plan before upgrading your consumer instance. See Upgrade Plan Properties for more details.

When you upgrade an instance, resolutions are skipped, and customizations are often loaded post upgrade. This causes temporary breakdown of features until fully loaded. Tasks like committing update sets, installing new plugins and applications, and multiple update are also time consuming. Use the Upgrade Plan feature to automate these post-upgrade tasks by tracking your actions and replay the steps on all the required instances. You don't have to manually apply post-upgrade tasks which helps in reducing downtime.

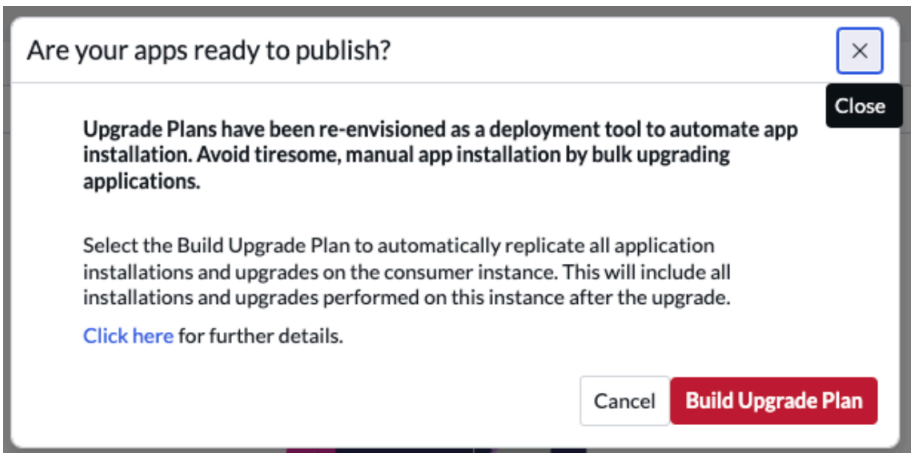
Note: After upgrading to the latest version, you will see some skipped records. Some of those records will already be marked as reviewed and some of them will need to be reviewed.

Starting Yokohama release, customizations and skipped records are not a part of the Upgrade Plan, by default. You can choose to include the customizations and skipped records along with the app installations within the Upgrade Plan by enabling the glide.upgrade.plan.include.skips property. This property controls about when skips and customizations are included when you build or refresh an Upgrade Plan.

- When glide.upgrade.plan.include.skips property is **TRUE**, skips and customizations are included when an Upgrade Plan is built or refreshed
- When glide.upgrade.plan.include.skips property is **FALSE**, skips and customizations aren't included when an Upgrade Plan is built or refreshed. This property has been set to False by default.

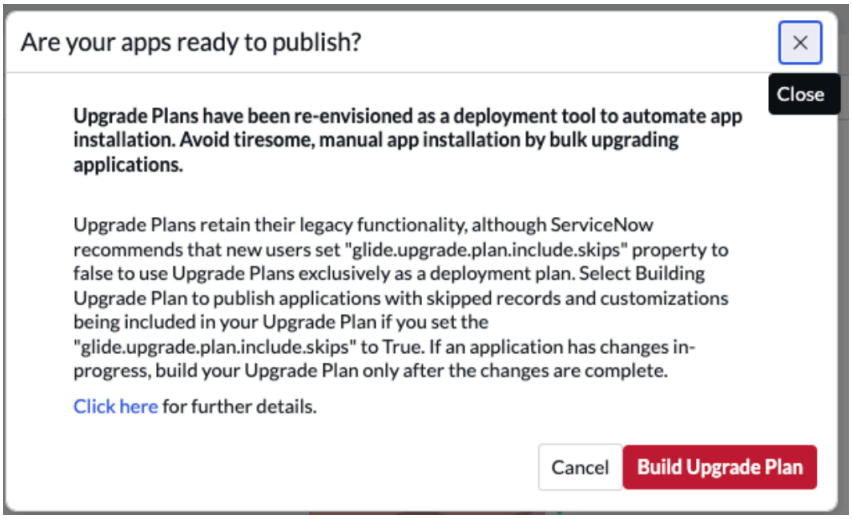
You will see one of the following modal messages depending on the scenario:

- First time user: When you are building your Upgrade Plan for the first time (the property is disabled by default)

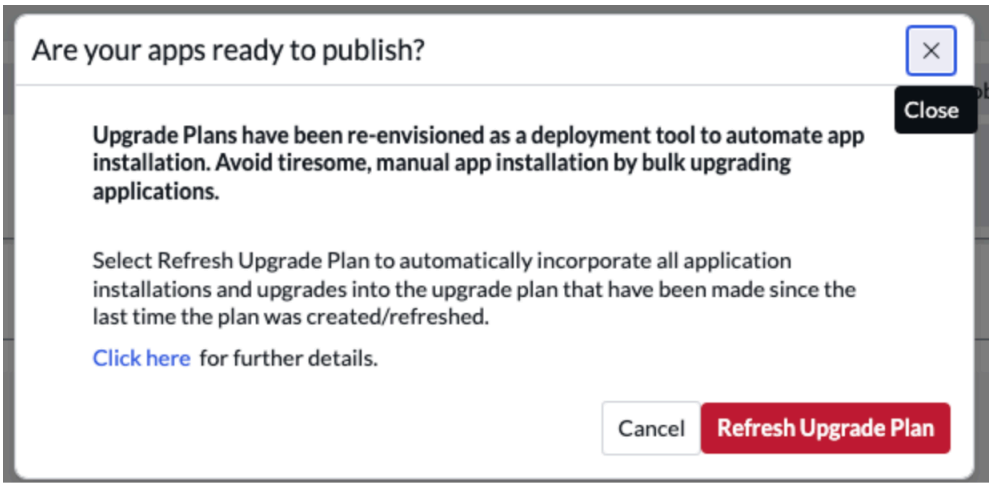


- Building the upgrade plan with the property enabled

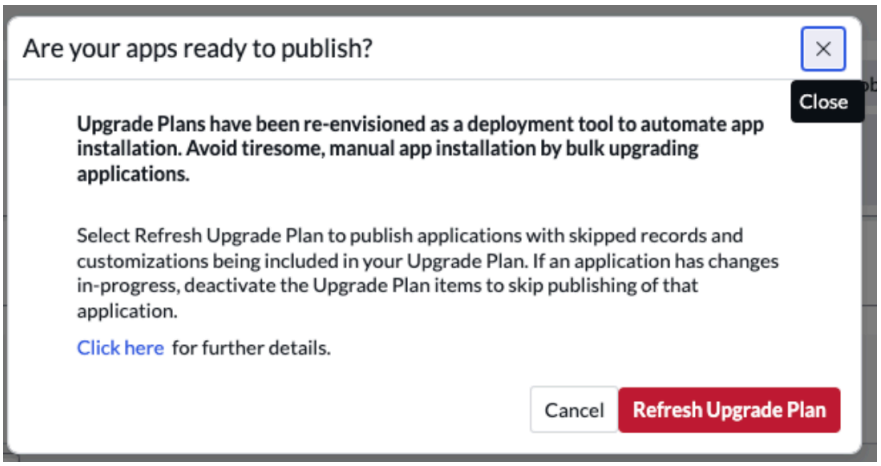
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- Refreshing the Upgrade Plan with the property disabled (default)



- Refreshing the Upgrade Plan with the property enabled



Advantages of Upgrade Plan over Update Sets

You can achieve the following using Upgrade Plans:

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- Along with the skipped record resolution, you can also track app and plugin installation

  Note: You won't be allowed to choose the skipped records that are captured by the upgrade plan. Upgrade plan captures all the skipped records regardless of whether they are reviewed or not and modified or not. If the customizations are coming from different instances, then the skipped records are required to be reviewed.

- Optimizing the table alters using batch bootstrapping
- Manage your customizations using the App Repository

Note: It is recommended to build an Upgrade Plan for each instance upgrade. When you build an upgrade plan on a builder instance, it gets created to the exactly same as the builder instance version (including patches and hot fixes). You can't use the previously created Upgrade Plan for the new instance upgrade. In case of consumer instances, when you install the upgrade plan, its version should match exactly the consumer instance version.

Persona

If you are using the app repository for active application development, use Upgrade Plan to accelerate your upgrades.

Note: If you are currently using the Update Sets and want to catapult your upgrade process, use the Upgrade Plan feature.

Design considerations

The following are the important considerations while working with Upgrade Plan:

- Each new instance upgrade requires its own upgrade plan. It can't be shared across upgrades.
- Only one builder instance is supported to build the Upgrade Plan
- Upgrade Plan can't be uninstalled on a consumer instance. You can rollback the entire upgrade but not partially.
- The scope of the files moved to **Global Customizations - Upgrade Plan** application by upgrade plan is still global
- During an upgrade, only the upgrade plan items with **State=Ready** and **Active=true** are installed on the consumer instances. The rest of the items are skipped.
- Upgrade sets can't be included in the Upgrade Plan
- Maint only plugins are not allowed in Upgrade Plan
- Configure your instance as a builder instance before installing new applications and plugins or during skip resolutions. Otherwise, the actions are not captured by the Upgrade Plan.
- You can't view the list of customizations in the Upgrade Plan items view. You can navigate to the respective tables to ensure if the customization has been captured.

See KB1271313 for more information.

Upgrade Plan background operations

During the building of the upgrade plan, the following operations are done at the background:

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- Skipped records are packaged and uploaded to the App Repository in the form of Global Application and App customization. The following are the 3 types of apps created by Upgrade Plan on your instance and App Repo.

  Note: After the packaging is done, you can choose the items from the Upgrade Plan. An Upgrade Plan works at the scope level, so it captures everything and publishes it to the repository.

  - The global records are packaged into the global customization upgrade plan app and published to the app repo
  - The scoped skipped records are packaged into the respective app customization packages
  - When the upgrade plan is published, a global application is created, for example, **Upgrade Plan - release name**
- Existing ServiceNow features like Global Application and App customization are used as application containers that can be installed in all the required instances. See and Application scope for more information.
- If you install any applications or plugins, they are also captured in the Upgrade plan. But, since they are application life cycle items, they are never pushed to the App Repository.

During the consumption of the upgrade plan, the following operations are done at the background:

- At first the upgrade plan is validated and then the source from the app repo is downloaded
- Once the source is downloaded, the app is moved to the ready state

  Note: Only the upgrade plan items with **State=Ready** and **Active=true** are installed on the consumer instances. The rest of the items are skipped.

- Auto-generation of the preview for the upgrade plan

Upgrade History module

The Upgrade History module tracks every upgrade made to an instance. You can also view the complete report of an old upgrade or a recently completed upgrade version using this module.

To view an upgrade history record, navigate to **All** > **Upgrade Center** > **Upgrade History** and select an upgrade from the list. On selecting an upgrade from the list, the System Upgrades form appears.

System Upgrades form details

Field	Description
From	Name of the previous .war file (version).
To	Name of the applied .war file (version).
Upgrade started	Time stamp when the upgrade process began.
Upgrade finished	Time stamp when the upgrade process was completed.

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Upgrade History Details form section

Field	Description
Changes skipped	Total number of records that are different from the previous upgrade and the upgrade component was not applied, mostly due to customization.
Changes applied	Total number of changes that are applied as a part of this upgrade **Changes applied** is sum of updated and different records, added to the number of deleted records (where the value of changed is true) added to the number of inserted records (where the value of changed is true).
Changes processed	Total number of records that were processed as a part of this upgrade. Changes processed is the sum of **Changes skipped** and **Changes applied**.
Copies to review	Total number of copied records to review whose base records have been upgraded

Select Skipped Record VTB related link to view and manage skipped records over VTB. See Skipped Records visual task board (VTB) for more information.

Select View Upgrade Plan History related link to view the details of the upgrade plan configuration. See Upgrade Plan overview for more information.

Select View Upgrade Summary Report related link to view the summary of an older upgrade over Upgrade Monitor module.

See Review skipped records using related lists for more information about related lists.

Using Upgrade Center

Use different features in Upgrade Center for previewing, scheduling, and monitoring your upgrade experience. You can also review and track every upgrade made in your instance using the Upgrade History module.

- Previewing your upgrade: Get an insight into your upgrade experience for different ServiceNow release versions and see its impact on your current configurations.
- Scheduling and monitoring your upgrade: Monitor the status of an ongoing upgrade using the Upgrade Monitor module. You can also schedule an upgrade using this module.
- Reviewing your upgrade history: Track an upgrade and review its reports using the Upgrade History module.

Previewing an upgrade

Use the Upgrade Preview module to have an insight about the experience of an upgrade prior to the actual upgrade. You can explore and preview upgrades to different ServiceNow release versions and see how your instance might be impacted with your current configurations.

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- Preview predicted changes: Preview the changes that have been predicted to occur after an upgrade.
- Upgrade Preview form: Alternate view of a previewed upgrade.

View previewed upgrade

Use the Upgrade Preview form to have an alternate view of a previewed upgrade.

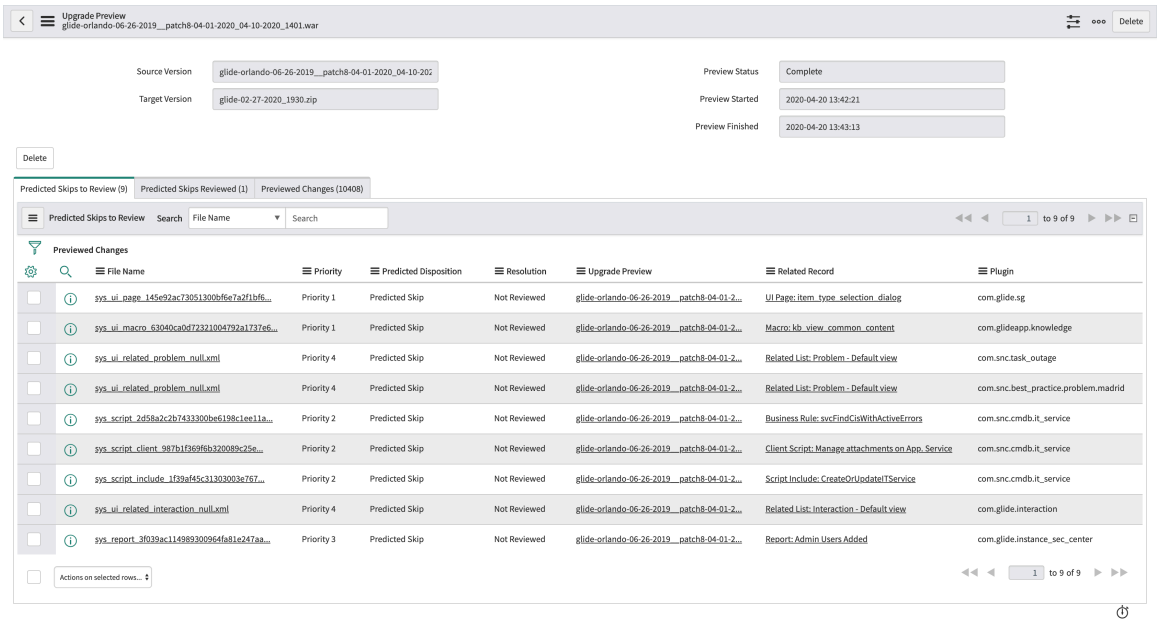
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Upgrade Center** > **Preview module**.
2. Select the target version to be previewed.
3. Click **Go** or **Refresh Preview** to run the selected preview.
4. Click **View preview details** on the **Previewing version** card to view the following related lists.
   - **Predicted Skips to Review related list**: The Upgrade Preview process informs you about the customizations that are predicted to be skipped during an upgrade. The upgrade preview process the skip files that have been customized. Predicted Skips to Review lists all the skipped files that haven't been reviewed yet.
   - **Predicted Skips Reviewed related list**: Predicted Skips Reviewed related list displays the records which have previously appeared on the Predicted Skips to Review related list and have been reviewed. When you select a skipped record to review and the **Resolution Status** has been set to a value other than **Not Reviewed**, the updated record moves to the Predicted Skips Reviewed related list.
   - **Previewed Changes related list**: Previewed Changes related list gives the total number of records that are predicted to change when the upgrade occurs. Total record changes also includes possible predicted skip files known as Predicted skipped records.

   See Previewed changes for more details about the related lists.



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Field	Input Value
Source version	Current version of the instance
Target version	Target version to which the instance is upgraded to be previewed
Preview status	Status of the preview. ○ Pending ○ In Progress ○ Complete ○ Cancelled ○ Failed
Preview Started	Date and time on which the preview started
Preview Finished	Date and time on which the preview completed

Preview predicted changes

Use the previewed changes table to view the list of total records that are predicted to change when the upgrade occurs.

Preview skipped list prediction

The **Total record changes** also includes records that are predicted to be skipped due to various reasons. The most common reason is due to customization. The reason an upgrade skips customizations is to avoid overwriting your customizations. Upgrade Preview attempts to predict which records will be skipped when the actual upgrade occurs. It predicts skips due to customizations, and some of the other more complex scenarios as well. It is possible to use Upgrade Preview to address these predicted customization skips before the upgrade occurs, which can prevent that skip from happening.

Click **View preview details** link on the **Previewing version** card. The Upgrade Preview form appears along with the following related lists details.

Related lists details

Field	Description
File name	Record that has been flagged for reconciliation.
Predicted Disposition	Action predicted to be performed on this file during the selected upgrade: • Predicted Insert: The system is predicted to insert a new record. • Predicted Update: The system is predicted to update this record. • Reverted: This record was reverted to the base version, and won't be skipped on the next upgrade.

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Related lists details (continued)

Field	Description
	• Predicted Skip: The system won't change this record in order to preserve customizations. • Predicted Skip (Manual Merge): The system won't change this record because updating it requires manual intervention. • Predicted Skip (Apply Once): The system is predicted to skip this record because it had already applied an update from an xml file in the apply once folder.
Priority	Priority that has been assigned to resolve the conflict. Values range from one to five, with one representing the highest priority. **Note:** ServiceNow prioritizes the skipped records based on the importance of the file types. The prioritization is done as follows: • Priority 1 (highest priority): UI pages, UI macros, and more • Priority 2: Business Rules, Security ACLs, and more • Priority 3: Reports and more • Priority 4: Form Sections, Choice Sets, and more • Priority 5 (lowest priority): other
Resolution	Ways to resolve a conflict. • **Not reviewed**: Conflicted files that have not been reviewed yet • **Reviewed**: Reviewed but no action has been taken yet • **Review not needed**: Review of the skipped files are not required • **Reviewed and Retained**: Left customizations in place without update from upgrade • **Reviewed and Reverted**: Customizations discarded, record updated according to the upgrade version
Plugin	Plugin containing the record
Related record	Record that the changelist entry applies to

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Scheduling and monitoring an upgrade

Use the Upgrade Monitor module to schedule and monitor the status of an ongoing upgrade in your instance. You can also view the upgrade summary and the list of records causing conflicts in your instance once the upgrade is complete.

- Monitoring an upgrade: Monitor the progress of an ongoing upgrade in your instance
- Process the skipped records list: Resolve the differences between the upgraded and customized versions of a record by processing the skipped records list
- Resolve conflicts of a record: Resolve conflicts between your customized record and the changes associated with the upgrade

Monitor an upgrade to an instance

Monitor the progress of an ongoing upgrade in an instance with the Upgrade Monitor. When the upgrade is done, you can view a summary of the results on the Upgrade Summary Report.

Before you begin

Role required: admin

Procedure

1. Navigate to **Upgrade Center** > **Upgrade Monitor**.

   Note: If an upgrade is in progress, the user is automatically directed to **Upgrade Center** > **Upgrade Monitor** page.

2. Monitor the progress of the upgrade.
   When the system finishes the upgrade, it displays the Complete upgrade summary report.

   Note: You can now view the status of every stage in the upgrade process. See Upgrade Progress for more information.

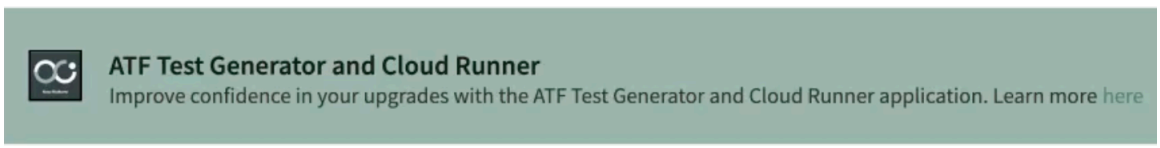
What to do next

From the Upgrade Summary Report, resolve any conflicts that prevented the system from upgrading records.

Upgrade Progress

When an upgrade is underway, Upgrade Progress displays progress bars and other information to help you monitor the process.

You can view the status of each of the stages during an upgrade process. It helps you to know exactly which stage you are in at any point of the upgrade process.



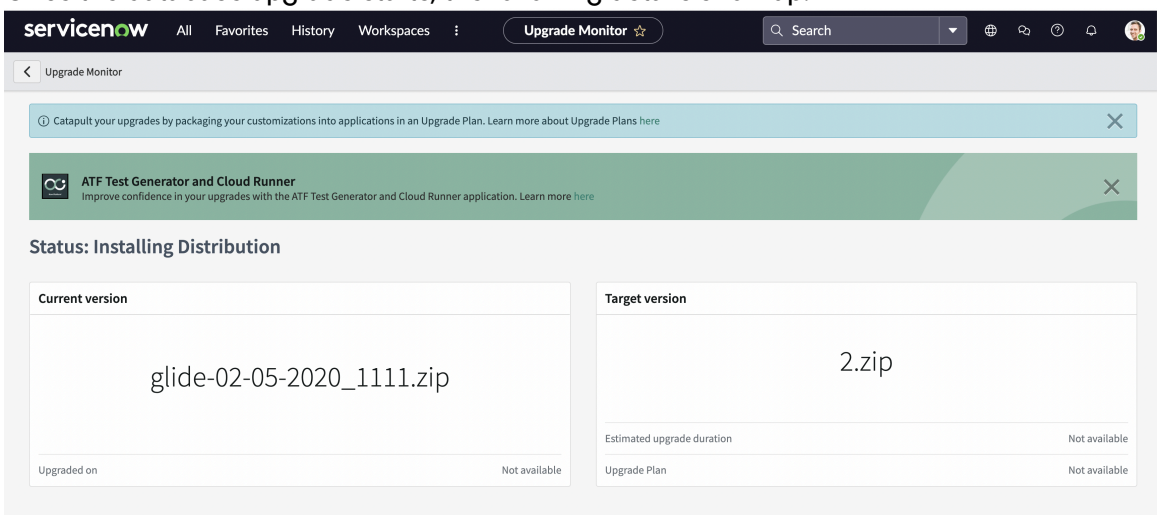
If you have the ATF Test Generator and Cloud Runner store application installed, you can schedule test generation runs from the Upgrade Monitor page. The above message shows up during an upgrade process when the following conditions are met.

- The SN_ATF_TG plugin is not active.
- The instance is not a fed instance.
- The instance is not a self-hosted instance.

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Note: You can now confidently upgrade your instance by using the ATF Test Generator and Cloud Runner store app. See Exploring ATF Test Generator and Cloud Runner for more information.

Once the database upgrade starts, the following details show up.



Upgrade Progress details

Field	Input Value
Current version	Current version of the instance
Target version	Target upgrade version of the instance
Upgrade Progress	A progress bar depicting where the upgrade is in the overall process. The length of a section in the bar does not indicate the relative duration of that process.
Upgrade Progress: Upgrading Platform	The system is applying upgrades to elements that form the foundation of the platform.
Upgrade Progress: Updating Schema	The system is scanning the plugins to create a list of tables that require upgrading. This prevents the system from upgrading the same table multiple times.
Upgrade Progress: Loading Plugins	The system is loading both core and optional plugins. Some features require more than one plugin, so the number of plugins listed may not match the number of optional features installed.
Upgrade Progress: Completing	The system is upgrading components that need to be completed after the previous three stages are done.
Details	Shows the current activity, a progress bar for the current activity, and the file currently being updated.
Node Upgrades	The color of the icons represents the status of each node during this upgrade: Pending, Running, Successful, Failed, or Down.

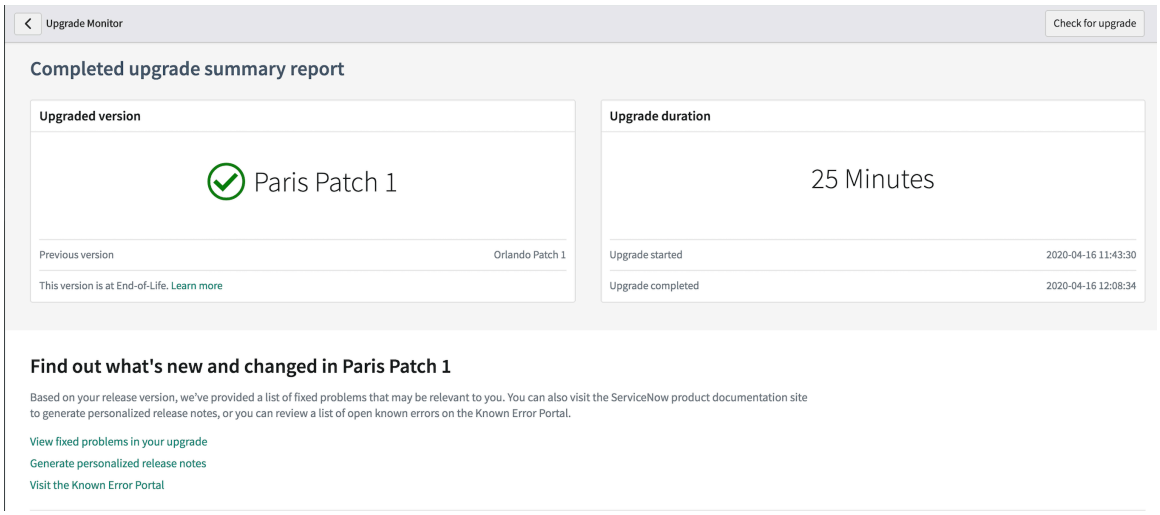
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Upgrade Progress details (continued)

Field	Input Value
Node	The selected node indicated by the arrow. To change the selection, position the mouse cursor over the icon for the node to select.
Running time	How long the selected node (indicated by the arrow) has been running. If the selected node is offline, this value stops updating and shows how long a node was online before going offline.
Version	The current build for the selected node (indicated by the arrow).
Successful upgrade	When the selected node is online, shows how long the node has been online. If the selected node is offline, shows how long the node has been offline.

Upgrade Summary Report

The Upgrade Summary report summarizes the actions taken, provides tools to resolve conflicts between customizations and changes that are part of the upgrade, and provides information to help estimate time for upgrades to other instances.



Upgrade Summary details

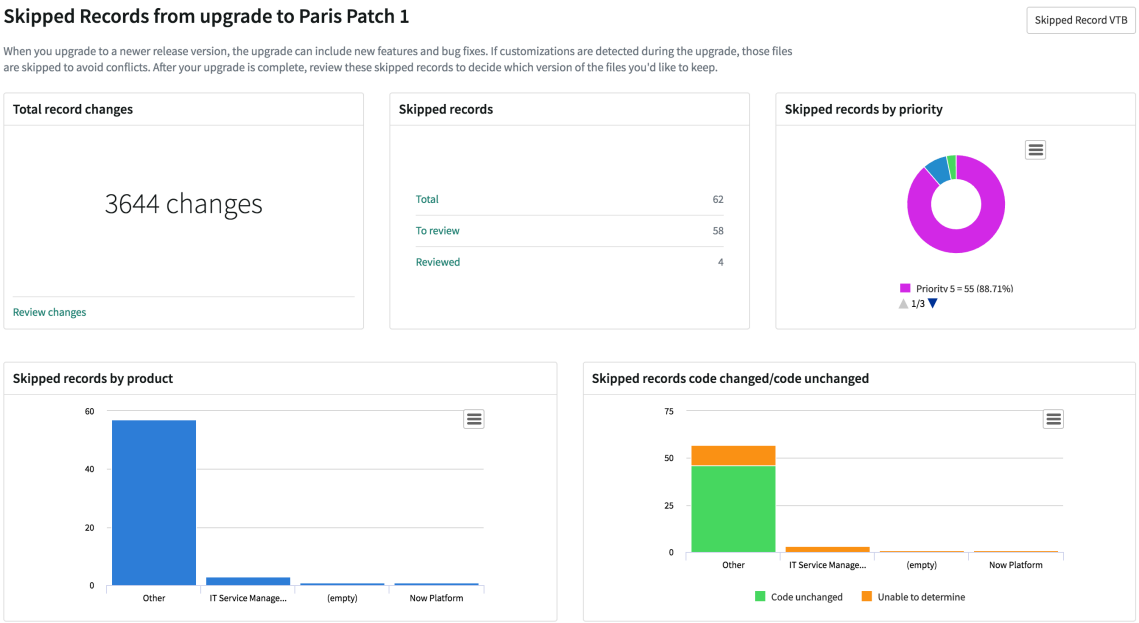
Field	Input Value
Upgraded version	Version to which the instance has been upgraded
Upgrade duration	Total time taken to make the upgrade
Find out what's new and changed	Links to view the new and changed features in the current upgrade version. The following three links show up.

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Upgrade Summary details (continued)

Field	Input Value
	• Problem fixes: Fixes that have been made since the last upgrade version • Personalized release notes: Release notes summary for the previewed version • Known error articles: Errors that have been identified but not yet resolved

Skipped Records



Skipped Records details

Field	Input Value
Total record changes	Total number of records that have changed since the previous upgrade version. **Review changes**: List of records that have changed can be reviewed. See System Upgrade form for more details.
Skipped records	Skipped records to prevent your customizations from being overwritten. If customizations are found in some records during the upgrade, those records are skipped. As an admin, you can resolve each update that was skipped due to a customization. To resolve a skipped update, you can review the reason for each skipped record and then

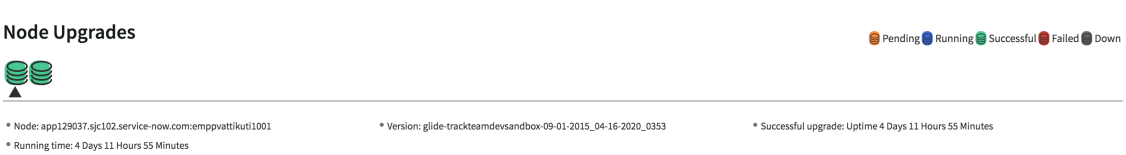
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Skipped Records details (continued)

Field	Input Value
	either retain the customization or revert the customization to the base system. If you choose to revert some of the customizations to the base version, those records are sent through the upgrade without getting skipped. • **Total**: Total skipped records • **To review**: Total skipped records that are yet to be reviewed • **Reviewed**: Total skipped records that have been reviewed
Skipped records by priority	ServiceNow prioritizes the skipped records based on the importance of the file types. The prioritization is done as follows: • Priority 1 (highest priority): UI pages, UI macros, and more • Priority 2: Business Rules, Security ACLs, and more • Priority 3: Reports and more • Priority 4: Form Sections, Choice Sets, and more • Priority 5 (lowest priority): other
Skipped records by product	Skipped records are sorted by product names
Skipped records code changed/code unchanged	Skipped records are sorted depending on if there are changes in the code or not.

Note: You can click **Skipped Record VTB** to view the resolution status of the current upgrade with skipped records using the visual task board (VTB) view. See Skipped Records visual task board (VTB) for more information.

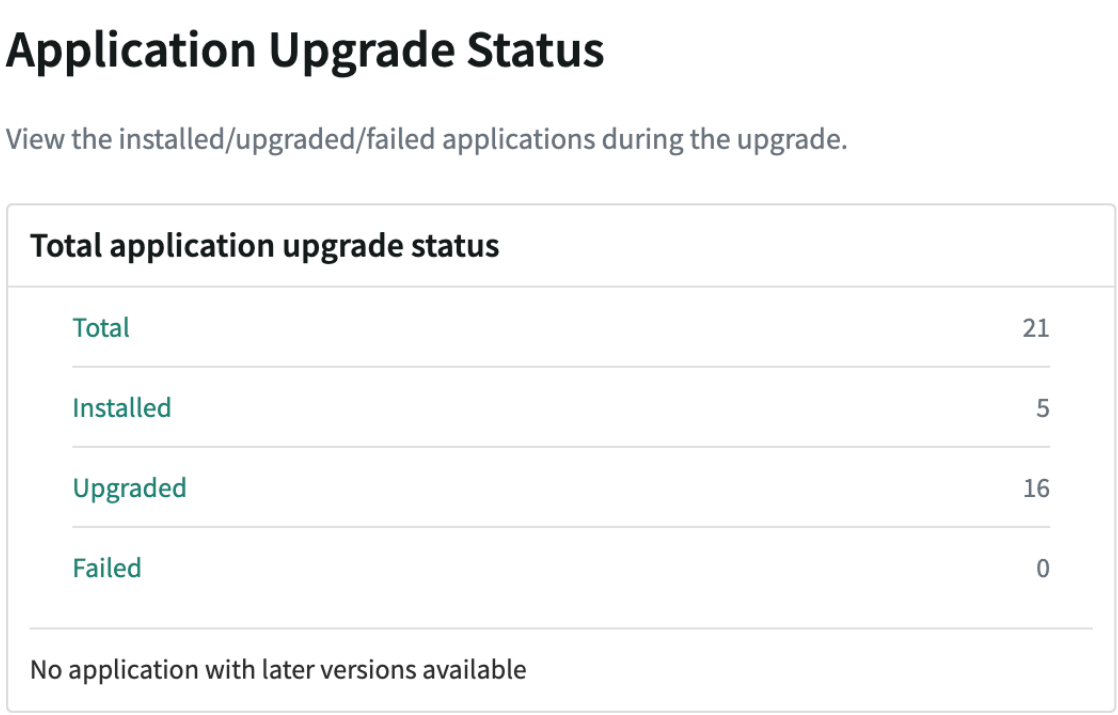
Node Upgrades



The Node Upgrades section shows the status of the upgrade for each node in the instance. The color of the icon denotes the status, as illustrated by the legend (key) and to the right of the node icons. To see details about a node, position the cursor above the icon for that node. An arrow points to the node selected, and the information below the icons pertains to that node.

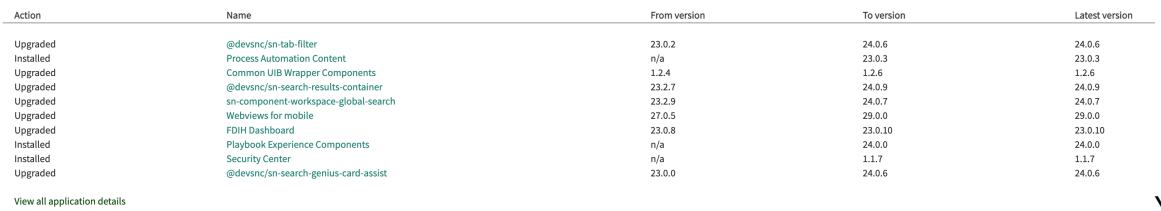
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Application Upgrade Status



You can view the list of installed and upgraded applications during an upgrade. It also lists the applications that failed to install during the process.

Note: The **All applications are on the latest versions** message shows up only when all the applications are on their latest versions.



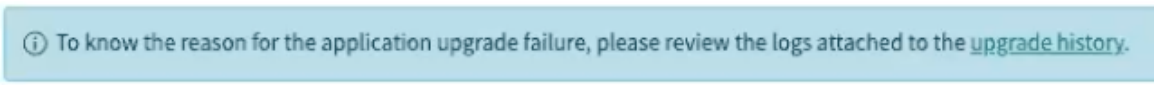
Action	Name	From version	To version	Latest version
Upgraded	@devsnc/sn-tab-filter	23.0.2	24.0.6	24.0.6
Installed	Process Automation Content	n/a	23.0.3	23.0.3
Upgraded	Common UIB Wrapper Components	1.2.4	1.2.6	1.2.6
Upgraded	@devsnc/sn-search-results-container	23.2.7	24.0.9	24.0.9
Upgraded	sn-component-workspace-global-search	23.2.9	24.0.7	24.0.7
Upgraded	Webviews for mobile	27.0.5	29.0.0	29.0.0
Upgraded	FDIH Dashboard	23.0.8	23.0.10	23.0.10
Installed	Playbook Experience Components	n/a	24.0.0	24.0.0
Installed	Security Center	n/a	1.1.7	1.1.7
Upgraded	@devsnc/sn-search-genius-card-assist	23.0.0	24.0.6	24.0.6

View all application details

You can view the first 10 applications that were installed during the upgrade. Select **View all application details** to view the information about all the installed, upgraded, and failed applications on the Upgrade App Version Histories table.

Note: You can select any of the application links to go to its form view. Select **Go to application** on the form view to go to the application sys record.

The following message shows up if you have selected any of the failed applications link.



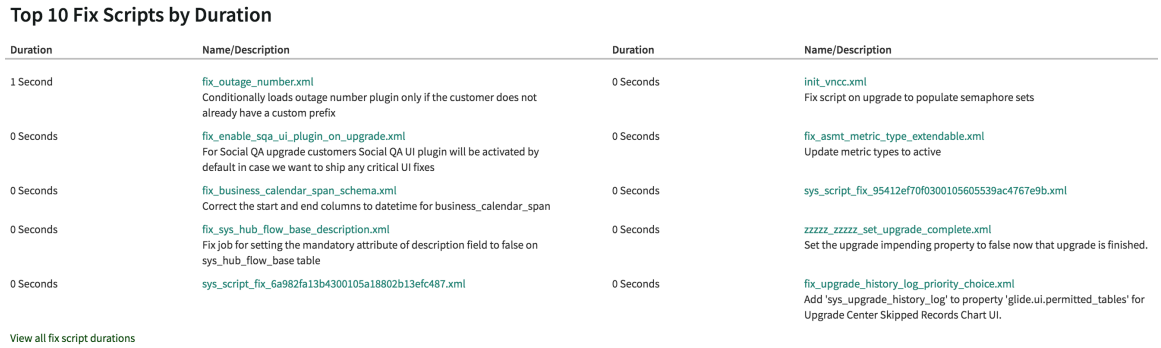
Schema Changes to Clone-excluded Tables



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The Schema Changes to Clone-excluded Tables section shows a list of tables affected by the upgrade that were clone-excluded when you cloned the production instance to this instance. Because clone-excluded tables are empty, upgrading them takes less time than upgrading those same tables on the production instance. To estimate how much longer the production upgrade takes, note the size of the clone-excluded tables on the production instance.

Top 10 Fix Scripts by Duration



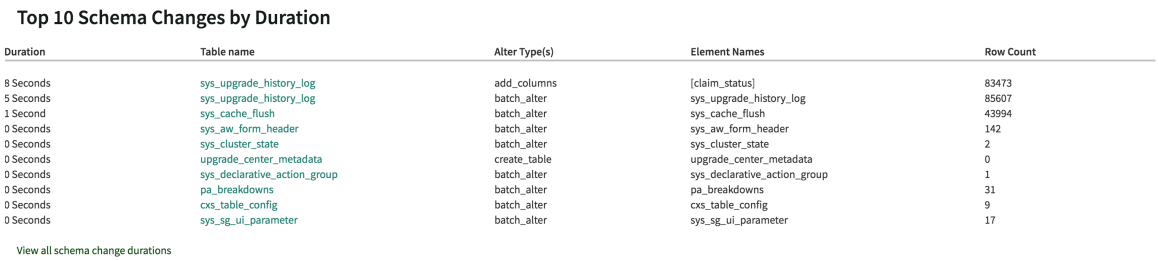
Top 10 Fix Scripts by Duration

Duration	Name/Description	Duration	Name/Description
1 Second	fix_outage_number.xml Conditionally loads outage number plugin only if the customer does not already have a custom prefix	0 Seconds	init_vncc.xml Fix script on upgrade to populate semaphore sets
0 Seconds	fix_enable_sqa_ui_plugin_on_upgrade.xml For Social QA upgrade customers Social QA UI plugin will be activated by default in case we want to ship any critical UI fixes	0 Seconds	fix_asmt_metric_type_extendable.xml Update metric types to active
0 Seconds	fix_business_calendar_span_schema.xml Correct the start and end columns to datetime for business_calendar_span	0 Seconds	sys_script_fix_95412ef70f0300105605539ac4767e9b.xml
0 Seconds	fix_sys_hub_flow_base_description.xml Fix job for setting the mandatory attribute of description field to false on sys_hub_flow_base table	0 Seconds	zzzzz_zzzzz_set_upgrade_complete.xml Set the upgrade impending property to false now that upgrade is finished.
0 Seconds	sys_script_fix_6a982fa13b4300105a18802b13efc487.xml	0 Seconds	fix_upgrade_history_log_priority_choice.xml Add 'sys_upgrade_history_log' to property 'glide.ui.permitted_tables' for Upgrade Center Skipped Records Chart UI.

View all fix script durations

The Top 10 Fix Scripts by Duration helps you understand which fix scripts required the most time.

Top 10 Schema Changes by Duration



Top 10 Schema Changes by Duration

Duration	Table name	Alter Type(s)	Element Names	Row Count
8 Seconds	sys_upgrade_history_log	add_columns	[claim_status]	83473
5 Seconds	sys_upgrade_history_log	batch_alter	sys_upgrade_history_log	85607
1 Second	sys_cache_flush	batch_alter	sys_cache_flush	43994
0 Seconds	sys_aw_form_header	batch_alter	sys_aw_form_header	142
0 Seconds	sys_cluster_state	batch_alter	sys_cluster_state	2
0 Seconds	upgrade_center_metadata	create_table	upgrade_center_metadata	0
0 Seconds	sys_declarative_action_group	batch_alter	sys_declarative_action_group	1
0 Seconds	pa_breakdowns	batch_alter	pa_breakdowns	31
0 Seconds	cxs_table_config	batch_alter	cxs_table_config	9
0 Seconds	sys_sg_ui_parameter	batch_alter	sys_sg_ui_parameter	17

View all schema change durations

The Top 10 Schema Changes by Duration helps you understand which schema changes required the most time.

Top 10 Plugins by Duration

The Top 10 Plugins by Duration helps you see the plugins that required the most time. Click **View all plugin duration** to see the **System Upgrade Metrics** list filtered by current sys upgrade history log and sorted by duration. See View loaded files for a plugin for more information.

View loaded files for a plugin

Get a related list view of all the files loaded for a plugin by clicking **View all plugin duration**.

Before you begin

Role required: admin.

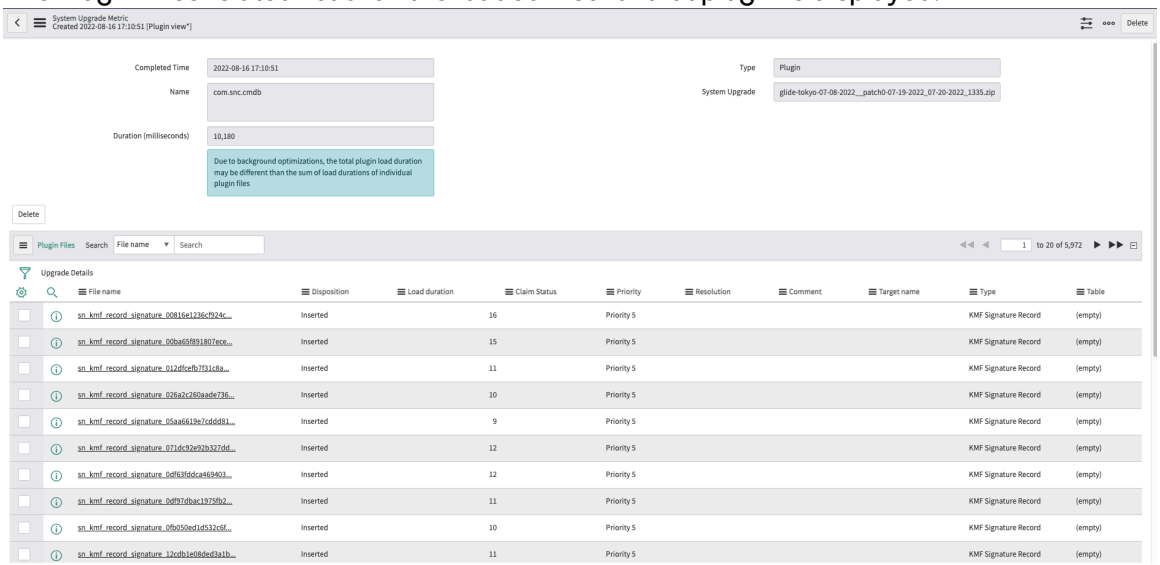
Procedure

1. Navigate to **All** > **Upgrade Center** > **Upgrade Monitor**.
   When the system finishes the upgrade, it displays the Upgrade Summary Report.
2. Scroll down to **Top 10 Plugins by Duration**.
3. Click **View all plugin duration**.

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The **System Upgrade Metrics** list of all the plugins and their durations shows up.

4. Click one of the plugins from the list to open the **System Upgrade Metrics** form view of that plugin.
   The Plugin Files related list of all the loaded files for that plugin is displayed.



Note: The total plugin load duration is not the sum of the load duration of all the loaded files for that plugin.

Process the skipped records list

Process the skipped records list to resolve the differences between the upgraded and customized versions of a record. If you have customized or altered a record affected by this upgrade, such as a business rule or script, the upgrade generates a skip log record.

Before you begin

Role required: admin

About this task

Review the changes you made to baseline records, such as business rules and scripts, that appear on the skipped records list and revert to the baseline version if appropriate. Post-upgrade, thoroughly test all changes you made to these records.

Procedure

1. Navigate to **All** > **Upgrade Center** > **Upgrade Monitor**.

   If the upgrade is still in progress, the system displays the Upgrade Progress screen. When the upgrade finishes, the system displays the Upgrade Summary Report.

2. After the system displays the Upgrade Summary Report, click the Review changes link in the Skipped box.

   The system displays the System Upgrades form.

3. Navigate to Review Skipped Records section and – if necessary – scroll to the Skipped Changes to Review related list.
   See Review skipped records using related lists for more information.

4. Click the row for the first record you want to reconcile.

   The system displays the Upgrade details form for that record.

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5. Evaluate how you want to resolve the conflict for this record and take the appropriate action:

Action	Description
Retain the customized record as is and do not update it	After reviewing the changes, set **Resolution Status** to **Reviewed and Retained**. The record moves from the Skipped Changes to Review to Skipped Changes Reviewed related list. See Review skipped records using related lists.
Retain the customization by merging changes from the updated object	**a.** Click **Resolve Conflicts** to navigate to the Resolve Conflicts form. **b.** Review the differences. **c.** To merge a field: ▪ Click the right-arrow button for the field. ▪ Click a text box to view and edit the detailed differences. ▪ When you have merged all appropriate fields, click **Merge**. After merging the customization changes: ○ The **Resolution Status** changes to **Reviewed and Merged**. ○ The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list.
Discard the customization and update the record to match the base system for this upgrade	After reviewing the changes, click **Revert to Base System**. ○ The **Disposition** changes from **Skipped** to **Reverted**. ○ The **Resolution Status** changes to **Reviewed and Reverted**. ○ The system creates a Customer Update record. ○ The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list. **Note:** At any time after you revert a customization, you can click **Reapply Changes** to reapply the customization (undo the revert).
Review the skip and perform no action on the object	After reviewing the changes, set **Resolution Status** to **Reviewed**. The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list.

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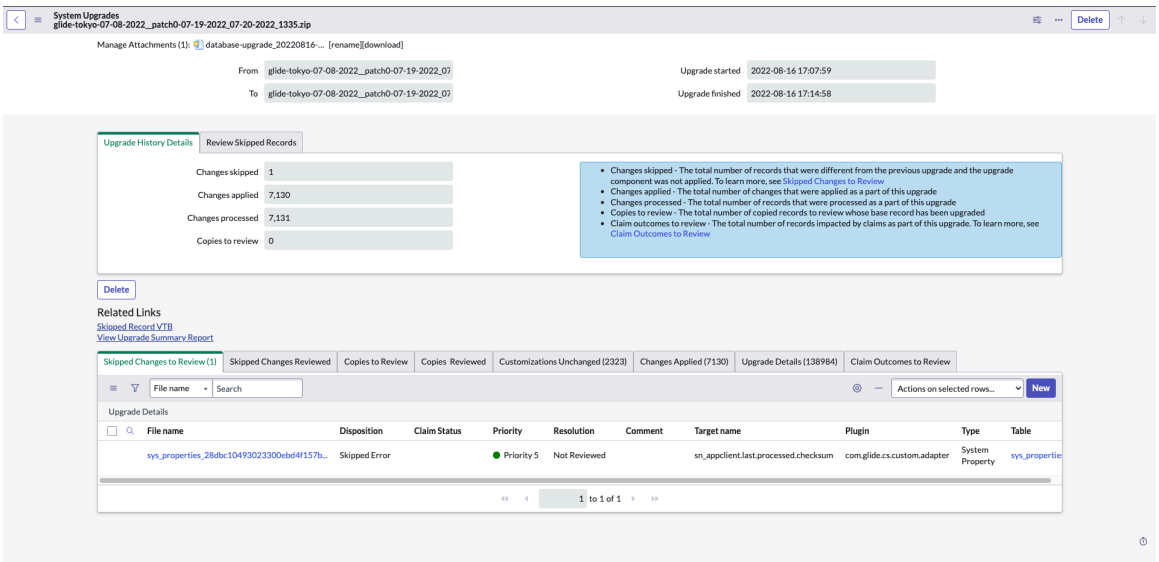
Action	Description
Leave on the skipped list for a later decision, and note that you have not reviewed the record	From the **Resolution** list, choose **Not Reviewed** to defer the decision on how to handle this conflict. The record stays on the Skipped Changes to Review related list.

Note: The system tracks changes to records in an update set so you can apply these changes to another instance later. However, the system does not migrate the upgrade details records from one instance to the next. These records apply to a specific upgrade of a specific instance. If you want to preserve the Comments, Resolutions, or other information from the skipped list, export it from this instance.

6. In the **Comment** field, write the reasons for making your decision and other information you want to document.
7. Click **Update**.
   Post-upgrade, thoroughly test all changes you made to the records on the skipped record list.

System Upgrade form

When an upgrade is complete, the System Upgrades form displays key statistics about the upgrade and a related list of skipped records (the skipped list).



System Upgrade details

Field	Input Value
From	Version of the instance before upgrading.
To	Version of the instance after upgrading.
Upgrade started	Time of the start of the upgrade.
Upgrade finished	Time at which the upgrade completed.
Changes skipped	Total number of records that are different from the previous upgrade and the upgrade component was not applied, mostly due to customization.

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System Upgrade details (continued)

Field	Input Value
Changes applied	Total number of changes that are applied as a part of this upgrade **Changes applied** is sum of updated, different records, deleted records (where the value of changed is true) and inserted records (where the value of changed is true).
Changes processed	Total number of records that were processed as a part of this upgrade. Changes processed is the sum of **Changes skipped** and **Changes applied**.
Copies to review	Total number of copied records to review whose base records have been upgraded

Resolve conflicts for an individual record

Reconcile differences between your customized record and the changes associated with the upgrade.

Before you begin

Role required: admin

Procedure

1. From the Upgrade Details form for the record you are reconciling, click **Resolve Conflicts**.

   The system displays the Resolve Conflicts form, which highlights differences between the two versions of the record. The form displays information about the base system record on the left and the customized record on the right.

   Note: The system creates a new customer update record when you click **Resolve Conflicts**.

2. Compare the base system with the customized record for each field on this form.
   For non-script fields, edit the customized record on the right-hand side to include what you want from the base system and the customization.
3. If this record contains a script, check it for conflicts and resolve.
   a. Click inside the Script field.

      The system displays the Resolve Conflicts - Script form highlighting areas where the two versions of the script differ.

   b. Edit the right-hand side so that the script contains whichever content you want. To move a block of code from the left to right side, click the small arrows corresponding to that block in the middle column.

   c. Click **OK**.

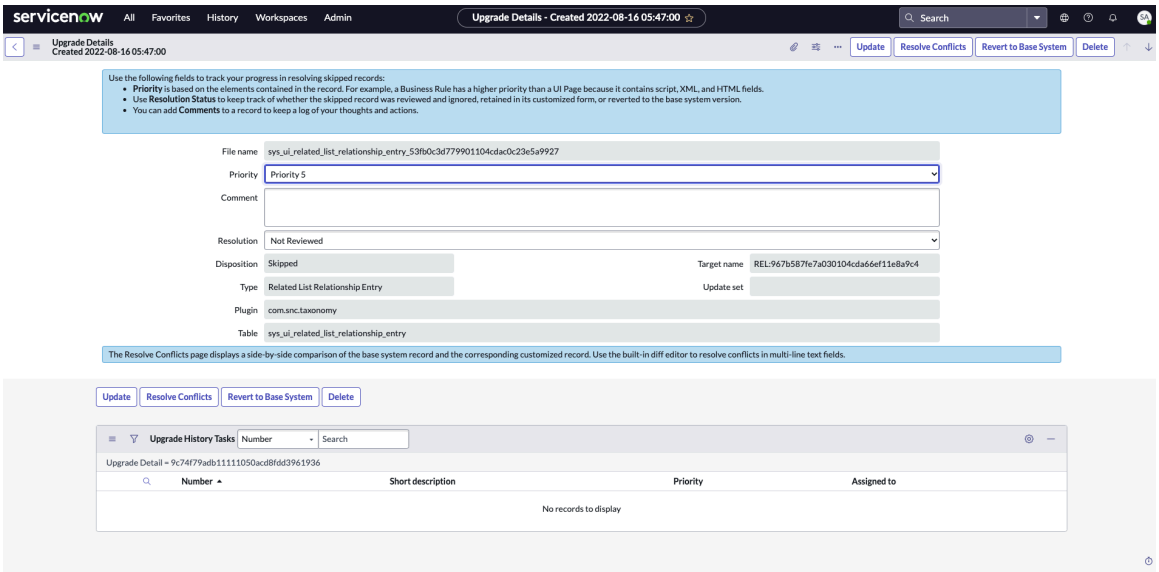
      The system returns to the Resolve Conflicts form.

4. To save your changes to the record, click **Save Merge**.
   The system sets the **Resolution** for this record to **Reviewed and Merged**.

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Upgrade details form

From the Upgrade Details form, you can review an individual record affected by the upgrade and reconcile conflicts between the upgrade and customizations.



Upgrade Details form details

Field	Input value
File name	The record the system has flagged as needing to be reconciled.
Priority	The priority the system has assigned to resolving this conflict. Values range from one to five, with one representing the highest priority.
Comment	Comments to document your decisions about reconciling this record.
Resolution	How you elected to resolve this conflict: • **Not reviewed**: Not yet reviewed • **Reviewed**: Reviewed but no action yet taken • **Reviewed and Merged**: Made changes to the record to reconcile the customized and upgraded versions • **Reviewed and Retained**: Left customizations in place without update from upgrade • **Reviewed and Reverted**: Customizations discarded, record updated according to upgrade For more information, see Process the skipped records list.
Disposition	Action performed on this file during the selected upgrade:

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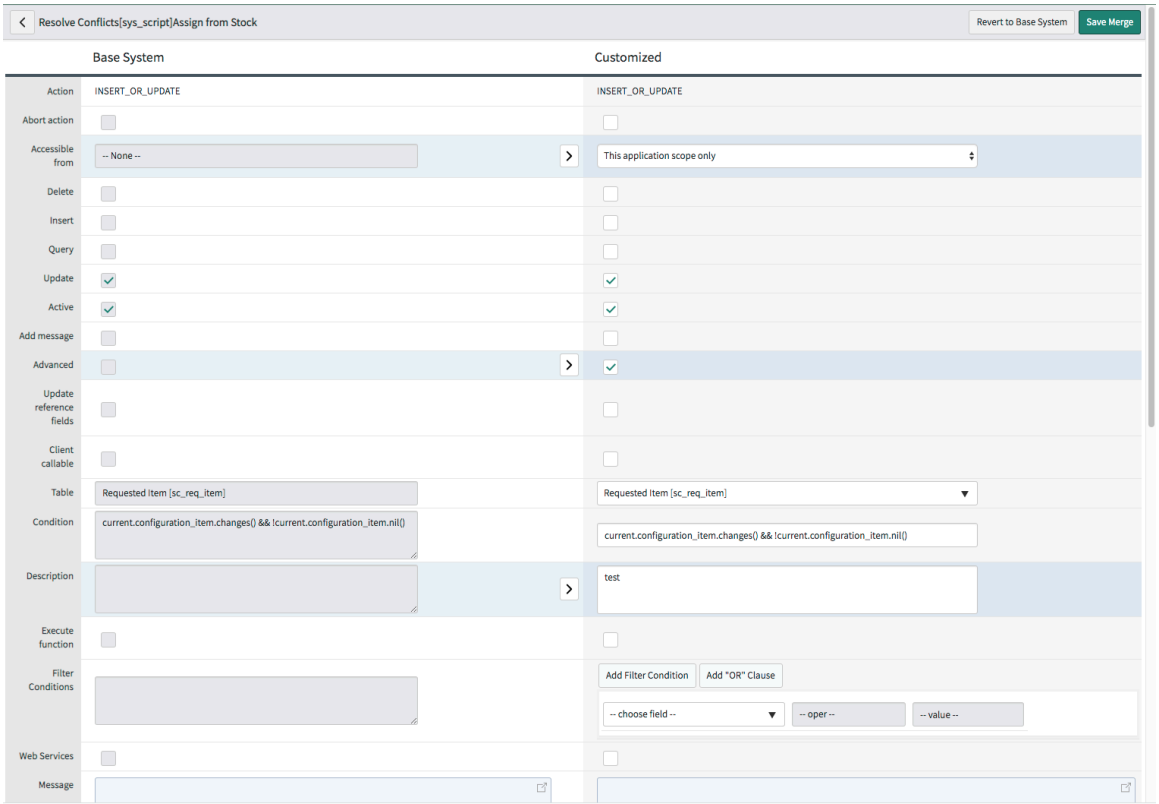
Upgrade Details form details (continued)

Field	Input value
	• Inserted: The system inserted a new record • Updated: The system updated the record • Deleted: The system deleted the record • Skipped: The system did not change this record in order to preserve customizations • Reverted: This record was reverted to the base version • Table not found: The system could not find the table that contains this record • Unchanged: The system did not change this record because the baseline component has not changed since the last release • Skipped Manual Merge: The system did not change this record because updating it requires manual intervention • Skipped Apply Once: The system skipped this record because it had already applied an update from an xml file in the apply once folder • Not Latest: The system applied a change, but this change was overwritten later during the same upgrade.
Type	Type of the record, for example, Script include.
Target name	Name of the skipped record, if applicable.
Update set	Unused.
Plugin	The plugin containing this record.
Table	The table containing this record.

Resolve Conflicts form

The Resolve Conflicts form you compare to the base system version with the customized version of a record and reconcile the differences.

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Fields

The fields this form displays depend on the type of record you are reconciling. The left column shows the records fields in the base system, including the proposed changes that are part of the upgrade. The right column shows the fields for your customized record.

Preparing your upgrade plan

Prepare an upgrade plan to be used in your upgrade by executing the following tasks.

Building your Upgrade Plan

Build your upgrade plan to experience a seamless and an accelerated upgrade by packaging the applications in an upgrade plan.

Before you begin

Note: Ensure that you have upgraded your instance to the latest available version to build the upgrade plan. It is recommended to build an Upgrade Plan for each instance upgrade. The target version of the Upgrade Plan must be exactly the same as the instance version (including patches and hot fixes). You can't use the previously created Upgrade Plan for the new instance upgrade.

Role required: admin

Procedure

1. Navigate to **All** > **Upgrade Center** > **Administration** > **Properties** > **Upgrade Plan Properties**.

   Note: It is recommended to set up your dev instance as a builder instance.

2. Navigate to **All** > **Upgrade Center** > **Upgrade Plan**.

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Note: If you are on the Upgrade Monitor page, click **Manage Upgrade Plan**.

The Upgrade Plan list view shows up.

3. Click **Build** to start the upgrade plan build.
   Upgrade Plan takes up only the app installations by default and publish it on to the app repository. See Upgrade Plan background operations section in Upgrade Plan overview for more information.

   Note: Ensure all the applications in the instance are in ready state to be published on to the app repository.

   You are allowed to have only one Upgrade Plan at any point of time.
   A final confirmation message shows up to start building the upgrade plan. If any application has changes in-progress, the Upgrade Plan must be built only after the changes are done. Warning message shows up to complete the review of the remaining skipped records, provided you have enabled the GLIDE_UPGRADE_PLAN_INCLUDE_SKIPS property.
4. Click **Build Upgrade Plan**.
   The upgrade plan starts to build.
5. Click **Go to Upgrade Plan** once the build is done.

   Note: Click **View Details** if you want to view the execution details of the Upgrade Plan. If you see a warning, it is recommended to review the execution details to know the errors.

   The upgrade plan opens and a list of upgrade plan items shows up.
6. **Optional:** Click **New** if you want to manually add any upgrade plan items.

   Note: The applications or plugins that you want to add manually to the upgrade plan must be already installed and active on the instance.

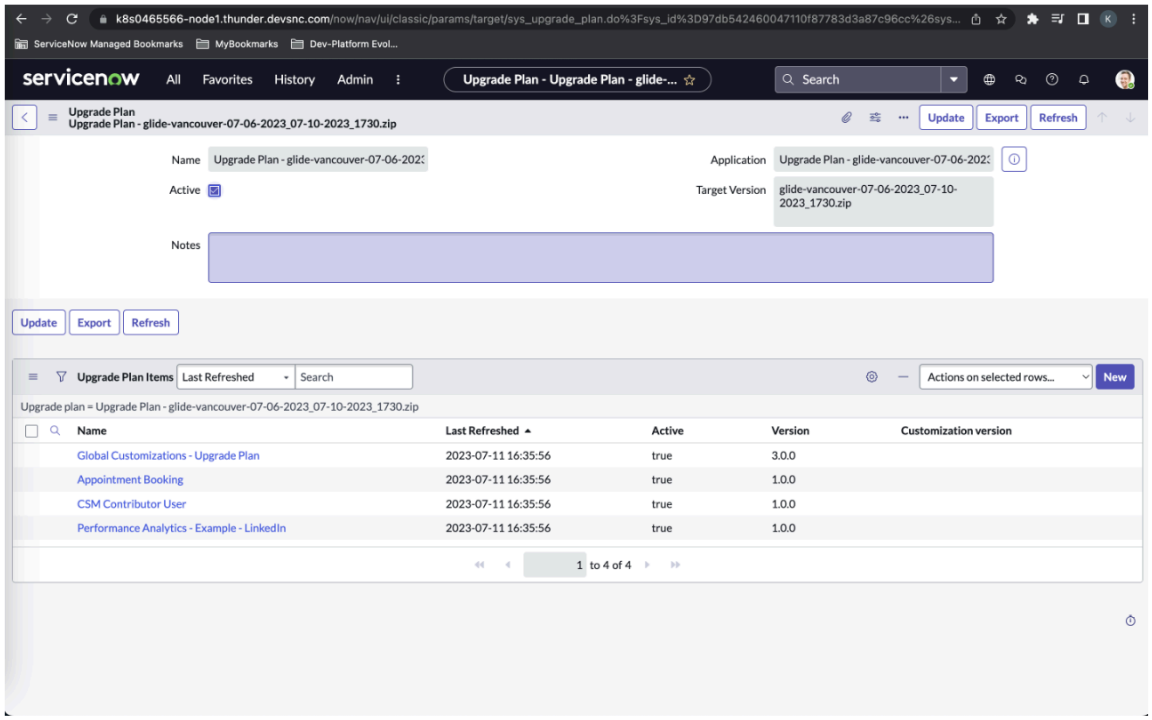
   If you want to skip any of the upgrade plan items from being a part of the Upgrade Plan, set the selected upgrade plan item to false.
7. **Optional:** Click **Refresh** to capture all the recent changes to the Upgrade Plan.

   Note: This step is applicable only if you have any update on the existing application or plugin in the Upgrade Plan. If the upgrade plan has already been published, you are required to republish it after every refresh.

8. Click **Publish** to publish the Upgrade Plan.
   See Upgrade Plan background operations section in Upgrade Plan overview for more information.

   Note: Install all the required applications and plugins before publishing the upgrade plan. If you have set the GLIDE_UPGRADE_PLAN_INCLUDE_SKIPS property to true, you will have to resolve all the skipped records before publishing the upgrade plan. If you want to delete the Upgrade Plan, click **Delete**. The **Delete** option is available only for the Upgrade Plans that are not yet published.

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The upgrade plan is now ready to be installed in the consumer instance.

Refreshing your Upgrade Plan

Refresh your upgrade plan to package all the recently installed plugins and applications into your upgrade plan.

Before you begin

Role required: admin

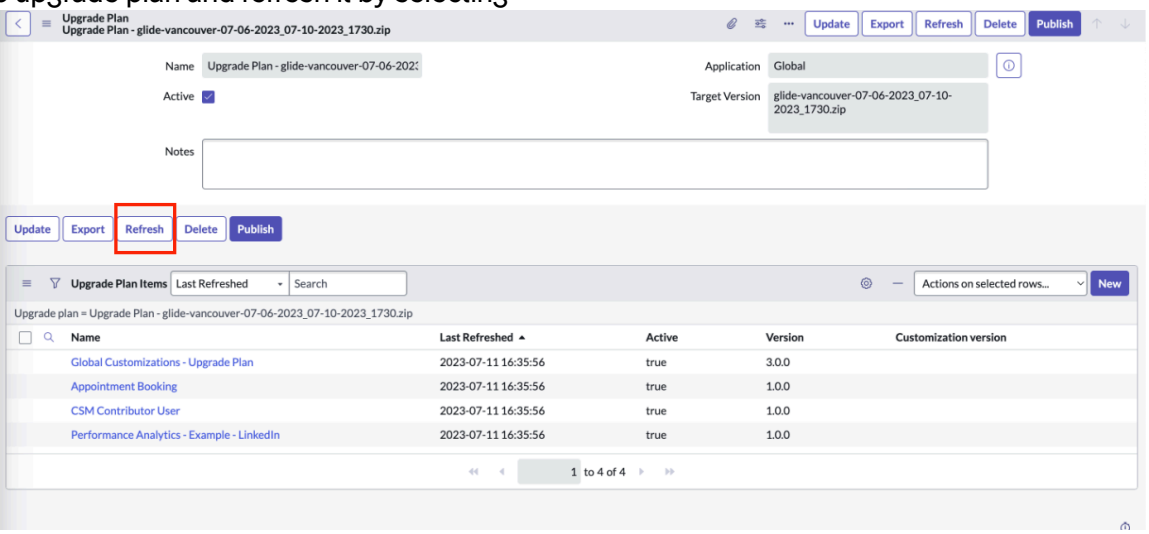
Procedure

1. Go to the applications and plugins you need and select **Activate** to install them.

   Note: This can be done even after the Upgrade Plan is published.

   The plugin activation starts and installs successfully.

2. Go to the upgrade plan and refresh it by selecting



Refresh.

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The Refresh Upgrade Plan confirmation message shows up.

3. After the upgrade plan refreshes, select **Go to Upgrade Plan**.

> **Note:** The **Publish** button is still visible because the updated Upgrade Plan needs to be published.

The recently installed plugins and applications show up under Upgrade Plan Items related list.

Installing your Upgrade Plan

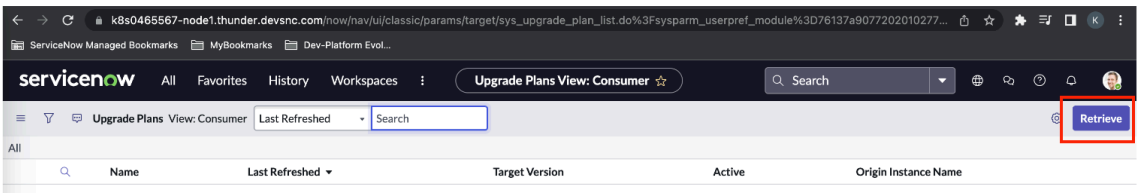
Install your upgrade plan in the consumer instance to implement it in your upgrades.

Before you begin

Role required: admin

Procedure

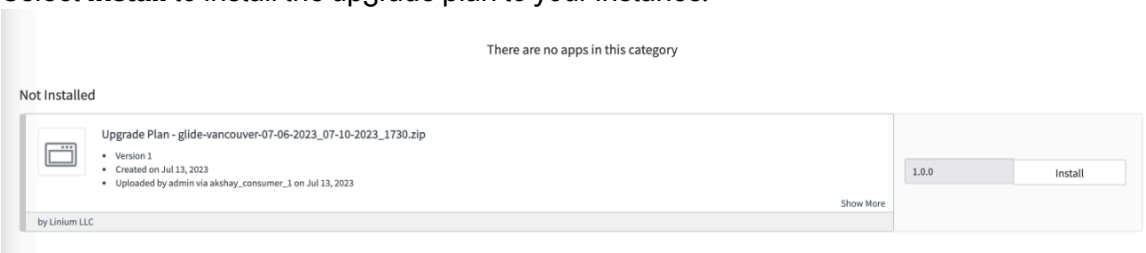
1. Navigate to **All** > **Upgrade Plan**.
   The list view of the upgrade plans shows up.
2. Select Retrieve to find your upgrade plan.



3. Search your upgrade plan by name.
4. **Optional:** Navigate to **All** > **My company applications** and refresh it.

> **Note:** This step is applicable only if you can't find the required version of your upgrade plan.

5. Repeat the previous steps to see the latest version of the upgrade plan.
6. Select **Install** to install the upgrade plan to your instance.



> **Note:** If you made any changes to the upgrade plan on the builder instance after installing it on the consumer instance, then update the upgrade plan to the latest version.

Prepare to upgrade with Upgrade Plan

Prepare your instance upgrade with Upgrade Plan by determining all the applications and plugins are ready to be implemented in the upgrade.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Upgrade Plan**.
   The upgrade plan that is installed shows up on the list.
2. Select the upgrade plan.
   The upgrade plan form view shows up with all its configurations.
3. To ensure that all the applications and plugins are ready to be implemented in the upgrade, select **Refresh** in the context menu of the Upgrade Plan.
   If there are errors for any of the items, then fix them and follow the Reprocess step.

   Note: All the applications and plugins under the Upgrade Plan Items related list must be in the **Ready** state to proceed with the upgrade. The application or plugin in the **Already Installed** state, error or its latest version won't be considered during the upgrade process.

   The upgrade plan is now ready to be implemented.
4. Apply an existing upgrade plan to an instance anytime, without being limited to during upgrades only.

   You can now also export the upgrade plan in a batch install format by using the **Export** button. See CI/CD - POST /sn_cicd/app/batch/install for more information.
5. **Optional:** Select **Reinstall** to reinstall the failed items in an upgrade plan, after the upgrade completes.
   You can also review the upgrade plan history to know the reasons of failure.

   Note: You are required to use this option only if you have failed items in an upgrade plan.
6. **Optional:** Click **Reprocess** to reprocess the upgrade plan after the upgrade plan item errors have been resolved.

   Note: This step is applicable only if you have any error items in the upgrade plan.

Preview Upgrade Plan

Preview your upgrade plan before being implemented in the upgrades. Once the upgrade plan is installed, it auto generates the preview of the upgrade plan.

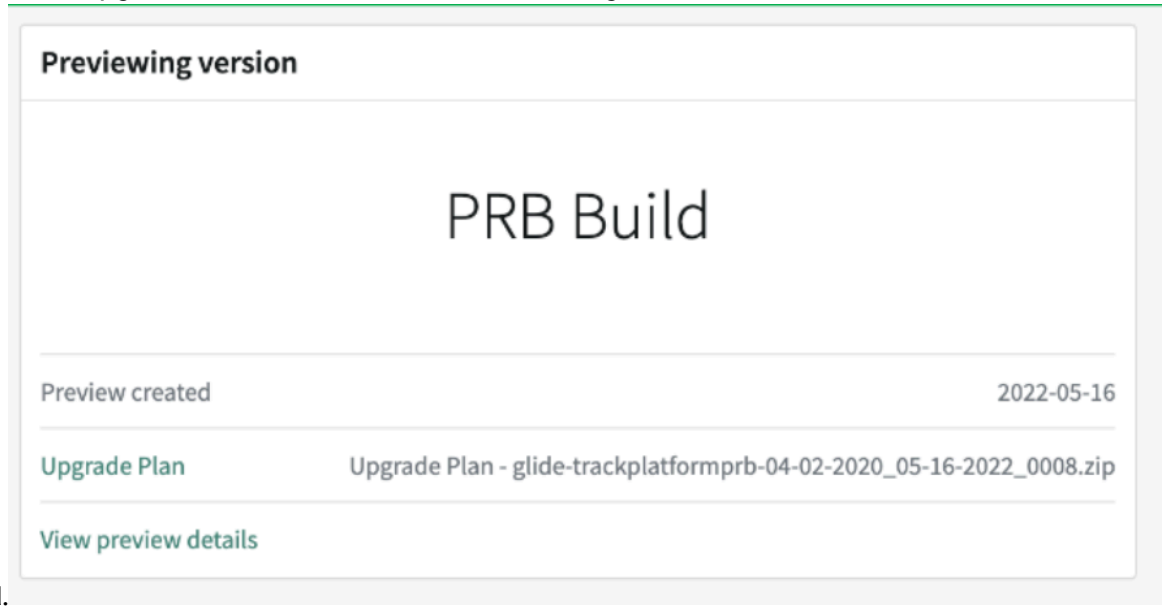
Before you begin

Role required: admin

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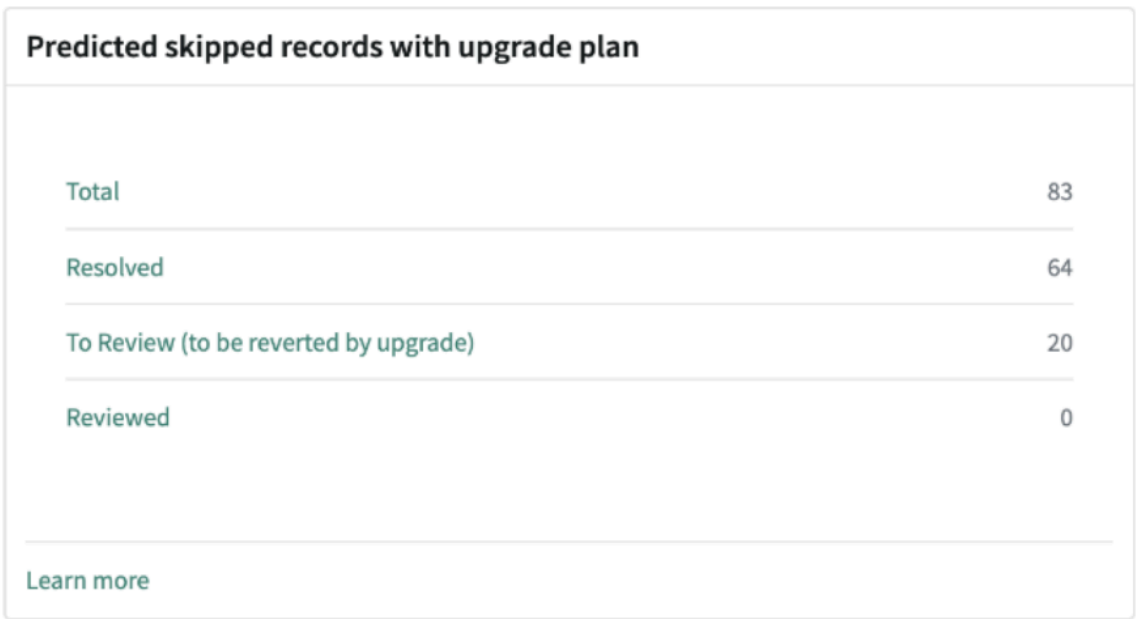
Procedure

1. Go to the Upgrade Preview page to preview the Upgrade Plan.
2. Check the Upgrade Plan mentioned on the Previewing version



card.

3. **Optional:** Check the Predicted skipped records with upgrade plan card to preview the skipped



records.

- Total: total number of skipped records
- Resolved: skipped records included in the upgrade plan
- Reviewed: skipped records that have been reviewed

Note: This step is applicable only if you have enabled the GLIDE_UPGRADE_PLAN_INCLUDE_SKIPS property.

Apply Upgrade Plan on your upgrade

Apply the selected upgrade plan to your instance upgrade.

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Before you begin

Role required: admin

Procedure

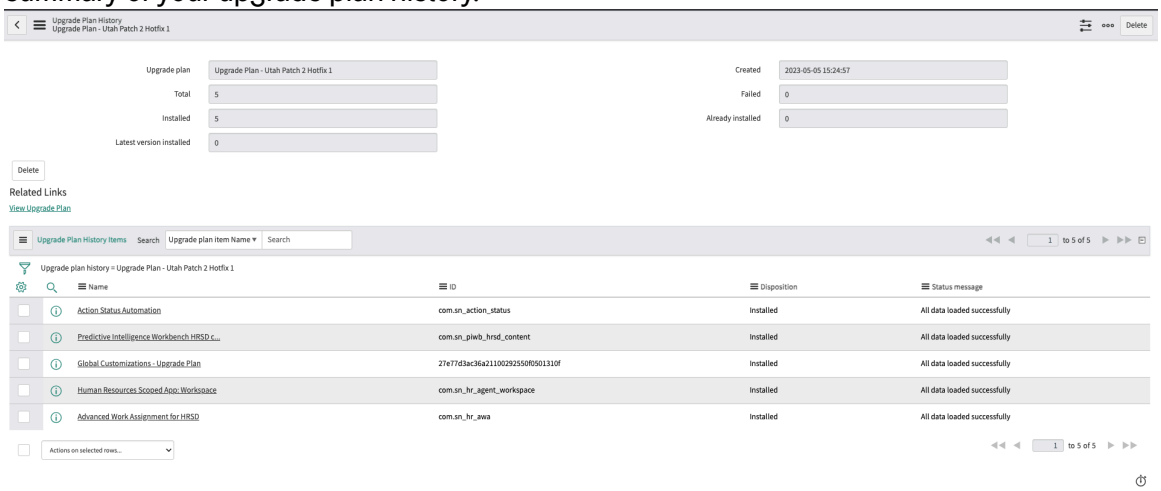
1. Go to the Upgrade Monitor page to ensure that the selected upgrade plan is being implemented in your upgrade.
   If the upgrade plan has been implemented on the ongoing upgrade, the Review upgrade plan link shows up on the Target version card.

   See Upgrade Plan background operations section in Upgrade Plan overview for more information.

2. Check on the date and time of the implemented upgrade plan in the Upgrade duration card once the upgrade completes.
   You can select the Review upgrade plan link on the Upgrade duration card to know the history of the upgrade plan. It shows all the installed applications and plugins and the failed items.
3. **Optional:** Scroll down to see the skipped records with upgrade plan.
   - Total: Total number of skipped records
   - Resolved: Total records from the upgrade plan that have been auto-resolved
   - To review: Total records left to be reviewed manually

   Note: This step is applicable only if you have enabled the GLIDE_UPGRADE_PLAN_INCLUDE_SKIPS property.

4. **Optional:** Click **Review upgrade plan** on the Upgrade duration card if you want to check the summary of your upgrade plan history.



Review skipped records with upgrade plan

Review the skipped records after the completion of the upgrade.

Before you begin

Note: This process is applicable only if you have enabled the GLIDE_UPGRADE_PLAN_INCLUDE_SKIPS property.

Role required: admin

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Procedure

1. Once the upgrade completes, scroll down to see the skipped records with upgrade plan.
   - Total: Total number of skipped records
   - Resolved: Total records from the upgrade plan that have been auto-resolved
   - To review: Total records left to be reviewed manually

   Note: After using the upgrade plan, the Global Application is created and all the records move to the Global Application. As soon as you create the Global Application, the new update sets show up.

   You won't be allowed to choose the skipped records that are captured by the upgrade plan, regardless of whether they are being reviewed. If the customizations are coming from different instances, then the skipped records are required to be reviewed.

2. Select the To review link to look at the records that need to be reviewed manually.

Reviewing upgrade history

The Upgrade History module tracks every upgrade made to an instance. You can also view the complete report of an old upgrade or a recently completed upgrade version using this module.

- Upgrade history related lists: Use the related lists to resolve, track and review the skipped records in an upgrade
- Visual task board (VTB) view of skipped records: Use the VTB view to see the resolution status of any previous upgrade with skipped records

Review skipped records using related lists

Use different related lists to resolve, track and review the skipped records in an upgrade.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Upgrade Center** > **Upgrade History**.
   A list of upgrades is displayed.
2. Select an upgrade from the list.
   System Upgrades form is displayed.
3. Select any of the following related lists to review the skipped records.

   Skipped Changes to Review related list

   Resolve the skipped update records by tracking and reviewing them in the Skipped Changes to Review related list. To prevent your customizations from being overwritten during system upgrades, the upgrade process skips (does not apply the update to) objects that have been customized. See Resolve a skipped update and set a resolution status for more information.

   Skipped Changes Reviewed related list

   View the list of the reviewed skipped records in the Skipped Changes Reviewed related list. When you select a skipped record to review and set a **Resolution Status** to a value other than Not Reviewed, the update record moves from Skipped Changes to Review related list to the Skipped Changes Reviewed related list.

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Copies to Review related list

Copies to Review lists all the records that need to be reviewed.

Copies Reviewed related list

Copies Reviewed lists all the records that have been reviewed.

Customization Unchanged related list

Customizations Unchanged lists all records that were skipped (due to a customization), but there have been no changes from the last upgrade. See Revert a customization for more information.

Changes Applied related list

Changes Applied lists all changes that were applied in this upgrade.

Claim Outcomes to Review related list

During system upgrades, the Claim Status tab displays outcomes to review and resolve.

Upgrade Details related list

Upgrade Details lists all Upgrade Details records for this upgrade.

Note: The Copies to Review and Copies Reviewed related lists are Platform specific related lists.

Upgrade history related lists details

The following table gives the description of each field in all the related lists within the upgrade history module.

Related lists details

Field	Input Value
File name	File name has different description for different related lists • Skipped Changes to Review related list: Name of skipped Upgrade Detail record • Skipped Changes Reviewed related list: Name of the reviewed Upgrade Detail record • Copies to Review related list: Name of the record that needs to be reviewed • Copies Reviewed related list: Name of the record that has been reviewed • Customization Unchanged related list: Name of unchanged sys_upgrade_history_log record. Select it if you want to access Upgrade Details and add comment text, or set a resolution status for it • Changes Applied related list: Current upgrade file name

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Related lists details (continued)

Field	Input Value
	• Claim Outcomes to Review related list: Name of skipped Upgrade Detail record • Upgrade Details related list: Current upgrade file name
Disposition	Action performed on this file during the selected upgrade: • Inserted: The system inserted a new record. • Updated: The system updated this record. • Deleted: The system deleted this record. • Skipped: The system did not change this record in order to preserve customizations. • Skipped Error: The system didn't have the upgrade on this file but skipped due to reasons like the record already exist in the system in a different scope or a system property exists. **Note:** This is editable only by a maint. • Reverted: This record was reverted to the base version. • Table not found: The system could not find the table that contains this record. • Unchanged: The system did not change this record because the baseline component has not changed since the last release. • Skipped Manual Merge: The system did not change this record because updating it requires manual intervention. • Skipped Apply Once: The system skipped this record because it had already applied an update from an xml file in the apply once folder. • Not Latest: The system applied a change, but this change was overwritten later during the same upgrade.
Priority	Relative importance of the conflict that caused the skip.

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Related lists details (continued)

Field	Input Value
	Note: ServiceNow prioritizes the skipped records based on the importance of the file types. The prioritization is done as follows: • Priority 1 (highest priority): UI pages, UI macros, and more • Priority 2: Business Rules, Security ACLs, and more • Priority 3: Reports and more • Priority 4: Form Sections, Choice Sets, and more • Priority 5 (lowest priority): other
Claim Status	Outcomes: • N/A: There are no claims on the record (no need to review) • Won conflict: The loading application loaded the file but is in conflict with the previously loaded file. Recommendation: Review the two versions of the file to confirm your intended outcome. • No conflict: There may be one or more applications loading but there is no conflict. However, it is still good to review the outcome to see if it's what you intended. • Lost conflict: The file was not loaded because another application has a better claim on the file. Recommendation: Review the two versions of the file to see which should be loaded (or if they should be merged).
Reason	States the reason why a particular record has been moved to the Skipped Error disposition.
Resolution	• Reviewed • Retained • Reverted
Comment	During the process of resolving a skipped update, you have the option to add a **Comment** to any record. For example, the comment might explain the action that you took to future reviewers.

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Related lists details (continued)

Field	Input Value
Target name	Name of the record corresponding to the current file.
Plugin	Plugin that contains the record.
Type	Current file type (such as Business Rule or UI Policy).
Table	Table that contains the record.
Changed by vendor	Indicates whether the file has been changed by the vendor since the last upgrade.

Revert a customization

To prevent customizations from being overwritten by system upgrades, the upgrade process automatically skips changes to objects that have been customized. You may want to overwrite your customizations when a software upgrade contains a feature that you would like to implement.

Before you begin

Role required: admin

About this task

To identify customized objects, the system adds a corresponding record in the Customer Updates [sys_update_xml] table. The table maintains the current version information for all objects that have been customized. The upgrade process skips changes to objects that have entries in the table. The upgrade process does not skip objects if only excluded fields have changed.

Procedure

1. Navigate to **All** > **Upgrade Center** > **Upgrade History**.
2. Select the desired software version.
3. Filter the Upgrade Details related list by **Disposition is Skipped**.
4. **Optional:** Add another filter condition for **Changed is True** to return only the objects that have changed since the last upgrade.
5. Select the update record to implement.
   The **File differences** field displays a side-by-side comparison of the customization and the default version. Deletions are highlighted in red, additions in green, and modifications in yellow.
6. Click **Revert to base system** to overwrite your customized object with the system default version.
   - The **Disposition** changes from **Skipped** to **Reverted**.
   - After you revert a customization, you have the option to click **Reapply Changes** to reapply your customizations (undo the revert).

Resolve a skipped update and set a resolution status

Review the reason for each skipped record to resolve each skipped update after an upgrade.

Before you begin

Role required: admin

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About this task

You resolve an update by either retaining the customization or by merging or overwriting the customization with the base system update.

Note: Objects that are customized and that did not change in the base system since the last upgrade require no action on your part.

When an object is customized, the system adds a corresponding record to the Customer Updates [sys_update_xml] table and then maintains current version information for all customized objects. The upgrade process skips changes to objects that have a current version in the Customer Updates table. When you follow the procedure, you perform one of the following actions:

- Retain a customization with no changes
- Retain a customization by merging changes from the updated object
- Revert a customized object to the updated version (that is, overwrite the customization)
- Review the skip and perform no action on the object

Note: If you want to capture your changes in update sets other than the default, ensure that you are in the Application Scope context of the item that you change while reviewing it as part of skipped items. If you are in a different scope, you may end up with items for different scopes in your update set.

Procedure

1. Navigate to **All** > **Upgrade Center** > **Upgrade History**.
2. Select the desired software version.
3. In the Skipped Changes to Review related list, select the update record to resolve.
   See Review skipped records using related lists.
4. Review the list of changes.
   For text fields, you can click in the field to open the Diff/Merge tool.

   To review the differences, Click a text box to view and edit the detailed differences.
5. Perform one of the following actions.

   You have the option to add a **Comment** to any record, for example, to explain the action to future reviewers.

Skipped Changes to Review related list

Field	Input Value
Retain the customized record as is and do not update it.	After reviewing the changes, set **Resolution Status** to **Reviewed and Retained**. The record moves from the Skipped Changes to Review to Skipped Changes Reviewed related list.
Retain the customization by merging changes from the updated object.	**a.** Click**Resolve Conflicts** to navigate to the Resolve Conflicts form. **b.** Review the differences. **c.** To merge a field:

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Field	Input Value
	▪ Click the right-arrow button for the field. ▪ Click a text box to view and edit the detailed differences. ▪ When you have merged all appropriate fields, click **Merge**. After merging the customization changes: ○ The Resolution Status changes to Reviewed and Merged. ○ The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list.
Discard the customization and update the record to match the base system for this upgrade.	After reviewing the changes, click **Revert to Base System**. ○ **Disposition** changes from **Skipped** to **Reverted**. ○ **Resolution Status** changes to **Reviewed and Reverted**. ○ The system creates a Customer Update record. ○ The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list. **Note:** At any time after you revert a customization, you can click **Reapply Changes** to reapply the customization.
Review the skip and perform no action on the object.	After reviewing the changes, set **Resolution Status** to **Reviewed**. The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list.
Leave on the skipped list for a later decision, and note that you have not reviewed the record.	From the **Resolution** list, choose **Not Reviewed** to defer the decision on how to handle this conflict. The record stays on the Skipped Changes to Review related list.

6. Click **Update**.
7. Repeat the process to resolve each update record in the list.

Result

Only skipped updates with a **Resolution Status** of **Not Reviewed** or without a resolution set appear in the Skipped Changes to Review related list. Any action you take that changes the **Resolution Status** to a value other than **Not Reviewed** or **--None--** removes the skipped update from list and moves it to the Skipped Changes Reviewed related list.

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Skipped Records visual task board (VTB)

View the resolution status of any previous upgrade with skipped records using the visual task board (VTB) view. An upgrade history record is created for each upgrade that is run.

To view the history report navigate to **Upgrade Center** > **Upgrade History**. You can then select an upgrade from the list to view the upgrade history details. Click the **Skipped Record VTB** related link to view and manage the skipped records over VTB.

Note: The **Skipped Record VTB** related link shows up only when there are skipped records for the version upgrade.

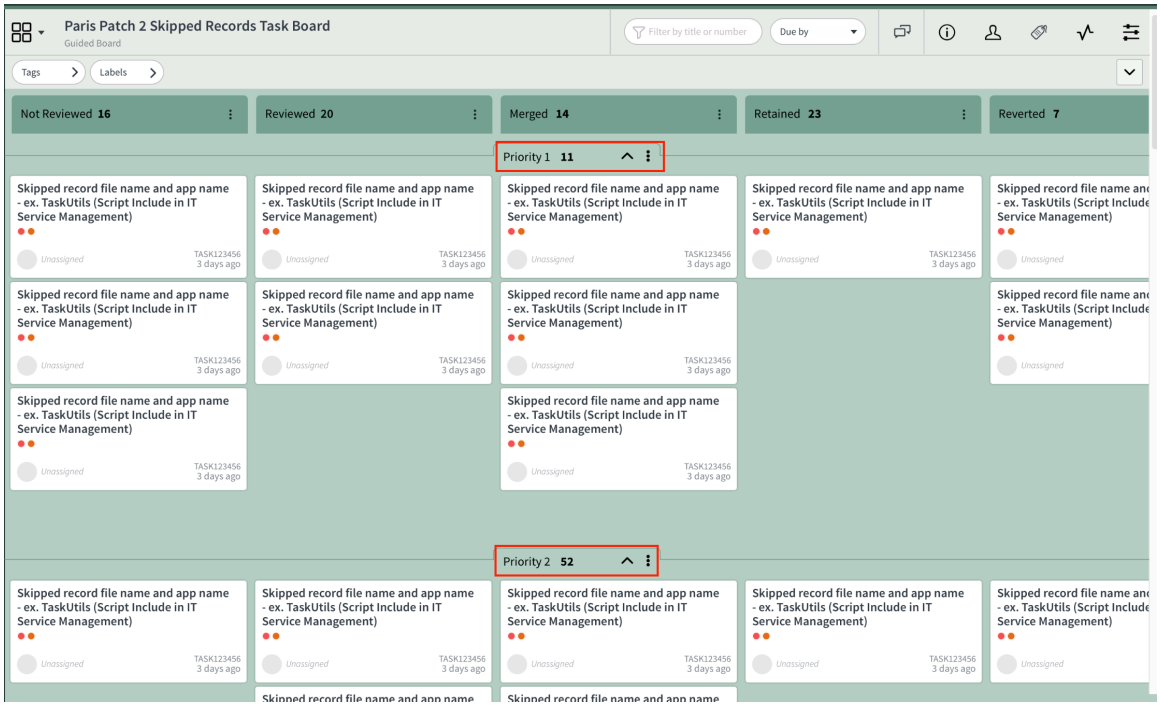
Upgrade History VTB details

Field	Description
Not Reviewed	Tasks which have not been reviewed
Reviewed	Tasks which have been reviewed
Merged	Tasks which have both the old and new changes
Retained	Tasks which have retained the updates from the latest upgrade
Reverted	Tasks which have reverted its changes to the base system

The skipped records are prioritized based on the importance of the file types. The prioritization is done as follows:

- Priority 1 (highest priority): UI pages, UI macros, and more
- Priority 2: Business Rules, Security ACLs, and more
- Priority 3: Reports and more
- Priority 4: Form Sections, Choice Sets, and more
- Priority 5 (lowest priority): other

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Upgrade History Task form

You can update information about a skipped record task using the Upgrade History Task form.

To make changes on a skipped record task, click a task number link on a task over VTB.

Upgrade History task form details

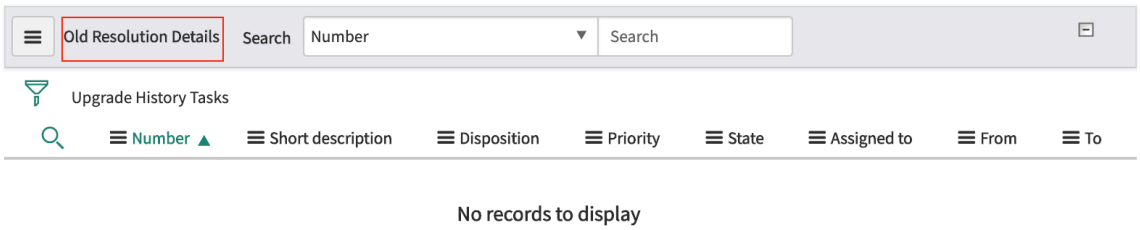
Field	Description
Short description	Description about the task
Priority	Prioritization of the skipped records based on the importance of the file types. The prioritization is done as follows: • Priority 1 (highest priority): UI pages, UI macros, and more • Priority 2: Business Rules, Security ACLs, and more • Priority 3: Reports and more • Priority 4: Form Sections, Choice Sets, and more • Priority 5 (lowest priority): other
Disposition	Disposition is Skipped since the task board is only for skipped records. The system did not change this record in order to preserve customizations.
Type	Type of file which determines the priority level.
State	State of the files.

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Upgrade History task form details (continued)

Field	Description
	• Not reviewed: Tasks which have not been reviewed • Reviewed: Tasks which have been reviewed • Merged: Tasks which have both the old and new changes • Retained: Tasks which have retained the updates from the latest upgrade • Reverted: Tasks which have reverted its changes to the base system
Work notes	Notes about the skipped record task
Update	Button to update the skipped record task
Resolve Conflicts	Button to resolve conflicts by reviewing the differences
Revert to Base System	Button to revert the customizations
Delete	Button to delete the skipped record task

The Old Resolution Details related list shows the actions taken in the previous upgrade



version.

Old Resolution Details related list

Field	Description
Number	Task number of the skipped file where some actions were taken in the previous upgrade version.
Short description	Description about the task
Disposition	Action performed on this file during previous upgrade
Priority	Prioritization of the skipped records based on the importance of the file types. The prioritization is done as follows: **1.** (highest priority): xml content **2.** script or script_plain **3.** html content

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Old Resolution Details related list (continued)

Field	Description
	4. sys_ui_form_section, sys_ui_related_list, or sys_choice_set 5. (lowest priority): other
State	State of the files. • Not reviewed: Tasks which have not been reviewed • Reviewed: Tasks which have been reviewed • Reviewed and Merged: Tasks which have been reviewed and have both the old and new changes • Reviewed and Retained: Tasks which have been reviewed and have retained the updates from the latest upgrade • Reviewed and Reverted: Tasks which have been reviewed and have reverted its changes to the base system
Assigned to	Name of the assigned user
From	Past previous version
To	Past current version

Previous Resolutions related list

The Previous Resolutions related list shows the history of the selected skipped record. You can see what resolutions have been done with the selected skipped record in the previous upgrades.

Upgrade History task form details

Field	Description
File name	Name of the skipped record.
Disposition	Disposition is skipped since the related list is only for skipped records.
Priority	Prioritization of the skipped records based on the importance of the file types. The prioritization is done as follows: • Priority 1 (highest priority): UI pages, UI macros, and more • Priority 2: Business Rules, Security ACLs, and more • Priority 3: Reports and more

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Upgrade History task form details (continued)

Field	Description
	• Priority 4: Form Sections, Choice Sets, and more • Priority 5 (lowest priority): other
Resolution	The resolution made in the previous upgrades
Target name	Name of the record that you see on UI, as opposed to the sys_update_name which is the underlying name that has the table and sys_id
Type	Type of file which determines the priority level.
Table	The table where the skipped record belongs.

Update default labels in VTB view

Filter skipped records in the task board of the VTB with the implementation of color-coded labels. You can filter the skipped records by assigning a color to each of the products.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Upgrade Center** > **Upgrade History**.
2. Select an upgrade from the list.
   The System Upgrades form appears.
3. Click the **Skipped Record VTB** related link to view the resolution status of the skipped records over VTB.

   Note: The **Skipped Record VTB** related link shows up only when there are skipped records for the version upgrade.

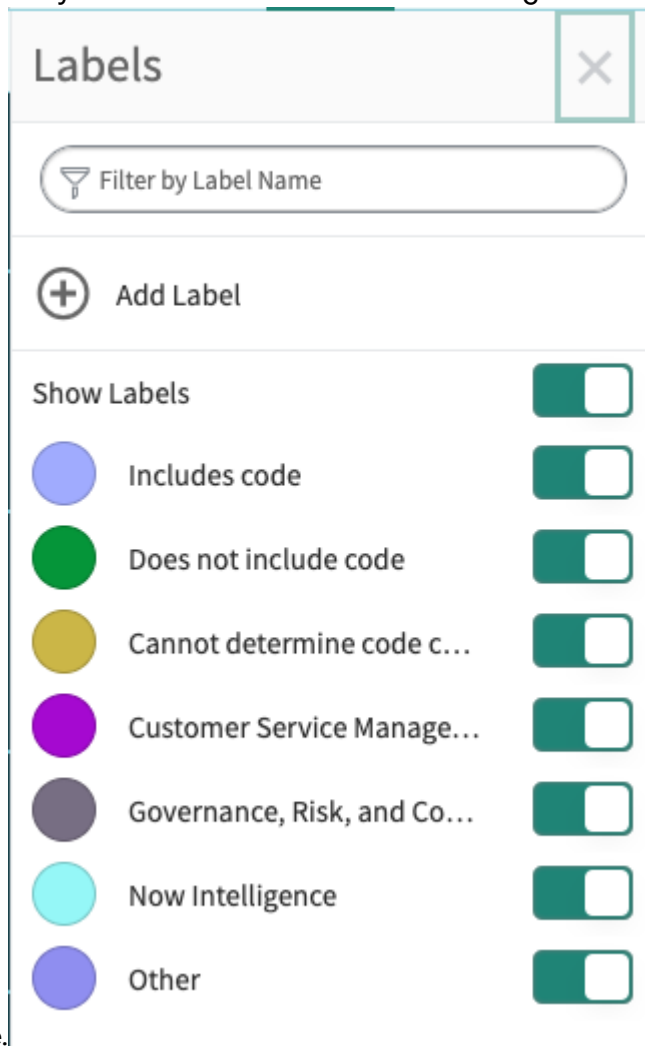
   The VTB view of the resolution status of the skipped records shows up.
4. Click **Labels** to show the default labels.
   The default labels consist of Include codes, Does not include code and Others categories.

   Note: The Include and Does not include codes categories indicate if there is any change in the code of the skipped records. All products fall under Other category of labels. The product labels are assigned with different colors. The tasks get assigned based on the label colors of the products.

5. **Optional:** If you want to add a label, click **Add Label**.

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Enter the name of the label you want to create. You can also change the color of a label by clicking the color circle.



Note: The new labels and colors are saved only for the current visual task board and don't get rolled over to the next updated board. If you want the new label updates to show up in the next updated board, navigate to **Upgrade Center** > **Administration** > **Properties** > **Upgrade Center VTB Labels**. Set the colors as required and the updated colors start showing up from the next generated board.

What to do next

Click on a skipped record in the VTB to update the task. See Upgrade History Task form for more information.

View import history

View your import history by accessing the **My Application Import History** module.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **My Application Import History**.
   The list of import history records in your instance shows up.
2. Select one of the imports from the list for more information about that import.

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The form view of sys_upgrade_history record shows up.

Note: To learn more about importing from Source Control, see ServiceNow Studio. Once the importing is done, use the **My Application Import History** module to view the import history.

Quick access to plugins and history records

Reduce the navigating time by directly accessing plugins, application installation history records, and update set commits history records. The filters for the plugins and history records are automatically implemented in the plugins and history records views.

Before you begin
Role required: admin

About this task

Plugins and application installation history records

1. Navigate to **System Definition** > **Plugin Installation History**.
2. Select any of the plugins or history records to access them directly.

Update set commit history records

1. Navigate to **System Update Sets** > **Update Sets to Commit**.
2. Select any of the update sets to directly view the commit history of that update set.

Explore upgrade history log

Reduce processing time by extracting all upgrade related logs into a separate file named database-upgrade_<timestamp>.log. You can also zip the file and attach it to upgrade history.

Before you begin
Role required: admin.

About this task
When the upgrade starts, the upgrade log messages are written to both the localhost_log file and the database-upgrade_<timestamp>.log file. When the upgrade is done, the database-upgrade_<timestamp>.log file is uploaded to the upgrade history table.

Procedure

1. Navigate to **All** > **System Logs** > **Utilities**.

   Note: You can implement this step to view the extracted database-upgrade_<timestamp>.log file only after the upgrade is done.

2. Click **Node Log File Download**.
   The database-upgrade_<timestamp>.log file appears in the list of log files.

   Note: The localhost_log file consists of all the logs. The database-upgrade_<timestamp>.log file consists of logs only related to the upgrade.

   The database-upgrade_<timestamp>.log file appears only if the `glide.db.upgrade.log.save_to_db.enabled` property is set to True. By default, the `glide.db.upgrade.log.save_to_db.enabled` is set to True.

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3. Go to **Upgrade Center** > **Upgrade History**.
   A list of upgrades shows up.
4. Click the required upgrade from the list.
   You can see database-upgrade_<timestamp>.log file is automatically attached to the upgrade.

   Note: The database-upgrade_<timestamp>.log file gets attached only if the `glide.db.upgrade.log.save_to_db.enabled` property is set to True. By default, the `glide.db.upgrade.log.save_to_db.enabled` is set to True.

5. Download the zipped database-upgrade_<timestamp>.log file.

   Note: The database-upgrade_<timestamp>.log file has been zipped to reduce the download time.

Administering Upgrade Center

The Administration module contains information about upgrade risk and execution of skipped record rules.

Managing upgrade risk

You will be notified of the possible conflicts that might result due to several customizations in a skipped metadata file, with a new UI message on the form pages of the metadata files.

One of the major conflict areas during an upgrade is resolving conflicts for skipped metadata files that are released by ServiceNow® but have been customized. These conflicts result from multiple users updating the same files. ServiceNow might update the code in the files which you have customized over time. Whenever you install an application or a plugin, you often customize them as per your requirements. During the next upgrade, you might have several skipped records depending on the previous customizations.

Important: Avoid modifying the high risk and medium risk (if possible) skipped metadata files that can potentially cause conflicted skipped metadata files in your next upgrade. You can edit the files if the modifications are absolutely required.

The purpose of the UI message is to inform you about potential complications that might arise during the upgrade process, especially if any high-priority files have been modified. The notification is of the form of UI messages on the form pages of the metadata files.

The UI message varies based on the severity of the files.

- Medium risk and non-customized: The medium risk files that are not customized might be updated in future releases. It is recommended not to modify these files unless necessary.

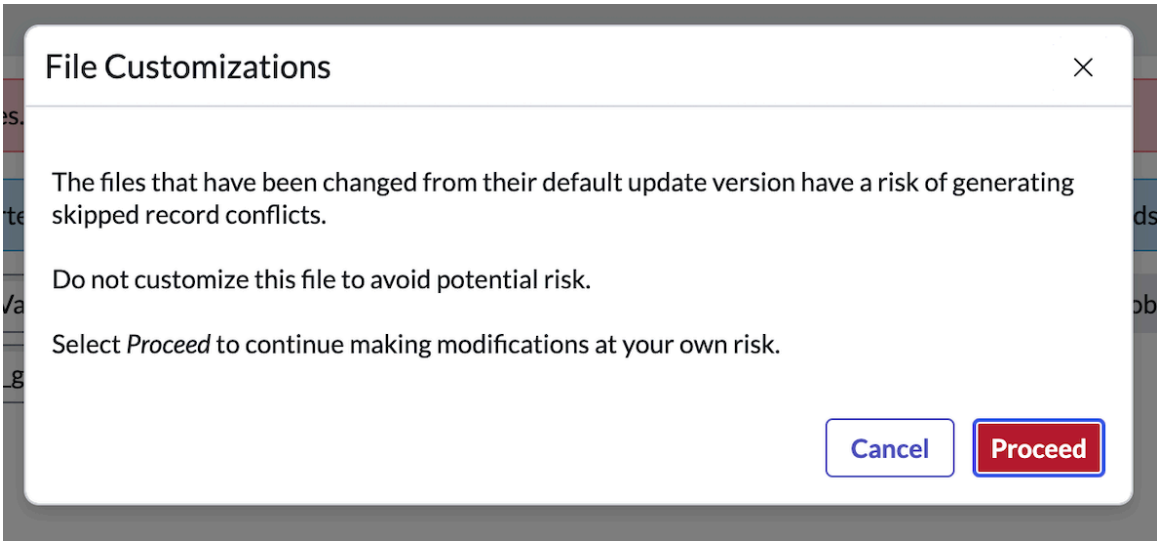
  ⓘ Warning: This is a Medium Risk file that might get updated again in later releases. **Do not** alter this file unless necessary.

- High risk and non-customized: The high risk files that are non-customized might be updated in future releases. It is recommended not to modify these files unless necessary.

  ⊗ Warning: This is a High Risk file that might get updated again in later releases. **Do not** alter this file unless necessary.

  Note: You can proceed to modify these files if the changes are absolutely required. The following modal shows up.

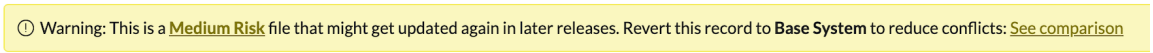
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- High risk and customized: The high risk files that are customized might be updated in future releases. It is recommended to revert them to the Base System to avoid conflicts.



- Medium risk and customized: The medium risk files that are customized might be updated in future releases. It is recommended to revert it to the Base System to avoid conflicts.

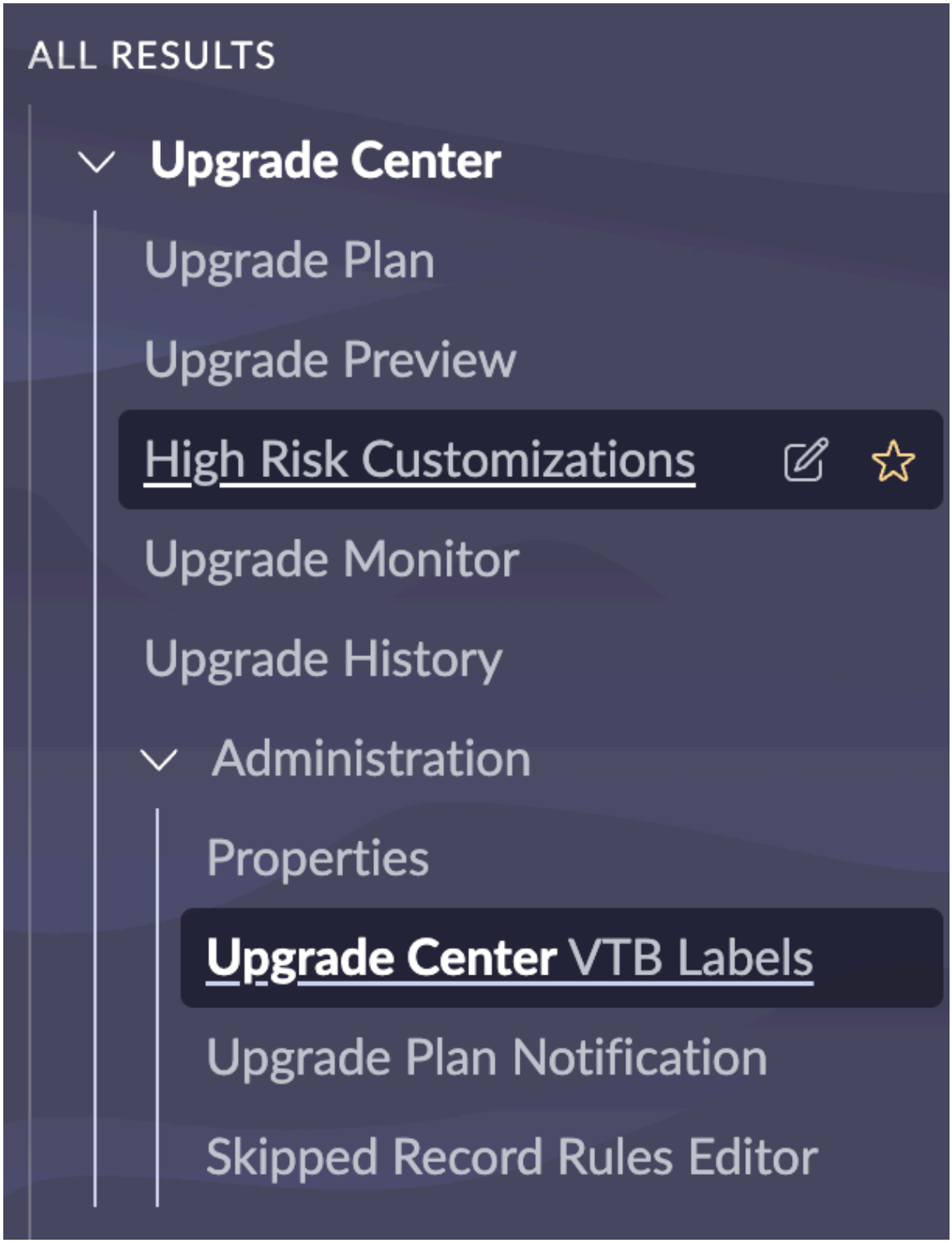


- Non-risky and non-customized: You don’t see any warning for this condition.
- Non-risky and customized: You don’t see any warning for this condition.

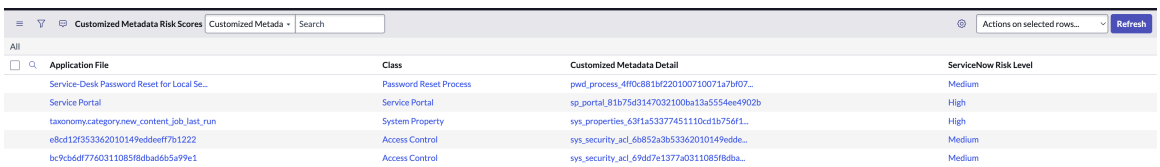
High Risk Customizations menu

The **High Risk Customizations** menu item presents the overlap between ServiceNow's high and medium risk files and your customizations.

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They are stored in a virtual table called v_metadata_customization_risk, and is refreshed after a set period of time or when you select the **Refresh** on the list view.

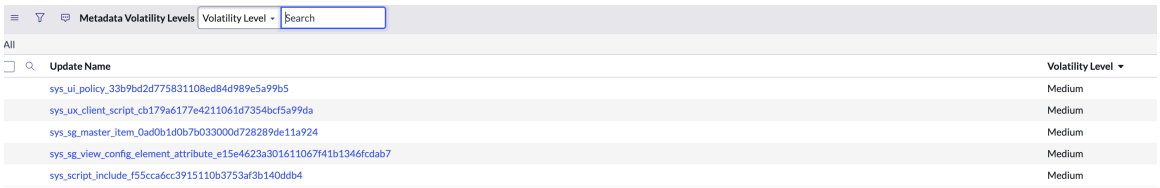


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Risk files storage

The high risk and medium risk files are stored in the new sys_metadata_volatility table.

Note: It is recommended not to modify the sys_metadata_volatility table and is automatically updated for every family upgrade. The sys_metadata_volatility table is not a part of the menu item in the navbar.



Note: Risk is determined by the likelihood of a given metadata file being modified, which is predicted based on trends in updates from recent releases. Some files that may not currently exist in the system will be present in the table to account for future installation of apps/plugins.

Create a skipped record rule

Create skipped record rules based on your set conditions to define your customizations after an upgrade.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Upgrade Center** > **Administration** > **Skipped Record Rules Editor**.
   A list of available rules shows up.

   Note: By default, a few inactive sample rules have been provided. You can set it to active if you want to use the sample rules.

2. Select **New** to create a new skipped record rule.
   The Upgrade Skipped Record Rules form shows up.

   Note: The new rules are active by default. You can make them inactive if you don't want to use them.

3. Fill in the fields on the form.

Field	Description
Name	Name of the rule.
Order	Order in which the rule runs. **Note:** The order number automatically increments from the last rule order created.
Active	Option to activate the rule.
Conditions	Conditions as to when the rules are implemented on the skipped records.

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Field	Description
	Note: These conditions are only for skipped records that are not being reviewed. If you set the disposition condition to anything other than the skipped records, that condition doesn't work.
Action	Option to choose one of the four following actions: ○ Keep My Modifications (Always Retain) ○ Revert and Keep Inactive ○ Assign Skipped Records to User ○ Assign Tags to Skipped Records **Note:** Based on the selected action, a message shows up with more information.
Comment	Add a comment on the conditions being set.

4. Select **Submit**.
   The new rule appears on the list of available rules.

What to do next
You can now run the skipped record rules either automatically during an upgrade or can run on demand on the skipped records. See Execute a skipped record rule for more information.

Execute a skipped record rule

Run skipped record rules based on your set conditions to resolve skipped records in an upgrade. The rules either execute automatically during an upgrade or can run on demand after an upgrade.

Before you begin
Role required: admin

Execute a skipped record rule on demand

Execute the skipped record rules on demand on the skipped records whenever it's required.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Upgrade Center** > **Administration** > **Skipped Record Rules Editor**.
   A list of available rules shows up.

   Note: By default, a few inactive sample rules have been provided. You can set it to active if you want to use the sample rules.

2. Execute the rules on demand using either of the following ways.

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Option	Steps
Using Run Now	**a.** Select the rule that you want to execute from the list. **b.** Select **Run Now** from the configuration list action items. **Note:** When you select **Run Now**, a progress bar shows up to display the progress of the rule execution.
Using View Latest Upgrade History tab	**a.** Select the **View Latest Upgrade History** tab. The System Upgrades form shows up. **Note:** The skipped record rules are executed only on the latest upgrade. **b.** Select **Run skipped Record Rules** on the form. **Note:** All the active rules get exe cuted. You can't choose the specif ic active rules to run while using this process.

Execute a skipped record rule automatically

Execute the skipped record rules automatically during the upgrade on the skipped records.

These rules are executed on the skipped records automatically during the upgrade process. The prediction of the rules execution on the skipped records can be previewed on the Skipped list prediction card in the Upgrade Preview module.

Once the execution of the rules are done, the summary can be reviewed in the Upgrade Summary of Upgrade Monitor.

Note: Skipped record rules and upgrade plans can't be implemented together in an upgrade.

Upgrade Center references

These reference topics provide additional information about your upgrade properties, roles and skipped rules.

Upgrade Center properties

On the properties form, you can set parameters that control how the system executes.

Upgrade Duration Estimation Properties

Field / Element	Description
Queries upgrade duration estimate *glide.upgrade.preview.duration.instance.id*	A non-production instance queries the upgrade duration estimate. If this property is absent, the system uses all remote instance records to

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Upgrade Duration Estimation Properties (continued)

Field / Element	Description
	query the upgrade duration estimate. You can also copy the sys_id of the remote instance record you wish to query for upgrade duration estimate. The system uses the highest duration from the results.

Upgrade Visual Task Board Properties

Field / Element	Description
Enable an admin or user with admin role to own Upgrade VTB *glide.upgrade_center.task_board.owner*	Upgrade VTB owner must be an admin. If this property is absent, the system uses the first admin user from active admin users list. The active admin users list is sorted by username.
Enable admins or users with admin role to be members of Upgrade VTB *glide.upgrade_center.task_board.members*	Upgrade VTB members must be an admin. If this property is absent, the system adds all active admin users as members.

Upgrade Plan Properties

Field / Element	Description
Queries about the type of instance the user is configured. *glide.upgrade.plan.instance_type*	You must configure the instance either as a builder or a consumer. You must build the upgrade plan on a builder instance and implement it on a consumer instance.

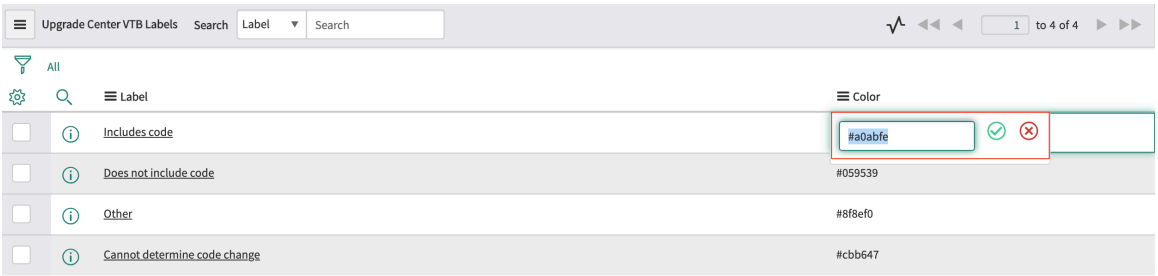
Upgrade Center VTB Labels list

The Upgrade Center VTB Labels list under Administration module shows all the labels in the Upgrade Visual Task Board (VTB). You can also change the color of the existing labels.

If you want to change the color of an existing label, navigate to **Upgrade Center** > **Administration** > **Properties** > **Upgrade Center VTB Labels**

Note: If you update the color of an existing label, the change will not be reflected in the current version upgrade related board. The change will be seen only from the next version upgrade.

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Default skipped rules

Reduce considerable processing time with the default skipped rules to auto-retain high friction causing configuration metadata types.

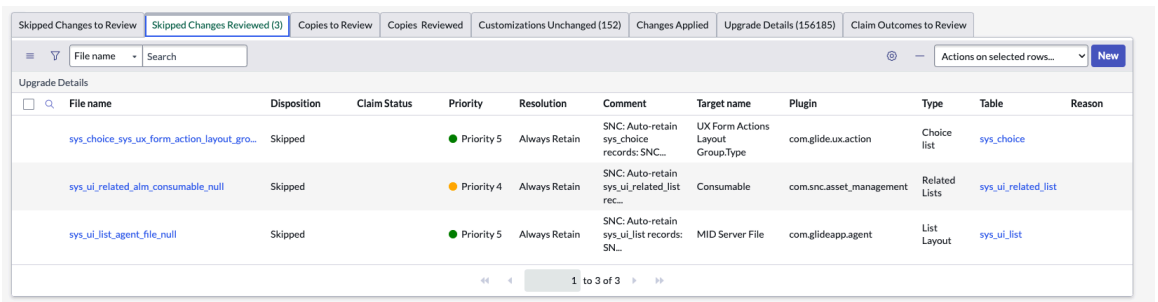
Starting with Xanadu, new skipped rules have been introduced by default to help you auto-retain certain customizations during the upgrade process. This eliminates the need for manual review of the skipped records generated during the upgrade process.

The following is the list of tables from which if any skipped record is being generated as a metadata file, the customizations are retained by default with the new skipped rules:

- sys_ui_section
- sys_ui_form
- sys_ui_form_section
- sysevent_email_action
- sys_ui_related_list
- sys_ui_list
- sys_choice
- sys_choice_set
- sys_report
- pa_dashboards
- wf_workflow

Note: For wf_workflow_version table, the new skipped rules automatically sets the generated skipped records to **Keep My Modifications (Always Retain)**. This table is generally used for configuration changes and doesn't need to be reviewed.

The skipped records that are retained automatically by the default skipped rules are found in the Skipped Changes Reviewed related list.



Note: You can also find a comment for each retained skipped records to show the related table it was generated from during the upgrade process.

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Upgrade Center roles

Upgrade Center is installed with these roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

System administrator [admin]

Access all tables and information within Upgrade Center on your instance.

Contains Roles

List of roles contained within the role.

- sn_templated_snip.template_snippet_admin
- sn_employee.admin
- taxonomy_admin
- sn_ace.ace_user
- sn_hr_sp.esc_admin

Groups

List of groups this role is assigned to by default.

None

Elevated

Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevate to a privileged role.

No.

Special considerations

None.

Upgrade Console

Leverage ServiceNow Upgrade Console for a comprehensive and efficient upgrade experience. Streamline your upgrade process by accessing all necessary tools and insights from within the instance.

Get started

Explore	Use	Configure
Learn about Upgrade Console	Use the tools, relevant information, and guided setup for your upgrades	Configure Upgrade Console

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Administer	Reference	
 Administering Upgrade Console	 Learn miscellaneous information about Upgrade Console	

Note: Starting Brazil release, the Upgrade Console store app can be installed from the ServiceNow® store.

Troubleshoot and get help

- Ask or answer questions about Upgrade Console in the ServiceNow Community
- Search the Known Error Portal for known error articles

Exploring Upgrade Console

Utilize Upgrade Console to gain a comprehensive understanding of your upgrade process and make informed decisions.

Upgrade Console overview

Upgrade Console is an application that provides the option to upgrade from the instance itself. When you request an upgrade, the instance automatically begins the process at the scheduled time. This upgrade includes both pre-upgrade and post-upgrade steps.

Note: You can install the Upgrade Console store application from the ServiceNow store for the latest version.

Upgrade Console summary	Guided Upgrade
 Access all the relevant information and tools required for your upgrade	 Simplify your upgrade process with the guided setup

Note: The **Guided Upgrade** tab shows up only when the upgrade process has started.

You can access Upgrade Console in one of the following ways.

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Option	Steps
Using the application navigator	1. Navigate to **All** > **Admin Center** > **Upgrade Console**. 2. Select one of the sections or tool tiles for more information.
Using Admin tab option	1. Navigate to **Admin** > **Upgrade Console**. 2. Select one of the sections or tool tiles for more information.
Using Admin tab and Admin Home option	1. Navigate to **All** > **Admin Center** > **Admin Home**. 2. Scroll down to the Get information about your instance section. 3. Select the Upgrade Console link in the Instance Upgrade tile.

Upgrade Console users

Users

User	Description
upgrade_admin	The system administrator user accesses all tables, tools and information within Upgrade Console on your instance.

Upgrade Console benefits

Benefit	Feature	Users
One-stop shop experience for all relevant information for an upgrade	Upgrade Console summary	System administrator
Unfettered access to all tools required for your instance upgrade	Upgrade Console tools	System administrator
Guided setup process for your instance upgrade	Access guided upgrade on a non-production instance	System administrator

What to explore next

To learn more about using Upgrade Console, see:

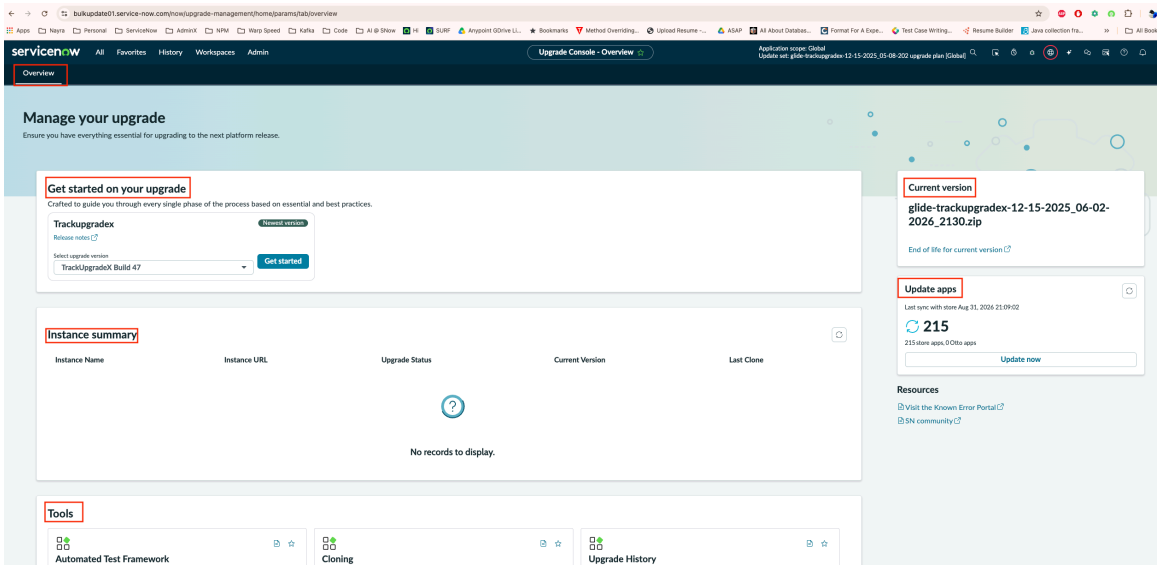
- Using Upgrade Console
- Administering Upgrade Console
- Upgrade Console references

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Upgrade Console summary

Utilize the Upgrade Console store application to access all pertinent information and tools for your upgrade.

Note: The Overview details for Upgrade Console are same for both sub-production and production instances.



You can achieve the following using Upgrade Console.

- Get a comprehensive, single-page view of all relevant information for an upgrade
- Access to all required tools for an upgrade
- Option to use the guided setup process for an upgrade on your instance
- One-stop experience for a seamless upgrade process

Note: By default, you are on the Overview tab when you first land in Upgrade Console. The Guided Upgrade tab shows up only when the upgrade process has started.

The following are the major sections on the Overview tab.

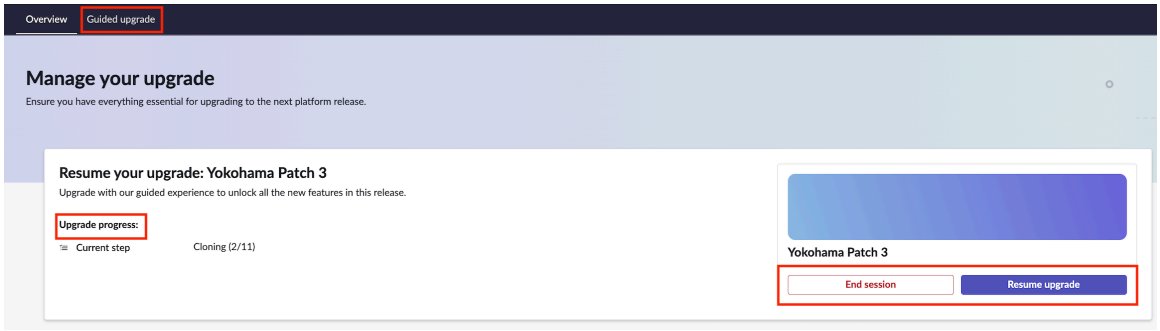
Get started on your upgrade

In this section, you can view the latest version. You can also select the required patch version and select **Get started** to start the selected upgrade. Select Read release notes link to view the delta changes in the latest version of the release.

Note: This section has the above UI only when an upgrade has not started.

If an upgrade is already in progress or have been paused in between, you will see the following.

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This section shows the current upgrade version name and the progress of the upgrade process. Select **Resume upgrade** if you want to resume the upgrade process. You can also end the upgrade process by selecting **End session**.

Note: It is to be noted that if you end an upgrade, it rolls back all progress and data created for your upgrade.

Upgrade scheduled

In this section, you can view the scheduled upgrade name and the start date information. You can select **Go to monitor** to go to the Monitor module to see more details on the scheduled upgrade. Select **Go to guided upgrade** to work on the pre and post upgrade activities.

Note: This section is visible only when an upgrade is scheduled.

Instance summary

This section states the name of the instance and the URL link to the instance. It also shows the status which can be either Scheduled or Not Scheduled. Apart from that, it also shows the current version of the instance and information about the latest clone.

Current version

You can view the current version name in this section.

Note: You can also select the End of life for current version link to learn when the current version expires. See KB0610454 for more information.

Tools

This section displays all the required tools needed for a seamless upgrade experience. It has the following tools:

- Automated Test Framework: The Automated Test Framework (ATF) is a robust tool designed to automate the testing of your instance. By automating test creation and execution, the ATF significantly reduces the time and effort required to verify instance functionality after various changes, such as upgrades, application development, or configuration updates implemented through update sets. When a test fails, the ATF provides detailed information about the specific changes that might have caused the issue, enabling you to quickly identify and address the root cause. See Explore ATF in Upgrade Console for more details.
- Cloning: The System Clone application facilitates the duplication of entire databases. This cloning technique, frequently employed to mirror a production instance for testing purposes, utilizes data extracted from the latest nightly backup. See Explore Cloning in Upgrade Console for more details.
- Upgrade History: The Upgrade History module maintains a comprehensive record of all upgrades performed on your instance. This module allows you to access detailed reports of

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both historical and recent upgrades, providing valuable insights into the upgrade process and its outcomes. See Explore Upgrade History in Upgrade Console for more details.

- Upgrade Monitor: The Upgrade Monitor module empowers you to efficiently manage the upgrade process. You can schedule upcoming upgrades and monitor the progress of ongoing upgrades in real-time. Once an upgrade is complete, the module provides a detailed summary of the upgrade process and a list of any records that encountered conflicts during the upgrade. See Explore Upgrade Monitor in Upgrade Console for more details.
- Now Support: See Now Support in Upgrade Console for more details.
- Upgrade Preview: The Upgrade Preview module offers a comprehensive solution for gaining a deep understanding of your instance's readiness for an upgrade. By providing a detailed preview of how your instance might be affected by different ServiceNow release versions, this module enables you to make informed decisions about your upgrade strategy. With the ability to explore and assess potential impacts, you can confidently plan, schedule, and prepare for your upgrade, ensuring a successful transition to the latest ServiceNow release. Explore Upgrade Preview in Upgrade Console for more details.
- Upgrade Skipped Record Rules Editor: To effectively manage customization requirements during and after upgrades, leverage skipped record rules. By creating these rules based on your specific conditions, you can either automate the resolution of skipped records during the upgrade process or manually execute them post-upgrade. This flexible approach empowers you to maintain control over your customizations and ensure a seamless upgrade experience. See Explore Upgrade Skipped Record Rules Editor in Upgrade Console for more details.
- Upgrade Plans: Experience a more efficient and streamlined upgrade process with the Upgrade Plan. This feature automates the installation of applications, significantly reducing the time and effort required to complete upgrades. Upgrade Plan empowers you to take control of your upgrade process and achieve a seamless transition to the latest ServiceNow release by allowing you to define the applications and target versions to be installed in your instance. See Explore Upgrade Plan in Upgrade Console for more details.

Helpful Resources

This section contains links to the product documentations, knowledge error portals, and community forums.

Explore ATF in Upgrade Console

The ATF Test Generator and Cloud Runner is a powerful tool that leverages ServiceNow's advanced capabilities to intelligently generate comprehensive regression tests specifically designed for your instance.

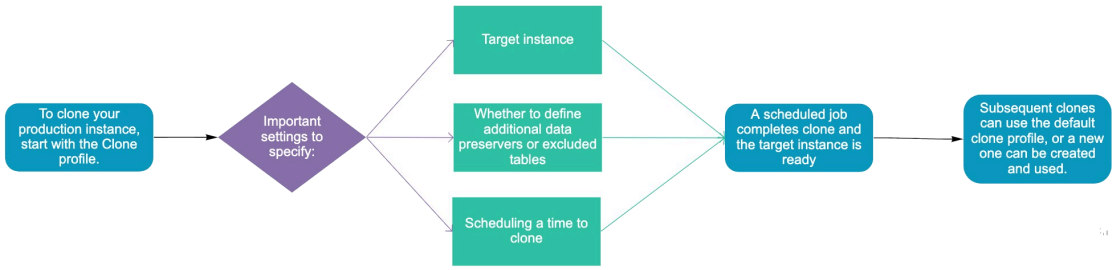
By analyzing your instance's specific behavior and workflows, the test generator intelligently creates precise test cases. This tool seamlessly integrates with the existing ATF framework, providing a smooth user experience. Additionally, you have the flexibility to execute these tests using ServiceNow's Cloud Runner, which leverages headless browsers hosted by ServiceNow.

See ATF Test Generator and Cloud Runner tool in Upgrade Console for more information.

Explore Cloning in Upgrade Console

The System Clone application facilitates the creation of exact copies of instance databases. This process is frequently employed to replicate production instances into pre-production environments for thorough testing of proposed changes. The cloned data is derived from the most recent nightly backup, ensuring data accuracy and consistency.

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Note: A new, unified admin experience for cloning data between instances is now available in the Clone Admin Console. This enhanced console builds upon our existing clone engine and provides improved visibility into one of our most frequently used automations. In addition to streamlining the cloning process, the console offers a range of other enhancements.

See Cloning tool in Upgrade Console for more information.

Explore Upgrade History in Upgrade Console

The Upgrade History module maintains a comprehensive record of all upgrades performed on an instance. This module allows you to access detailed reports for both historical and recent upgrade versions.

To view an upgrade history record, navigate to Upgrade Console in one of the ways.

Option	Steps
Using left navigation	1. Navigate to **All** > **Admin Center** > **Upgrade Console** > **Upgrade History**. 2. Select an upgrade from the list. On selecting an upgrade from the list, the System Upgrades form appears.
Using Admin tab option	1. Navigate to **Admin** > **Upgrade Console** > **Upgrade History**. 2. Select an upgrade from the list. On selecting an upgrade from the list, the System Upgrades form appears.

System Upgrades form details

Field	Description
From	Name of the previous .war file (version).
To	Name of the applied .war file (version).
Upgrade started	Time stamp when the upgrade process began.
Upgrade finished	Time stamp when the upgrade process was completed.

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Upgrade History Details form section

Field	Description
Changes skipped	Total number of records that are different from the previous upgrade and the upgrade component was not applied, mostly due to customization.
Changes applied	Total number of changes that are applied as a part of this upgrade **Changes applied** is sum of updated and different records, added to the number of deleted records (where the value of changed is true) added to the number of inserted records (where the value of changed is true).
Changes processed	Total number of records that were processed as a part of this upgrade. Changes processed is the sum of **Changes skipped** and **Changes applied**.
Copies to review	Total number of copied records to review whose base records have been upgraded.

See Upgrade History tool in Upgrade Console for more information.

Explore Upgrade Monitor in Upgrade Console

The Upgrade Monitor module is a powerful tool for scheduling upgrades, monitoring their progress, and analyzing post-upgrade results, including conflict resolution.

Access Upgrade Monitor

If you log in with the admin role while an upgrade is underway, the system automatically displays the Upgrade Progress screen. If no upgrade is in progress, you can follow one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Console** > **Upgrade Monitor**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Console** > **Upgrade Monitor**.

How the Upgrade Monitor fits into the upgrade process

Note: For detailed information about the upgrade process, see Upgrade your instance.

The Upgrade Monitor concerns only part of the larger upgrade process:

1. Clone the production instance to a test instance and a non-production instance.
2. Apply the upgrade to the non-production instance.
3. On the upgraded non-production instance, Process the skipped records list.

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4. Test the non-production instance to confirm that the instance still works and performs adequately. Compare to benchmark data from pre-upgrade production instance.
5. Apply the upgrade to the test instance. Import the update sets created on the non-production instance when you processed the skipped list. Repeat the testing to make sure that the process is working.
6. Apply the upgrade to the production instance. Import the update sets created on the non-production instance when you processed the skipped list. Test to confirm that the instance works and performs adequately.

Within this larger process, the Upgrade Monitor helps you upgrade individual instances:

- During the upgrade, it shows where in the process the system is
- After the upgrade, it reports what the upgrade did and for how long
- As you upgrade the first non-production instance, it helps you resolve conflicts between customizations and changes that are part of the upgrade
- On non-production instances, it provides information that can help you estimate how long the upgrade might take on the production instance

Monitoring an individual instance as it upgrades

While the upgrade is in progress the Upgrade Progress shows what the upgrade process has done, what it is doing, and what remains to be done.

When the upgrade completes, the system displays the Upgrade Summary Report. The Upgrade Summary Report provides information about conflicts between customizations versus changes in the upgrade and provides a link to reconcile these conflicts. For information about understanding and resolving these conflicts, see Process the skipped records list list.

When you upgrade a non-production instance, the Upgrade Summary Report can help you estimate how long the same upgrade might take on a production instance. For details about the elements on this report and how to use this information, see Upgrade details form.

Resolving conflicts

To prevent losing customizations, the system skips upgrading records you have customized and provides you with a list of these skipped records.

As you upgrade your first non-production instance, go through the Skipped Changes to Review related list and resolve these conflicts. The system records the changes you make during this process in update sets. See Review skipped records using related lists, for more information.

You do not need to reconcile the skipped list on any instances you later upgrade. Instead, you can apply the upgrade then import the update sets containing your changes.

For details on reconciling conflicts, see Process the skipped records list.

See Upgrade Monitor tool in Upgrade Console for more information.

Factors affecting upgrade duration

Various factors affect how long the system takes to perform an upgrade. The Upgrade Monitor on non-production instance can help you understand those factors and estimate how long the upgrade to your production instance takes.

Many factors can affect the duration of the upgrade process:

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- The number of records in the database
- The number of customizations in the database
- The number of nodes in the instance
- The size of tables in the instance that require a schema-change in the instance
- The number of fix scripts required and the size of the tables those fix scripts manipulate

Upgrading a non-production instance can help you estimate how long the upgrade takes on production, but differences between the instances can significantly affect the duration:

- When you cloned the production instance to the non-production instance, you may have clone-excluded some tables. This reduces the size of the database and makes the non-production instance upgrade faster than the production instance.
- The production instance may have more memory and processing power.
- The production instance may have more nodes than the non-production instance.

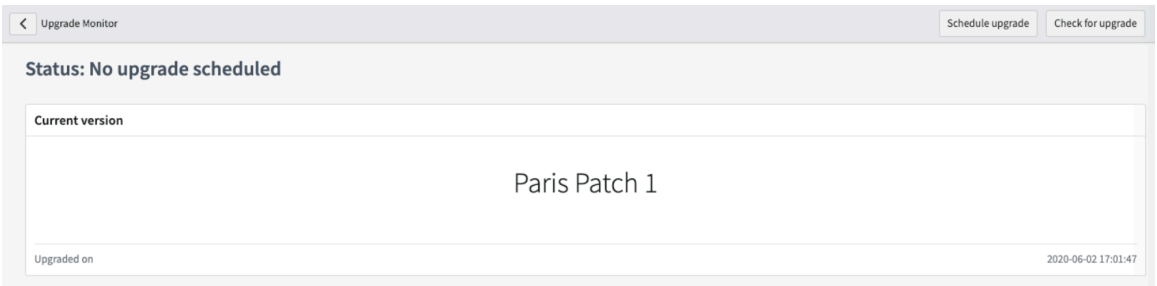
After upgrading the first non-production instance, examine the Upgrade Summary Report for data to help estimate the impact of these factors.

Upgrade Monitor schedule states

When an upgrade is scheduled, the Upgrade Monitor displays information about the next scheduled upgrade. It displays the date and time when the next scheduled upgrade will start. If there is no upgrade scheduled, the Upgrade Monitor displays **Status: No upgrade detected**.

No upgrade scheduled

There is no upgrade that has been scheduled currently.

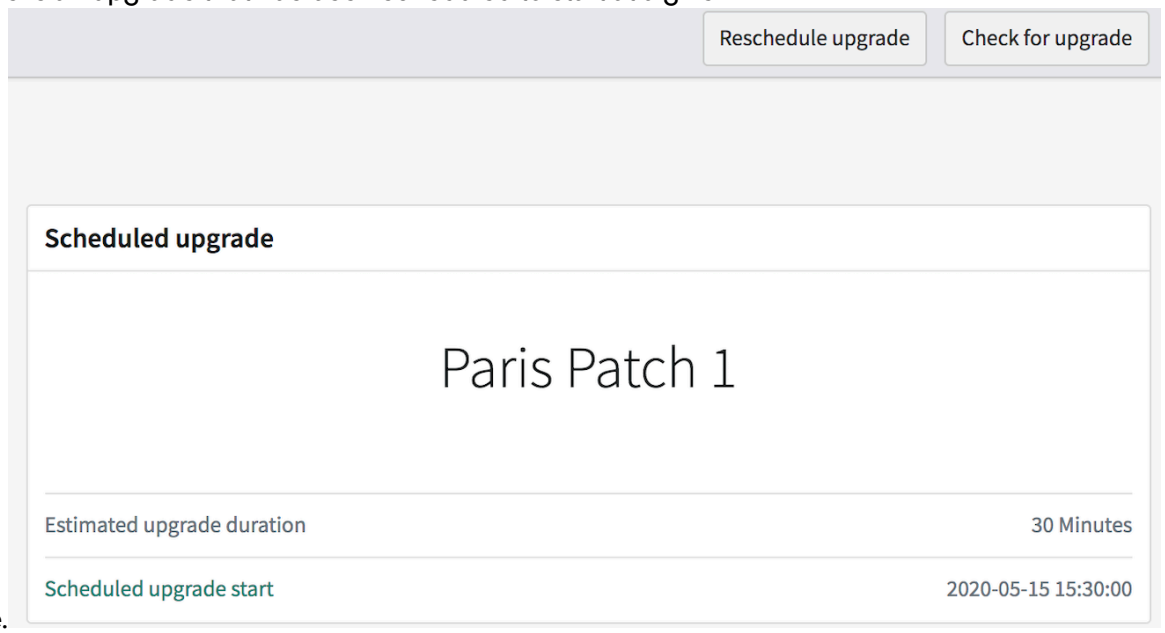


You can also schedule an upgrade by selecting **Schedule upgrade**. To check for an immediately available upgrade, select **Check for upgrade**. It also shows the current version of your upgrade and the date it was upgraded on.

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Upgrade scheduled

There is an upgrade that has been scheduled to start at a given time.

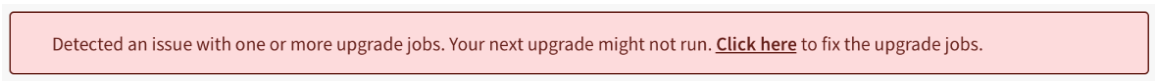


You can also reschedule the upgrade by selecting **Reschedule upgrade**. To check for an immediately available upgrade, select **Check for upgrade**. By selecting either **Reschedule upgrade** or **Schedule upgrade**, you will be directed to HI Upgrade Wizard.

Upgrade monitor with issue detected

If one or both of the triggers for upgrading the system ('Check distribution for possible upgrade' and 'Check database for possible upgrade') have been customized or are missing, the Upgrade Monitor displays a warning and provides a button for resolving the issues.

Note: If your instance is self-hosted (not hosted by ServiceNow) this message may not necessarily indicate a problem. If you have customized or disabled the upgrade job and want to keep that customization or disabled state, do not select the button to fix the upgrade issue.



To resolve the issues with the upgrade jobs, select the link in the message. This action reverts both upgrade triggers ('Check distribution for possible upgrade' and 'Check database for possible upgrade') to their base versions.

Note: 'Upgrade' job has been renamed to 'Check distribution for possible upgrade' starting Paris. 'Check Upgrade Script' job has been renamed to 'Check database for possible upgrade' starting Paris.

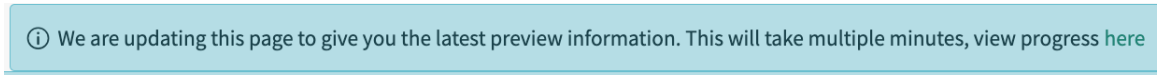
Explore Upgrade Preview in Upgrade Console

Leverage the Upgrade Preview module to conduct in-depth assessments of your ServiceNow instance prior to an upgrade. Explore how different release versions may affect your current configurations and fine-tune your upgrade plan accordingly.

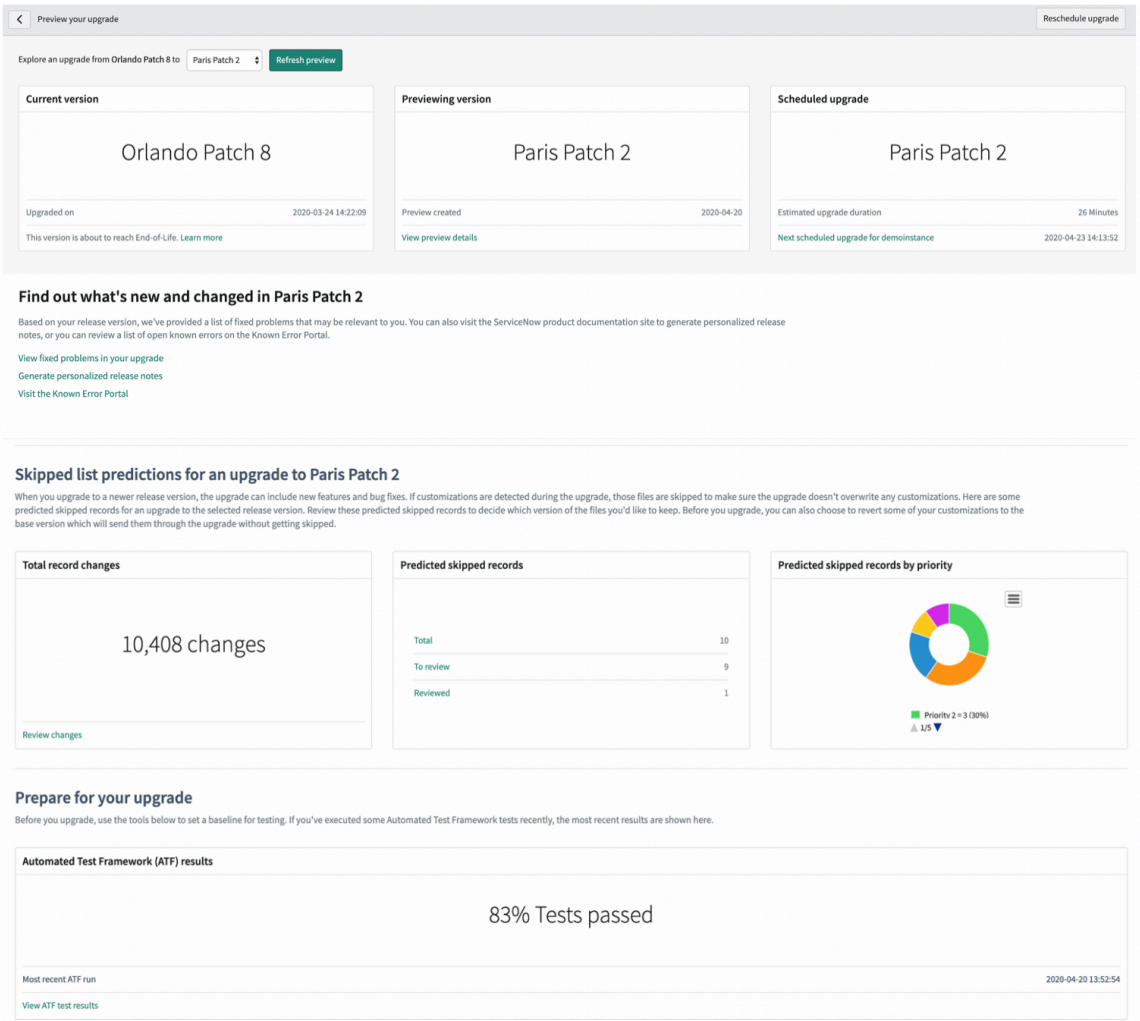
The preview status info and link in the message displayed on top of the Upgrade Preview page states the current status of the ongoing preview process. Since you can get an accurate prediction on the new and existing applications and their skipped records, the preview execution

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time has increased considerably. Click on the link in the message to see the status of the preview process.



The Execution Tracker record shows up on clicking the progress link in the message. Click Show status related list to show the current status of the executed preview process.



Note: Depending on the eligibility of your instance, the list of available target versions for preview varies. Only versions that are allowed for a particular instance to be upgraded to, show up on the list. If your instance is not eligible to be upgraded to any version, the drop-down menu is empty.

The following cards show up with more information.

Card names	Description
Current version	Name of the current version.

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Card names	Description
	• Upgraded on: Date on which the instance got upgraded to the current version • End of life: Link to KB0610454 for more information about end of life
Previewing version	Information about the previewing version shows up. If you haven't previewed any version, you are expected to select a version for preview and click **Go**. If you have already previewed a version, the following information shows up. • Preview created: Date on which the preview was created • View preview details: Link to the Upgrade Preview form **Note:** Click **Refresh preview** if you want to regenerate a new preview of the same target version. Although clicking **Refresh preview** regenerates the skipped list, the reverted records won't get skipped. If you have reviewed and retained some records, they get replaced as soon as you click **Refresh preview**.
Scheduled upgrade	Name of the next upgrade that has been scheduled to start. If there is no currently scheduled upgrade, the card shows No upgrade scheduled. **Note:** This card can have different messages depending on the schedule of the upgrade. If there is an upgrade scheduled, the following information shows up. • Estimated upgrade duration: Estimated duration needed to complete the scheduled upgrade **Note:** If this is your first upgrade, there will be no information about estimated upgrade duration. • Next scheduled upgrade: Date and time on which the next upgrade has been scheduled to start.
Find out what's new and changed	Links to view the new and changed features in the current upgrade version. The following

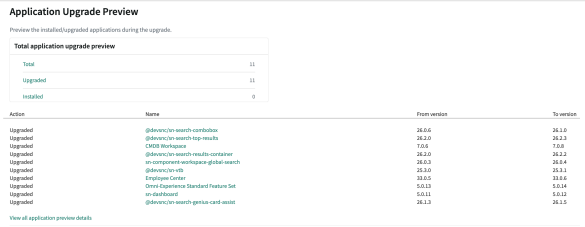
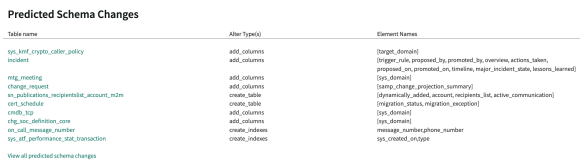
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Card names	Description
	three links show up when you click **Go** to preview the upgrade version. • Problem fixes: Fixes that have been made since the last upgrade version • Personalized release notes: Release notes summary for the previewed version • Known error articles: Errors that have been identified but not yet resolved **Note:** These links don't show up if you haven't previewed any upgrades.
Skipped list prediction **Note:** If you are using Upgrade Plan, the card name changes to Skipped list prediction with plans.	Information about the predicted skipped records. See Preview predicted changes for more details. • Total record changes: Total number of records that are predicted to change when the upgrade occurs. Total record changes also include possible predicted skipped files known as Predicted skipped records. Review changes: Link to the list of records that have changed and can be reviewed • Predicted skipped records: Total number of records that have been predicted to be skipped. ○ Total: Total predicted skipped records ○ To review: Predicted skipped records to be reviewed ○ Reviewed: Predicted skipped records that have been reviewed ○ Resolved: Predicted skipped records that have been resolved by implementing the rules **Note:** This entry shows up on the card only when rules are executed on the skipped records. You will also see a link to create a skipped record rule if either there are no existing rules or the existing rules aren't executed. **Note:** Skipped record rules and upgrade plans can't be implemented together. See Execute a skipped record rule automatically for more information.

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Card names	Description
	• Predicted skipped records by priority: Pie chart to represent the predicted skipped records by priority. **Note:** Click the pie chart to see the list of predicted skipped records. ServiceNow prioritizes the skipped records based on the importance of the file types. The prioritization is done as follows: ○ Priority 1 (highest priority): UI pages, UI macros, and more ○ Priority 2: Business Rules, Security ACLs, and more ○ Priority 3: Reports and more ○ Priority 4: Form Sections, Choice Sets, and more ○ Priority 5 (lowest priority): everything else
Predicted skipped records by product	Records that have been predicted to be skipped and are sorted as per their product families.  **Note:** The products sorted under the Other category don't have any specific product family.
Application Upgrade Preview	Accurate prediction on the installs and upgrades for new and existing applications and for their specific skipped records. It states the total number of applications that have been either upgraded or installed. **Note:** The skipped records prediction is reflected on the Predicted skipped records by product card.

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Card names	Description
	 By default, 10 applications preview details show up. Click View all applications preview details link to view the entire list. It states the name of the application and the following information: • Action: The action taken on the specific application. It can either be upgraded for the existing applications or installed for the new applications. • From version: States the previous version of the upgraded application (existing application). **Note:** This field is empty if the application is a newly installed application. • To version: States the current version to which the existing application has been upgraded. **Note:** This field shows the current version of the newly installed application.
Predicted Schema Changes	Prediction about the kind of changes in the database based on the upgrade on your instance.  By default, 10 predicted schema changes show up. Click View all predicted schema changes link to view the entire list. Changes like new columns, new tables, and new indexes are captured in this section.
Automated Test Framework (ATF) results	Percentage of passing ATF tests that ran in the last 30 days.

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Card names	Description
	• Most recent ATF run: Date and time on which the recent ATF tests ran • View ATF results: Link to show more information about the recent ATF results **Note:** Only the tests which are finished and have passed are considered for the ATF results. If one test runs more than once, only the recent execution is considered in the results.

See Upgrade Preview tool in Upgrade Console for more information.

Explore Upgrade Skipped Record Rules Editor in Upgrade Console

Configure skipped record rules with the use of Upgrade Skipped Record Rules Editor to automate or facilitate the resolution of data inconsistencies arising from the upgrade process.

Formulate automated resolution rules to mitigate potential customization conflicts following an upgrade. These rules can be configured to execute autonomously during the upgrade process or manually initiated post-upgrade.

Starting Xanadu release, new skipped rules have been introduced by default to help you auto-retain certain customizations during the upgrade process. This eliminates the need for manual review of the skipped records generated during the upgrade process.

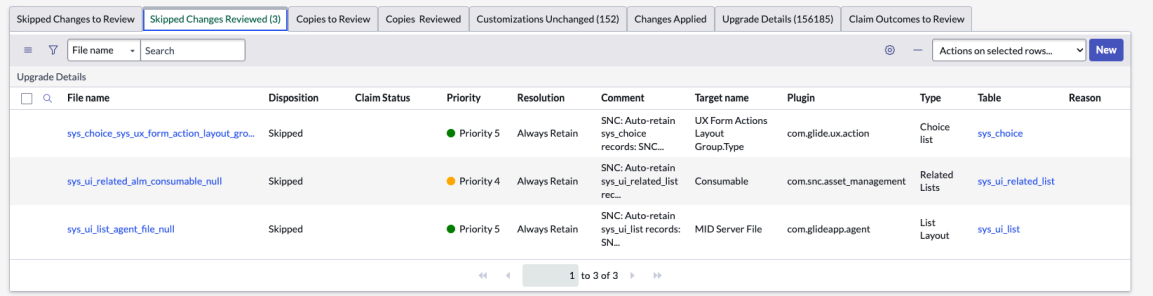
The following is the list of tables from which if any skipped record is being generated as a metadata file, the customizations are retained by default with the new skipped rules:

- sys_ui_section
- sys_ui_form
- sys_ui_form_section
- sysevent_email_action
- sys_ui_related_list
- sys_ui_list
- sys_choice
- sys_choice_set
- sys_report
- pa_dashboards
- wf_workflow

Note: For wf_workflow_version table, the new skipped rules automatically sets the generated skipped records to **Keep My Modifications (Always Retain)**. This table is generally used for configuration changes and doesn't need to be reviewed.

The skipped records that are retained automatically by the default skipped rules are found in the Skipped Changes Reviewed related list.

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Note: You can also find a comment for each retained skipped record to show the related table it was generated from during the upgrade process.

See Upgrade Skipped Record Rules Editor tool in Upgrade Console for more information.

Explore Upgrade Plan in Upgrade Console

The Upgrade Plan automates the installation of applications during upgrades, providing a seamless upgrade experience. Define applications and target versions to be installed in your instance and accelerate your upgrade process.

Navigate to Upgrade Plan using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Console** > **Upgrade Plan**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Console** > **Upgrade Plan**.

You will need the following instances to use Upgrade Plan.

- Builder instance: Build your upgrade plan
- Consumer instance: Implement your created upgrade plan

Note: Ensure that you have upgraded your instance to the latest available version to build the upgrade plan. It is recommended to configure your dev instance as your builder instance. You are required to install the upgrade plan before upgrading your consumer instance. See Upgrade Plan Properties for more details.

When you upgrade an instance, resolutions are skipped, and customizations are often loaded post upgrade. This causes temporary breakdown of features until fully loaded. Tasks like committing update sets, installing new plugins and applications, and multiple updates are also time consuming. Use the Upgrade Plan feature to automate these post-upgrade tasks by tracking your actions and replaying the steps on all the required instances. You don't have to manually apply post-upgrade tasks which helps in reducing downtime.

Note: After upgrading to the latest version, you will see some skipped records. Some of those records will already be marked as reviewed and some of them will need to be reviewed.

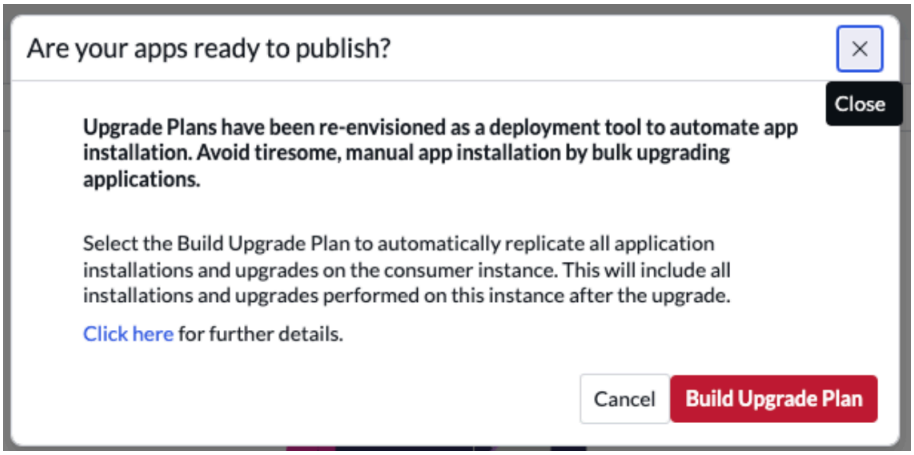
Starting in the Yokohama release, customizations and skipped records are not a part of the Upgrade Plan, by default. You can choose to include the customizations and skipped records along with the app installations within the Upgrade Plan by enabling theglide.upgrade.plan.include.skips property. This property controls about when skips and customizations are included when you build or refresh an Upgrade Plan.

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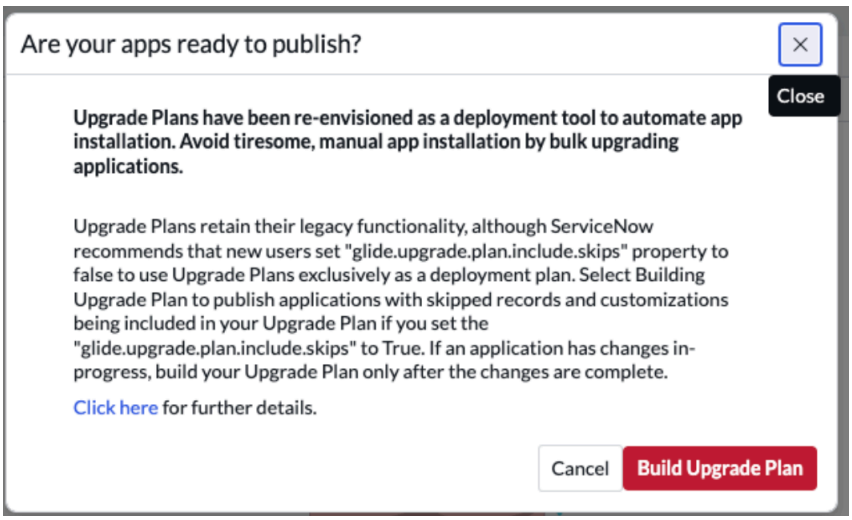
- When glide.upgrade.plan.include.skips property is **TRUE**, skips and customizations are included when an Upgrade Plan is built or refreshed
- When glide.upgrade.plan.include.skips property is **FALSE**, skips and customizations aren't included when an Upgrade Plan is built or refreshed. This property has been set to False by default.

You will see one of the following modal messages depending on the scenario:

- First time user: When you are building your Upgrade Plan for the first time (the property is disabled by default)

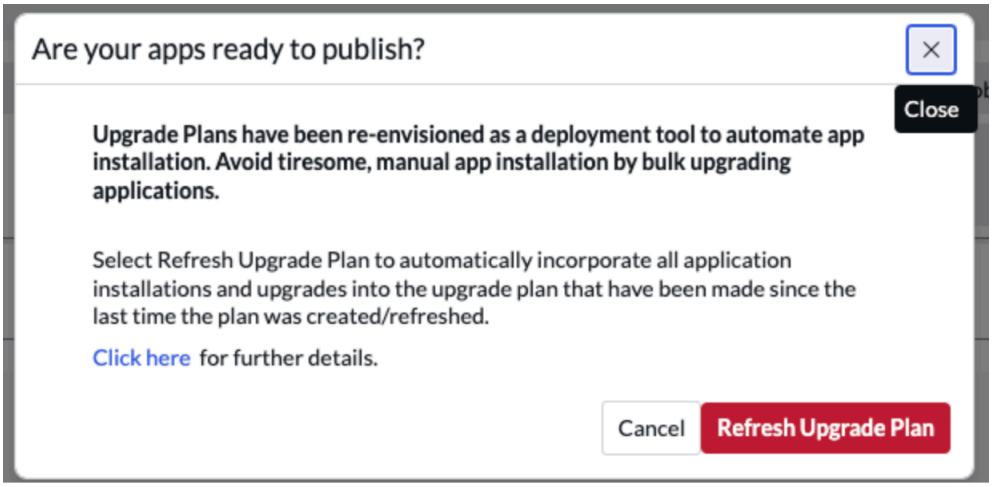


- Building the upgrade plan with the property enabled

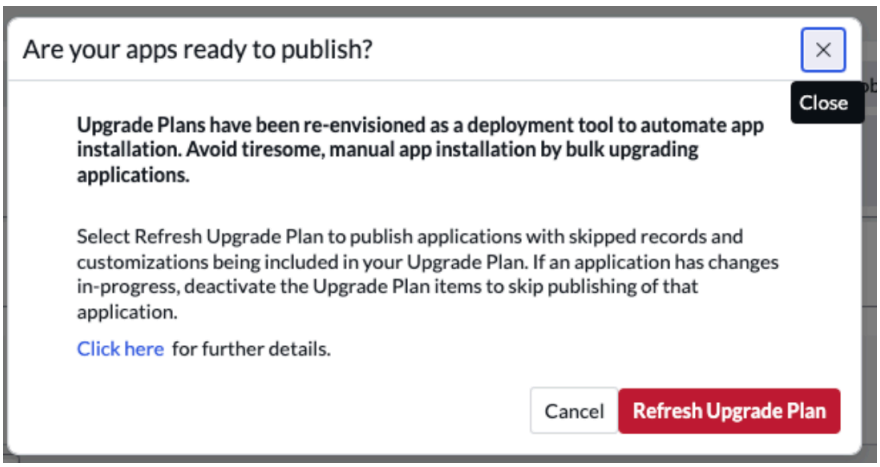


- Refreshing the Upgrade Plan with the property disabled (default)

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- Refreshing the Upgrade Plan with the property enabled



Advantages of Upgrade Plan over Update Sets

You can achieve the following using Upgrade Plans:

- Along with the skipped record resolution, you can also track app and plugin installation.

  Note: You won't be allowed to choose the skipped records that are captured by the upgrade plan. Upgrade plan captures all the skipped records regardless of whether they are reviewed or not and modified or not. If the customizations are coming from different instances, then the skipped records are required to be reviewed.

- Optimizing the table alters using batch bootstrapping.
- Manage your customizations using the App Repository.

Note: It is recommended to build an Upgrade Plan for each instance upgrade. When you build an upgrade plan on a builder instance, it gets created to the exact same version as the builder instance version (including patches and hot fixes). You can't use the previously created Upgrade Plan for the new instance upgrade. In case of consumer instances, when you install the upgrade plan, its version should match exactly the consumer instance version.

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Persona

If you are using the app repository for active application development, use Upgrade Plan to accelerate your upgrades.

Note: If you are currently using the Update Sets and want to catapult your upgrade process, use the Upgrade Plan feature.

Design considerations

The following are the important considerations while working with Upgrade Plan:

- Each new instance upgrade requires its own upgrade plan. It can't be shared across upgrades.
- Only one builder instance is supported to build the Upgrade Plan.
- Upgrade Plan can’t be uninstalled on a consumer instance. You can roll back the entire upgrade but not partially.
- The scope of the files moved to **Global Customizations - Upgrade Plan** application by upgrade plan is still global.
- During an upgrade, only the upgrade plan items with **State=Ready** and **Active=true** are installed on the consumer instances. The rest of the items are skipped.
- Upgrade sets can’t be included in the Upgrade Plan.
- Maint only plugins are not allowed in Upgrade Plan.
- Configure your instance as a builder instance before installing new applications and plugins or during skip resolutions. Otherwise, the actions are not captured by the Upgrade Plan.
- You can’t view the list of customizations in the Upgrade Plan items view. You can navigate to the respective tables to ensure if the customization has been captured.

See KB1271313 for more information.

Upgrade Plan background operations

During the building of the upgrade plan, the following operations are done in the background:

- Skipped records are packaged and uploaded to the App Repository in the form of Global Application and App customization. The following are the 3 types of apps created by Upgrade Plan on your instance and App Repo.

  Note: After the packaging is done, you can choose the items from the Upgrade Plan. An Upgrade Plan works at the scope level, so it captures everything and publishes it to the repository.

  - The global records are packaged into the global customization upgrade plan app and published to the app repo.
  - The scoped skipped records are packaged into the respective app customization packages.
  - When the upgrade plan is published, a global application is created, for example, **Upgrade Plan - release name**.
- Existing ServiceNow features like Global Application and App customization are used as application containers that can be installed in all the required instances. See and Application scope for more information.
- If you install any applications or plugins, they are also captured in the Upgrade plan. But, since they are application life cycle items, they are never pushed to the App Repository.

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During the consumption of the upgrade plan, the following operations are done in the background:

- At first the upgrade plan is validated and then the source from the app repo is downloaded.
- Once the source is downloaded, the app is moved to the ready state.

> **Note:** Only the upgrade plan items with **State=Ready** and **Active=true** are installed on the consumer instances. The rest of the items are skipped.

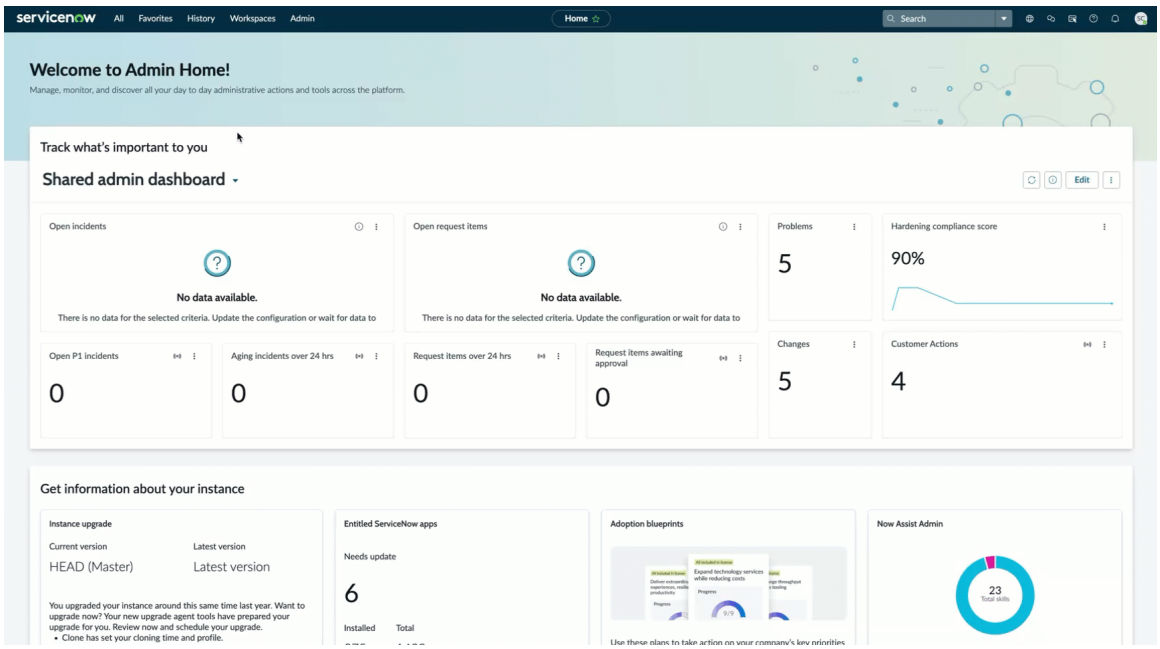
- Auto-generation of the preview for the upgrade plan.

See Upgrade Plans tool in Upgrade Console for more information.

Guided upgrade

Upgrade your instance effortlessly with the guided process.

To streamline your upgrade process, follow the guided setup steps outlined in Access guided upgrade on a non-production instance and Access guided upgrade on a production instance. Before you begin, ensure you're logged in as an administrator. This intuitive tool walks you through the necessary pre- and post-upgrade activities and the instance upgrade tasks, ensuring a seamless transition to the latest release.



> **Note:** The GIF illustrates accessing the guided upgrade feature on a non-production instance. The process is the same for both production and non-production instances.

Using Upgrade Console

Use the Upgrade Console experience to access all the tools, information, and guided setup for a smooth upgrade on your instance.

Review the following for a seamless upgrade experience.

Upgrade Console tools

Access all the necessary tools you might require for a seamless upgrade experience on your instance.

You can access the following tools from the Upgrade Console experience.

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Note: The tools available in Upgrade Console are same for both sub-production and production instances.

ATF Test Generator and Cloud Runner tool in Upgrade Console

Leverage the power of ServiceNow's ATF Test Generator and Cloud Runner to create intelligent, comprehensive regression tests.

You can achieve the following using the ATF Test Generator and Cloud Runner store application.

- Leverages ServiceNow's AI to automatically create regression tests tailored to specific instances.
- Integrates seamlessly with the existing ATF framework, ensuring a smooth user experience.
- ServiceNow's Cloud Runner allows you to execute ATF tests on a headless browser, eliminating the need for local setup.
- Intelligent test generation helps ensure comprehensive test coverage for your applications.
- Automated test creation and cloud-based execution significantly reduce testing time and effort.
- AI-powered test generation minimizes human error and improves the reliability of test results.
- Streamlined workflows and efficient test execution optimize your testing process.

See ATF Test Generator and Cloud Runner for more information.

Cloning tool in Upgrade Console

Utilize the System Clone application to duplicate an entire database from one instance to another. This cloning process, commonly employed to replicate a production instance for pre-production testing, leverages the latest nightly backup as the data source.

You can achieve the following using the System Clone tool:

- Clone a ServiceNow instance to a target instance.
- Clone a ServiceNow instance to a target instance running a different version.
- Clone a ServiceNow instance from a backup.
- Clone a ServiceNow instance over a production instance.

See Exploring Instance Clone for more information.

Upgrade History tool in Upgrade Console

Utilize the Upgrade History module to maintain a comprehensive record of all upgrades performed on an instance. Access detailed reports for both historical and recent upgrade versions to facilitate analysis and troubleshooting.

See Reviewing upgrade history for more information.

Reviewing upgrade history

The Upgrade History module tracks every upgrade made to an instance. You can also view the complete report of an old upgrade or a recently completed upgrade version using this module.

- Upgrade History related lists: Use the related lists to resolve, track and review the skipped records in an upgrade
- Visual task board (VTB) view of skipped records: Use the VTB view to see the resolution status of any previous upgrade with skipped records

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Review skipped records using related lists

Use different related lists to resolve, track and review the skipped records in an upgrade.

Before you begin

Role required: admin

Procedure

1. Navigate to Upgrade History using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade History**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade History**.

   A list of upgrades is displayed.

2. Select an upgrade from the list.
   System Upgrades form is displayed.
3. Select any of the following related lists to review the skipped records.

   Skipped Changes to Review related list

   Resolve the skipped update records by tracking and reviewing them in the Skipped Changes to Review related list. To prevent your customizations from being overwritten during system upgrades, the upgrade process skips (does not apply the update to) objects that have been customized. See Resolve a skipped update and set a resolution status for more information.

   Skipped Changes Reviewed related list

   View the list of the reviewed skipped records in the Skipped Changes Reviewed related list. When you select a skipped record to review and set a **Resolution Status** to a value other than Not Reviewed, the update record moves from Skipped Changes to Review related list to the Skipped Changes Reviewed related list.

   Copies to Review related list

   Copies to Review lists all the records that need to be reviewed.

   Copies Reviewed related list

   Copies Reviewed lists all the records that have been reviewed.

   Customization Unchanged related list

   Customizations Unchanged lists all records that were skipped (due to a customization), but there have been no changes from the last upgrade. See Revert a customization for more information.

   Changes Applied related list

   Changes Applied lists all changes that were applied in this upgrade.

   Claim Outcomes to Review related list

   During system upgrades, the Claim Status tab displays outcomes to review and resolve.

   Upgrade Details related list

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Upgrade Details lists all Upgrade Details records for this upgrade.

Note: The Copies to Review and Copies Reviewed related lists are Platform specific related lists.

Upgrade history related lists details

The following table gives the description of each field in all the related lists within the upgrade history module.

Related lists details

Field	Input Value
File name	File name has different description for different related lists • Skipped Changes to Review related list: Name of skipped Upgrade Detail record • Skipped Changes Reviewed related list: Name of the reviewed Upgrade Detail record • Copies to Review related list: Name of the record that needs to be reviewed • Copies Reviewed related list: Name of the record that has been reviewed • Customization Unchanged related list: Name of unchanged sys_upgrade_history_log record. Select it if you want to access Upgrade Details and add comment text, or set a resolution status for it • Changes Applied related list: Current upgrade file name • Claim Outcomes to Review related list: Name of skipped Upgrade Detail record • Upgrade Details related list: Current upgrade file name
Disposition	Action performed on this file during the selected upgrade: • Inserted: The system inserted a new record. • Updated: The system updated this record. • Deleted: The system deleted this record. • Skipped: The system did not change this record in order to preserve customizations. • Skipped Error: The system didn't have the upgrade on this file but skipped due to reasons like the record already exist in the system in a different scope or a system property exists. **Note:** This is editable only by a maint.

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Related lists details (continued)

Field	Input Value
	• Reverted: This record was reverted to the base version. • Table not found: The system could not find the table that contains this record. • Unchanged: The system did not change this record because the baseline component has not changed since the last release. • Skipped Manual Merge: The system did not change this record because updating it requires manual intervention. • Skipped Apply Once: The system skipped this record because it had already applied an update from an xml file in the apply once folder. • Not Latest: The system applied a change, but this change was overwritten later during the same upgrade.
Priority	Relative importance of the conflict that caused the skip. **Note:** ServiceNow prioritizes the skipped records based on the importance of the file types. The prioritization is done as follows: • Priority 1 (highest priority): UI pages, UI macros, and more • Priority 2: Business Rules, Security ACLs, and more • Priority 3: Reports and more • Priority 4: Form Sections, Choice Sets, and more • Priority 5 (lowest priority): other
Reason	States the reason why a particular record has been moved to the Skipped Error disposition.
Resolution	• Reviewed • Retained • Reverted
Comment	During the process of resolving a skipped update, you have the option to add a **Comment** to any record. For example, the comment might explain the action that you took to future reviewers.

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Related lists details (continued)

Field	Input Value
Target name	Name of the record corresponding to the current file.
Plugin	Plugin that contains the record.
Type	Current file type (such as Business Rule or UI Policy).
Table	Table that contains the record.

Revert a customization

To prevent customizations from being overwritten by system upgrades, the upgrade process automatically skips changes to objects that have been customized. You may want to overwrite your customizations when a software upgrade contains a feature that you would like to implement.

Before you begin

Role required: admin

About this task

To identify customized objects, the system adds a corresponding record in the Customer Updates [sys_update_xml] table. The table maintains the current version information for all objects that have been customized. The upgrade process skips changes to objects that have entries in the table. The upgrade process does not skip objects if only excluded fields have changed.

Procedure

1. Navigate to Upgrade History using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade History**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade History**.

   A list of upgrades is displayed.
2. Select the desired software version.
3. Filter the Upgrade Details related list by **Disposition is Skipped**.
4. **Optional:** Add another filter condition for **Changed is True** to return only the objects that have changed since the last upgrade.
5. Select the update record to implement.
   The **File differences** field displays a side-by-side comparison of the customization and the default version. Deletions are highlighted in red, additions in green, and modifications in yellow.
6. Click **Revert to base system** to overwrite your customized object with the system default version.

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- The **Disposition** changes from **Skipped** to **Reverted**.
- After you revert a customization, you have the option to click **Reapply Changes** to reapply your customizations (undo the revert).

Resolve a skipped update and set a resolution status

Review the reason for each skipped record to resolve each skipped update after an upgrade.

Before you begin

Role required: admin

About this task

You resolve an update by either retaining the customization or by merging or overwriting the customization with the base system update.

Note: Objects that are customized and that did not change in the base system since the last upgrade require no action on your part.

When an object is customized, the system adds a corresponding record to the Customer Updates [sys_update_xml] table and then maintains current version information for all customized objects. The upgrade process skips changes to objects that have a current version in the Customer Updates table. When you follow the procedure, you perform one of the following actions:

- Retain a customization with no changes
- Retain a customization by merging changes from the updated object
- Revert a customized object to the updated version (that is, overwrite the customization)
- Review the skip and perform no action on the object

Procedure

1. Navigate to Upgrade History using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade History**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade History**.

   A list of upgrades is displayed.

2. Select the desired software version.
3. In the Skipped Changes to Review related list, select the update record to resolve.
   See Review skipped records using related lists.
4. Review the list of changes.
   For text fields, you can click in the field to open the Diff/Merge tool.

   To review the differences, Click a text box to view and edit the detailed differences.

5. Perform one of the following actions.

   You have the option to add a **Comment** to any record, for example, to explain the action to future reviewers.

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Skipped Changes to Review related list

Field	Input Value
Retain the customized record as is and do not update it.	After reviewing the changes, set **Resolution Status** to **Reviewed and Retained**. The record moves from the Skipped Changes to Review to Skipped Changes Reviewed related list.
Retain the customization by merging changes from the updated object.	**a.** Click**Resolve Conflicts** to navigate to the Resolve Conflicts form. **b.** Review the differences. **c.** To merge a field: ▪ Click the right-arrow button for the field. ▪ Click a text box to view and edit the detailed differences. ▪ When you have merged all appropriate fields, click **Merge**. After merging the customization changes: ○ The Resolution Status changes to Reviewed and Merged. ○ The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list.
Discard the customization and update the record to match the base system for this upgrade.	After reviewing the changes, click **Revert to Base System**. ○ **Disposition** changes from **Skipped** to **Reverted**. ○ **Resolution Status** changes to **Reviewed and Reverted**. ○ The system creates a Customer Update record. ○ The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list. **Note:** At any time after you revert a customization, you can click **Reapply Changes** to reapply the customization.
Review the skip and perform no action on the object.	After reviewing the changes, set **Resolution Status** to **Reviewed**. The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list.
Leave on the skipped list for a later decision, and note that you have not reviewed the record.	From the **Resolution** list, choose **Not Reviewed** to defer the decision on how to

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Field	Input Value
	handle this conflict. The record stays on the Skipped Changes to Review related list.

6. Click **Update**.
7. Repeat the process to resolve each update record in the list.

Result

Only skipped updates with a **Resolution Status** of **Not Reviewed** or without a resolution set appear in the Skipped Changes to Review related list. Any action you take that changes the **Resolution Status** to a value other than **Not Reviewed** or **--None--** removes the skipped update from list and moves it to the Skipped Changes Reviewed related list.

Skipped Records visual task board (VTB)

View the resolution status of any previous upgrade with skipped records using the visual task board (VTB) view. An upgrade history record is created for each upgrade that is run.

To view the history report navigate to Upgrade History using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade History**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade History**.

You can then select an upgrade from the list to view the upgrade history details. Click the **Skipped Record VTB** related link to view and manage the skipped records over VTB.

Note: The **Skipped Record VTB** related link shows up only when there are skipped records for the version upgrade.

Upgrade History VTB details

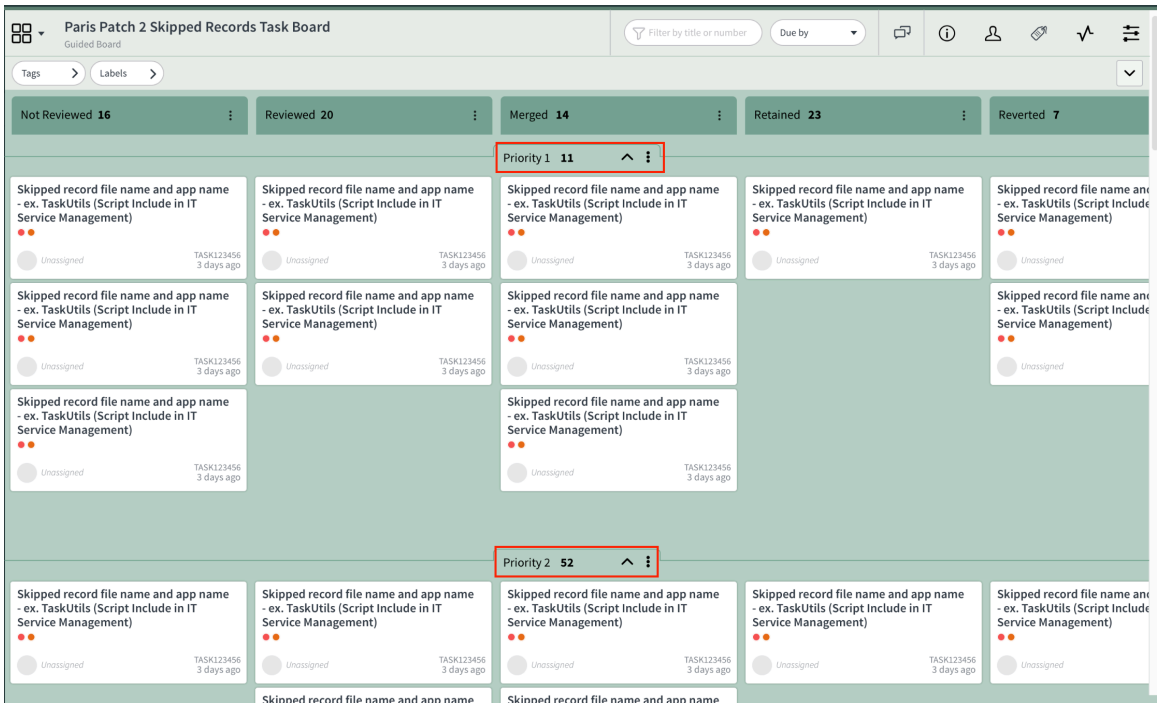
Field	Description
Not Reviewed	Tasks which have not been reviewed
Reviewed	Tasks which have been reviewed
Merged	Tasks which have both the old and new changes
Retained	Tasks which have retained the updates from the latest upgrade
Reverted	Tasks which have reverted its changes to the base system

The skipped records are prioritized based on the importance of the file types. The prioritization is done as follows:

- Priority 1 (highest priority): UI pages, UI macros, and more
- Priority 2: Business Rules, Security ACLs, and more
- Priority 3: Reports and more

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- Priority 4: Form Sections, Choice Sets, and more
- Priority 5 (lowest priority): other



Upgrade History Task form

You can update information about a skipped record task using the Upgrade History Task form.

To make changes on a skipped record task, click a task number link on a task over VTB.

Upgrade History task form details

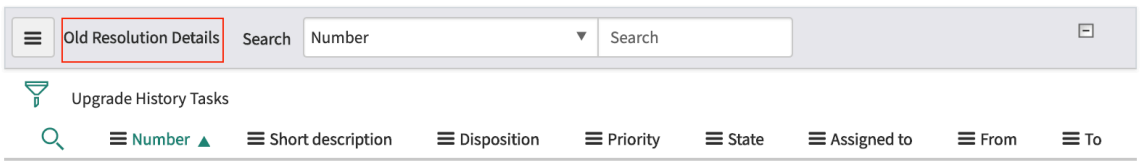
Field	Description
Short description	Description about the task
Priority	Prioritization of the skipped records based on the importance of the file types. The prioritization is done as follows: • Priority 1 (highest priority): UI pages, UI macros, and more • Priority 2: Business Rules, Security ACLs, and more • Priority 3: Reports and more • Priority 4: Form Sections, Choice Sets, and more • Priority 5 (lowest priority): other
Disposition	Disposition is Skipped since the task board is only for skipped records. The system did not change this record in order to preserve customizations.

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Upgrade History task form details (continued)

Field	Description
Type	Type of file which determines the priority level.
State	State of the files. • Not reviewed: Tasks which have not been reviewed • Reviewed: Tasks which have been reviewed • Merged: Tasks which have both the old and new changes • Retained: Tasks which have retained the updates from the latest upgrade • Reverted: Tasks which have reverted its changes to the base system
Work notes	Notes about the skipped record task
Update	Button to update the skipped record task
Resolve Conflicts	Button to resolve conflicts by reviewing the differences
Revert to Base System	Button to revert the customizations
Delete	Button to delete the skipped record task

The Old Resolution Details related list shows the actions taken in the previous upgrade



version.

Old Resolution Details related list

Field	Description
Number	Task number of the skipped file where some actions were taken in the previous upgrade version.
Short description	Description about the task
Disposition	Action performed on this file during previous upgrade
Priority	Prioritization of the skipped records based on the importance of the file types. The prioritization is done as follows: **1.** (highest priority): xml content **2.** script or script_plain

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Old Resolution Details related list (continued)

Field	Description
	3. html content 4. sys_ui_form_section, sys_ui_related_list, or sys_choice_set 5. (lowest priority): other
State	State of the files. • Not reviewed: Tasks which have not been reviewed • Reviewed: Tasks which have been reviewed • Reviewed and Merged: Tasks which have been reviewed and have both the old and new changes • Reviewed and Retained: Tasks which have been reviewed and have retained the updates from the latest upgrade • Reviewed and Reverted: Tasks which have been reviewed and have reverted its changes to the base system
Assigned to	Name of the assigned user
From	Past previous version
To	Past current version

Previous Resolutions related list

The Previous Resolutions related list shows the history of the selected skipped record. You can see what resolutions have been done with the selected skipped record in the previous upgrades.

Upgrade History task form details

Field	Description
File name	Name of the skipped record.
Disposition	Disposition is skipped since the related list is only for skipped records.
Priority	Prioritization of the skipped records based on the importance of the file types. The prioritization is done as follows: • Priority 1 (highest priority): UI pages, UI macros, and more • Priority 2: Business Rules, Security ACLs, and more • Priority 3: Reports and more

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Upgrade History task form details (continued)

Field	Description
	• Priority 4: Form Sections, Choice Sets, and more • Priority 5 (lowest priority): other
Resolution	The resolution made in the previous upgrades
Target name	Name of the record that you see on UI, as opposed to the sys_update_name which is the underlying name that has the table and sys_id
Type	Type of file which determines the priority level.
Table	The table where the skipped record belongs.

Update default labels in VTB view

Filter skipped records in the task board of the VTB with the implementation of color-coded labels. You can filter the skipped records by assigning a color to each of the products.

Before you begin

Role required: admin

Procedure

1. Navigate to Upgrade History using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade History**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade History**.

   A list of upgrades is displayed.

2. Select an upgrade from the list.
   The System Upgrades form appears.
3. Click the **Skipped Record VTB** related link to view the resolution status of the skipped records over VTB.

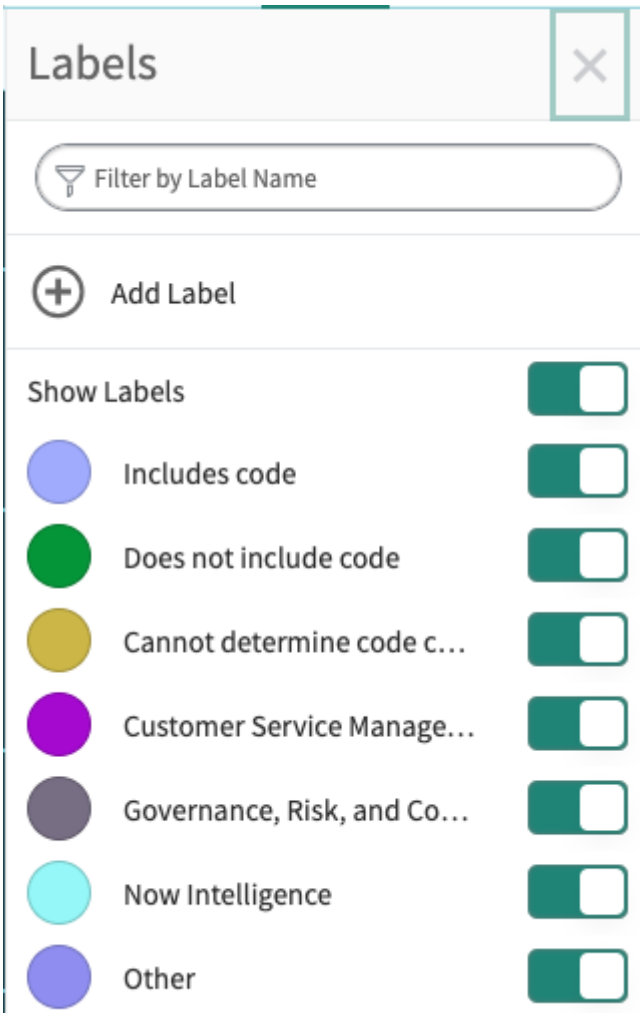
   Note: The **Skipped Record VTB** related link shows up only when there are skipped records for the version upgrade.

   The VTB view of the resolution status of the skipped records shows up.
4. Click **Labels** to show the default labels.
   The default labels consist of Include codes, Does not include code and Others categories.

   Note: The Include and Does not include codes categories indicate if there is any change in the code of the skipped records. All products fall under Other category of labels. The product labels are assigned with different colors. The tasks get assigned based on the label colors of the products.

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5. **Optional:** If you want to add a label, click **Add Label**.
   Enter the name of the label you want to create. You can also change the color of a label by clicking the color circle.



(Optional)

> **Note:** The new labels and colors are saved only for the current visual task board and don't get rolled over to the next updated board. If you want the new label updates to show up in the next updated board, navigate to **Upgrade Center** > **Administration** > **Properties** > **Upgrade Center VTB Labels**. Set the colors as required and the updated colors start showing up from the next generated board.

What to do next

Click on a skipped record in the VTB to update the task. See Upgrade History Task form for more information.

View import history

View your import history by accessing the **My Application Import History** module.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **My Application Import History**.
   The list of import history records in your instance shows up.

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2. Select one of the imports from the list for more information about that import.
   The form view of sys_upgrade_history record shows up.

   Note: To learn more about importing from Source Control, see ServiceNow Studio. Once the importing is done, use the **My Application Import History** module to view the import history.

Quick access to plugins and history records

Reduce the navigating time by directly accessing plugins, application installation history records, and update set commits history records. The filters for the plugins and history records are automatically implemented in the plugins and history records views.

Before you begin
Role required: admin

About this task

Plugins and application installation history records

1. Navigate to **System Definition** > **Plugin Installation History**.
2. Select any of the plugins or history records to access them directly.

Update set commit history records

1. Navigate to **System Update Sets** > **Update Sets to Commit**.
2. Select any of the update sets to directly view the commit history of that update set.

Explore upgrade history log

Reduce processing time by extracting all upgrade related logs into a separate file named database-upgrade_<timestamp>.log. You can also zip the file and attach it to upgrade history.

Before you begin
Role required: admin.

About this task
When the upgrade starts, the upgrade log messages are written to both the localhost_log file and the database-upgrade_<timestamp>.log file. When the upgrade is done, the database-upgrade_<timestamp>.log file is uploaded to the upgrade history table.

Procedure

1. Navigate to **All** > **System Logs** > **Utilities**.

   Note: You can implement this step to view the extracted database-upgrade_<timestamp>.log file only after the upgrade is done.

2. Click **Node Log File Download**.
   The database-upgrade_<timestamp>.log file appears in the list of log files.

   Note: The localhost_log file consists of all the logs. The database-upgrade_<timestamp>.log file consists of logs only related to the upgrade.

   The database-upgrade_<timestamp>.log file appears only if the `glide.db.upgrade.log.save_to_db.enabled` property is set to True. By default, the `glide.db.upgrade.log.save_to_db.enabled` is set to True.

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3. Go to **Admin** > **Upgrade Management Console** > **Upgrade History**.
   A list of upgrades shows up.
4. Click the required upgrade from the list.
   You can see database-upgrade_<timestamp>.log file is automatically attached to the upgrade.

   Note: The database-upgrade_<timestamp>.log file gets attached only if the `glide.db.upgrade.log.save_to_db.enabled` property is set to True. By default, the `glide.db.upgrade.log.save_to_db.enabled` is set to True.

5. Download the zipped database-upgrade_<timestamp>.log file.

   Note: The database-upgrade_<timestamp>.log file has been zipped to reduce the download time.

Upgrade Monitor tool in Upgrade Console

Leverage Upgrade Monitor to schedule upgrades, monitor their progress, and analyze post-upgrade results, including conflict resolution.

Scheduling and monitoring an upgrade

Use the Upgrade Monitor module to schedule and monitor the status of an ongoing upgrade in your instance. You can also view the upgrade summary and the list of records causing conflicts in your instance once the upgrade is complete.

- Monitoring an upgrade: Monitor the progress of an ongoing upgrade in your instance
- Process the skipped records list: Resolve the differences between the upgraded and customized versions of a record by processing the skipped records list
- Resolve conflicts of a record: Resolve conflicts between your customized record and the changes associated with the upgrade

Monitor an upgrade to an instance

Monitor the progress of an ongoing upgrade in an instance with the Upgrade Monitor. When the upgrade is done, you can view a summary of the results on the Upgrade Summary Report.

Before you begin

Role required: admin

Procedure

1. Navigate to Upgrade Monitor using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade Monitor**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade Monitor**.

   Note: If an upgrade is in progress, the user is automatically directed to the Upgrade Monitor page.

   A list of upgrades is displayed.

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2. Monitor the progress of the upgrade.
   When the system finishes the upgrade, it displays the Complete upgrade summary report.

Note: You can now view the status of every stage in the upgrade process. See Upgrade Progress for more information.

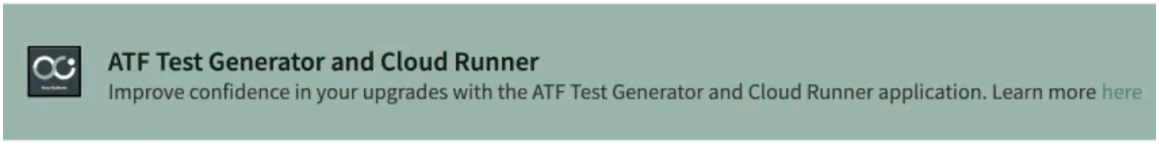
What to do next

From the Upgrade Summary Report, resolve any conflicts that prevented the system from upgrading records.

Upgrade Progress

When an upgrade is underway, Upgrade Progress displays progress bars and other information to help you monitor the process.

You can view the status of each of the stages during an upgrade process. It helps you to know exactly which stage you are in at any point of the upgrade process.

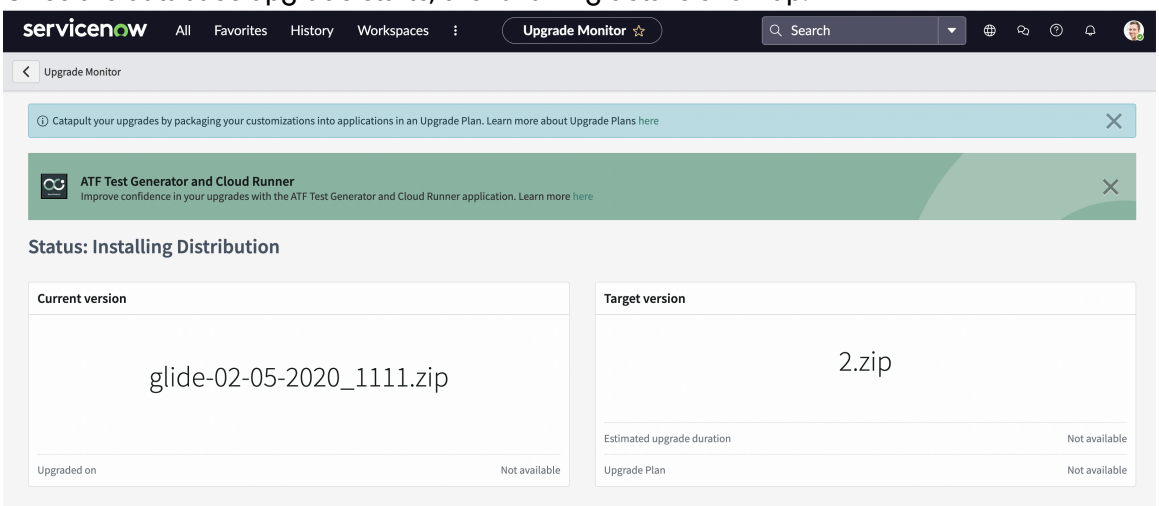


If you have the ATF Test Generator and Cloud Runner store application installed, you can schedule test generation runs from the Upgrade Monitor page. The above message shows up during an upgrade process when the following conditions are met.

- The SN_ATF_TG plugin is not active.
- The instance is not a fed instance.
- The instance is not a self-hosted instance.

Note: You can now confidently upgrade your instance by using the ATF Test Generator and Cloud Runner store app. See Exploring ATF Test Generator and Cloud Runner for more information.

Once the database upgrade starts, the following details show up.



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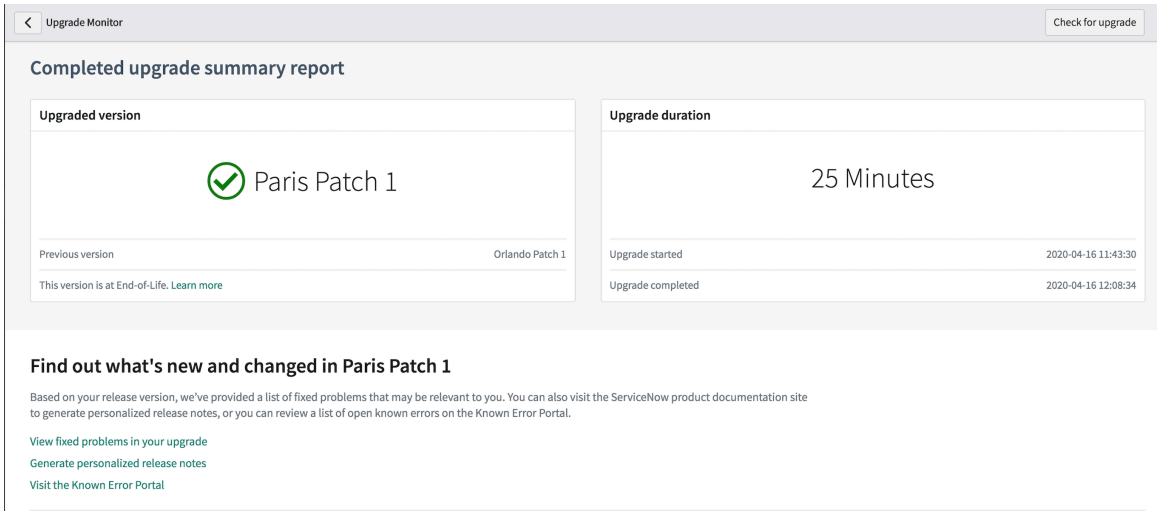
Upgrade Progress details

Field	Input Value
Current version	Current version of the instance
Target version	Target upgrade version of the instance
Upgrade Progress	A progress bar depicting where the upgrade is in the overall process. The length of a section in the bar does not indicate the relative duration of that process.
Upgrade Progress: Upgrading Platform	The system is applying upgrades to elements that form the foundation of the platform.
Upgrade Progress: Updating Schema	The system is scanning the plugins to create a list of tables that require upgrading. This prevents the system from upgrading the same table multiple times.
Upgrade Progress: Loading Plugins	The system is loading both core and optional plugins. Some features require more than one plugin, so the number of plugins listed may not match the number of optional features installed.
Upgrade Progress: Completing	The system is upgrading components that need to be completed after the previous three stages are done.
Details	Shows the current activity, a progress bar for the current activity, and the file currently being updated.
Node Upgrades	The color of the icons represents the status of each node during this upgrade: Pending, Running, Successful, Failed, or Down.
Node	The selected node indicated by the arrow. To change the selection, position the mouse cursor over the icon for the node to select.
Running time	How long the selected node (indicated by the arrow) has been running. If the selected node is offline, this value stops updating and shows how long a node was online before going offline.
Version	The current build for the selected node (indicated by the arrow).
Successful upgrade	When the selected node is online, shows how long the node has been online. If the selected node is offline, shows how long the node has been offline.

Upgrade Summary Report

The Upgrade Summary report summarizes the actions taken, provides tools to resolve conflicts between customizations and changes that are part of the upgrade, and provides information to help estimate time for upgrades to other instances.

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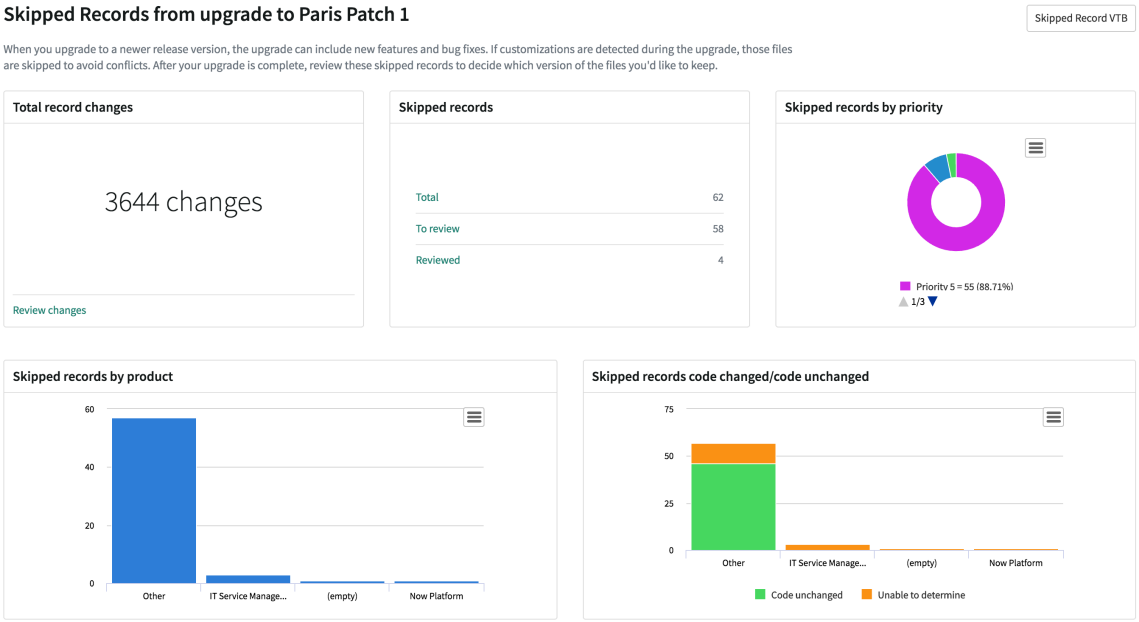


Upgrade Summary details

Field	Input Value
Upgraded version	Version to which the instance has been upgraded
Upgrade duration	Total time taken to make the upgrade
Find out what's new and changed	Links to view the new and changed features in the current upgrade version. The following three links show up. • Problem fixes: Fixes that have been made since the last upgrade version • Personalized release notes: Release notes summary for the previewed version • Known error articles: Errors that have been identified but not yet resolved

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Skipped Records



Skipped Records details

Field	Input Value
Total record changes	Total number of records that have changed since the previous upgrade version. **Review changes**: List of records that have changed can be reviewed. See System Upgrade form for more details.
Skipped records	Skipped records to prevent your customizations from being overwritten. If customizations are found in some records during the upgrade, those records are skipped. As an admin, you can resolve each update that was skipped due to a customization. To resolve a skipped update, you can review the reason for each skipped record and then either retain the customization or revert the customization to the base system. If you choose to revert some of the customizations to the base version, those records are sent through the upgrade without getting skipped. • **Total**: Total skipped records • **To review**: Total skipped records that are yet to be reviewed • **Reviewed**: Total skipped records that have been reviewed

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Skipped Records details (continued)

Field	Input Value
Skipped records by priority	ServiceNow prioritizes the skipped records based on the importance of the file types. The prioritization is done as follows: • Priority 1 (highest priority): UI pages, UI macros, and more • Priority 2: Business Rules, Security ACLs, and more • Priority 3: Reports and more • Priority 4: Form Sections, Choice Sets, and more • Priority 5 (lowest priority): other
Skipped records by product	Skipped records are sorted by product names
Skipped records code changed/code unchanged	Skipped records are sorted depending on if there are changes in the code or not.

Note: You can click **Skipped Record VTB** to view the resolution status of the current upgrade with skipped records using the visual task board (VTB) view. See Skipped Records visual task board (VTB) for more information.

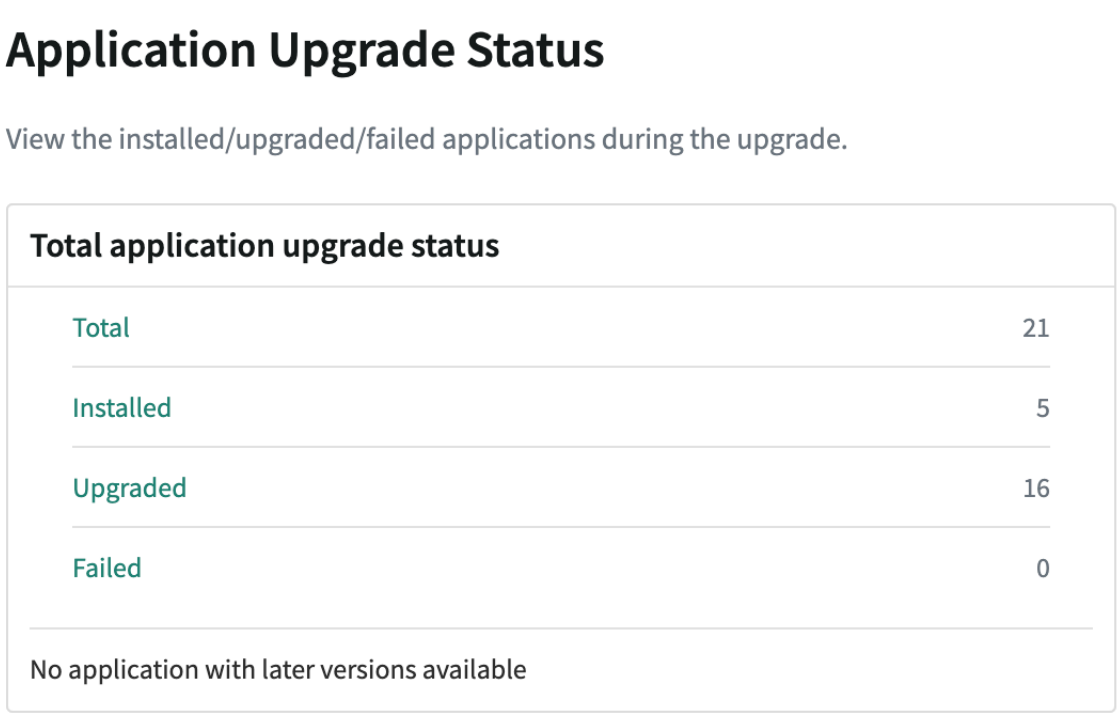
Node Upgrades



The Node Upgrades section shows the status of the upgrade for each node in the instance. The color of the icon denotes the status, as illustrated by the legend (key) and to the right of the node icons. To see details about a node, position the cursor above the icon for that node. An arrow points to the node selected, and the information below the icons pertains to that node.

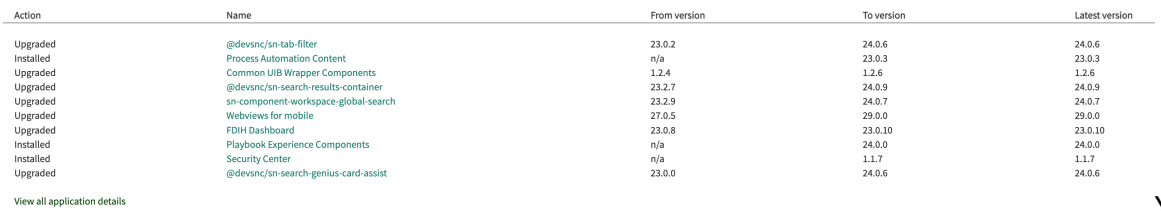
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Application Upgrade Status



You can view the list of installed and upgraded applications during an upgrade. It also lists the applications that failed to install during the process.

Note: The **All applications are on the latest versions** message shows up only when all the applications are on their latest versions.



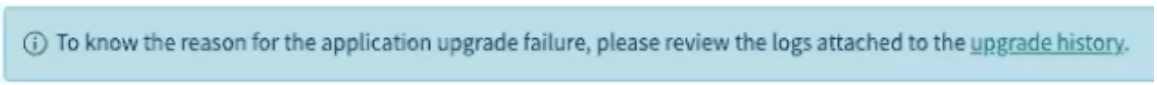
Action	Name	From version	To version	Latest version
Upgraded	@devsnc/sn-tab-filter	23.0.2	24.0.6	24.0.6
Installed	Process Automation Content	n/a	23.0.3	23.0.3
Upgraded	Common UIB Wrapper Components	1.2.4	1.2.6	1.2.6
Upgraded	@devsnc/sn-search-results-container	23.2.7	24.0.9	24.0.9
Upgraded	sn-component-workspace-global-search	23.2.9	24.0.7	24.0.7
Upgraded	Webviews for mobile	27.0.5	29.0.0	29.0.0
Upgraded	FDIH Dashboard	23.0.8	23.0.10	23.0.10
Installed	Playbook Experience Components	n/a	24.0.0	24.0.0
Installed	Security Center	n/a	1.1.7	1.1.7
Upgraded	@devsnc/sn-search-genius-card-assist	23.0.0	24.0.6	24.0.6

View all application details

You can view the first 10 applications that were installed during the upgrade. Select **View all application details** to view the information about all the installed, upgraded, and failed applications on the Upgrade App Version Histories table.

Note: You can select any of the application links to go to its form view. Select **Go to application** on the form view to go to the application sys record.

The following message shows up if you have selected any of the failed applications link.



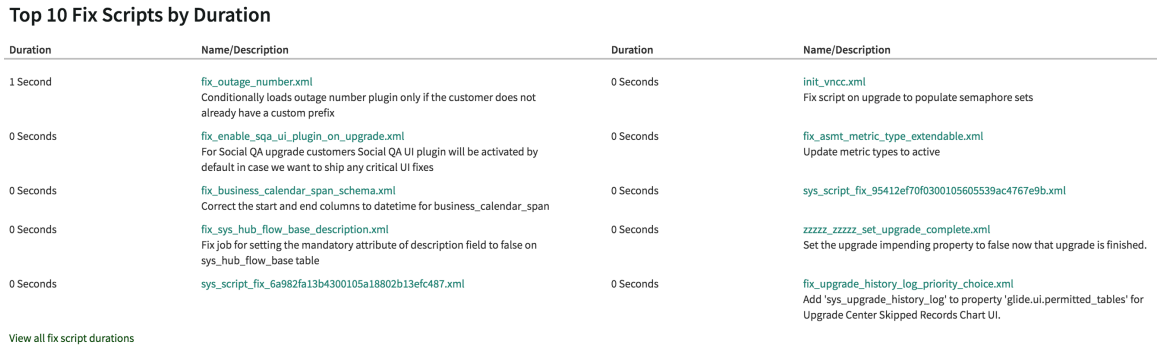
Schema Changes to Clone-excluded Tables



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The Schema Changes to Clone-excluded Tables section shows a list of tables affected by the upgrade that were clone-excluded when you cloned the production instance to this instance. Because clone-excluded tables are empty, upgrading them takes less time than upgrading those same tables on the production instance. To estimate how much longer the production upgrade takes, note the size of the clone-excluded tables on the production instance.

Top 10 Fix Scripts by Duration



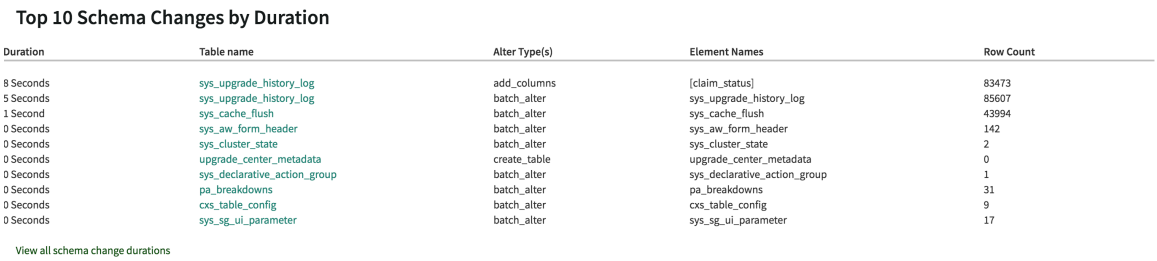
Top 10 Fix Scripts by Duration

Duration	Name/Description	Duration	Name/Description
1 Second	fix_outage_number.xml Conditionally loads outage number plugin only if the customer does not already have a custom prefix	0 Seconds	init_vncc.xml Fix script on upgrade to populate semaphore sets
0 Seconds	fix_enable_sqa_ui_plugin_on_upgrade.xml For Social QA upgrade customers Social QA UI plugin will be activated by default in case we want to ship any critical UI fixes	0 Seconds	fix_asmt_metric_type_extendable.xml Update metric types to active
0 Seconds	fix_business_calendar_span_schema.xml Correct the start and end columns to datetime for business_calendar_span	0 Seconds	sys_script_fix_95412ef70f0300105605539ac4767e9b.xml
0 Seconds	fix_sys_hub_flow_base_description.xml Fix job for setting the mandatory attribute of description field to false on sys_hub_flow_base table	0 Seconds	zzzzz_zzzzz_set_upgrade_complete.xml Set the upgrade impending property to false now that upgrade is finished.
0 Seconds	sys_script_fix_6a982fa13b4300105a18802b13efc487.xml	0 Seconds	fix_upgrade_history_log_priority_choice.xml Add 'sys_upgrade_history_log' to property 'glide.ui.permitted_tables' for Upgrade Center Skipped Records Chart UI.

View all fix script durations

The Top 10 Fix Scripts by Duration helps you understand which fix scripts required the most time.

Top 10 Schema Changes by Duration



Top 10 Schema Changes by Duration

Duration	Table name	Alter Type(s)	Element Names	Row Count
8 Seconds	sys_upgrade_history_log	add_columns	[claim_status]	83473
5 Seconds	sys_upgrade_history_log	batch_alter	sys_upgrade_history_log	85607
1 Second	sys_cache_flush	batch_alter	sys_cache_flush	43994
0 Seconds	sys_aw_form_header	batch_alter	sys_aw_form_header	142
0 Seconds	sys_cluster_state	batch_alter	sys_cluster_state	2
0 Seconds	upgrade_center_metadata	create_table	upgrade_center_metadata	0
0 Seconds	sys_declarative_action_group	batch_alter	sys_declarative_action_group	1
0 Seconds	pa_breakdowns	batch_alter	pa_breakdowns	31
0 Seconds	cxs_table_config	batch_alter	cxs_table_config	9
0 Seconds	sys_sg_ui_parameter	batch_alter	sys_sg_ui_parameter	17

View all schema change durations

The Top 10 Schema Changes by Duration helps you understand which schema changes required the most time.

Top 10 Plugins by Duration

The Top 10 Plugins by Duration helps you see the plugins that required the most time. Click **View all plugin duration** to see the **System Upgrade Metrics** list filtered by current sys upgrade history log and sorted by duration. See View loaded files for a plugin for more information.

View loaded files for a plugin

Get a related list view of all the files loaded for a plugin by clicking **View all plugin duration**.

Before you begin
Role required: admin.

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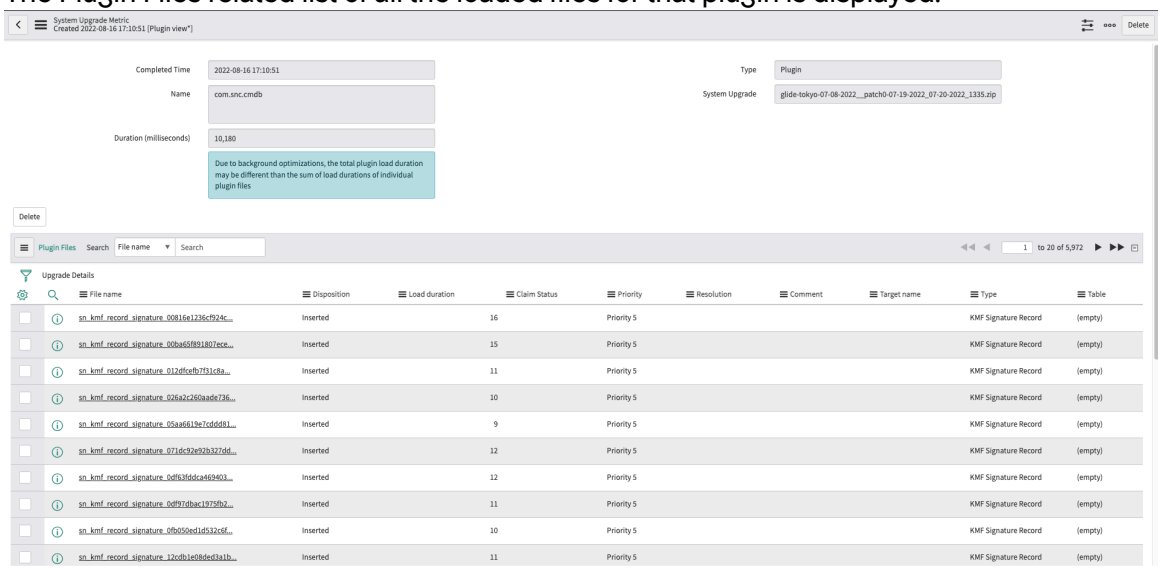
Procedure

1. Navigate to Upgrade Monitor using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade Monitor**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade Monitor**.

Note: When the system finishes the upgrade, it displays the Upgrade Summary Report.

2. Scroll down to **Top 10 Plugins by Duration**.
3. Click **View all plugin duration**.
   The **System Upgrade Metrics** list of all the plugins and their durations shows up.
4. Click one of the plugins from the list to open the **System Upgrade Metrics** form view of that plugin.
   The Plugin Files related list of all the loaded files for that plugin is displayed.



Note: The total plugin load duration is not the sum of the load duration of all the loaded files for that plugin.

Process the skipped records list

Process the skipped records list to resolve the differences between the upgraded and customized versions of a record. If you have customized or altered a record affected by this upgrade, such as a business rule or script, the upgrade generates a skip log record.

Before you begin

Role required: admin

About this task

Review the changes you made to baseline records, such as business rules and scripts, that appear on the skipped records list and revert to the baseline version if appropriate. Post-upgrade, thoroughly test all changes you made to these records.

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Procedure

1. Navigate to Upgrade Monitor using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade Monitor**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade Monitor**.

Note: If the upgrade is still in progress, the system displays the Upgrade Progress screen. When the upgrade finishes, the system displays the Upgrade Summary Report.

A list of upgrades is displayed.

2. After the system displays the Upgrade Summary Report, click the Review changes link in the Skipped box.

   The system displays the System Upgrades form.

3. Navigate to Review Skipped Records section and – if necessary – scroll to the Skipped Changes to Review related list.
   See Review skipped records using related lists for more information.
4. Click the row for the first record you want to reconcile.

   The system displays the Upgrade details form for that record.

5. Evaluate how you want to resolve the conflict for this record and take the appropriate action:

Action	Description
Retain the customized record as is and do not update it	After reviewing the changes, set **Resolution Status** to **Reviewed and Retained**. The record moves from the Skipped Changes to Review to Skipped Changes Reviewed related list. See Review skipped records using related lists.
Retain the customization by merging changes from the updated object	**a.** Click **Resolve Conflicts** to navigate to the Resolve Conflicts form. **b.** Review the differences. **c.** To merge a field: ▪ Click the right-arrow button for the field. ▪ Click a text box to view and edit the detailed differences. ▪ When you have merged all appropriate fields, click **Merge**. After merging the customization changes:

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Action	Description
	○ The **Disposition** changes from **Skipped** to **Merged**. ○ The **Resolution Status** changes to **Reviewed and Merged**. ○ The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list.
Discard the customization and update the record to match the base system for this upgrade	After reviewing the changes, click **Revert to Base System**. ○ The **Disposition** changes from **Skipped** to **Reverted**. ○ The **Resolution Status** changes to **Reviewed and Reverted**. ○ The system creates a Customer Update record. ○ The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list. **Note:** At any time after you revert a customization, you can click **Reapply Changes** to reapply the customization (undo the revert).
Review the skip and perform no action on the object	After reviewing the changes, set **Resolution Status** to **Reviewed**. The record moves from the Skipped Changes to Review to the Skipped Changes Reviewed related list.
Leave on the skipped list for a later decision, and note that you have not reviewed the record	From the **Resolution** list, choose **Not Reviewed** to defer the decision on how to handle this conflict. The record stays on the Skipped Changes to Review related list.

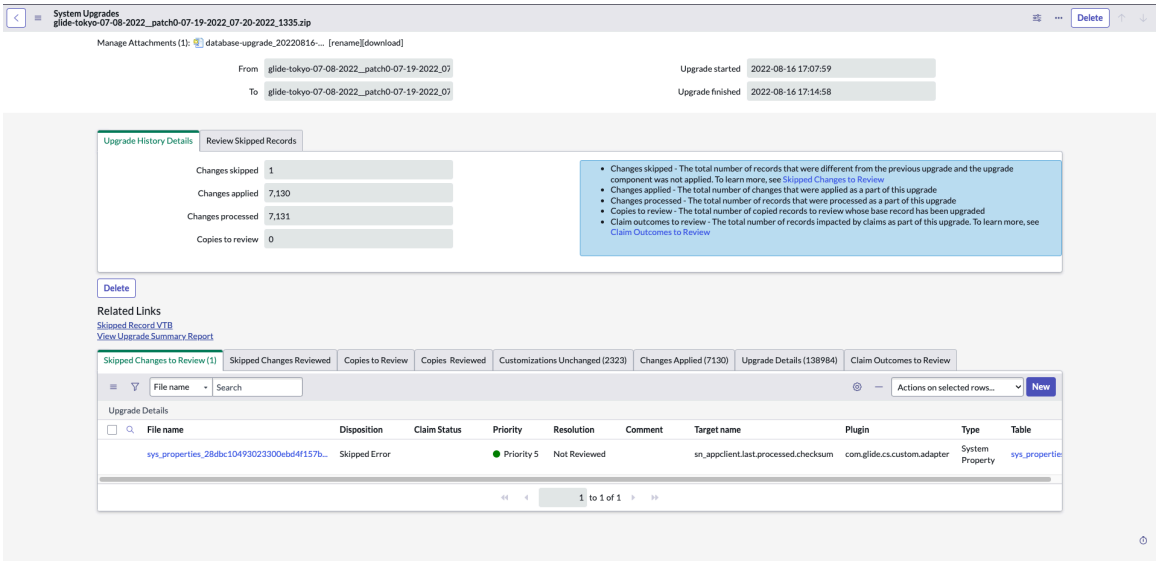
Note: The system tracks changes to records in an update set so you can apply these changes to another instance later. However, the system does not migrate the upgrade details records from one instance to the next. These records apply to a specific upgrade of a specific instance. If you want to preserve the Comments, Resolutions, or other information from the skipped list, export it from this instance.

6. In the **Comment** field, write the reasons for making your decision and other information you want to document.
7. Click **Update**.
   Post-upgrade, thoroughly test all changes you made to the records on the skipped record list.

System Upgrade form

When an upgrade is complete, the System Upgrades form displays key statistics about the upgrade and a related list of skipped records (the skipped list).

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System Upgrade details

Field	Input Value
From	Version of the instance before upgrading.
To	Version of the instance after upgrading.
Upgrade started	Time of the start of the upgrade.
Upgrade finished	Time at which the upgrade completed.
Changes skipped	Total number of records that are different from the previous upgrade and the upgrade component was not applied, mostly due to customization.
Changes applied	Total number of changes that are applied as a part of this upgrade **Changes applied** is sum of updated, different records, deleted records (where the value of changed is true) and inserted records (where the value of changed is true).
Changes processed	Total number of records that were processed as a part of this upgrade. Changes processed is the sum of **Changes skipped** and **Changes applied**.
Copies to review	Total number of copied records to review whose base records have been upgraded

Resolve conflicts for an individual record

Reconcile differences between your customized record and the changes associated with the upgrade.

Before you begin

Role required: admin

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Procedure

1. From the Upgrade Details form for the record you are reconciling, click **Resolve Conflicts**.

   The system displays the Resolve Conflicts form, which highlights differences between the two versions of the record. The form displays information about the base system record on the left and the customized record on the right.

   Note: The system creates a new customer update record when you click **Resolve Conflicts**.

2. Compare the base system with the customized record for each field on this form.
   For non-script fields, edit the customized record on the right-hand side to include what you want from the base system and the customization.
3. If this record contains a script, check it for conflicts and resolve.
   a. Click inside the Script field.

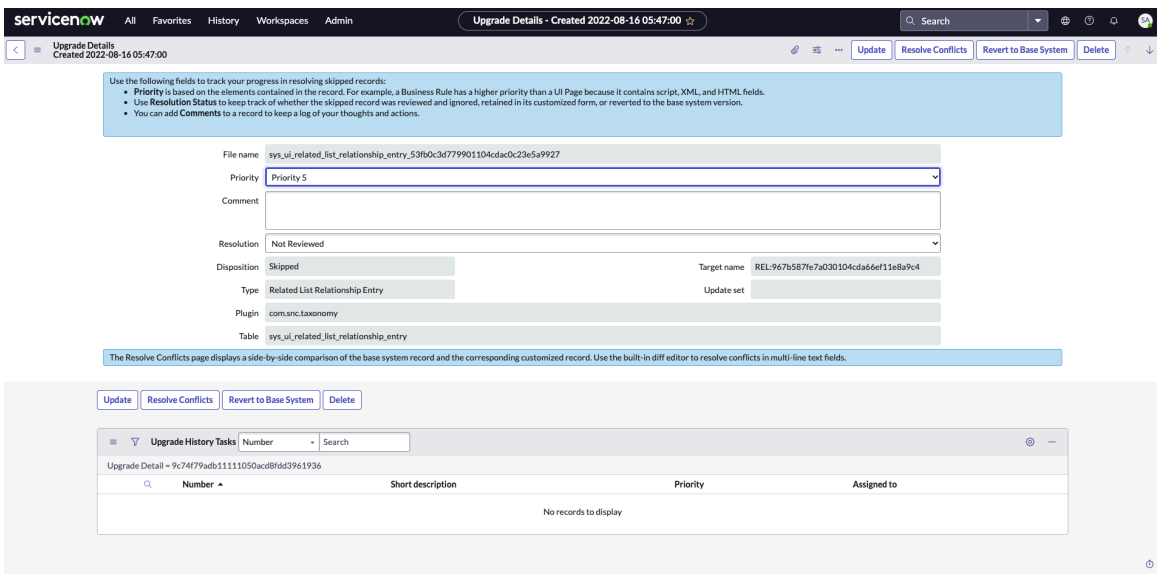
      The system displays the Resolve Conflicts - Script form highlighting areas where the two versions of the script differ.

   b. Edit the right-hand side so that the script contains whichever content you want. To move a block of code from the left to right side, click the small arrows corresponding to that block in the middle column.
   c. Click **OK**.

      The system returns to the Resolve Conflicts form.
4. To save your changes to the record, click **Save Merge**.
   The system sets the **Resolution** for this record to **Reviewed and Merged**.

Upgrade details form

From the Upgrade Details form, you can review an individual record affected by the upgrade and reconcile conflicts between the upgrade and customizations.



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Upgrade Details form details

Field	Input value
File name	The record the system has flagged as needing to be reconciled.
Priority	The priority the system has assigned to resolving this conflict. Values range from one to five, with one representing the highest priority.
Comment	Comments to document your decisions about reconciling this record.
Resolution	How you elected to resolve this conflict: • **Not reviewed**: Not yet reviewed • **Reviewed**: Reviewed but no action yet taken • **Reviewed and Merged**: Made changes to the record to reconcile the customized and upgraded versions • **Reviewed and Retained**: Left customizations in place without update from upgrade • **Reviewed and Reverted**: Customizations discarded, record updated according to upgrade For more information, see Process the skipped records list.
Disposition	Action performed on this file during the selected upgrade: • Inserted: The system inserted a new record • Updated: The system updated the record • Deleted: The system deleted the record • Skipped: The system did not change this record in order to preserve customizations • Reverted: This record was reverted to the base version • Table not found: The system could not find the table that contains this record • Unchanged: The system did not change this record because the baseline component has not changed since the last release • Skipped Manual Merge: The system did not change this record because updating it requires manual intervention • Skipped Apply Once: The system skipped this record because it had already applied

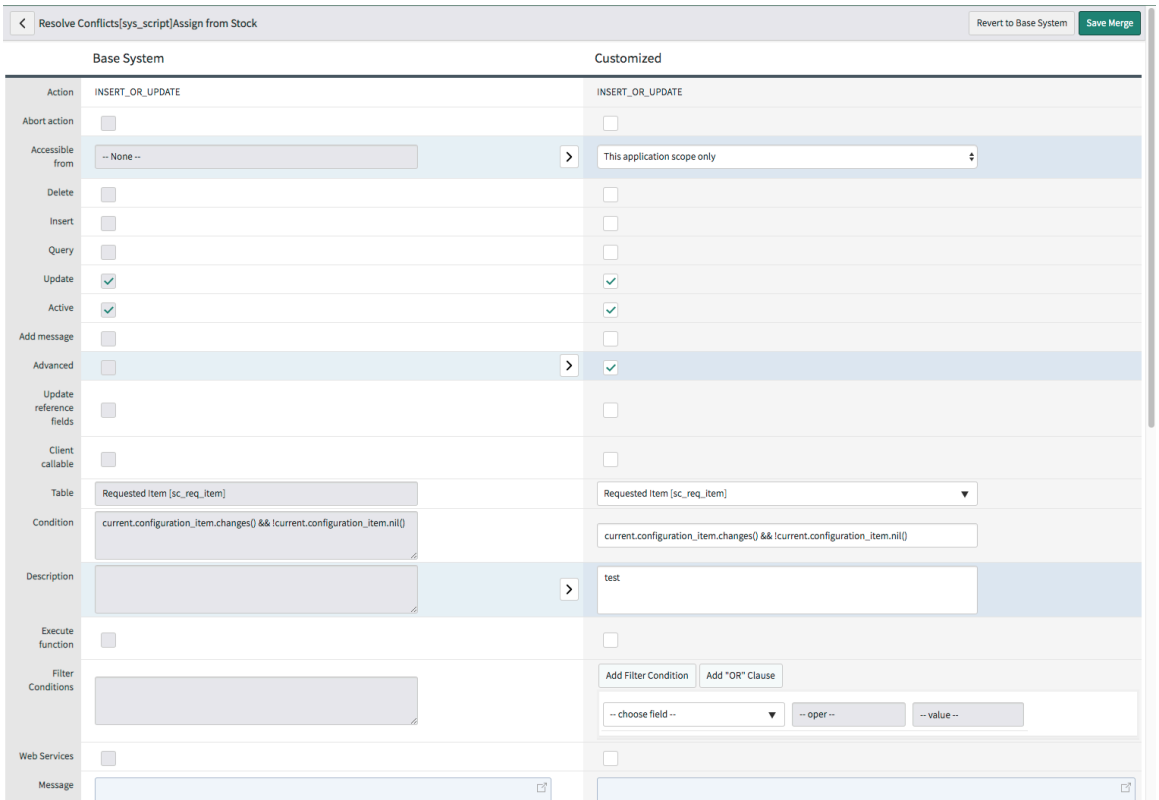
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Upgrade Details form details (continued)

Field	Input value
	an update from an xml file in the apply once folder • Not Latest: The system applied a change, but this change was overwritten later during the same upgrade.
Type	Type of the record, for example, Script include.
Target name	Name of the skipped record, if applicable.
Update set	Unused.
Plugin	The plugin containing this record.
Table	The table containing this record.

Resolve Conflicts form

The Resolve Conflicts form you compare to the base system version with the customized version of a record and reconcile the differences.



Fields

The fields this form displays depend on the type of record you are reconciling. The left column shows the records fields in the base system, including the proposed changes that are part of the upgrade. The right column shows the fields for your customized record.

Now Support in Upgrade Console

Try contacting Now Support if you need any assistance regarding Upgrade Console.

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Click Contact Customer Service and Support for more information.

Upgrade Preview tool in Upgrade Console

Use the Upgrade Preview module to have an insight about the experience of an upgrade prior to the actual upgrade. You can explore and preview upgrades to different ServiceNow release versions and see how your instance might be impacted with your current configurations.

- Preview predicted changes: Preview the changes that have been predicted to occur after an upgrade.
- Upgrade Preview form: Alternate view of a previewed upgrade.

View previewed upgrade

Use the Upgrade Preview form to have an alternate view of a previewed upgrade.

Before you begin

Role required: admin

Procedure

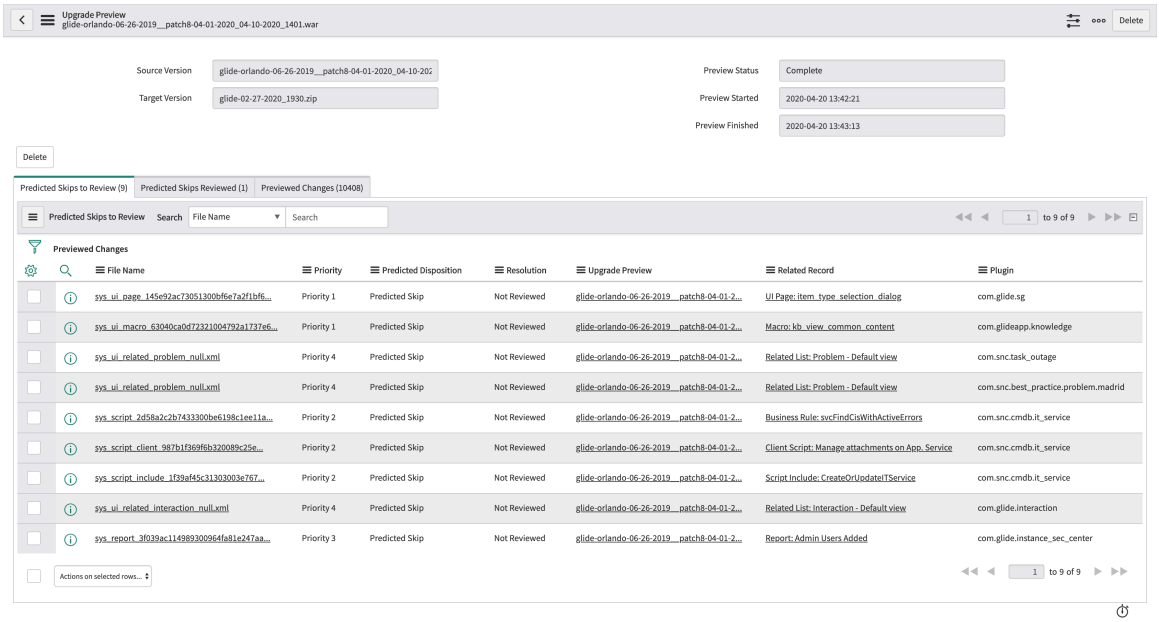
1. Navigate to Upgrade Preview using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade Preview**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade Preview**.

2. Select the target version to be previewed.
3. Click **Go** or **Refresh Preview** to run the selected preview.
4. Click **View preview details** on the **Previewing version** card to view the following related lists.
   - **Predicted Skips to Review related list**: The Upgrade Preview process informs you about the customizations that are predicted to be skipped during an upgrade. The upgrade preview process the skip files that have been customized. Predicted Skips to Review lists all the skipped files that haven't been reviewed yet.
   - **Predicted Skips Reviewed related list**: Predicted Skips Reviewed related list displays the records which have previously appeared on the Predicted Skips to Review related list and have been reviewed. When you select a skipped record to review and the **Resolution Status** has been set to a value other than **Not Reviewed**, the updated record moves to the Predicted Skips Reviewed related list.
   - **Previewed Changes related list**: Previewed Changes related list gives the total number of records that are predicted to change when the upgrade occurs. Total record changes also includes possible predicted skip files known as Predicted skipped records.

   See Previewed changes for more details about the related lists.

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Field	Input Value
Source version	Current version of the instance
Target version	Target version to which the instance is upgraded to be previewed
Preview status	Status of the preview. ○ Pending ○ In Progress ○ Complete ○ Cancelled ○ Failed
Preview Started	Date and time on which the preview started
Preview Finished	Date and time on which the preview completed

Preview predicted changes

Use the previewed changes table to view the list of total records that are predicted to change when the upgrade occurs.

Preview skipped list prediction

The **Total record changes** also includes records that are predicted to be skipped due to various reasons. The most common reason is due to customization. The reason an upgrade skips customizations is to avoid overwriting your customizations. Upgrade Preview attempts to predict which records will be skipped when the actual upgrade occurs. It predicts skips due to customizations, and some of the other more complex scenarios as well. It is possible to use Upgrade Preview to address these predicted customization skips before the upgrade occurs, which can prevent that skip from happening.

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Click **View preview details** link on the **Previewing version** card. The Upgrade Preview form appears along with the following related lists details.

Related lists details

Field	Description
File name	Record that has been flagged for reconciliation.
Predicted Disposition	Action predicted to be performed on this file during the selected upgrade: • Predicted Insert: The system is predicted to insert a new record. • Predicted Update: The system is predicted to update this record. • Reverted: This record was reverted to the base version, and won't be skipped on the next upgrade. • Predicted Skip: The system won't change this record in order to preserve customizations. • Predicted Skip (Manual Merge): The system won't change this record because updating it requires manual intervention. • Predicted Skip (Apply Once): The system is predicted to skip this record because it had already applied an update from an xml file in the apply once folder.
Priority	Priority that has been assigned to resolve the conflict. Values range from one to five, with one representing the highest priority. **Note:** ServiceNow prioritizes the skipped records based on the importance of the file types. The prioritization is done as follows: • Priority 1 (highest priority): UI pages, UI macros, and more • Priority 2: Business Rules, Security ACLs, and more • Priority 3: Reports and more • Priority 4: Form Sections, Choice Sets, and more • Priority 5 (lowest priority): other
Resolution	Ways to resolve a conflict.

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Related lists details (continued)

Field	Description
	• **Not reviewed**: Conflicted files that have not been reviewed yet • **Reviewed**: Reviewed but no action has been taken yet • **Review not needed**: Review of the skipped files are not required • **Reviewed and Retained**: Left customizations in place without update from upgrade • **Reviewed and Reverted**: Customizations discarded, record updated according to the upgrade version
Plugin	Plugin containing the record
Related record	Record that the changelist entry applies to

Upgrade Skipped Record Rules Editor tool in Upgrade Console

Create skipped record rules, based on your specified conditions, to define customizations post-upgrade. Subsequently, execute these rules to resolve skipped records during or after the upgrade process, either automatically or on demand.

Create a skipped record rule

Create skipped record rules based on your set conditions to define your customizations after an upgrade.

Before you begin

Role required: admin

Procedure

1. Navigate to Skipped Rules using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Skipped Rules**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Skipped Rules**.

A list of available rules shows up.

Note: By default, a few inactive sample rules have been provided. You can set it to active if you want to use the sample rules.

2. Select **New** to create a new skipped record rule.
The Upgrade Skipped Record Rules form shows up.

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Note: The new rules are active by default. You can make them inactive if you don't want to use them.

3. Fill in the fields on the form.

Field	Description
Name	Name of the rule.
Order	Order in which the rule runs. **Note:** The order number automatically increments from the last rule order created.
Active	Option to activate the rule.
Conditions	Conditions as to when the rules are implemented on the skipped records. **Note:** These conditions are only for skipped records that are not being reviewed. If you set the disposition condition to anything other than the skipped records, that condition doesn't work.
Action	Option to choose one of the four following actions: ○ Keep My Modifications (Always Retain) ○ Revert and Keep Inactive ○ Assign Skipped Records to User ○ Assign Tags to Skipped Records **Note:** Based on the selected action, a message shows up with more information.
Comment	Add a comment on the conditions being set.

4. Select **Submit**.
   The new rule appears on the list of available rules.

What to do next

You can now run the skipped record rules either automatically during an upgrade or can run on demand on the skipped records. See Execute a skipped record rule for more information.

Execute a skipped record rule

Run skipped record rules based on your set conditions to resolve skipped records in an upgrade. The rules either execute automatically during an upgrade or can run on demand after an upgrade.

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Execute a skipped record rule on demand

Execute the skipped record rules on demand on the skipped records whenever it's required.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Upgrade Center** > **Administration** > **Skipped Record Rules Editor**.
   A list of available rules shows up.

   Note: By default, a few inactive sample rules have been provided. You can set it to active if you want to use the sample rules.

2. Execute the rules on demand using either of the following ways.

Option	Steps
Using Run Now	**a.** Select the rule that you want to execute from the list. **b.** Select **Run Now** from the configuration list action items. **Note:** When you select **Run Now**, a progress bar shows up to display the progress of the rule execution.
Using View Latest Upgrade History tab	**a.** Select the **View Latest Upgrade History** tab. The System Upgrades form shows up. **Note:** The skipped record rules are executed only on the latest upgrade. **b.** Select **Run skipped Record Rules** on the form. **Note:** All the active rules get exe cuted. You can't choose the specif ic active rules to run while using this process.

Execute a skipped record rule automatically

Execute the skipped record rules automatically during the upgrade on the skipped records.

These rules are executed on the skipped records automatically during the upgrade process. The prediction of the rules execution on the skipped records can be previewed on the Skipped list prediction card in the Upgrade Preview module.

Once the execution of the rules are done, the summary can be reviewed in the Upgrade Summary of Upgrade Monitor.

Note: Skipped record rules and upgrade plans can't be implemented together in an upgrade.

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Upgrade Plans tool in Upgrade Console

Accelerate your upgrades using the Upgrade Plan that automates the installation of applications during upgrades, giving you a seamless upgrade experience. It helps you define applications and target versions to be installed in your instance.

Follow the following task to build and apply an upgrade plan to your upgrade.

Building your Upgrade Plan

Build your upgrade plan to experience a seamless and an accelerated upgrade by packaging the applications in an upgrade plan.

Before you begin

Note: Ensure that you have upgraded your instance to the latest available version to build the upgrade plan. It is recommended to build an Upgrade Plan for each instance upgrade. The target version of the Upgrade Plan must be exactly the same as the instance version (including patches and hot fixes). You can't use the previously created Upgrade Plan for the new instance upgrade.

Role required: admin

Procedure

1. Navigate to **All** > **Upgrade Center** > **Administration** > **Properties** > **Upgrade Plan Properties**.

   Note: It is recommended to set up your dev instance as a builder instance.

2. Navigate to Upgrade Plan using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade Plan**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade Plan**.

   Note: If you are on the Upgrade Monitor page, click **Manage Upgrade Plan**.

   The Upgrade Plan list view shows up.

3. Click **Build** to start the upgrade plan build.
   Upgrade Plan takes up only the app installations by default and publish it on to the app repository. See Upgrade Plan background operations section in Upgrade Plans tool in Upgrade Console for more information.

   Note: Ensure all the applications in the instance are in ready state to be published on to the app repository.

   You are allowed to have only one Upgrade Plan at any point of time.
   A final confirmation message shows up to start building the upgrade plan. If any application has changes in-progress, the Upgrade Plan must be built only after the changes are done.
   Warning message shows up to complete the review of the remaining skipped records, provided you have enabled the GLIDE_UPGRADE_PLAN_INCLUDE_SKIPS property.

4. Click **Build Upgrade Plan**.
   The upgrade plan starts to build.

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5. Click **Go to Upgrade Plan** once the build is done.

   Note: Click **View Details** if you want to view the execution details of the Upgrade Plan. If you see a warning, it is recommended to review the execution details to know the errors.

   The upgrade plan opens and a list of upgrade plan items shows up.

6. **Optional:** Click **New** if you want to manually add any upgrade plan items.

   Note: The applications or plugins that you want to add manually to the upgrade plan must be already installed and active on the instance.

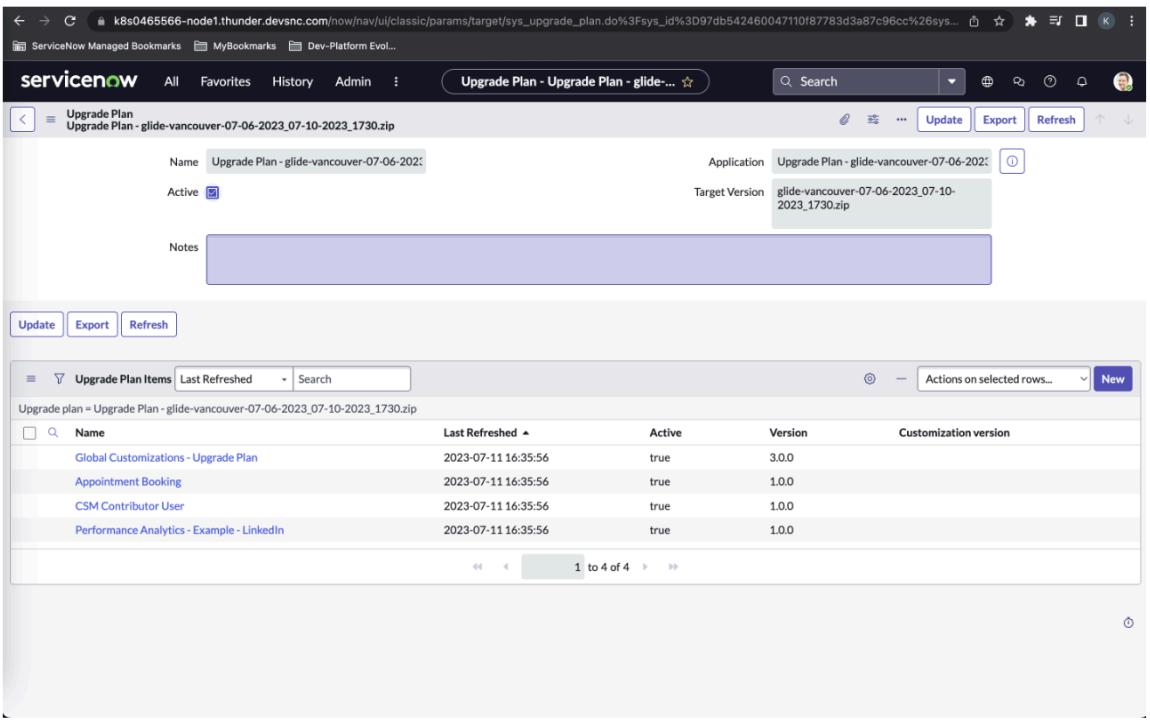
   If you want to skip any of the upgrade plan items from being a part of the Upgrade Plan, set the selected upgrade plan item to false.

7. **Optional:** Click **Refresh** to capture all the recent changes to the Upgrade Plan.

   Note: This step is applicable only if you have any update on the existing application or plugin in the Upgrade Plan. If the upgrade plan has already been published, you are required to republish it after every refresh.

8. Click **Publish** to publish the Upgrade Plan.
   See Upgrade Plan background operations section in Upgrade Plans tool in Upgrade Console for more information.

   Note: Install all the required applications and plugins before publishing the upgrade plan. If you have set the GLIDE_UPGRADE_PLAN_INCLUDE_SKIPS property to true, you will have to resolve all the skipped records before publishing the upgrade plan. If you want to delete the Upgrade Plan, click **Delete**. The **Delete** option is available only for the Upgrade Plans that are not yet published.



The upgrade plan is now ready to be installed in the consumer instance.

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Refreshing your Upgrade Plan

Refresh your upgrade plan to package all the recently installed plugins and applications into your upgrade plan.

Before you begin
Role required: admin

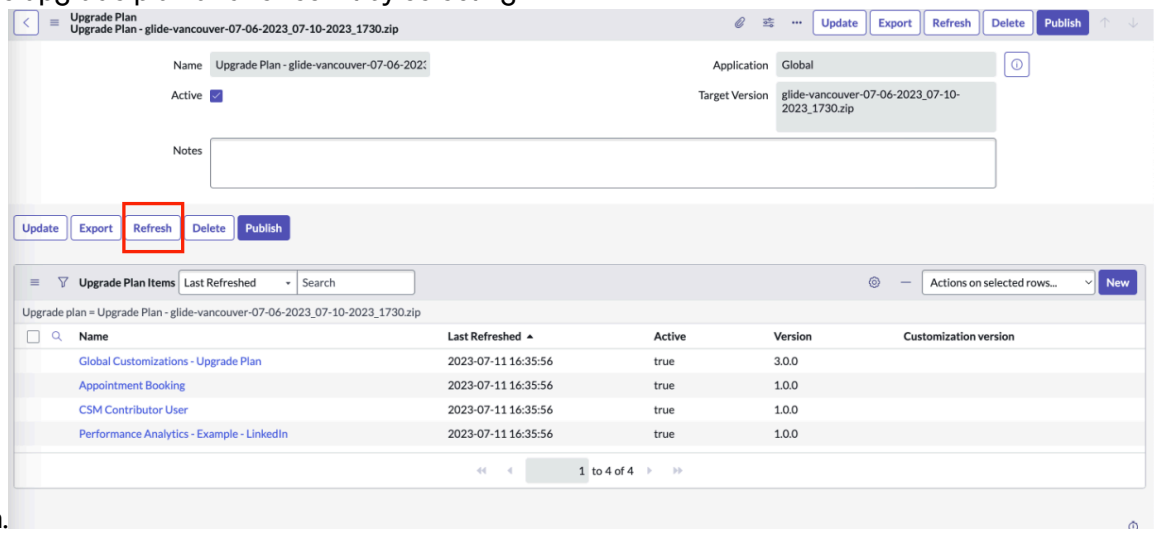
Procedure

1. Go to the applications and plugins you need and select **Activate** to install them.

   Note: This can be done even after the Upgrade Plan is published.

   The plugin activation starts and installs successfully.

2. Go to the upgrade plan and refresh it by selecting



   Refresh.
   The Refresh Upgrade Plan confirmation message shows up.

3. After the upgrade plan refreshes, select **Go to Upgrade Plan**.

   Note: The **Publish** button is still visible because the updated Upgrade Plan needs to be published.

   The recently installed plugins and applications show up under Upgrade Plan Items related list.

Installing your Upgrade Plan

Install your upgrade plan in the consumer instance to implement it in your upgrades.

Before you begin
Role required: admin

Procedure

1. Navigate to Upgrade Plan using one of the following ways.

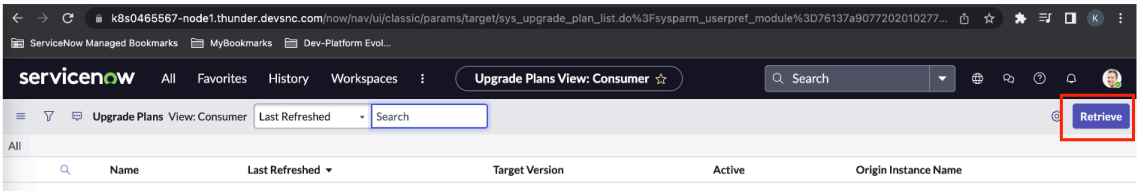
Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade Plan**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade Plan**.

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Note: If you are on the Upgrade Monitor page, click **Manage Upgrade Plan**.

The list view of the upgrade plans shows up.

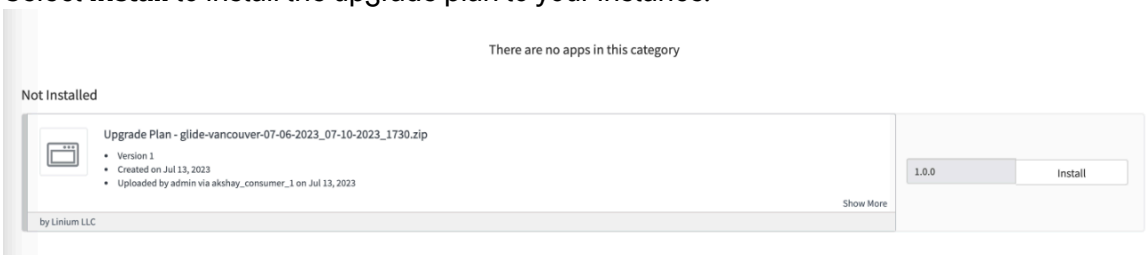
2. Select Retrieve to find your upgrade plan.



3. Search your upgrade plan by name.
4. **Optional:** Navigate to **All** > **My company applications** and refresh it.

Note: This step is applicable only if you can't find the required version of your upgrade plan.

5. Repeat the previous steps to see the latest version of the upgrade plan.
6. Select **Install** to install the upgrade plan to your instance.



Note: If you made any changes to the upgrade plan on the builder instance after installing it on the consumer instance, then update the upgrade plan to the latest version.

Prepare to upgrade with Upgrade Plan

Prepare your instance upgrade with Upgrade Plan by determining all the applications and plugins are ready to be implemented in the upgrade.

Before you begin

Role required: admin

Procedure

1. Navigate to Upgrade Plan using one of the following ways.

Option	Navigation
Using left navigation	Navigate to **All** > **Admin Center** > **Upgrade Management** > **Upgrade Plan**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Management** > **Upgrade Plan**.

The upgrade plan that is installed shows up on the list.

2. Select the upgrade plan.
The upgrade plan form view shows up with all its configurations.

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3. To ensure that all the applications and plugins are ready to be implemented in the upgrade, select **Refresh** in the context menu of the Upgrade Plan.
   If there are errors for any of the items, then fix them and follow the Reprocess step.

   Note: All the applications and plugins under the Upgrade Plan Items related list must be in the **Ready** state to proceed with the upgrade. The application or plugin in the **Already Installed** state, error or its latest version won't be considered during the upgrade process.

   The upgrade plan is now ready to be implemented.
4. Apply an existing upgrade plan to an instance anytime, without being limited to during upgrades only.

   You can now also export the upgrade plan in a batch install format by using the **Export** button. See CI/CD - POST /sn_cicd/app/batch/install for more information.
5. **Optional:** Select **Reinstall** to reinstall the failed items in an upgrade plan, after the upgrade completes.
   You can also review the upgrade plan history to know the reasons of failure.

   Note: You are required to use this option only if you have failed items in an upgrade plan.
6. **Optional:** Click **Reprocess** to reprocess the upgrade plan after the upgrade plan item errors have been resolved.

   Note: This step is applicable only if you have any error items in the upgrade plan.

Preview Upgrade Plan

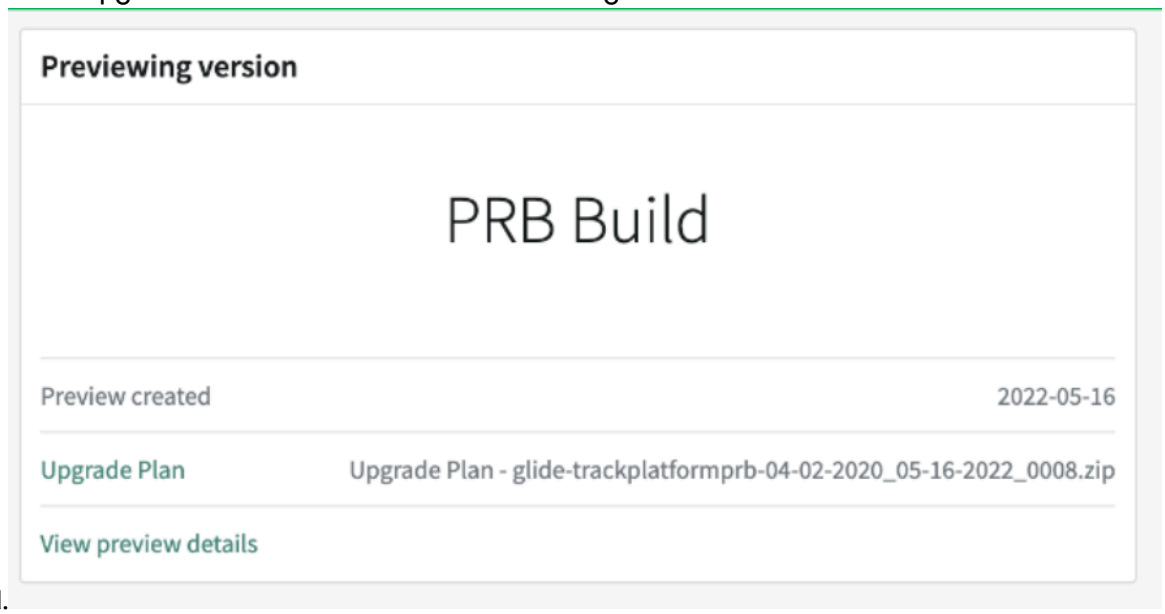
Preview your upgrade plan before being implemented in the upgrades. Once the upgrade plan is installed, it auto generates the preview of the upgrade plan.

Before you begin
Role required: admin

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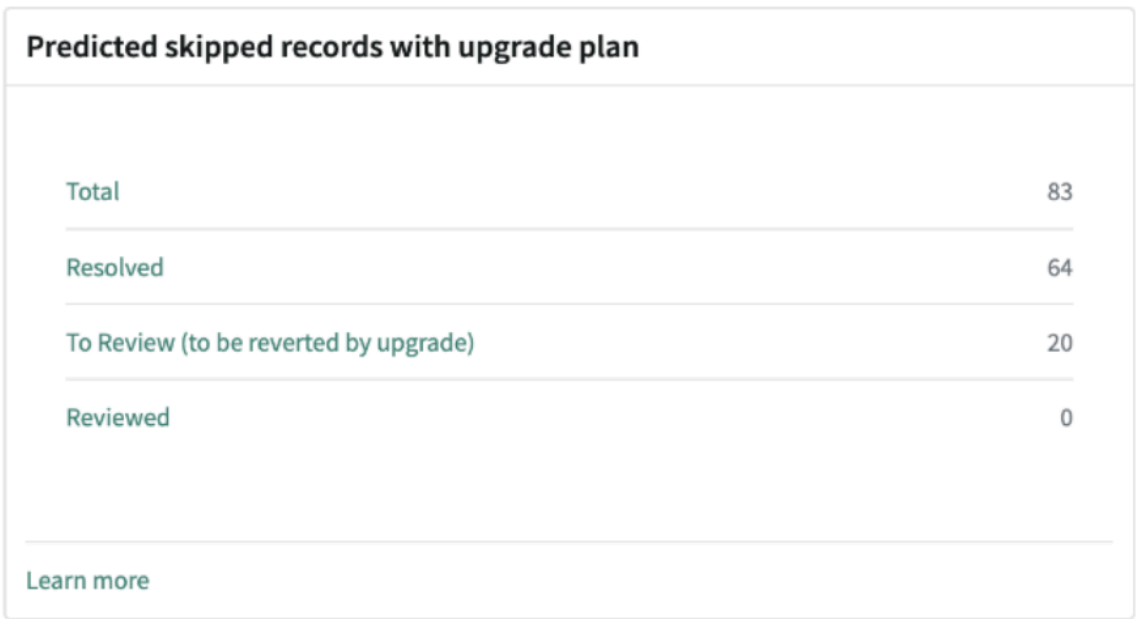
Procedure

1. Go to the Upgrade Preview page to preview the Upgrade Plan.
2. Check the Upgrade Plan mentioned on the Previewing version



card.

3. **Optional:** Check the Predicted skipped records with upgrade plan card to preview the skipped



records.

- Total: total number of skipped records
- Resolved: skipped records included in the upgrade plan
- Reviewed: skipped records that have been reviewed

Note: This step is applicable only if you have enabled the GLIDE_UPGRADE_PLAN_INCLUDE_SKIPS property.

Apply Upgrade Plan on your upgrade

Apply the selected upgrade plan to your instance upgrade.

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Before you begin

Role required: admin

Procedure

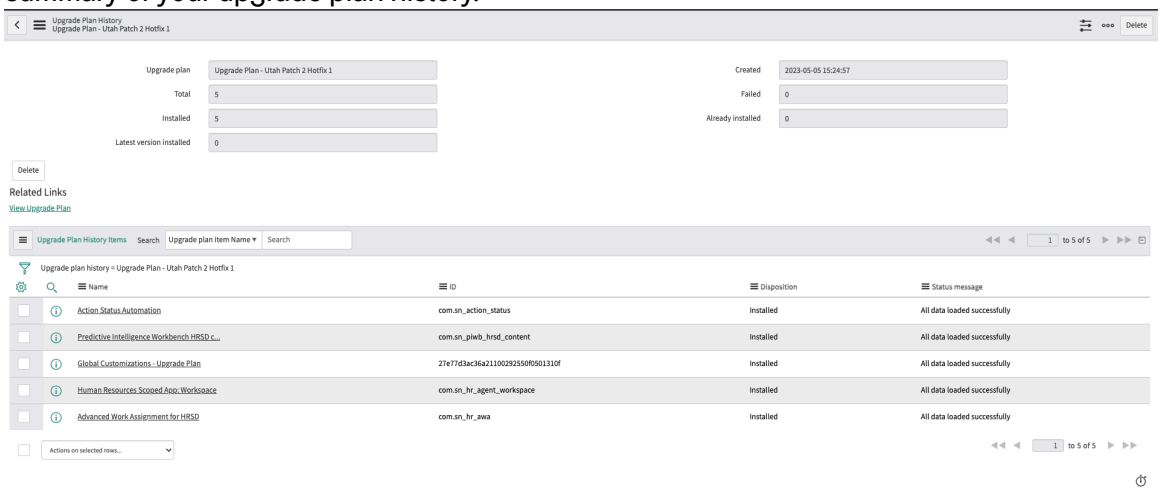
1. Go to the Upgrade Monitor page to ensure that the selected upgrade plan is being implemented in your upgrade.
   If the upgrade plan has been implemented on the ongoing upgrade, the Review upgrade plan link shows up on the Target version card.

   See Upgrade Plan background operations section in Upgrade Plans tool in Upgrade Console for more information.

2. Check on the date and time of the implemented upgrade plan in the Upgrade duration card once the upgrade completes.
   You can select the Review upgrade plan link on the Upgrade duration card to know the history of the upgrade plan. It shows all the installed applications and plugins and the failed items.
3. **Optional:** Scroll down to see the skipped records with upgrade plan.
   - Total: Total number of skipped records
   - Resolved: Total records from the upgrade plan that have been auto-resolved
   - To review: Total records left to be reviewed manually

   Note: This step is applicable only if you have enabled the GLIDE_UPGRADE_PLAN_INCLUDE_SKIPS property.

4. **Optional:** Click **Review upgrade plan** on the Upgrade duration card if you want to check the summary of your upgrade plan history.



Review skipped records with upgrade plan

Review the skipped records after the completion of the upgrade.

Before you begin

Note: This process is applicable only if you have enabled the GLIDE_UPGRADE_PLAN_INCLUDE_SKIPS property.

Role required: admin

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Procedure

1. Once the upgrade completes, scroll down to see the skipped records with upgrade plan.
   - Total: Total number of skipped records
   - Resolved: Total records from the upgrade plan that have been auto-resolved
   - To review: Total records left to be reviewed manually

   Note: After using the upgrade plan, the Global Application is created and all the records move to the Global Application. As soon as you create the Global Application, the new update sets show up.

   You won't be allowed to choose the skipped records that are captured by the upgrade plan, regardless of whether they are being reviewed. If the customizations are coming from different instances, then the skipped records are required to be reviewed.

2. Select the To review link to look at the records that need to be reviewed manually.

Configuring Upgrade Console

Upgrade your production or sub-production instance effortlessly by following our guided steps.

Note: It is recommended to clone the production instance to sub-production instance.

The following steps are in a nutshell to explain the overall configuration experience of Upgrade Console in a sub-production or a production instance.

Configuring Upgrade Console

Implement the following steps to configure Upgrade Console.

1. Navigate to **Admin** > **Upgrade Console** > **Guided upgrade**.

   Note: The **Guided upgrade** tab shows up only when the upgrade is in progress. If there is no ongoing upgrade, you can select the required upgrade version and select **Get started** in the Get started with your upgrade section.

2. Complete the **Pre-upgrade** tasks to move to the Instance upgrade tasks.

   Note: Select either **Mark as complete** or **Skip** to move to the next task in the Pre-upgrade section.

3. Complete the **Instance upgrade** tasks.
4. Complete the **Post-upgrade** tasks to complete the guided upgrade.

   Note: You need to first complete the pre-upgrade tasks to move to the instance upgrade and post-upgrade tasks.

Using guided upgrade to implement Upgrade Console

Implement the following to experience the guided upgrade for a seamless upgrade on your instance.

Access guided upgrade on a non-production instance

Follow the guided upgrade steps to experience the seamless upgrade on your non-production instance.

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Before you begin

Role required: upgrade_admin

Procedure

1. Access Upgrade Console in one of the following ways.

Option	Navigation
Using the application navigator	Navigate to **All** > **Admin Center** > **Upgrade Console**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Console**.
Using Admin tab and Admin Home option.	**a.** Navigate to **All** > **Admin Center** > **Admin Home**. **b.** Select the Upgrade Console link in the In stance Upgrade tile.

Note: By default, you are in the Overview tab at the end of this step.

The Upgrade Console landing page shows up.

2. Access the guided upgrade in one of the following ways.

Option	Steps
Using Get started button **Note: This option is available only when you haven't started the upgrade yet.**	**a.** Select **Get started** in the Newest version tile under Get started on your upgrade sec tion. **b.** Select the Guided upgrade version that you want to implement on your instance.
Using Guided upgrade tab option **Note: This tab is visible only if there's an ongoing upgrade in the instance.**	**a.** Select the **Guided upgrade** tab on the top of the Upgrade Console landing page. **b.** Select **Resume upgrade** to continue with the upgrade process. You can also select **End session** if you want to cancel the ongo ing upgrade process.

3. Complete the Pre-upgrade, Instance upgrade, and Post-upgrade tasks to complete the upgrade process on your non-production instance.

Implement pre-upgrade activities on a non-prod instance

Complete the pre-upgrade tasks for a successful upgrade experience on your instance.

Before you begin

Note: For each step, you will have the option to either skip the step or mark complete and only then move to the next guided upgrade step.

Role required: upgrade_admin

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Procedure

1. Select **View release notes** if you want to review the release notes of the selected Guided upgrade version.

   Note: This step is visible only if you are in a non-production instance.

2. Request a clone.

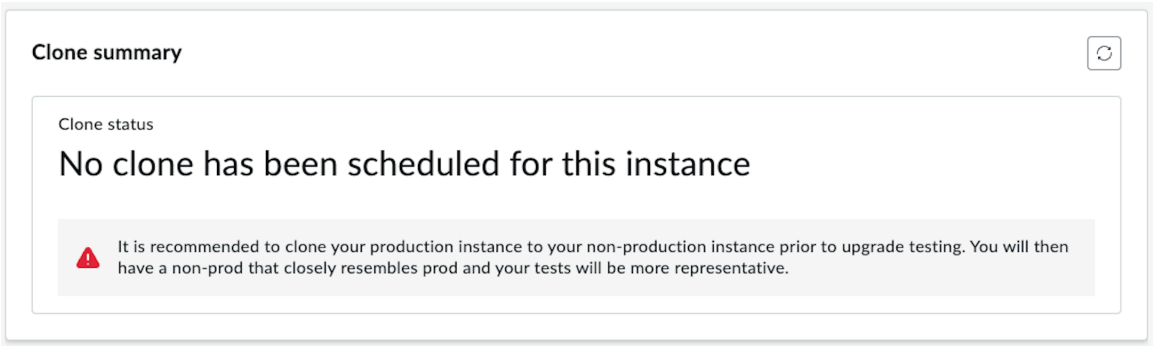
   Note: This step is visible only if you are in a non-production instance. It is recommended to clone the production instance to non-production instance. Select **Request clone** to configure the source and target instances.

   Note: For data integrity and recovery purposes, it is recommended that the update sets should be either closed out or backed up. It is crucial for preserving all system modifications and enabling restoration when required.

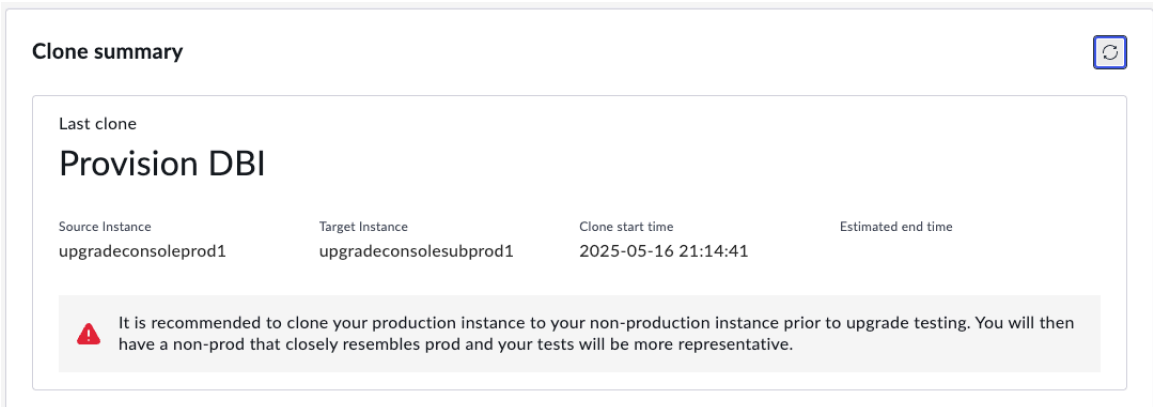
   You can also see the cloning summary information that tells you the instance you have cloned and other relevant information. You can see the start and end time of the cloning process. By default, you are in the America/Los Angeles timezone. You can modify the timezone preference by navigating to **User Menu** > **Preferences** > **Language & Region**. You can then select the required timezone from the drop down menu.

   There are four different scenario for the cloning process.

   - No clone has been scheduled for this instance

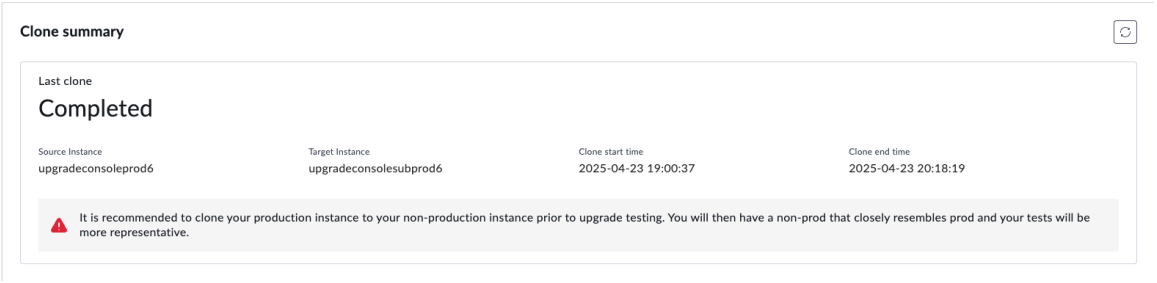


   - Scheduled
   - Running



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- Complete



Note: If the cloning process is in progress, the **Skip** and **Mark as complete** options are disabled.

A list of production instances shows up and you can select the instance you want to clone.

Note: If you are in a production instance, the list of instances for cloning doesn't show up.

You can expect the following in this pre-upgrade activity once you select the instance to be cloned.

- You will be redirected to the Cloning tool to initiate the cloning process.
- The Cloning tool guides you through the cloning process of your production instance.
- You will be reminded to ensure to back up the update sets before starting the cloning process to save any changes and configurations.

3. Choose an upgrade plan.
   There are two options to choose your upgrade plan.
   - Select an existing one: You can import update sets to apply or merge upgrade plans for your upgrades. This option is selected by default.

     In order to apply an existing upgrade plan, you have the following options:

     - Import update sets: You must first import update sets before selecting an existing upgrade plan.

       a. Select **Import update sets** to import an update set. The Retrieve Update Sets list shows up.

       b. Select the Import Update Set from XML related link to select the update set to be imported. The Import XML page shows up.

       c. Select an already existing update set using **Choose file** and then select **Upload**.

       The selected update set gets uploaded in the current upgrade plan. The current upgrade plan shows up on the Retrieve Update Sets list.

       d. Select the plan from the Retrieve Update Sets list. The Retrieve Update Set form shows up with all its associated customer updates.

       e. Select **Preview Update Set**. The Update Set Preview modal shows up.

       f. Once the previewing of the update set is completed successfully, select **Commit Update Set**. The Update Set Commit modal shows up.

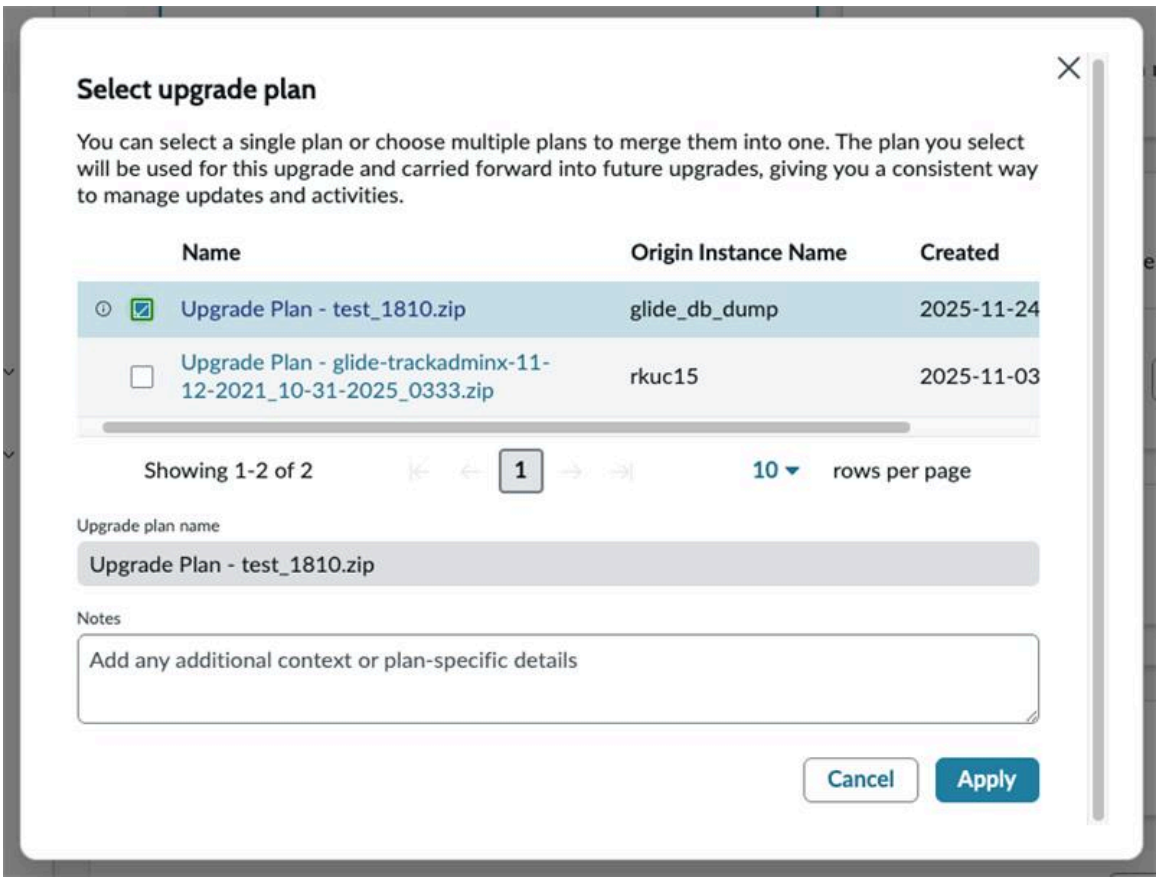
       Note: This option is visible only after the successful completion of update set preview.

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- Select an existing upgrade plan: You can view the imported plans to choose or can select multiple plans or merge them into one plan.

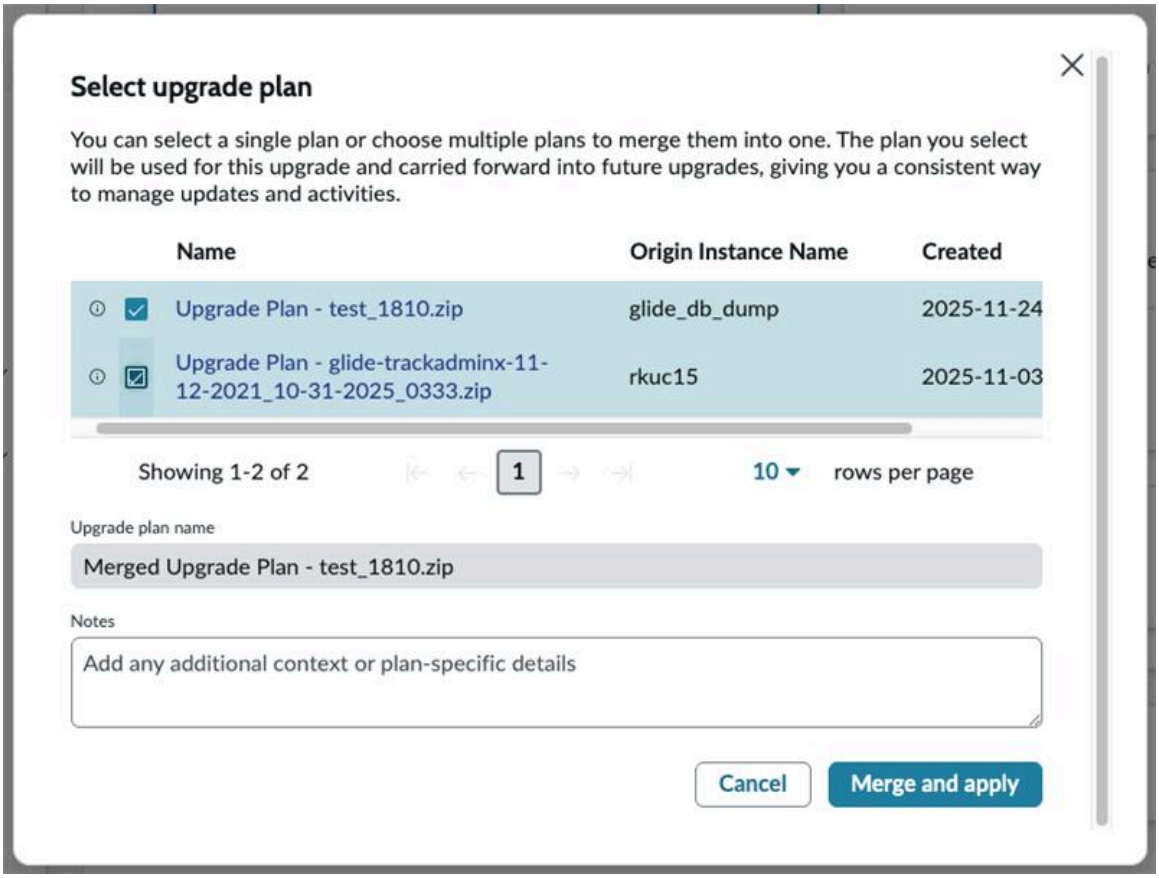
  Note: This option considerably reduces rework with an upgrade plan, maintains accuracy and makes your upgrade process seamless.

  You will see the following modal when you select Select upgrade plan. You can then select either one upgrade plan or multiple plans to be merged and applied to the current upgrade.



  Note: The **Apply** option is visible only when you select one upgrade plan to be applied to the current upgrade.

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Note: The **Merge and apply** option is visible only if you have selected multiple upgrade plans. The upgrade plan name changes as per the selection of upgrade plans.

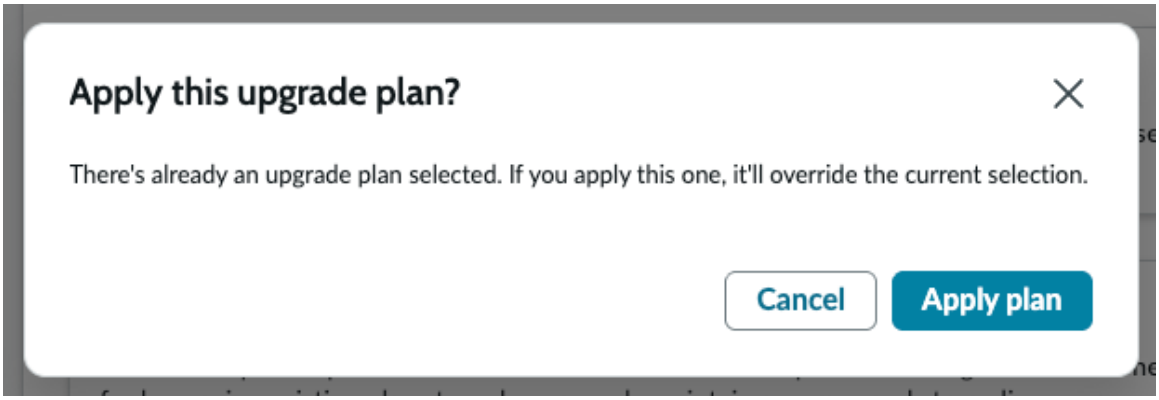
When merging multiple upgrade plans, upgrade plan items that appear in more than one plan are used in the merged plan by their highest version. This ensures consistency and avoids version conflicts in the resulting merged plan.

- Create a new one: You can get started with creating a new plan for your instance upgrade.
  - Create an upgrade plan: Select **Create a plan** to start creating the new upgrade plan. Select the Upgrade Plan link from the success message banner to view the created upgrade plan.

    Note: The success message banner is generated immediately after the upgrade plan is created by selecting **Create a plan** and stays visible until the page is reloaded.

    If you select the **Create a plan** option again after creating a plan, you will see the following message.

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Note: Only the most recent upgrade plan without any upgrade plan items is retained. For example, if the most recent upgrade plan is created without upgrade plan items, it automatically overrides any earlier upgrade plan that also doesn't have upgrade plan items. There can be more than one upgrade plan with upgrade plan items.

In the Upgrade Plans list, there can be several upgrade plans with upgrade plan items and only the recent upgrade plan with no upgrade plan items.

Note: An instance can have only one active upgrade plan at a time, regardless of whether the plan includes upgrade plan items. Only the most recent upgrade plan is in active state as it automatically gets applied to the current upgrade.

- View generated upgrade plan: This is an alternate way to view the recently created upgrade plan. This option is helpful when you reload the page and the success message banner disappears.

  Note: This option is visible only after the upgrade plan is created.

Once the upgrade plan is finally selected, the **Select upgrade plan** and **Create a new one** options are disabled.

4. Automate upgrade tasks.
   There are two different kinds of upgrade tasks in this step.
   - Default automated tasks: These tasks are completed automatically.
     - Generate upgrade preview: It helps you understand how your instance will be impacted after the upgrade even without having it really upgraded.
     - Create upgrade update sets: The automatic creation of the upgrade update sets capture changes and helps during review of the skipped records.
   - Optional automated tasks: You have the option of completing these tasks automatically.
     - Generate the ATF tests: Automatic generation of the ATF tests using the ATF test generator and cloud runner store application.

       Note: These ATF tests run automatically post-upgrade.

     - Upgrade store applications to the latest version: By default, all the applications are being upgraded to the latest version. If you don’t want them to be upgraded to the latest version, you can disable the toggle and manually select a compatible version during the store application upgrade step.
5. Conduct pre-testing.
   This step captures all the tests required to be executed after the upgrade.

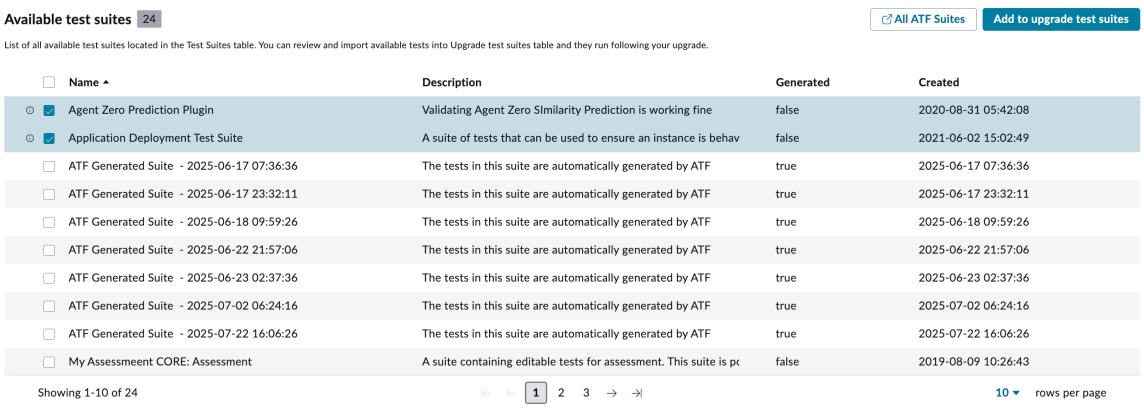
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- Generate tests: Auto-generates regression tests with the use of ATF Test generator tool. You can review the start time and the total time to complete the test generation.

  Note: The auto-generated ATF test suites are added to the Upgrade Test Suites table and are executed automatically post-upgrade.

  Select **Status** to check the status of the generated tests. You can also cancel the test generation process by selecting **Cancel**.

- Create additional tests: Review the existing tests or create additional tests to complete upgrade faster.
- Upgrade test suites: The auto-generated regression tests in the Generate tests section are added here automatically when they are generated. You can also add more tests by selecting it from the Available test suites table section.
- Available test suites: Review the list of available test suites. You can also select the tests you want to add to the Upgrade test suites section. Only the selected tests are executed automatically after the upgrade.



Note: The available test suites are already successfully passed test suites.

6. Preview application upgrades.

   You can preview all the store applications with their updates for your instance. If the upgrade preview generation is in progress, you can track it using the Execution tracker link.

   - Selected Apps: You can review the following information:
     - Customized apps: Number of apps that have been customized
     - New apps to be installed: Total number of new apps to be installed for the upgrade
     - Apps to be upgraded: Total number of existing apps whose version need to be upgraded

     Note: If you have disabled Upgrade store applications to the latest version previously, the value for Apps to be upgraded depends on the manual selection of the Upgrade store applications section.

   - Update Otto App Suite: Use the Update Otto App Suite section to manage application version compatibility. When you upgrade an application in the compatibility matrix, the system automatically updates all related applications to compatible versions.

     Select **Suite Version** to select a suite version from the dropdown menu. The dropdown menu shows the suite versions available in the selected version. For example, if you want to

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upgrade your instance to Australia, only the suite versions available in Australia are shown in the dropdown menu options.

Note: Select None as the Suite Version option if you don't want to update Otto App Suite.

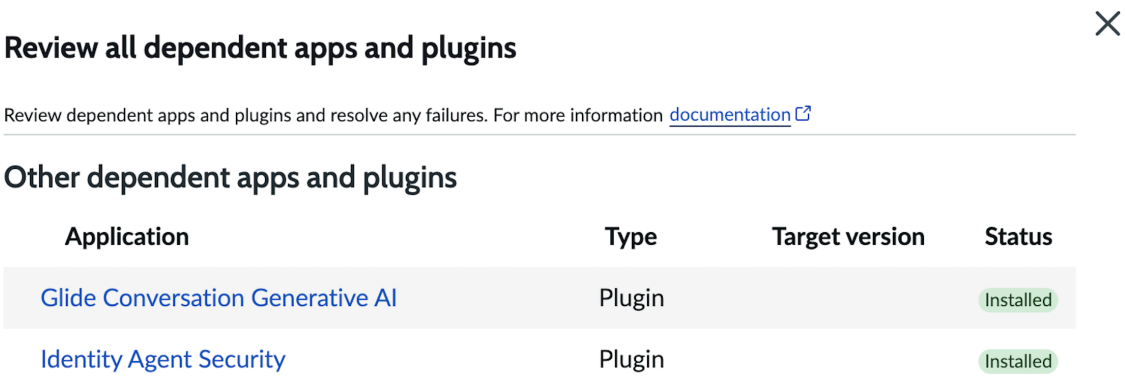
Select Execution tracker link to track the progress of the list. The Execution tracker form shows up. Select Show status related link to see the current status.

Note: Only the applications whose upgraded versions are available to be upgraded in the selected suite version are shown in the list. No new applications can be installed here.

- Application: Name of the application within the selected suite version
- Status: Status of the application
- Current Version: Current version of the application
- Latest Version: Latest available version of the application
- Selected Version: Configured version of the application in the selected suite version

Note: Downgrading of application versions is not allowed.

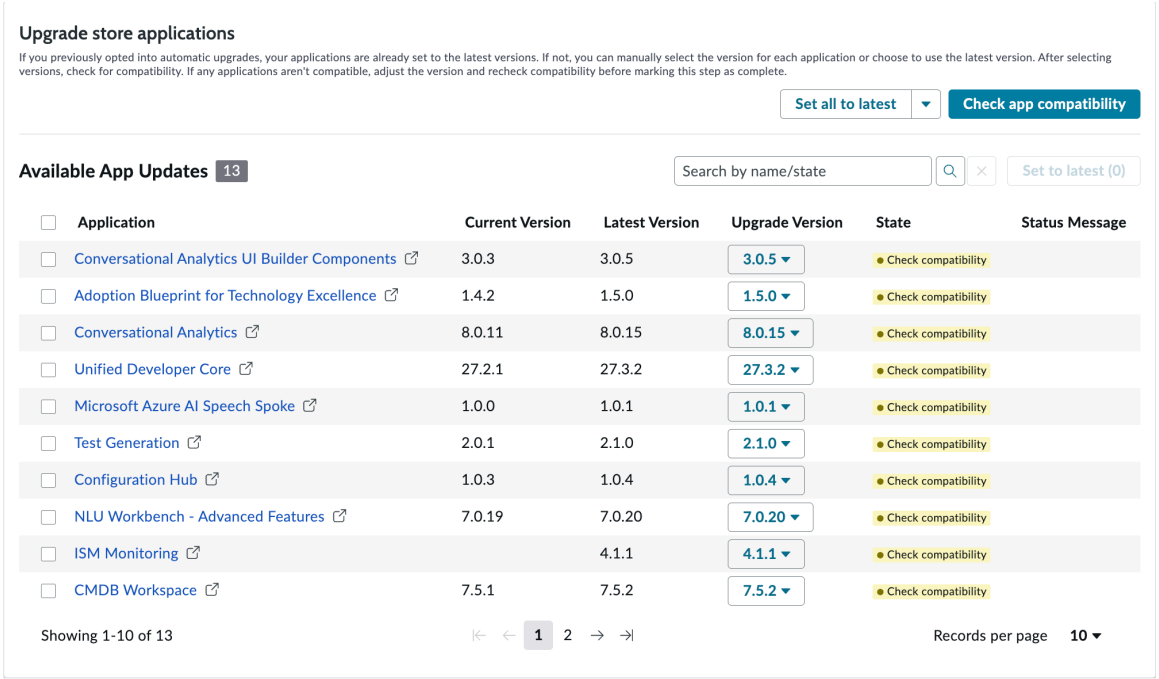
Select **Dependent apps and plugins** to see the calculated list of all dependent applications and plugins for the Otto App Suite applications list.



For example, if you have 5 applications in the selected version of Otto App Suite, the Otto App suite dependencies modal lists only the dependencies of these 5 applications.

- Upgrade store applications

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- Application: Name of the application
- Current version: Current version of the application on the instance
- Latest version: Latest available version of the application
- Upgrade Version: Selected version of the application to which you want to upgrade
- State: State of the application based on the selected version for the upgrade. It displays either **Compatible** or **Check compatibility** based on the selected version if its compatible or not.
- Status message: Provides you more information about app compatibility if there are any failures after running **Check app compatibility**.

> **Note:** If you have previously selected the automatic upgrade option, the applications are upgraded to the latest version by default.
>
> If you haven't selected the automatic upgrade option previously, you get an option to select the version of the application to which you want to upgrade.

The number of Apps to be upgraded gets updated depending on the manual selection of the apps for the selected versions. For example, if you select **Set all to minimum version** for all the applications, the number of Apps to be upgraded remains unchanged. Select **Set all to latest** if you want to update all the applications to the latest version available. Ensure to check the compatibility of the apps after selecting its versions by selecting **Check app compatibility**. If an application is not compatible, modify the version to make it compatible before moving on to the next step.

> **Note:** You can proceed to the next step of the upgrade process only after checking the compatibility of the applications.

Select **View upgrade plan** in the Selected Apps section to see all the items along with their selected versions being added to the upgrade plan at the end of this step.

You can now edit this step by selecting **Edit step** even after marking it complete.

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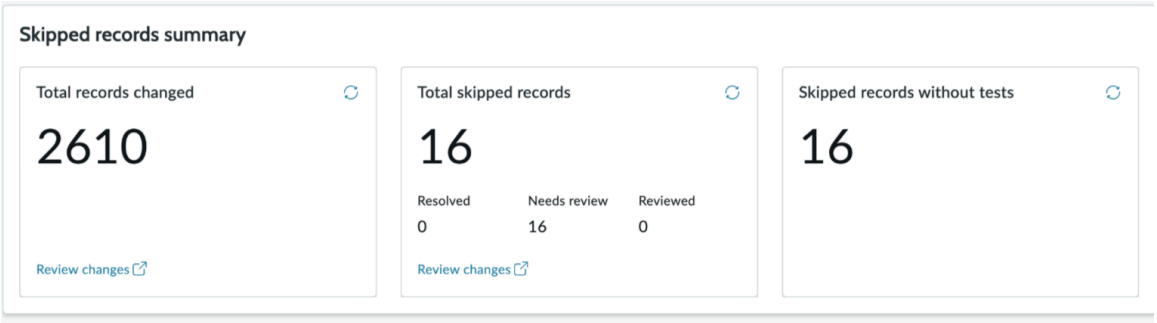
Note: The **Edit step** option is available only when you mark this step as complete and before scheduling or starting any upgrade. Once you select **Edit step**, the next step in the Pre-upgrade process resets. You can again proceed to the next step of the upgrade process only after checking the compatibility of the applications.

7. Review predicted skipped records.
   Skipped records occur when customizations on your instance prevent certain files from being automatically updated during an upgrade.

   Select **Regenerate Preview** to regenerate a preview either for all the applications or for only the modified applications in the previous step.

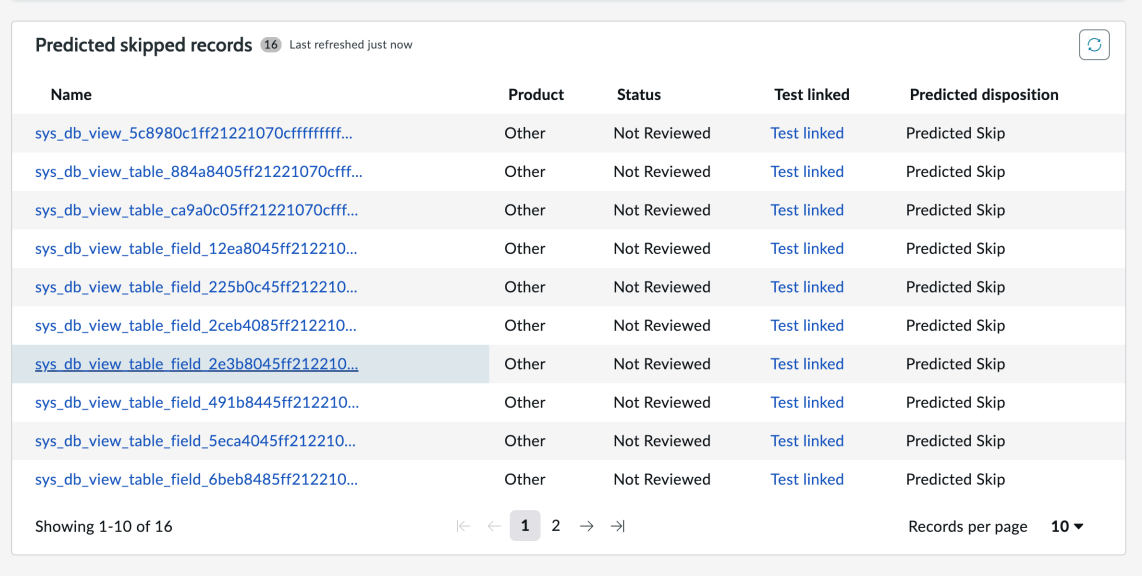
   Note: Set the glide.upgrade_center.regenerate_upgrade_preview property to `true` to regenerate the preview for all the apps.

   - Upgrade preview: You can view the current version and the previewing version of the upgrade in this section. You can also see if there is any upgrade been scheduled.
   - Skipped record summary: You can view the following information.



     - Total records changed: Gives the total number of records that have changed since last upgrade. Select the Review changes link to see the list of records that have changed.
     - Total skipped records: Shows the numbers of skipped records that have been resolved, total skipped records that need to be reviewed and the number of skipped records that have already been reviewed.
     - Skipped records without tests: States the total number of skipped records that have tests. The Test linked link in the Skipped records section points to the list of tests of the skipped records that have associated tests.
   - Predicted skipped records: Shows the total number of predicted skipped records

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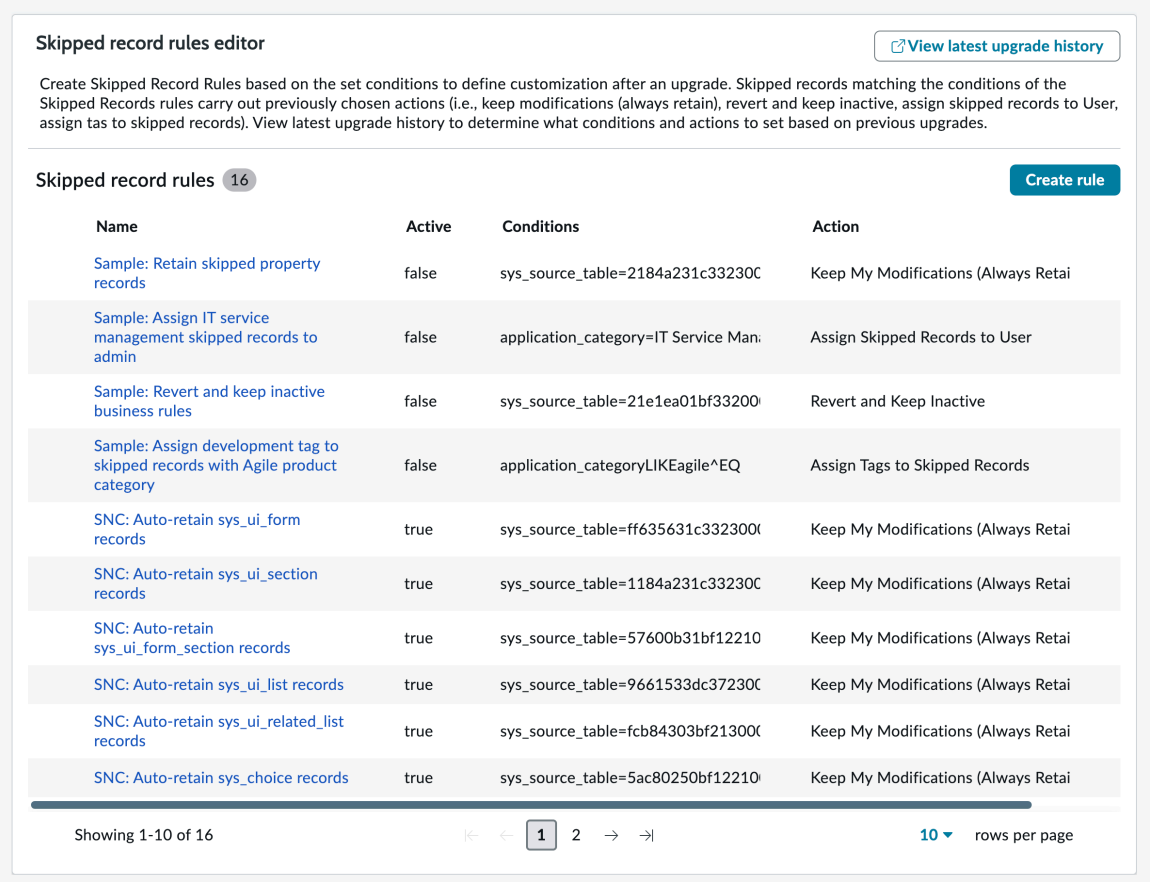
- Name: Name of the skipped record
- Product: Name of the record that the skipped record belongs to
- Status: Status of the skipped record if it has been resolved, reviewed or needs to be reviewed
- Test linked: Links to the list of test associated with the skipped record. It helps you know the reason why a certain record has been skipped by viewing all the tests associated with the skipped record.
- Prediction disposition: Action predicted to be performed on the skipped record during the selected upgrade.
  - Predicted Insert: The system is predicted to insert a new record.
  - Predicted Update: The system is predicted to update this record.
  - Reverted: This record was reverted to the base version, and won't be skipped on the next upgrade.
  - Predicted Skip: The system won't change this record in order to preserve customizations.
  - Predicted Skip (Manual Merge): The system won't change this record because updating it requires manual intervention.
  - Predicted Skip (Apply Once): The system is predicted to skip this record because it had already applied an update from an xml file in the apply once folder.

- Skipped record rules editor: Use the skipped record rules editor to create skipped record rules based on the set conditions to define customizations after an upgrade.

Note: This step is completed within the Review predicted skipped records step.

The skipped records matching the set conditions in the skipped record rules editor, perform the previously selected actions. Select **View latest upgrade history** to determine the actions and conditions to be set depending on the previous upgrades.

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The skipped record rules shows the list of skipped record rules on the instance.

- Name: Name of the rule
- Active: States if the rule is active or not
- Conditions: Conditions set by the rule to filter the skipped records
- Action: Previously chosen action for the specific rule
- Order: The order in which the rules are sorted

Select **Create rule** if you want to create any additional skipped record rules.

You can do the following in this pre-upgrade activity.

- Review the list of predicted skipped records in the Preview module and decide which versions of the files to be retained.
- You can choose some customizations to be reverted to the base version, allowing them to go through the entire upgrade process without being skipped.
- Ensure to review and update the list of skipped records after the upgrade.
- Once done with the reviewing of the skipped records, complete the next activities required in the pre-upgrade process.

Implement instance upgrade activities on a sub-prod instance

Implement the instance upgrade tasks for a successful upgrade on your instance.

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Before you begin

Note: You will be able to perform the Instance upgrade tasks only after completing the pre-upgrade tasks.

Role required: upgrade_admin

Procedure

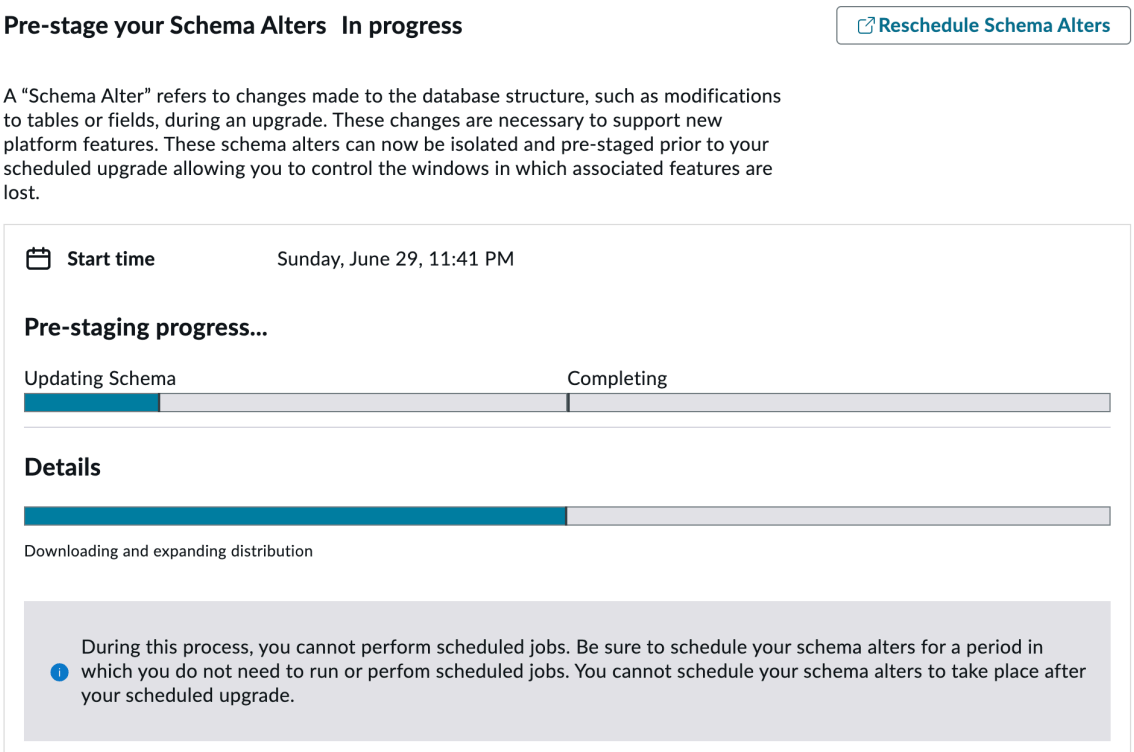
1. Upgrade your instance.
   In this section you will see the following information:
   - Scheduled Upgrade: It shows the current status of the upgrade on the instance. You can see one of the following stages in this section.
     - Not scheduled
     - Scheduled
     - Running or in progress
     - Complete

     Select **Reschedule upgrade** if you want to reschedule the upgrade. If there is no upgrade scheduled, select **Schedule upgrade** to schedule an upgrade. You are now redirected to ServiceNow Support to schedule an upgrade for your instance. You can then select one of the available versions and **Submit**. This automatically creates the upgrade request for your instance.

     When the status is Complete, you can view when the upgrade started and completed, as well as the total duration. By default, you are in the America/Los Angeles timezone. You can modify the timezone preference by navigating to **User Menu** > **Preferences** > **Language & Region**. You can then select the required timezone from the drop down menu.
   - Pre-stage your Schema Alters: This section notes the changes in the database during the upgrade process on your instance. It is to be noted that these database modifications are necessary for new platform features. You can now pre-stage the schema alters so that the actual upgrade process is expedited.

     Note: It is recommended to pre-stage your schema changes which accelerates the actual upgrade process. By default, it is scheduled one week prior to the upgrade. During this time, no scheduled upgrade can process. The schema alter process can't start after the scheduled upgrade.

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You can see the start time of the scheduled schema alters. Select **Reschedule Schema Alters** to update the scheduled time for schema alters.

> **Note:** The option of seeing the schema alters and updating the starting time is applicable only if the glide.staged_upgrade.enabled property is enabled or set to true. By default, the glide.staged_upgrade.enabled property is set to false.

2. Select **Mark as complete** when the upgrade process completes.

Implement post-upgrade activities on a non-prod instance

Implement the post-upgrade tasks for a successful upgrade completion on your instance.

Before you begin

> **Note:** You will be able to perform the post-upgrade tasks only after completing the pre-upgrade and instance upgrade tasks.

Role required: upgrade_admin

Procedure

1. Review skipped records.
   You can review the skipped records that were identified during the pre-upgrade steps and during the upgrade. You can see the following information:

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- Skipped records summary: This section shows the summary of all the skipped records
  - Total records changed: States the total number of records that have been changed since last upgrade. Select Review changes link if you want to see the changes in the records.
  - Total skipped records: States the total number of records that have been skipped during the upgrade. It also shows the number of records that have already been reviewed and need to be reviewed.
  - Skipped records without tests: States the total number of skipped records that have tests. The Test linked link in the Skipped records section points to the list of tests of the skipped records that have associated tests.
- Skipped records: This section shows the list of records that have been skipped during the upgrade.
  - Name: Name of the skipped file
  - Product: Name of the product where the skipped file belongs to
  - Priority: Priority of the skipped record to get it resolved
  - Status: States if the skipped file has been reviewed or not
  - Test linked: Links to the list of test associated with the skipped record. It helps you know the reason why a certain record has been skipped by viewing all the tests associated with the skipped record
  - Predicted Disposition: Action performed on the skipped record during the upgrade
  - Assigned to: Owner of the skipped record

    Note: Select **Assign** to assign a skipped record to get it resolved.

  - Plugin: The app id where the skipped record is found

2. Store application upgrades.
   You can now view the list of applications that have been upgraded depending on the selections made in the Preview application upgrades step in the Pre-upgrade stage.

   Note: It is to be noted that the applications that were not selected during the preview or dont have a newer version available are not listed.

   You can see the following information in this task.

   - App updates: Summary of the applications.
     - Total apps: Total apps the current instance has
     - Apps updated: Total apps that got upgraded during the upgrade or post upgrade
     - Apps to be updated: Total apps that have updates but are yet to be upgraded
     - Scheduled Apps: Total selected apps for scheduled upgrade at later point of time
   - Otto update suite: Select **Suite Version** to select a suite version from the dropdown menu. The dropdown menu shows the suite versions available for the Otto App suite.

     Note: Only the applications whose upgraded versions are available to be upgraded in the selected suite version are shown in the list. No new applications can be installed here. The applications that are already updated in the Preview application upgrade step are not listed in the list.

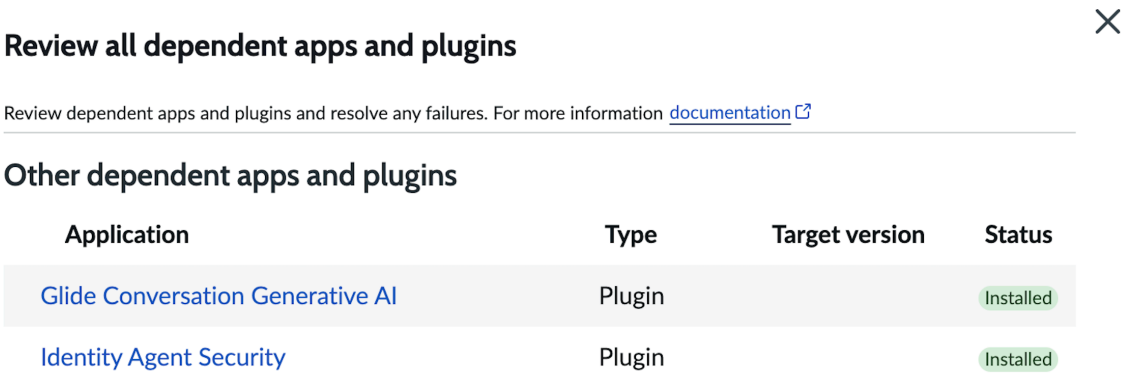
     Select **Updated suite** if you want to upgrade all the applications mentioned in the list.

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- Application: Name of the application within the selected suite version
- Current Version: Current version of the application
- Latest Version: Latest available version of the application
- Selected Version: Configured version of the application in the selected suite version
- Status: Status of the application

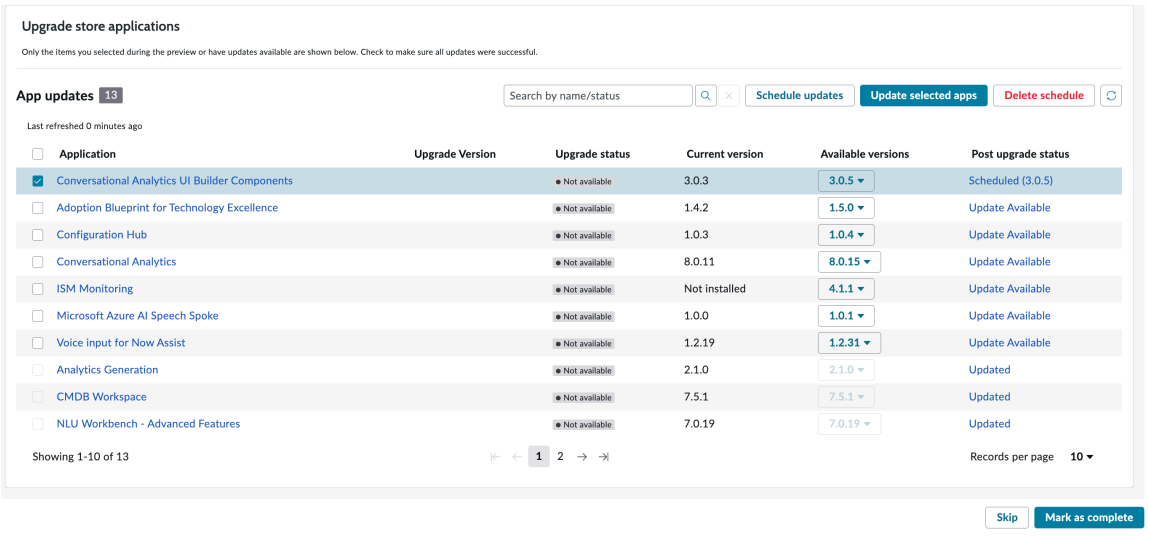
Note: Downgrading of application versions is not allowed.

Select **All dependent apps and plugins** to see the calculated list of all dependent applications and plugins for the Otto update suite applications list.



For example, if you have 5 applications in the selected version of Otto update suite, the Otto update suite dependencies modal lists only the dependencies of these 5 applications.

- Upgrade store applications: List of applications that have been selected in the pre-upgrade stage and have updated versions available.



- Application: Name of the application
- Upgrade version: Selected version of the application to which you want to upgrade. This was selected before upgrade starts in preview apps page
- Upgrade status: States if the application is in the Store

Note: The applications that are installed on the instance show up at the end of the applications list.

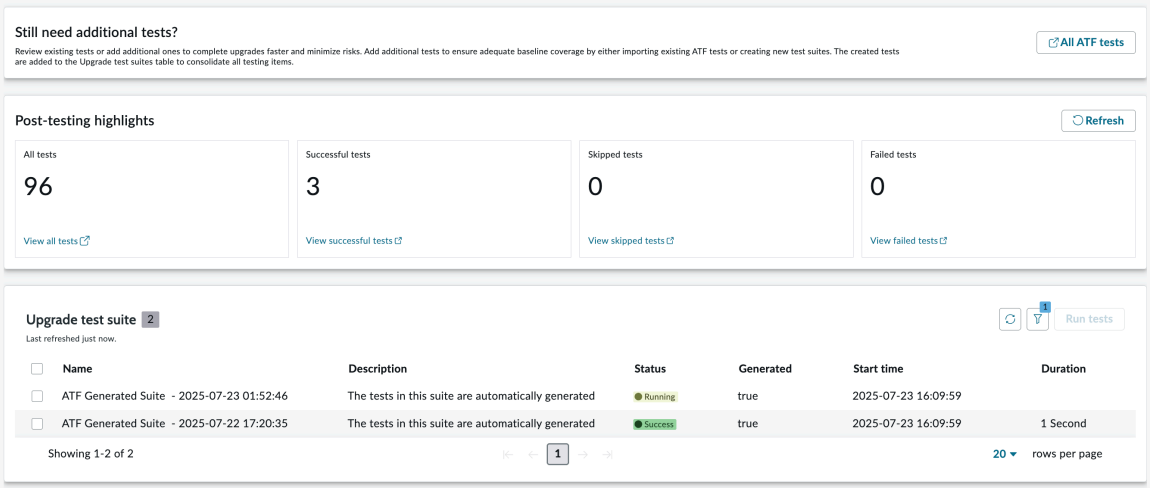
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- Current version: States the current version of the application
- Available versions: States the most updated version available for upgrade
- Post upgrade status: States the status of the application. For example, the status indicates whether an application update is Scheduled, Update Available, or already Updated. You can also see the version for the scheduled applications.

Select **Update selected apps** to upgrade the selected apps to the available version immediately. You can also schedule the upgrades by selecting **Schedule updates**. You can also search for an application based on its name or status.

Use **Sync Now** to update the list of installed applications that were added or upgraded outside the upgrade process. For example, if you install or update an app through the App Manager, select **Sync Now** to reflect the latest application status.

3. Conduct post-testing.
   In order to conduct post-testing, the selected ATF tests are executed to ensure system functionality and integrity of the existing features.



You can review the following information in this step:

- Still need additional tests: You can review the existing tests and add more tests if required for a seamless and faster upgrade. You can either import existing ATF tests or create new test suites.

  Note: The created tests or test suites are added to the Upgrade test suite table for consolidated testing.

- Post-testing highlights: This section states the number of total tests, passed and failed tests, and the skipped records during the upgrade process. You can also select View successful tests and View failed tests links to see the list of tests that passed or failed. Select View skipped tests to view the list of all the skipped tests in the upgrade.
- Upgrade test suite: This section lists the recently created test suites that were additional tests for faster upgrade.
  - Name: Name of the test suite
  - Description: Description of the test suite
  - Status: Status of the test suite if it has been tested or not
  - Generated: States if it has been generated or recently created

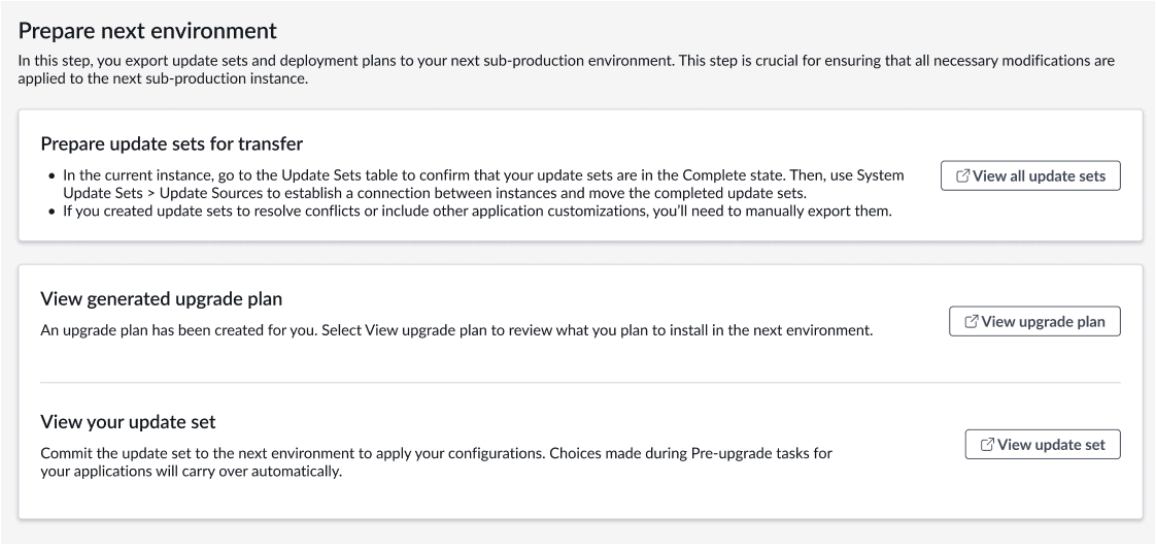
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- Start time: States the start time of testing of the test suite
- Duration: States the total duration for the testing of the test suite

- ATF troubleshooting agent: Select ATF troubleshooting agent to identify the root cause of test failures on specific metadata. See ATF troubleshooting agent for more information.

4. Prepare next environment.

   In this step, you can see the currently selected upgrade plan. You then prepare the update set and export it to the next production or non-production instance. This task is used to ensure that all necessary modifications are applied to the next production or non-production instance.



   You can see the following information in this task:

   - Prepare update sets for transfer: Check the Update Sets Table and ensure that your update sets are in Complete state. Once they are completed, you can move the update sets to the next production or non-production instance. If you have created new update sets and included other apps customizations, you can manually export them to the next instance. Select **View all update sets** to review your update sets in the Update Sets Table table.
   - View generated upgrade plan: View the upgrade plan created automatically for you to install in the next environment. Select **View update plan** to review the update plan that has been created for you.
   - View your update set: Commit the selected update set to the next environment to apply your configurations. Select **View update set** to download the update set.

     Note: The selection made during the Pre-upgrade tasks for your applications are automatically included.

5. Select **Mark as complete** to complete the sub-production tasks in a non-production instance.

Access guided upgrade on a production instance

Follow the guided upgrade steps to experience the seamless upgrade on your production instance.

Before you begin
Role required: upgrade_admin

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Procedure

1. Access Upgrade Console in one of the following ways.

Option	Navigation
Using the application navigator	Navigate to **All** > **Admin Center** > **Upgrade Console**.
Using Admin tab option	Navigate to **Admin** > **Upgrade Console**.
Using Admin tab and Admin Home option	**a.** Navigate to **All** > **Admin Center** > **Admin Home**. **b.** Select the Upgrade Console link in the In stance Upgrade tile.

Note: By default, you are in the Overview tab at the end of this step.

The Upgrade Console landing page shows up.

2. Access the guided upgrade in one of the following ways.

Option	Steps
Using Get started button **Note: This option is available only when you haven't started the upgrade yet.**	**a.** Select **Get started** in the Newest version tile under Get started on your upgrade sec tion. **b.** Select the Guided upgrade version that you want to implement on your instance.
Using Guided upgrade tab option **Note: This tab is visible only if there's an ongoing upgrade in the instance.**	**a.** Select the **Guided upgrade** tab on the top of the Upgrade Console landing page. **b.** Select **Resume upgrade** to continue with the upgrade process. You can also select **End session** if you want to cancel the ongo ing upgrade process.

3. Complete the Select upgrade, Pre-upgrade, Instance upgrade, and Post-upgrade tasks to complete the upgrade process on your production instance.

Implement pre-upgrade activities on a prod instance

Complete the pre-upgrade tasks for a successful upgrade experience on your production instance.

Before you begin

Note: For each step, you will have the option to either skip the step or mark complete and only then move to the next guided upgrade step.

Role required: upgrade_admin

Procedure

1. Choose an upgrade plan.
   There are two options to choose your upgrade plan.

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- Select an existing one: You can import update sets to apply or merge upgrade plans for your upgrades. This option is selected by default.

  In order to apply an existing upgrade plan, you have the following options:

  - Import update sets: You must first import update sets before selecting an existing upgrade plan.

    a. Select **Import update sets** to import an update set. The Retrieve Update Sets list shows up.

    b. Select the Import Update Set from XML related link to select the update set to be imported. The Import XML page shows up.

    c. Select an already existing update set using **Choose file** and then select **Upload**.

    The selected update set gets uploaded in the current upgrade plan. The current upgrade plan shows up on the Retrieve Update Sets list.

    d. Select the plan from the Retrieve Update Sets list. The Retrieve Update Set form shows up with all its associated customer updates.

    e. Select **Preview Update Set**. The Update Set Preview modal shows up.

    f. Once the previewing of the update set is completed successfully, select **Commit Update Set**. The Update Set Commit modal shows up.

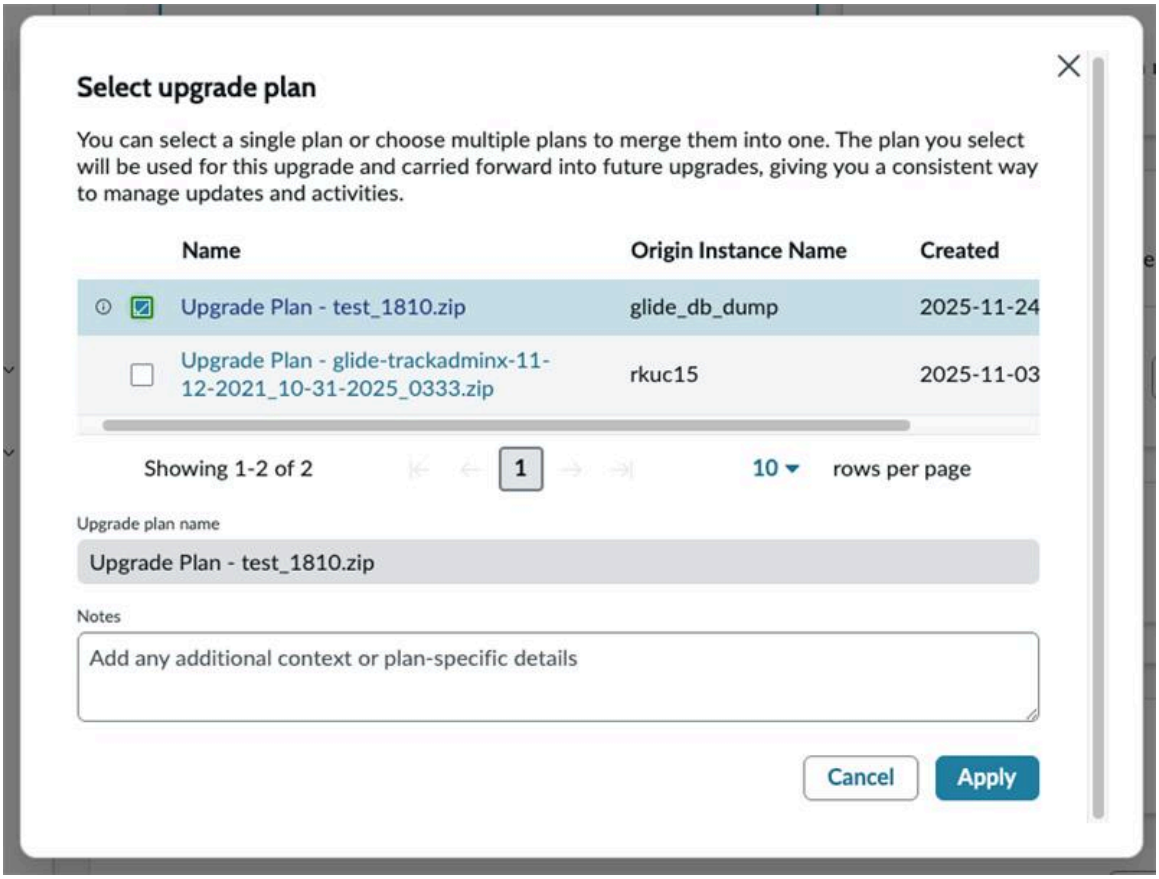
    Note: This option is visible only after the successful completion of update set preview.

  - Select an existing upgrade plan: You can view the imported plans to choose or can select multiple plans or merge them into one plan.

    Note: This option considerably reduces rework with an upgrade plan, maintains accuracy and makes your upgrade process seamless.

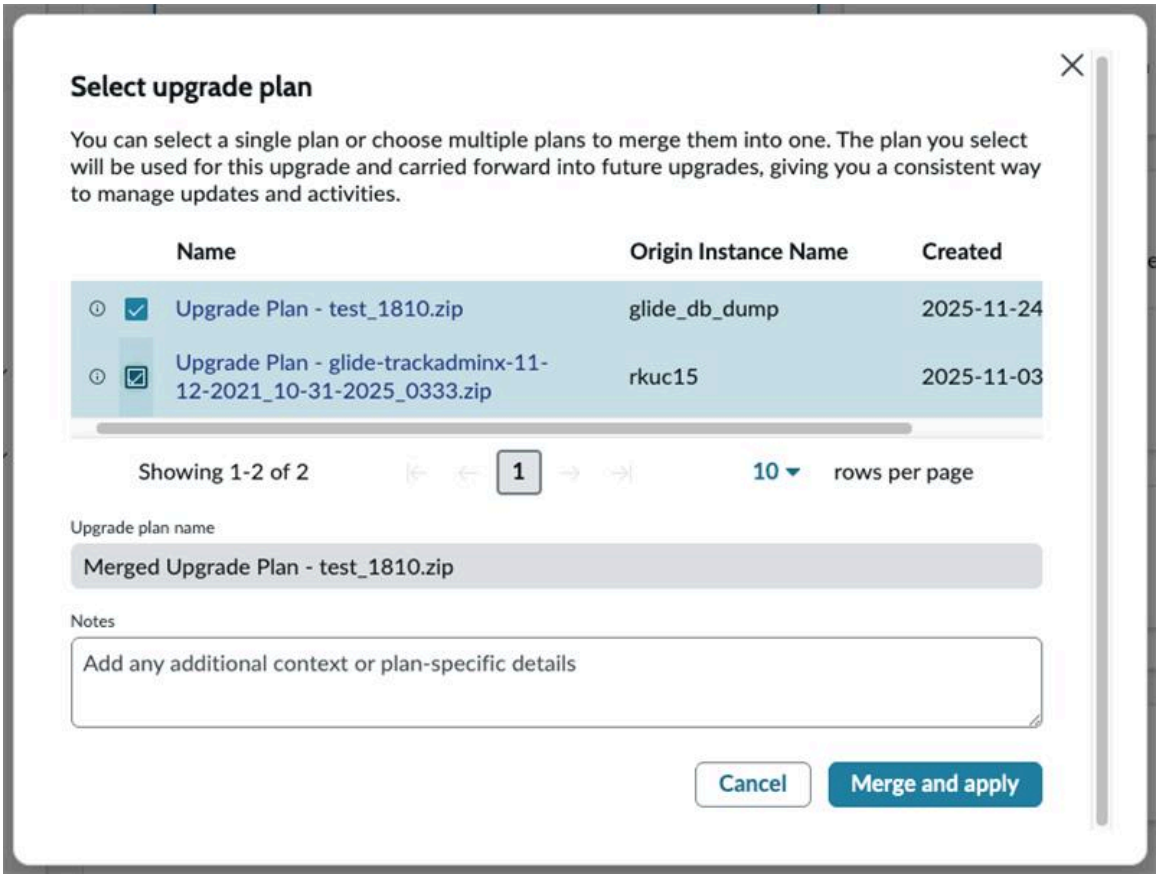
    You will see the following modal when you select Select upgrade plan. You can then select either one upgrade plan or multiple plans to be merged and applied to the current upgrade.

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Note: The **Apply** option is visible only when you select one upgrade plan to be applied to the current upgrade.

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Note: The **Merge and apply** option is visible only if you have selected multiple upgrade plans. The upgrade plan name changes as per the selection of upgrade plans.

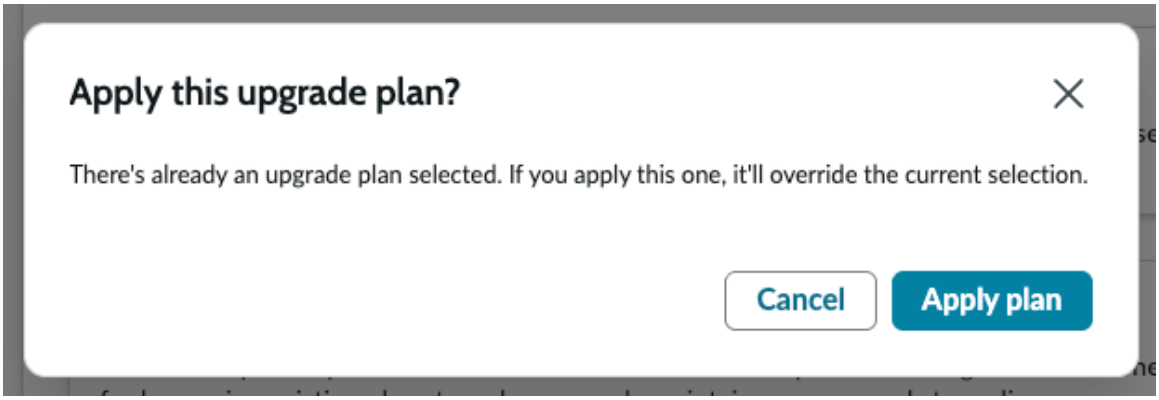
When merging multiple upgrade plans, upgrade plan items that appear in more than one plan are used in the merged plan by their highest version. This ensures consistency and avoids version conflicts in the resulting merged plan.

- Create a new one: You can get started with creating a new plan for your instance upgrade.
  - Create an upgrade plan: Select **Create a plan** to start creating the new upgrade plan. Select the Upgrade Plan link from the success message banner to view the created upgrade plan.

    Note: The success message banner is generated immediately after the upgrade plan is created by selecting **Create a plan** and stays visible until the page is reloaded.

    If you select the **Create a plan** option again after creating a plan, you will see the following message.

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Note: Only the most recent upgrade plan without any upgrade plan items is retained. For example, if the most recent upgrade plan is created without upgrade plan items, it automatically overrides any earlier upgrade plan that also doesn't have upgrade plan items. There can be more than one upgrade plan with upgrade plan items.

In the Upgrade Plans list, there can be several upgrade plans with upgrade plan items and only the recent upgrade plan with no upgrade plan items.

Note: An instance can have only one active upgrade plan at a time, regardless of whether the plan includes upgrade plan items. Only the most recent upgrade plan is in active state as it automatically gets applied to the current upgrade.

- View generated upgrade plan: This is an alternate way to view the recently created upgrade plan. This option is helpful when you reload the page and the success message banner disappears.

  Note: This option is visible only after the upgrade plan is created.

Once the upgrade plan is finally selected, the **Select upgrade plan** and **Create a new one** options are disabled.

2. Preview application upgrades.

   You can preview all the store applications with their updates for your instance. If the upgrade preview generation is in progress, you can track it using the Execution tracker link.

   - Selected Apps: You can review the following info
     - Customized apps: Number of apps that have been customized
     - New apps to be installed: Total number of new apps to be installed for the upgrade
     - Apps to be upgraded: Total number of existing apps whose version need to be upgraded

     Note: If you have disabled Upgrade store applications to the latest version previously, the value for Apps to be upgraded depends on the manual selection of the Upgrade store applications section.

   - Upgrade store applications

     - Application: Name of the application
     - Current version: Current version of the application on the instance
     - Latest version: Latest available version of the application

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- Upgrade Version: Selected version of the application to which you want to upgrade
- State: State of the application based on the selected version for the upgrade. It displays either **Compatible** or **Check compatibility** based on the selected version if its compatible or not.
- Status message: Provides you more information about app compatibility if there are any failures after running **Check app compatibility**.

Note: If you have previously selected the automatic upgrade option, the applications are upgraded to the latest version by default.

If you haven't selected the automatic upgrade option previously, you get an option to select the version of the application to which you want to upgrade.

The number of Apps to be upgraded gets updated depending on the manual selection of the apps for the selected versions. For example, if you select **Set all to minimum version** for all the applications, the number of Apps to be upgraded remains unchanged. Select **Set all to latest** if you want to update all the applications to the latest version available. Ensure to check the compatibility of the apps after selecting its versions by selecting **Check app compatibility**. If an application is not compatible, modify the version to make it compatible before moving on to the next step.

Note: You can proceed to the next step of the upgrade process only after checking the compatibility of the applications.

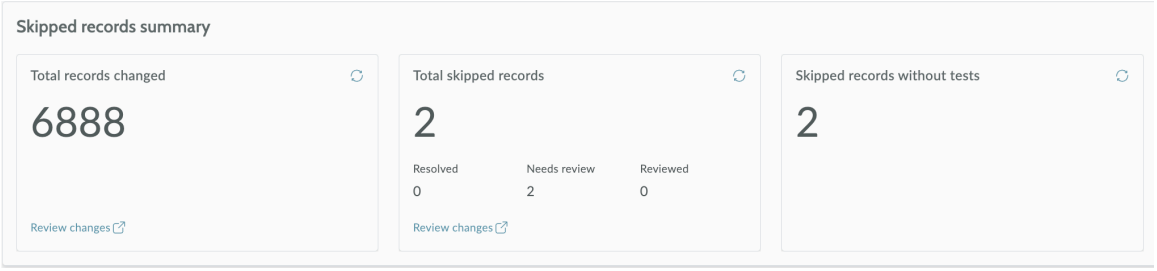
Select **View upgrade plan** in the Selected Apps section to see all the items along with their selected versions being added to the upgrade plan at the end of this step.

You can now edit this step by selecting **Edit step** even after marking it complete.

Note: The **Edit step** option is available only when you mark this step as complete and before scheduling or starting any upgrade. Once you select **Edit step**, the next step in the Pre-upgrade process resets. You can again proceed to the next step of the upgrade process only after checking the compatibility of the applications.

If automatic upgrade has not been opted in, you can manually select the versions of the applications to be upgraded. Select **Set all to latest** if you want to update all the applications to the latest version available. Ensure to check the compatibility of the apps after selecting its versions by selecting **Check app compatibility**. If an application is not compatible, modify the version to make it compatible before moving on to the next step.

3. Review predicted skipped records.
   Skipped records occur when customizations on your instance prevent certain files from being automatically updated during an upgrade.
   - Upgrade preview: You can view the current version and the previewing version of the upgrade in this section. You can also see if there is any upgrade been scheduled.
   - Skipped record summary: You can view the following information.



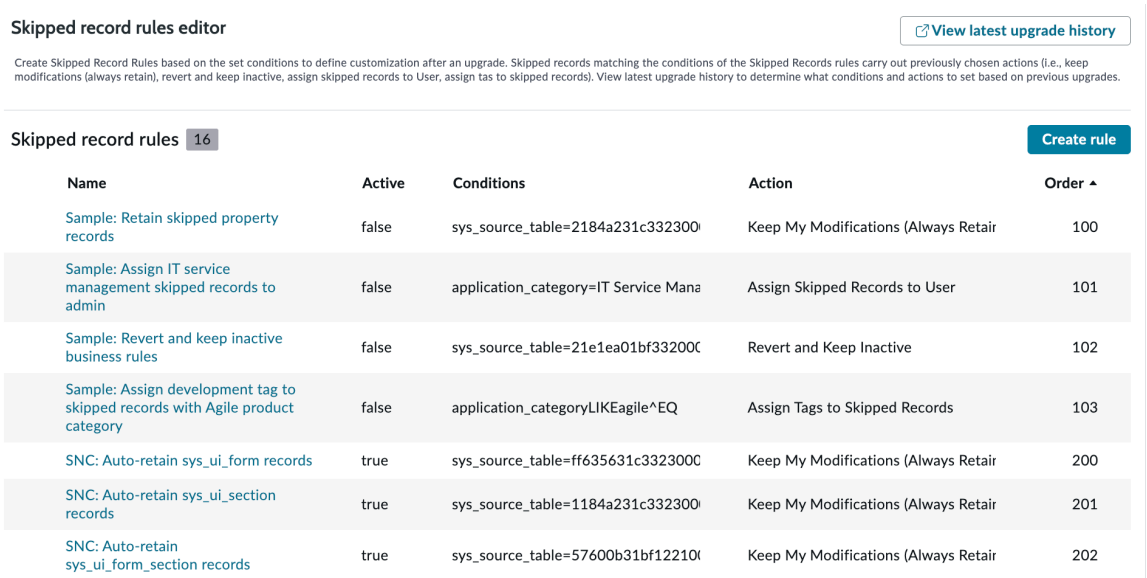
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- Total records changed: Gives the total number of records that have changed since last upgrade. Select the Review changes link to see the list of records that have changed.
- Total skipped records: Shows the numbers of skipped records that have been resolved, total skipped records that need to be reviewed and the number of skipped records that have already been reviewed.
- Skipped records without tests: States the total number of skipped records that have tests. The Test linked link in the Skipped records section points to the list of tests of the skipped records that have associated tests.

- Predicted skipped records: Shows the total number of predicted skipped records
  - Name: Name of the skipped record
  - Product: Name of the record that the skipped record belongs to
  - Priority:
  - Status: Status of the skipped record if it has been resolved, reviewed or needs to be reviewed
  - Prediction disposition: Action predicted to be performed on the skipped record during the selected upgrade.
    - Predicted Insert: The system is predicted to insert a new record.
    - Predicted Update: The system is predicted to update this record.
    - Reverted: This record was reverted to the base version, and won't be skipped on the next upgrade.
    - Predicted Skip: The system won't change this record in order to preserve customizations.
    - Predicted Skip (Manual Merge): The system won't change this record because updating it requires manual intervention.
    - Predicted Skip (Apply Once): The system is predicted to skip this record because it had already applied an update from an xml file in the apply once folder.
  - Plugin: The app id where the skipped record is found
- Skipped record rules editor: Use the skipped record rules editor to create skipped record rules based on the set conditions to define customizations after an upgrade.

Note: This step is completed within the Review predicted skipped records step.

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The skipped records matching the set conditions in the skipped record rules editor, perform the previously selected actions. Select **View latest upgrade history** to determine the actions and conditions to be set depending on the previous upgrades.

The skipped record rules shows the list of skipped record rules on the instance.

- Name: Name of the rule
- Active: States if the rule is active or not
- Conditions: Conditions set by the rule to filter the skipped records
- Action: Previously chosen action for the specific rule
- Order: The order in which the rules are sorted

Select **Create rule** if you want to create any additional skipped record rules.

You can do the following in this pre-upgrade activity.

- Review the list of predicted skipped records in the Preview module and decide which versions of the files to be retained.
- You can choose some customizations to be reverted to the base version, allowing them to go through the entire upgrade process without being skipped.
- Ensure to review and update the list of skipped records after the upgrade.
- Once done with the reviewing of the skipped records, complete the next activities required in the pre-upgrade process.

Implement instance upgrade activities on a prod instance

Implement the instance upgrade tasks for a successful upgrade on your prod instance.

Before you begin

Note: You will be able to perform the Instance upgrade tasks only after completing the pre-upgrade tasks.

Role required: upgrade_admin

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Procedure

1. Upgrade your instance.
   In this section you will see the following information:
   - Scheduled Upgrade: It shows the current status of the upgrade on the instance. You can see the following stages in this section.
     - Not scheduled
     - Scheduled
     - Running or in progress
     - Complete

     Select **Reschedule upgrade** if you want to reschedule the upgrade. If there is no upgrade scheduled, select **Schedule upgrade** to schedule an upgrade. You are now redirected to ServiceNow Support to schedule an upgrade for your instance. You can then select one of the available versions and **Submit**. This automatically creates the upgrade request for your instance.

     When the status is Complete, you can view when the upgrade started and completed, as well as the total duration. By default, you are in the America/Los Angeles timezone. You can modify the timezone preference by navigating to **User Menu** > **Preferences** > **Language & Region**. You can then select the required timezone from the drop down menu.
   - Pre-stage your Schema Alters: This section notes the changes in the database during the upgrade process on your instance. It is to be noted that these database modifications are necessary for new platform features. You can now pre-stage the schema alters so that the actual upgrade process is expedited.

     Note: It is recommended to pre-stage your schema changes which accelerates the actual upgrade process. By default, it is scheduled one week prior to the upgrade. During this time, no scheduled upgrade can process. The schema alter process can't start after the scheduled upgrade.

     You can see the start time of the scheduled schema alters. Select **Reschedule Schema Alters** to update the scheduled time for schema alters.

     Note: The option of seeing the schema alters and updating the starting time is applicable only if the glide.staged_upgrade.enabled property is enabled or set to true. By default, the glide.staged_upgrade.enabled property is set to false.
2. Select **Mark as complete** when the upgrade process completes.

Implement post-upgrade activities on a prod instance

Implement the post-upgrade tasks for a successful upgrade completion on your production instance.

Before you begin

Note: You will be able to perform the post-upgrade tasks only after completing the pre-upgrade and instance upgrade tasks.

Role required: upgrade_admin

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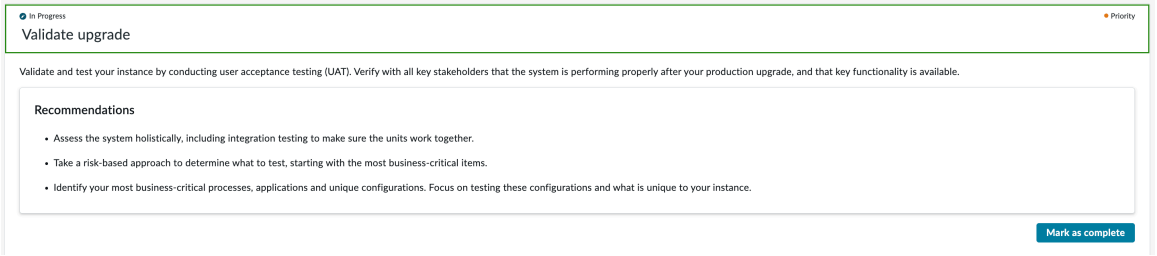
Procedure

1. Review skipped records.
   You can review the skipped records that were identified during the pre-upgrade steps and during the upgrade. You can see the following information:
   - Skipped records summary: This section shows the summary of all the skipped records
     - Total records changed: States the total number of records that have been changed since last upgrade. Select Review changes link if you want to see the changes in the records.
     - Total skipped records: States the total number of records that have been skipped during the upgrade. It also shows the number of records that have already been reviewed and need to be reviewed.
     - Skipped records without tests: States the total number of skipped records that have tests. The Test linked link in the Skipped records section points to the list of tests of the skipped records that have associated tests.
   - Skipped records: This section shows the list of records that have been skipped during the upgrade.
     - Name: Name of the skipped file
     - Product: Name of the product where the skipped file belongs to
     - Priority: Priority of the skipped records in which they are reviewed
     - Status: States if the skipped file has been reviewed or not
     - Predicted Disposition: Action performed on the skipped record during the upgrade
2. Store application upgrades.
   You can now view the list of applications that have been upgraded depending on the selections made in the Preview application upgrades step in the Pre-upgrade stage.

   Note: It is to be noted that the applications that were not selected during the preview or don't have a newer version available are not listed.

   You can see the following information in this task.
   - Upgrade store applications: List of applications that have been selected in the pre-upgrade stage and have updated versions available.
   - App updates: List of applications that have failed the upgrade.
     - Application: Name of the application
     - Upgrade version: The version that has been selected for the application before the upgrade starts in preview apps page
     - Upgrade status: States if the application is in the Store
     - Current version: States the current version of the application
     - Available versions: States the most updated version available for upgrade
     - Post upgrade status: States that if the application version is up to date after post upgrade
3. Validate your upgrade.
   Conduct User Accepting Testing (UAT) to ensure that the production instance is performing as expected after the upgrade.

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4. Select **Mark as complete** to complete the production tasks in a production instance.

Bulk application updates

The bulk application update console enables you to review, select, and update multiple applications in a single workflow, improving efficiency compared to updating applications individually through the Application Manager.

Benefits

As the number of applications and plugins in your ServiceNow instance increases, updating them individually through the Application Manager becomes increasingly time-consuming. The traditional method requires you to navigate to the Application Manager, search for each application, check the available version, and perform the installation one by one. This repetitive process is cumbersome and inefficient.

The bulk application update provides you a one-stop experience where you can:

- View all available application updates at once
- Select multiple applications to update in a single operation
- Preview changes and validate compatibility before applying updates
- Schedule updates for a future time to minimize system disruption

Performance considerations

Update duration depends on the number of applications selected for update:

- 4–5 applications: Approximately 5 minutes
- 200+ applications: Significantly longer (allow additional time)

Compatibility checks and test execution also extend update time, as the system downloads application packages and processes test results. Plan update operations during maintenance windows or off-peak hours when possible to minimize user impact.

When to use bulk updates vs. Application Manager

Use the bulk application update console when:

- You need to update multiple applications at once
- You want to preview and validate all changes before committing to any updates
- You need to schedule updates for a specific time
- You want to run automated tests on updates before they are applied

Use Application Manager when:

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- You need to update a single application
- You want to install new applications or plugins
- You need detailed information about an application's features or dependencies

Update multiple applications at once

Use the bulk application update console to review, select, and update multiple applications in a single workflow instead of updating them individually through the app manager.

Before you begin

Role required: upgrade_admin

About this task

The traditional method of updating applications requires you to navigate to the app manager, search for each application, and install updates one by one. This process becomes cumbersome as the number of applications and plugins in your system increases.

You can achieve the following:

- View all available application updates at once
- Select specific applications or all applications for update
- Preview changes before applying updates
- Run automated tests on selected updates
- Schedule updates for a future time or apply immediately
- Review results and troubleshoot any issues

Note: The update process can be time-consuming depending on the number of selected applications.

Procedure

1. Navigate to **Admin** > **Upgrade Console**.

   The Update apps card displays the number of available updates.

2. Review the update summary.
   - Total number of application updates available
   - Last sync date and time
   - Number of store application updates
   - Number of Now Assist application updates (if available)

   Note: Verify that the available updates match your expectations. The system syncs data with the ServiceNow store to display current version information.

3. Select **Update now** to begin the update wizard.
   The system initializes and displays the first step of the workflow.
4. Choose an upgrade plan.
   There are two options to choose your upgrade plan.

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- Select an existing one: You can import update sets to apply or merge upgrade plans for your upgrades. This option is selected by default.

  In order to apply an existing upgrade plan, you have the following options:

  - Import update sets: You must first import update sets before selecting an existing upgrade plan.

    a. Select **Import update sets** to import an update set. The Retrieve Update Sets list shows up.

    b. Select the Import Update Set from XML related link to select the update set to be imported. The Import XML page shows up.

    c. Select an already existing update set using **Choose file** and then select **Upload**.

    The selected update set gets uploaded in the current upgrade plan. The current upgrade plan shows up on the Retrieve Update Sets list.

    d. Select the plan from the Retrieve Update Sets list. The Retrieve Update Set form shows up with all its associated customer updates.

    e. Select **Preview Update Set**. The Update Set Preview modal shows up.

    f. Once the previewing of the update set is completed successfully, select **Commit Update Set**. The Update Set Commit modal shows up.

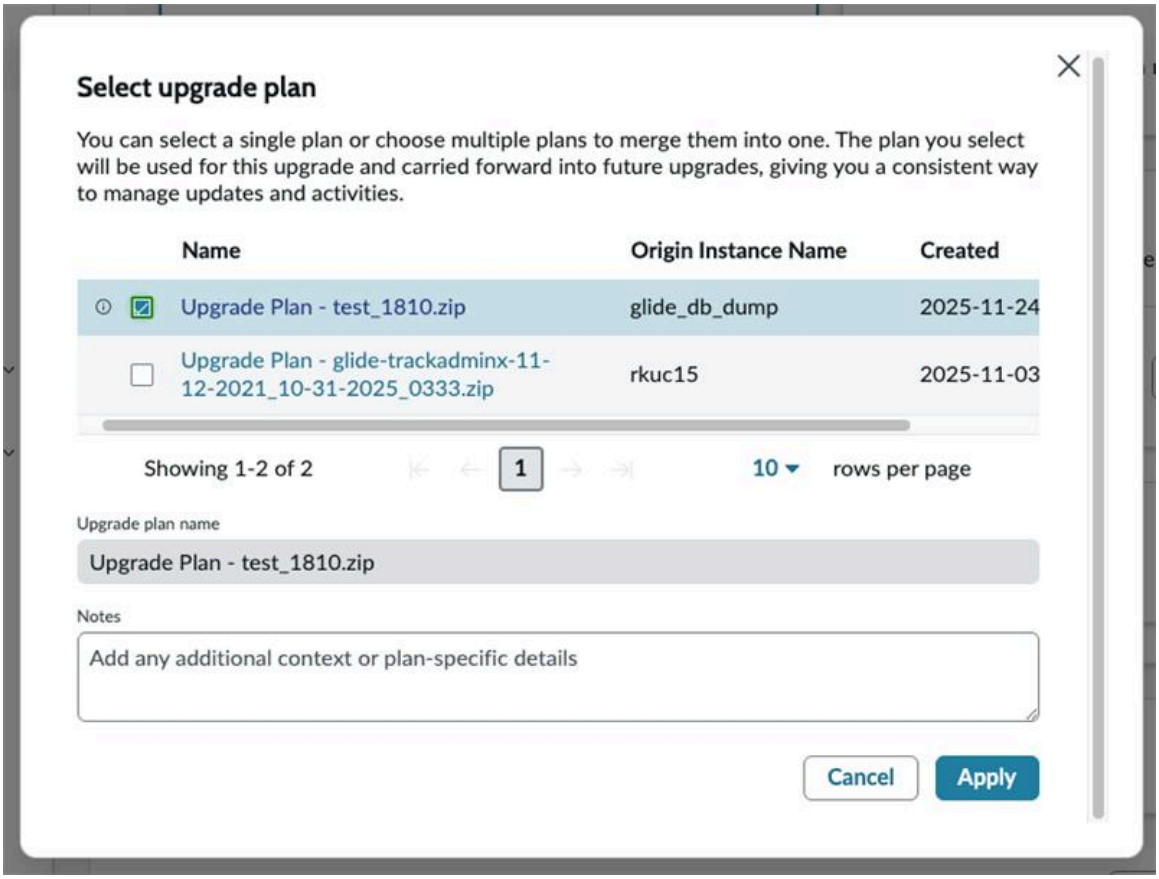
    Note: This option is visible only after the successful completion of update set preview.

  - Select an existing upgrade plan: You can view the imported plans to choose or can select multiple plans or merge them into one plan.

    Note: This option considerably reduces rework with an upgrade plan, maintains accuracy and makes your upgrade process seamless.

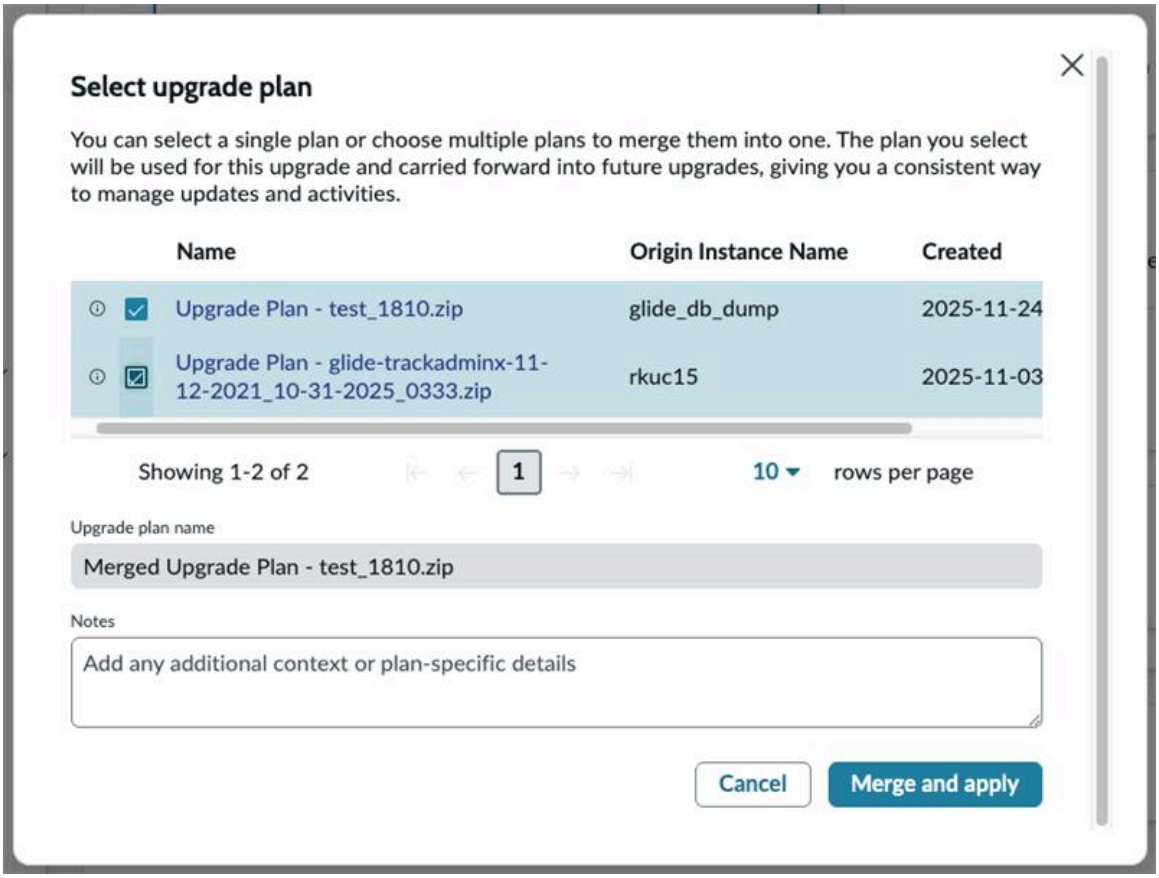
    You will see the following modal when you select Select upgrade plan. You can then select either one upgrade plan or multiple plans to be merged and applied to the current upgrade.

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Note: The **Apply** option is visible only when you select one upgrade plan to be applied to the current upgrade.

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Note: The **Merge and apply** option is visible only if you have selected multiple upgrade plans. The upgrade plan name changes as per the selection of upgrade plans.

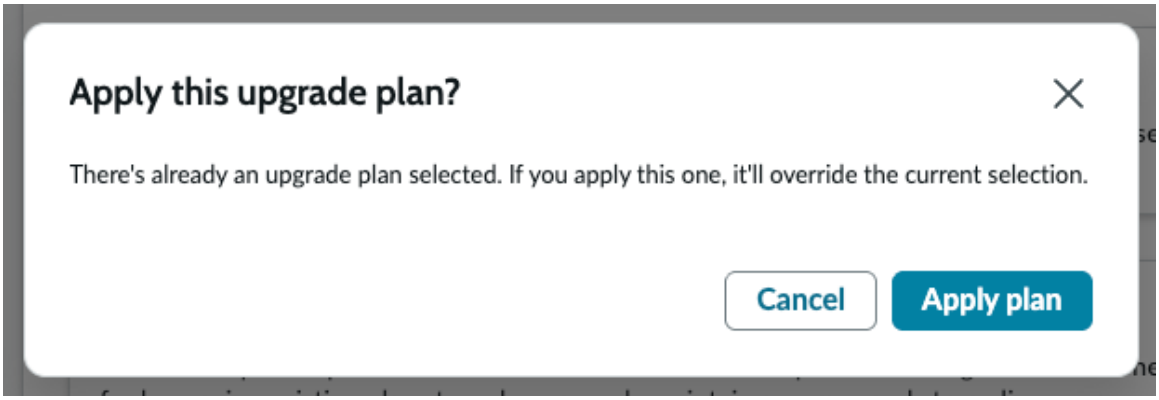
When merging multiple upgrade plans, upgrade plan items that appear in more than one plan are used in the merged plan by their highest version. This ensures consistency and avoids version conflicts in the resulting merged plan.

- Create a new one: You can get started with creating a new plan for your instance upgrade.
  - Create an upgrade plan: Select **Create a plan** to start creating the new upgrade plan. Select the Upgrade Plan link from the success message banner to view the created upgrade plan.

    Note: The success message banner is generated immediately after the upgrade plan is created by selecting **Create a plan** and stays visible until the page is reloaded.

    If you select the **Create a plan** option again after creating a plan, you will see the following message.

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Note: Only the most recent upgrade plan without any upgrade plan items is retained. For example, if the most recent upgrade plan is created without upgrade plan items, it automatically overrides any earlier upgrade plan that also doesn't have upgrade plan items. There can be more than one upgrade plan with upgrade plan items.

In the Upgrade Plans list, there can be several upgrade plans with upgrade plan items and only the recent upgrade plan with no upgrade plan items.

Note: An instance can have only one active upgrade plan at a time, regardless of whether the plan includes upgrade plan items. Only the most recent upgrade plan is in active state as it automatically gets applied to the current upgrade.

- View generated upgrade plan: This is an alternate way to view the recently created upgrade plan. This option is helpful when you reload the page and the success message banner disappears.

  Note: This option is visible only after the upgrade plan is created.

Once the upgrade plan is finally selected, the **Select upgrade plan** and **Create a new one** options are disabled.

5. Preview and select applications for update.

   The **Preview Application Updates** step displays all available application updates. For each application, you can:

   - **Check the checkbox** to select an application for update
   - **Select a version** from the dropdown menu (the system displays available versions for each application)
   - **Mark to latest** to update selected applications to the newest available version
   - **Select all** to include all 214 (or the total count in your system) applications in this update

   Unselected items show a status of Not selected and won't be included in the update. You can unselect an application at any time without removing it from the upgrade plan—it simply marks the item as inactive.

   After selecting applications, select **Check Compatibility** to validate that selected updates are compatible with your current system configuration. This process downloads application packages from the store and performs compatibility checks.

6. Review compatibility results.

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After the compatibility check completes, each selected application shows a compatibility status:

- **Compatible**: The update can be safely applied
- **Incompatible**: The update can't be applied due to dependency issues or platform version conflicts

If an application is marked incompatible, you can unselect it or choose a different version. Applications not selected for update don't require compatibility checks.

7. **Optional:** Conduct pre-testing with ATF (Automated Test Framework).

   (Optional) If ATF is installed on your instance, you can run tests on the selected updates:

   a. In the **Conduct Pre-Testing** step, select existing test suites from the available list
   b. Select **Add to Upgrade Test Suites** to include them in your update
   c. If ATF requires configuration (such as a test user profile), follow the on-screen alerts to complete setup
   d. Mark as complete when ready to proceed

   If ATF is not installed or if you prefer to skip testing, you can proceed directly to the update step.

8. Review the update summary before proceeding.

   The **Review Updates** page displays:

   - Total number of selected applications
   - Number of compatible and incompatible applications
   - Predicted script changes and records affected
   - Skip rules (if configured)

   Review this information carefully. If you need to make changes, navigate back to previous steps using the **Previous Step** button.

9. Choose to schedule or apply the update immediately.

   In the final step before execution, select one of the following:

   - **Update Now**: Apply all selected updates immediately
   - **Schedule Update**: Choose a future date and time for the update to begin

   If scheduling, select the desired date and time. The system prevents you from selecting a time within the next 5 minutes. If you schedule an update and needs to be updated later, you can:

   - Select **Schedule Update** again to reschedule for a different time
   - Select **Cancel Update** to remove the schedule and then select **Update Now** to apply immediately

10. Monitor update progress.

    Once the update begins, the system displays:

    - A progress bar showing the percentage complete
    - The start time of the update

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- Current step information (for example, "Step 10 of 10")
- Pending test counts (if ATF testing is in progress)

You can remain on this page to monitor progress, or navigate away if needed. The system continues processing updates in the background.

11. Review update results.

    When the update completes, the **Results** page displays a summary:

    - Number of applications successfully updated
    - Number of applications with scheduled updates (not yet applied)
    - Number of applications with available updates (not selected in this run)
    - Number of applications that failed during update

    For each application, you can:

    - View the current and updated version numbers
    - Check the post-update status (up-to-date, scheduled, available for update, or failed)
    - Select the application name or status to navigate to the app manager for details

12. **Optional:** Conduct post-testing and troubleshooting.

    (Optional) If ATF testing is enabled, the system automatically runs selected test suites after updates complete. You can:

    - Monitor test progress in real-time
    - View test results, including passed and failed tests
    - If troubleshooting is enabled, investigate failed tests using the troubleshooting agent to identify root causes

    Note: Post-testing and troubleshooting steps may require additional plugins to be installed. Contact your system administrator if these options are unavailable.

13. Review update sets and upgrade plan details (optional).

    In the final step, you can:

    - View all update sets that were created during the update process
    - Access the upgrade plan used for this update
    - Select **View Update Set** to see the combined update set that captured all application updates

    These details are available for reference and troubleshooting if needed in future updates.

What to do next

After completing the update:

- Verify that critical applications are functioning correctly
- If failures occurred, review the post-update status and app manager details to determine remediation steps

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- If tests were skipped or failed, schedule a separate testing run or contact your development team
- Return to the bulk application update console periodically to check for new available updates

Administering Upgrade Console

The Administration module contains information about managing upgrade risks.

Managing upgrade risk

You will be notified of the possible conflicts that might result due to several customizations in a skipped metadata file, with a new UI message on the form pages of the metadata files.

One of the major conflict areas during an upgrade is resolving conflicts for skipped metadata files that are released by ServiceNow® but have been customized. These conflicts result from multiple users updating the same files. ServiceNow might update the code in the files which you have customized over time. Whenever you install an application or a plugin, you often customize them as per your requirements. During the next upgrade, you might have several skipped records depending on the previous customizations.

Important: Avoid modifying the high risk and medium risk (if possible) skipped metadata files that can potentially cause conflicted skipped metadata files in your next upgrade. You can edit the files if the modifications are absolutely required.

The purpose of the UI message is to inform you about potential complications that might arise during the upgrade process, especially if any high-priority files have been modified. The notification is of the form of UI messages on the form pages of the metadata files.

The UI message varies based on the severity of the files.

- Medium risk and non-customized: The medium risk files that are not customized might be updated in future releases. It is recommended not to modify these files unless necessary.

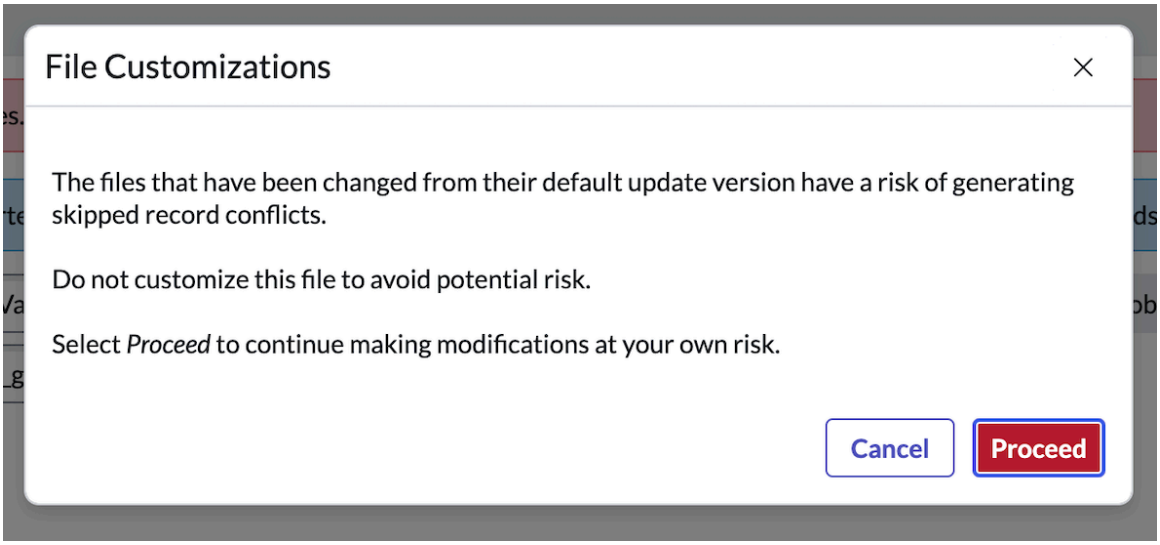
  ⓘ Warning: This is a Medium Risk file that might get updated again in later releases. **Do not** alter this file unless necessary.

- High risk and non-customized: The high risk files that are non-customized might be updated in future releases. It is recommended not to modify these files unless necessary.

  ⊗ Warning: This is a High Risk file that might get updated again in later releases. **Do not** alter this file unless necessary.

Note: You can proceed to modify these files if the changes are absolutely required. The following modal shows up.

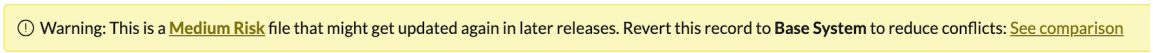
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- High risk and customized: The high risk files that are customized might be updated in future releases. It is recommended to revert them to the Base System to avoid conflicts.



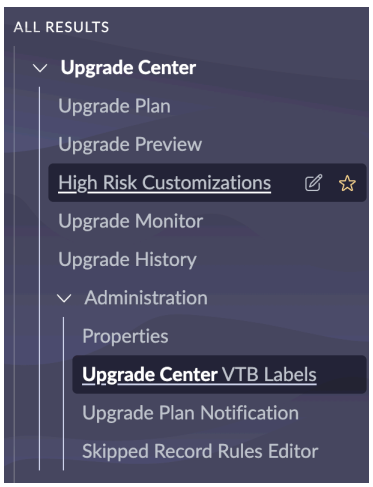
- Medium risk and customized: The medium risk files that are customized might be updated in future releases. It is recommended to revert it to the Base System to avoid conflicts.



- Non-risky and non-customized: You don’t see any warning for this condition.
- Non-risky and customized: You don’t see any warning for this condition.

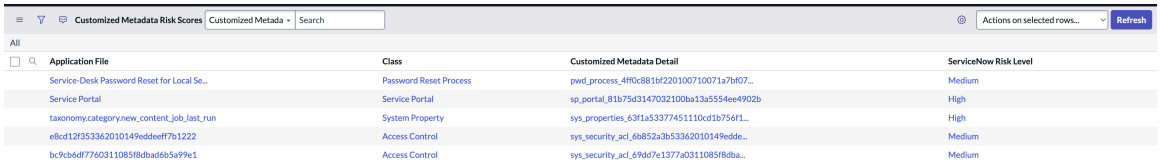
High Risk Customizations menu

The **High Risk Customizations** menu item presents the overlap between ServiceNow's high and medium risk files and your customizations.



They are stored in a virtual table called v_metadata_customization_risk, and is refreshed after a set period of time or when you select the **Refresh** on the list view.

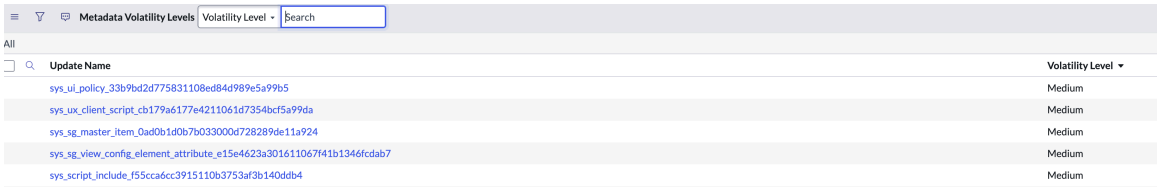
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Risk files storage

The high risk and medium risk files are stored in the new sys_metadata_volatility table.

Note: It is recommended not to modify the sys_metadata_volatility table and is automatically updated for every family upgrade. The sys_metadata_volatility table is not a part of the menu item in the navbar.



Note: Risk is determined by the likelihood of a given metadata file being modified, which is predicted based on trends in updates from recent releases. Some files that may not currently exist in the system will be present in the table to account for future installation of apps/plugins.

Upgrade Console references

Find all the miscellaneous information about Upgrade Console in this section.

Upgrade Console roles

Upgrade Console is installed with these roles.

To learn more about managing subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

Administrator [upgrade_admin]

Access all tables, tools and information within Upgrade Console on your instance.

Contains Roles

List of roles contained within the role.

- sn_templated_snip.template_snippet_admin
- sn_employee.admin
- taxonomy_admin
- sn_ace.ace_user
- sn_hr_sp.esc_admin

Groups

List of groups this role is assigned to by default.

None

Elevated

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Whether the role is an elevated role. Elevated roles aren't assigned to users or groups, and must be used by elevation. For details, see Elevate to a privileged role.

No.

Special considerations

None.

Additional resources for ServiceNow AI Platform products and solutions

If you're looking for ServiceNow AI Platform best practices, troubleshooting, or other implementation guidelines, select a feature or resource type to discover ServiceNow resources on other relevant websites.

Note: Many resources below require you to log in to sites like ServiceNow University, Now Create, or the ServiceNow Community. If the expected resource does not load, please log in and try to access the resource again.

Resource links

ServiceNow AI Platform features or products	Resource type	Resources
Admin Center	Getting Started	Getting started with Admin Center
Admin Center	FAQs	Admin Center FAQs
Admin Center	Troubleshooting	Troubleshooting for Admin Center
AI Search	Getting Started	Getting started with AI Search
AI Search	Best practices	Best practices for AI Search
AI Search	Release notes	
AI Search	Training	AI Search: Indexing Explore AI Search
Application Manager	Getting Started	Getting started with Application Manager
Core Configuration	Release notes	https://www.servicenow.com/docs/access?context=core-platform-rn&version=brazil&pubname=brazil-release-notes&ft:locale=en-US

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Resource links (continued)

ServiceNow AI Platform features or products	Resource type	Resources
Data Management	Getting Started	Getting started with Data Management
Data Management	Best practices	Best practices for Data Management Recommended best practices for Data Management
Data Management	Tips and examples	Tips for Data Management
Data Management	Release notes	
Domain Separation	Getting Started	Getting started with Domain Separation
Domain Separation	Best practices	Best practices for Domain Separation
Domain Separation	Tips and examples	Domain Separation examples
Domain Separation	Troubleshooting	Troubleshooting for Domain Separation
Domain Separation	Training	Domain Separation Basics Domain Separation Implementation
Dynamic Translation	Tips and examples	Dynamic Translation examples
Dynamic Translation	Release notes	
Instance Scan	Getting Started	Getting started with Instance Scan
Instance Scan	Training	Introduction to ServiceNow Instance Scan

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Resource links (continued)

ServiceNow AI Platform features or products	Resource type	Resources
Notifications	Best practices	Best practices for Notifications
Notifications	Tips and examples	Notifications tips
Notifications	Troubleshooting	Troubleshooting for Notifications
ServiceNow AI Platform	Training	System administrator Troubleshoot the ServiceNow AI Platform ServiceNow AI Platform Implementation ServiceNow Administration fundamentals on demand Performance Troubleshooting overview ServiceNow AI Platform Implementation on Demand Process and Platform Owner Learning Path ServiceNow Administration Fundamentals on Demand
ServiceNow AI Platform	Getting Started	Introducing the ServiceNow AI Platform Getting started with the ServiceNow AI Platform Platform Academies overview ServiceNow System administrator overview ServiceNow Admin full course How to use ServiceNow - A comprehensive guide Setup the ServiceNow AI Platform and get upgrade ready ServiceNow Fundamentals ServiceNow Admin Complete Course|System Administrator Beginner
Platform Performance	Getting Started	Getting started with Platform Performance

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Resource links (continued)

ServiceNow AI Platform features or products	Resource type	Resources
Platform Performance	Best practices	Best practices for Platform performance
Subscription Management	Getting Started	Getting started with Subscription Management
Subscription Management	Training	Subscription Management Overview
System Clone	Getting Started	Getting started with System Clone
System Clone	Best practices	Best practices for System Clone
System Clone	FAQs	System Clone FAQs
System Clone	Tips and examples	System Clone tips
System Localization	Getting Started	Getting started with System Localization
System Localization	Training	ServiceNow Localization Overview
Table Administration	Best practices	Best practices for Table Administration
Table Administration	Training	Table Administration and Security Overview
Upgrade Center	Getting Started	Getting started with Upgrade Center
Upgrade Center	Best practices	Best practices for Upgrade Center
Upgrade Center	FAQs	Upgrade Center FAQs
Upgrade Center	Tips and examples	Upgrade Center examples

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Resource links (continued)

ServiceNow AI Platform features or products	Resource type	Resources
Upgrade Center	Troubleshooting	Troubleshooting for Upgrade Center
Upgrade Center	Training	Upgrade Center overview Upgrade Skipped Records
Upgrade Management	Release notes	
User Administration	Best practices	Best practices for User Administration

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