

RingCentral for ServiceNow

Admin Guide

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Introduction

About RingCentral for ServiceNow

RingCentral for ServiceNow provides seamless integration between the ServiceNow application and RingCentral services. It allows customer service agents to do the following:

- Make an outgoing call to a customer phone number within ServiceNow.
- Receive an incoming call from a phone number or from another user within the system.
- Transfer a call to another user within the system.
- Place a call on hold or on mute.
- Set agent call status.

About this Guide

This guide is intended for Administrators of RingCentral for ServiceNow. This guide is not intended for ServiceNow users and does not provide any information on how to use the application or any related information. This administrator guide will show you how to set up your ServiceNow instance to enable users of RingCentral for ServiceNow.

About ServiceNow

ServiceNow enables service management for every department in the enterprise including IT, human resources, facilities, field service and more.

The ServiceNow Platform is a powerful cloud application that enables linking real-time data with activities, tasks, and processes to achieve better work outcomes.

ServiceNow Performance Analytics help to visualize data collected over time. This data reveals trends, which can be used to make real-time adjustments and improve business functions.

ServiceNow Reporting generates ad hoc snapshots of current ServiceNow data. ServiceNow reports can be lists, charts, or calendar-based views of data in a particular table.

Setting up RingCentral for ServiceNow

ServiceNow OpenFrame

ServiceNow OpenFrame provides a communication frame that customer service agents use to place and receive customer calls. The OpenFrame API can be used to communicate between the ServiceNow platform and the domain opened in the OpenFrame window.

Activate OpenFrame in ServiceNow Instance

You can activate the OpenFrame plugin (com.sn_openframe) if you have admin privileges. The OpenFrame plugin activates related plugins if they are not already active.

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 are listed along with their activation status.
3. (Optional) If available, select the Load demo data check box.
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 you first activate 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.
Reference: https://geneva-docs.servicenow.com/product/customer_service_management/task/t_ActivateOpenFrame.html
4. Click **Activate**.

Create an OpenFrame Configuration

This configuration specifies the OpenFrame window settings as well as the URL to be launched within OpenFrame. There can be multiple configurations but only one can be selected as the default. If there is only one configuration, check this field. When a default configuration is enabled, the phone icon appears on the ServiceNow banner frame.

Procedure

1. Navigate to **System Properties > OpenFrame** to display the OpenFrame Configurations list.
2. Click **New**.
3. Fill in the fields as appropriate.
Reference: https://geneva-docs.servicenow.com/product/customer_service_management/task/t_CreateAnOpenFrameConfiguration.html

The screenshot shows the ServiceNow interface for configuring an OpenFrame. The page title is "OpenFrame Configuration - RC Open CTI". The configuration fields are as follows:

Field	Value	Notes
Name	RC Open CTI	Highlighted with a blue border
Title		
Subtitle		
Default	<input checked="" type="checkbox"/>	
URL	http://beta.suqmaroc.com/sn/index.html	
Width	220	Required field (*)
Height	335	Required field (*)
Title Icon		Locked icon
Icon Class	icon-phone	Locked icon
Configuration		Expandable field (- +)

Buttons at the bottom: Update, Delete.

Figure 1— Sample OpenFrame Configuration

Computer Telephony Integration (CTI) enables the Customer Service application to support inbound and outbound telephone calls.

User Role Configuration

To access the OpenFrame, users need to be assigned the `sn_openframe_user` role.

Procedure

1. Navigate to **System Administration > User Administration > Users**.
2. Search from the list and find the user for whom you want to grant access to OpenFrame.
3. Click **User ID** link to view and edit user details.
4. In **Related Links > Roles**, click **Edit**.
5. On **Edit Members** page, select `sn_openframe_user` from **Collection** and add it to **Roles List**. (Figure 2, next page)
6. Click **Save**.

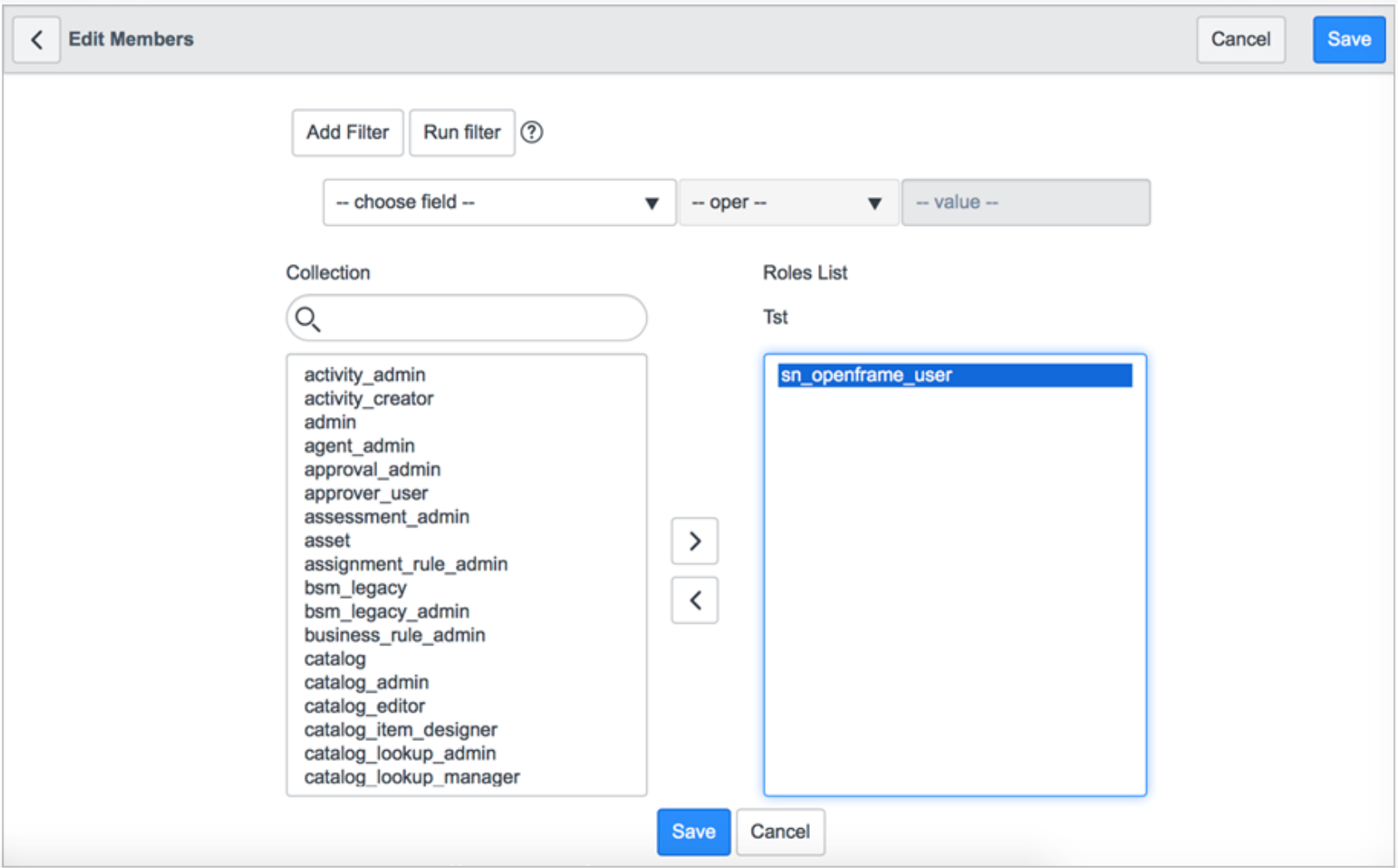


Figure 2— Sample User Role Configuration

ServiceNow OAuth

ServiceNow OAuth provides a way to make REST API calls to your ServiceNow instance. This section describes the settings required.

Create New Application Registry

You can create an application registry if you have admin privileges.

Procedure

1. Go to the Application Registry under the System OAuth section
2. Create 'New' button at the top
3. Choose 'Create An OAuth API endpoint for external clients
4. Fill in the fields with following values
 - a. Name: RingCentral for ServiceNow
 - b. Redirect URL: <https://apps.ringcentral.com/integration/servicenow/snRedirect.html>
 - c. Logo URL: <https://apps.ringcentral.com/integration/servicenow/RCOauth.png>
5. Click Submit to save the configuration

Add Client and Secret to OpenFrame Configuration

Procedure

1. Go to OpenFrame under System Properties section
2. Go to OpenFrame named 'RingCentral' Fill in the Configuration field with following value `${clientId}@@ringcentral@@${secret}`
3. Replace `${client}` and `${secret}` with the 'Client ID' and 'Client Secret' created in Step 1. Please keep the delimiter `@@ringcentral@@` as it is between actual Client Id and secret. This is delimiter is used for app to be able to parse Client Id and Secret correctly
4. Logout of ServiceNow and Log back to make sure the changes applies properly