Washington DC Service Bridge

Last updated: 02/01/2024

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

Table of Contents

H....5
R....6
Service Bridge....7
  Exploring Service Bridge....7
    Learn about Service Bridge....8
    Service Bridge Authorized Users and personas....9
    Remote catalogs in Service Bridge....10
    Using remote choice fields to directly access provider data....10
    Using remote tasks to fulfill consumer requests....10
    Service Bridge Provider Tasks....11
    Transform data with the Service Bridge transform framework....11
  Service Bridge for Providers....12
    Installation and configuring Service Bridge for Providers....12
    Use Service Bridge for providers....38
  Service Bridge for Consumers....42
    Installing and configuring Service Bridge for Consumers....43
    Using the Scratchpad for Service Bridge tasks....50
  Service Bridge reference....50
    Service Bridge data model....51
    Components installed with Service Bridge for Providers....58
    Components installed with Service Bridge for Consumers....70
    Service Bridge error log....76
    Domain separation and Service Bridge....78
Service Bridge (legacy)....79
  Exploring Service Bridge (legacy)....79
    Personas and roles for Service Bridge for Providers (legacy)....81
    Personas and roles for Service Bridge (legacy)....83
    Enable authorized users to access services in the product catalog (legacy)....84
    Remote tasks to fulfill customer requests (legacy)....84
    Using remote choice fields to directly access catalog items (legacy)....85
    Transform remote task data with a Transform Framework (legacy)....85
  Configuring Service Bridge (legacy)....86
    Installation and configuration of Service Bridge for Providers (legacy)....86
    Installation and configuration of Service Bridge in customer instances (legacy)....105
  Using Service Bridge (legacy)....108
    Onboarding a new customer in Service Bridge (legacy)....109
    Service request fulfillment in Service Bridge (legacy)....112
    Proactive Service Bridge case notification in Service Bridge (legacy)....113
  Service Bridge reference (legacy)....113

Service Bridge data model (legacy)....113
Components installed with Service Bridge for Providers (legacy).... 117
Components installed with Service Bridge (legacy).... 124
Domain separation and Service Bridge (legacy)....127
Cloning instances with Service Bridge (legacy)....128

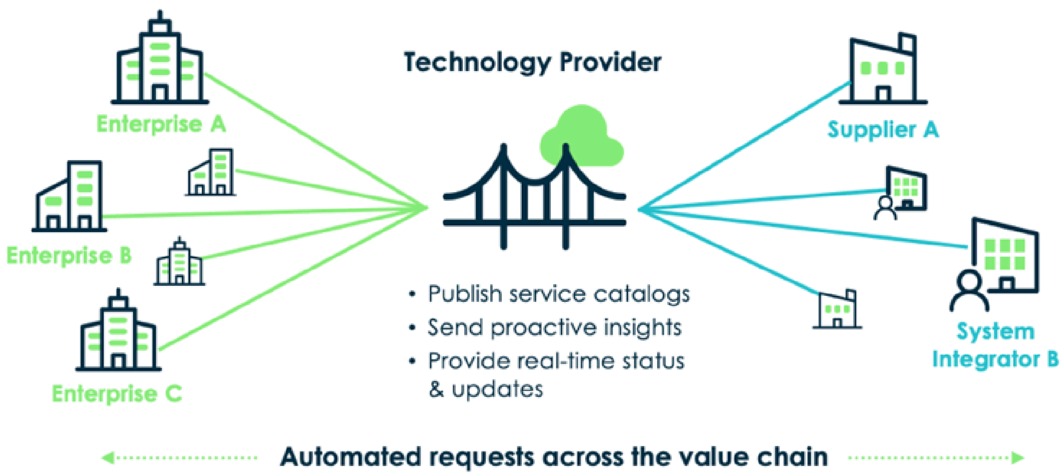
H

R

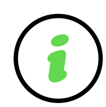
Service Bridge

Service Bridge connects multiple ServiceNow instances to provide seamless support and service experiences across the ecosystem, from enterprise customers to suppliers and system integrators. Service Bridge provides a frictionless experience that makes it easy to collaborate and process requests while giving users the convenience of working in their own ServiceNow instance.

Overview



Getting started

Service Bridge for Providers	Service Bridge for Consumers	Service Bridge Knowledge Base
		
Learn about the new Service Bridge application for providers	Learn about the new Service Bridge application for consumers	Review the Service Bridge knowledge base articles.

Exploring Service Bridge

Learn about the benefits of Service Bridge, the key capabilities, and the applications.

This section includes the following:

- Learn about Service Bridge
- Service Bridge Authorized Users and personas
- Remote catalogs in Service Bridge
- Using remote choice fields to directly access provider data
- Using remote tasks to fulfill consumer requests

- Service Bridge Provider Tasks
- Transform data with the Service Bridge transform framework

Learn about Service Bridge

Service Bridge helps consumers, providers, and partners connect their ServiceNow instances to securely build business workflows across the ServiceNow ecosystem.

Overview

Whether you are a provider or a consumer, learn how you can establish an integration between your instances with Service Bridge. This integration makes it easy for providers to receive and fulfill service requests in their own instances, and much more. Learn how you can use Service Bridge to connect buying, support, and service processes.

- Enterprise users can now easily collaborate with their service providers and partners through bi-directional workflows, providing them with visibility and a seamless experience.
- Service Bridge enables faster onboarding and provides quick service catalog refreshes to subscribers.
- The seamless registration process eliminates slow and expensive integrations with enterprise customers and partners.

Key capabilities

The main capabilities of Service Bridge include:

- Onboarding: Quickly onboard consumers and partners that use ServiceNow with a simple registration process and avoid slow, costly custom integrations.
- Authorized Users: Manage and control access at the Remote Catalog item level to meet security and compliance requirements.
- Remote Catalog: Update subscriber service catalogs in minutes as new items are introduced.
- Remote Choice: Ensure up-to-date field options in subscriber remote catalogs by retrieving real-time data from the provider's ServiceNow instance.
- Remote Task: Reduce swivel-chairing and increase automation with seamless multi-party and multi-instance workflows across the ServiceNow ecosystem.
- Provider Tasks: Enable all providers of services using Service Bridge to be transparent and collaborative with their consumers who use ServiceNow by syncing relevant tasks like cases, to consumers as Provider Tasks.
- Transform Framework: Transform inbound and outbound remote task data for easy process transformation between ServiceNow instances.

Service Bridge applications

The following table lists the features of the Service Bridge for Providers and the Service Bridge for Consumers applications.

Service Bridge applications

Application	Features
Service Bridge for Providers	• Author and publish remote catalogs from your instance for consumers to generate service requests that can be fulfilled in your instance. • Bidirectionally integrate your tasks with your consumer's tasks. • Send incidents and cases to your consumer's ServiceNow instance via Provider Task with no setup needed.
Service Bridge for Consumers	• Incorporate Remote Catalog items entitled to you from your provider into your local catalog and send the requests generated back to your provider for fulfillment. • Bidirectionally integrate your tasks with your provider's tasks. • Receive proactive tasks from providers for transparency and collaboration.

Service Bridge Authorized Users and personas

The Authorized Users feature enables a provider to categorize remote catalog items by user personas so that only authorized users with these personas can access the catalog items. It also allows consumer admins to associate these personas to users in their instances to allow access.

When a provider and a consumer initially register the Service Bridge application, the active contacts on the consumer's account in the provider's ServiceNow instance are automatically added to the Authorized Users table and synced with the consumer's ServiceNow instance.

Enables the provider to subdivide services by user personas giving the consumers an easy way to define access in their instance to the provider's services. By using the Authorized Users feature, you can identify the specific users between the provider and consumer instances to manage the consumer requests for the provider's services. You can then assign personas to the authorized users so that you can control the access to remote catalog items.

- Both providers and consumers can create Authorized Users.
- The providers manage the approval state for an Authorized User. By default, the approval state is set **Approved**.
- Consumers manage the active state for an Authorized User.
- Providers can set the maximum number of authorized users for each connection. This requires all consumers to maintain a list of active authorized users of less than or equal to the limit set by the provider. If the value is not set, consumers can have as many active authorized users as they want.

To learn more, see Add an authorized user.

Remote catalogs in Service Bridge

As an application developer for the provider, you can create a remote catalog item containing the services for your consumers. After you create a remote catalog item, an administrator in the consumer's instance can assign it to their catalogs and categories, and then activate it, just like any other catalog item.

Example:

For example, let's say that you have multiple SD-WAN product offerings: Gold, Silver, and Bronze. Your remote catalog contains 20 services that are associated with the SD-WAN products.

- The Gold product offering gives your consumer rights to all 20 services.
- The Silver product offering gives your consumer rights to 15 of the 20 services.
- The Bronze product offering gives your consumer rights to only 10 of the 20 services.

You can package all 20 of those services in a single catalog. The consumers for each product offering only have rights to the services to which they are entitled.

To learn more, see Create remote catalogs in Service Bridge for providers.

Using remote choice fields to directly access provider data

Remote choice fields provide your consumers direct access to your (provider) data in real time while they submit a remote catalog item from their instance.

Remote choice fields enable consumers to view the choice list for a catalog reference field directly from the provider's instance. They provide the following advantages:

- Removes the need to replicate foundation data.
- Reduces the cost and maintenance of integrations.

You can control the data that your consumers access by defining a remote choice field. To learn more, see Create remote choice definitions in Service Bridge for Providers.

Using remote tasks to fulfill consumer requests

Learn how you, as a provider, can resolve and fulfill multiple consumer tasks, such as incidents, cases, and service requests, by using remote tasks. Also as a consumer, you can assign the incidents to multiple providers for resolution.

Remote tasks enable you to assign and synchronize the task's data on separate instances so that you can quickly fulfill the service requests from your consumers. Some examples of the consumer requests are as follows:

1. Request help for issues that your consumers are having with your services.
2. Request for service changes to the services that your consumers have purchased.
3. Request to assign the existing tasks to you so that you can support your consumer's issues.

How a remote task works

As a provider, you must first create and publish the remote task definitions that your consumers can use for creating a remote task. You entitle these definitions to your consumers who can adjust the mappings and field data rules or simply activate the definition. Your consumers can apply a trigger on the definition or manually create a remote task for you, the provider, based on an active definition.

For more information, see Create remote task definitions in Service Bridge for Providers.

The remote task feature includes a Remote Task table, which is an extension of the Task table in the Now Platform. With remote tasks, you can enable bidirectional linking of workflows between multiple ServiceNow instances.

For example, an incident on a consumer instance must be assigned to a provider's instance as a case. The Remote Task record in each instance facilitates the bidirectional flow of the task's data between the case and the incident.

Service Bridge Provider Tasks

Enable all providers using Service Bridge to be transparent and collaborative with their consumers who use ServiceNow.

Provider tasks represent work that is being performed in a provider's ServiceNow instance and monitored in a consumer's instance. By using Provider Tasks, consumers can collaborate with all of their providers without the need for any additional configuration to their instances.

Transform data with the Service Bridge transform framework

Use the Transform Framework to integrate tasks between two ServiceNow instances to transform remote task data in the Service Bridge application.

As a provider, you can use the Transform Framework to transform your inbound and outbound data (such as incidents, cases, and service requests) of the remote tasks between your ServiceNow instance and your consumer's instance. To learn what a remote task is, see Using remote tasks to fulfill consumer requests.

While using the Service Bridge for Providers application, you and your consumer can exchange the remote task data through tables and fields. The Transform Framework helps you to convert the data between those tables and fields so that you and your consumer can easily communicate with each other while resolving the incidents, cases, and consumer requests. Transforms can be created once and used across all remote task definitions.

You can use the following transform types in the Transform Framework for your remote tasks:

- **Simple**: Select the simple transform option to use the predefined values of the inbound and outbound fields for your remote tasks. For example, by using this transform type, you're converting the Open state of an incident in the provider's ServiceNow® instance to the In Progress state in the consumer's ServiceNow instance.
- **Advanced**: Use an advanced transform where you run a script to determine the inbound and outbound data values for your remote tasks. For example, use this transform type to convert an incoming sys_id into a correlated sys_id for a reference field.
- **Virtual Inbound**: Use this to transform or set a value for an Inbound Virtual field. This option uses a script to transform the data and adds a mandatory Inbound Field field.
- **Virtual Outbound**: Use this to transform or set a value for an Outbound Virtual field. This option uses a script to transform the data and adds a mandatory Outbound Field field.
- **Global**: Use the global transform option to create a default transform definition that can be applied to all consumer accounts.

  Note: A matching company or account specific transform overrides the Global transform option.

To learn how to create a transform, see Create a transform in Service Bridge.

Service Bridge for Providers

Use the Service Bridge for Providers application to create and publish catalogs of services, receive, and fulfill requests generated from consumers, and establish integrations with consumer instances.

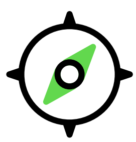
Overview

As a provider, you can:

- Author and publish remote service catalogs for your consumers on their instances.
- Integrate your instance with your consumer's instance.
- Receive and fulfill service requests on your instance from your consumer's ServiceNow instance.

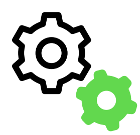
Getting started

Explore



Learn about the features and capabilities of Service Bridge.

Configure



As a provider, plan and configure your implementation.

Administer

Learn how to onboard consumers, create catalogs, and fulfill service requests.

Service Bridge reference

Get details about domain separation and installed components.

Installation and configuring Service Bridge for Providers

To set up and configure the Service Bridge for Providers application, follow these steps.

Setting up Service Bridge for Providers

Task	Link
Install the Service Bridge for Providers application.	See Install Service Bridge for Providers.

Setting up Service Bridge for Providers (continued)

Task	Link
Migrate from Service Bridge legacy version if required.	See Migrate from Service Bridge (legacy).
Set up a new provider record.	See Set up a Service Bridge provider record.
Assign Service Bridge roles for providers.	See User roles for providers.
Create catalog personas.	See Create catalog personas.
Create remote choice definitions.	See Create remote choice definitions in Service Bridge for Providers
Create remote catalog items.	See Create remote catalogs in Service Bridge for providers.
Create remote task definitions.	See Create remote task definitions in Service Bridge for Providers.
Create transforms.	See Create a transform in Service Bridge.
Update Authorized Users settings.	See Update settings for Authorized Users.

Install Service Bridge for Providers

If you have an admin role, you can install the Service Bridge for Providers (sn_sb_pro) application. The application includes the demo data and installations that are related to ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

About this task

The following plugins are automatically installed with the Service Bridge for Providers application:

- sn_req_criteria
- sn_sb
- sn_sb_rps
- sn_transport
- com.glide.hub.process.sync
- com.snc.ihub_spoke_util_pack

Apart from these, several components including roles, business rules, tables, and flows are also installed. For more information about the components that are installed with this application, see Components installed with Service Bridge for Providers.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Service Bridge for Providers application (sn_sb_pro) by 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 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. In the application installation dialog, review the application dependencies.

   This listing indicates, for each dependent plugin and application if it's being installed, is already installed, or must be installed. If any plugins or applications must be installed, you must install them before you can install Service Bridge for Providers.
4. If demo data is available and you want to install it, click **Load demo data**.
   Demo data contains the sample records that describe the application features for common use cases. Load demo data when you first install the application on a development or test instance. If you don't load the demo data during installation, it's unavailable to load later.
5. Select **Install**.

Migrate from Service Bridge (legacy)

This section describes the process to migrate from the Service Bridge (legacy) version.

To migrate from the legacy version, follow the steps listed in Service Bridge for Providers (Legacy) - Migration Utility (KB1499823).

Set up a Service Bridge provider record

Set up a new provider record to establish a unique identifier for the Service Bridge for Providers (sn_sb_pro) application.

Before you begin

- Role required: admin, sn_sb.admin
- This version of Service Bridge requires a global script that must be installed before you set up the Service Bridge for Providers application. Follow instructions in KB1225292 on the Now Support instance to install the script.

About this task

This one-time setup task must be completed from your ServiceNow instance.

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Provider**.
2. Enter a name for the provider.
   This can contain only alphanumeric characters and dashes. Names that include spaces or special characters result in an error.
3. Click **Submit**.

User roles for providers

Learn about the roles, skills, and tasks for the different users in the Service Bridge for Providers application.

A user role is a pre-configured role in the application that is made up of multiple granular roles. The user roles are designed to correspond to the common job titles for managers, analysts, and service owners in an IT organization. If you want your users and groups to have more access than a role permits, you can add more granular roles to your users and groups. If you want to limit the access for specific users and groups at the task level, you can remove the granular roles. You can also build custom roles and access controls (ACLs) to suit your needs.

User roles

Persona	Skills	Tasks	Roles
Developer	• Is a certified ServiceNow administrator • Is a certified ServiceNow application developer	• Creates provider connection records. • Creates and maintains remote task definitions and transforms. • Creates and maintains Flow Designer flows to determine the request fulfillment processes. • Creates and maintains remote record producers.	• admin • sn_sb.admin **Note:** If the user does not have the admin role, the catalog admin role is required to modify and publish Remote Record Producers.
Administrator	Is a certified ServiceNow system administrator	• Completes the Service Bridge registration requests. • Assists the consumer's system administrator as needed. • Publishes remote catalogs to the consumer's instance. • Publishes remote task definitions to	• admin • sn_sb.admin • sn_transport.admin

User roles (continued)

Persona	Skills	Tasks	Roles
		the consumer's instance. • Troubleshoots Service Bridge transport payloads.	
Provider Fulfiller	Has agent skills	• Resolves consumer questions and issues. • Engages in network operations when needed.	• *itil • sn_sb.requestor • *sn_customerservice_agent • *incident_read • *problem_read • *change_read
Consumer Requestor	End user	Makes requests from the Remote Catalog	sn_sb.requestor

Assign roles to groups for Service Bridge

Assign roles to control the actions that are available for each user. In ServiceNow, you assign roles by group rather than by individual user. When the job descriptions of users change, their roles are automatically updated.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Click the group that you want to assign the role to.
3. In the Roles related list, click **Edit**.
4. Add the roles to the group.
5. Click **Save**.

Create catalog personas

Create catalog user personas to control the catalog items that consumers can access on their instance.

Before you begin
Role required: admin, sn_sb.admin

About this task
You can assign personas to Remote Record Producers (RRPs). Personas are associated with a Remote Record Producer, and an Entitlement is generated for that record producer and synced with the consumer instance. An Entitlement is generated for all personas on the consumer's instance. Finally, personas can be related to Authorized Users to access the Remote Record Producers.

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Administration** > **Catalog Personas**.
2. Click **New**.
3. Enter a name and description for the catalog persona.
4. Click **Submit**.

Create remote choice definitions in Service Bridge for Providers

As a provider, define remote choice fields that allow consumers to retrieve choice data from their instances in real time.

Before you begin

- Role required for creating a Remote Choice Definition: security_admin
- Role required for creating Remote Choice fields: admin

Procedure

1. Elevate your role to security_admin.
2. Navigate to **All** > **Service Bridge Provider** > **Administration** > **Remote Choice Definitions**.
3. Click **New**.
4. On the form, fill in the fields.

Remote Choice Definitions form

Field	Description
Table	Name of the table that's available to your consumers to query for while they are selecting a catalog item on their service portal.
Name	Auto-assigned name that can be changed by an user with the `security_admin` role.
GlideRecordSecure	When this option is selected, all queries for this table follow the access control list (ACL) restrictions. When this option isn't selected: ◦ Queries for this table ignore all ACL restrictions. ◦ Reference qualifier conditions must be specified for each remote choice variable to limit data access.
AccountSecure	When this option is selected, all queries for this table limit the results that are based on the querying service account's **Company** field and the table's **Company** or **Account** field.

Field	Description
	Note: This flag is available only on the tables with references to the company or account where the field is named account, u_account, company, or u_company.
Short description	Additional information about the table.
Filter	Filter conditions that define the base conditions on the table.

5. Click **Save**.
6. Navigate to **Service Bridge Providers** > **Administration** > **Remote Catalog Items**.
7. Select a remote record producer and click **Edit**.
8. In the Variables related list, click **New**.
9. On the form, fill in the fields.

Remote Choice Variable form

Field	Description
Record producer table	Auto-selected table that appears when you select the field. This table can be selected manually if it isn't mapped to a field.
Type	Reference type.
Remote choice enabled	Option that you can select for a remote choice.
Catalog item	Name of the remote record producer.
Question	Questions that appear in a catalog record on your consumer's service portal.
Type Specifications	◦ **Remote choice reference** that includes the remote choice definition that you use for consumer queries for this variable. ◦ **Remote choice display** field that includes the primary data value that appears to your consumers in their querying results. ◦ **Remote choice additional info** field that includes the secondary data value that appears to your consumers in their querying results. ◦ **Reference qualifier condition** that includes the filter options that you define to limit the data that is returned by the definition.

10. Click **Submit**.

Result
A remote choice variable is created.

Create remote catalogs in Service Bridge for providers

As a provider, you can create remote catalogs to automate the task fulfillment process for your consumers.

By using remote catalogs, providers can maintain the development of shared catalogs on their instances and provide consumers with native catalog items in their instances.

The process for providers to create a remote catalog is as follows:

1. Create a remote record producer in a remote catalog. See Create remote record producers in a remote catalog in Service Bridge for Providers.
2. Create variables for remote record producers. See Create variables for remote record producers in Service Bridge for Providers.
3. Associate flows to the record producers.

Remote record producers in Service Bridge

Remote record producers in Service Bridge for Providers are service requests published in consumer instances. They enable your consumer to request provider services through their service catalog.

Overview of record producers

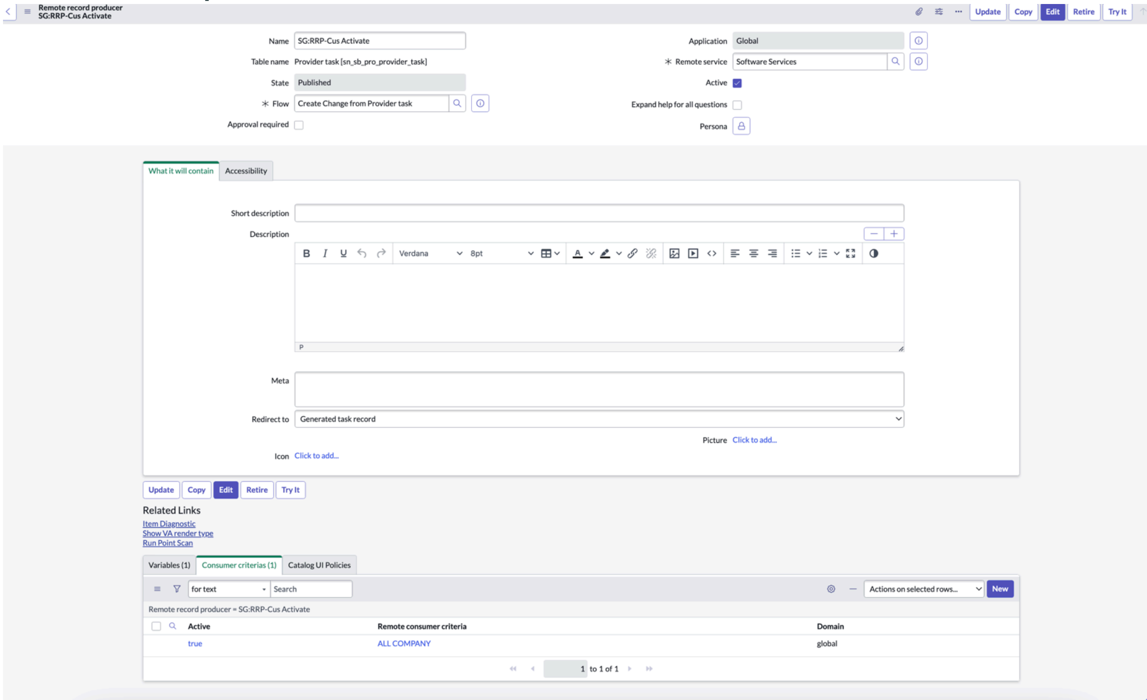
Remote record producers contain the variables that determine the information that a consumer can or must provide to submit a request. When a remote record producer is submitted from the consumer's service catalog, it generates a Provider Task record on the provider's instance and triggers a Create Case, Create Incident, or Create Change Request fulfillment task.

As the task moves through the fulfillment flow in the provider's instance, updates are visible in both the provider and the consumer's ServiceNow instances.

The remote record producer table is an extension of the sc_cat_item_producer table and uses the sn_sb_pro_remote_request table.

The following example shows a sample form that you use when you create a remote record producer.

Remote record producer



Create remote record producers in a remote catalog in Service Bridge for Providers

Create remote record producers as part of creating a Remote Catalog in Service Bridge for Providers.

Before you begin

- Ensure that the catalog scope is set to Global.
- Role required: admin, sn_sb.admin

Note: Users without the admin role must be granted a catalog admin role to modify and publish remote record producers.

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Administration** > **Remote Catalog Items**.
2. Click **New**.
3. On the form, fill in the fields.

Remote Record Producer New Record form

Field	Description
Name	Name of the remote record producer.
Application	This is a read only field and is set by default based on the application scope.
State	This is a read only field and shows the status of the record producer. The UI action supports the following states: Draft The form is ready with all the information and you save it.

Field	Description
	Published The form is published. Publishing The form is yet to receive more information. Retired The status is set to retired and the remote record producer can no longer be used.
Table name	Table name is Provider Task. This is a read only field.
Flow	Choose one of the default Service Bridge flows provided or create your own flow if required.
Active	This is a read only field and is enabled based on the **Publish**, **Retire**, or **Edit** actions.
Persona	Catalog personas that you want to assign to this record producer.
Short Description	Short description for the record producer.
Description	Detailed description for the record producer.

4. Click the link next to the Icon field to attach a picture.
5. Click the link next to the Picture field to attach a picture.

   Note: You can also delete the picture if it is no longer required.

6. Click **Submit**.
7. Add at least one variable.
   See Create variables for remote record producers in Service Bridge for Providers.
8. Add a consumer criteria.
9. Click **Publish** to publish the remote record producer and make it available in the provider and consumer instances.

   You can also perform the following actions:

   - Edit: Click **Edit** to modify a published remote record producer.
   - Retire: Click **Retire** if you no longer want to use the remote record producer. If any entitlements are associated with this remote record producer, a warning message is displayed. If you click **OK**, the remote record producer is retired. But you can **Publish** it again to activate it.

Create variables for remote record producers in Service Bridge for Providers

Create the variables for a remote record producer in Service Bridge for Providers application.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Administration** > **Remote Catalog Items**.
2. Click a record producer that you want to create variables for.
3. Click the **Variables** tab in the Related List and then click **New**.
4. On the form, fill in the fields.

Variable New Record form

Field	Description
Type	Supported variable types are as follows: ◦ Attachment ◦ Break ◦ CheckBox ◦ Container End ◦ Container Split ◦ Container Start ◦ Date ◦ Date/Time ◦ Duration ◦ Email ◦ HTML ◦ IP Address ◦ Label ◦ List Collector ◦ Lookup Multiple Choice ◦ Lookup Select Box ◦ Masked ◦ Multi line text ◦ Multiple Choice ◦ Numeric Scale ◦ Reference ◦ Requested For ◦ Rich Text Label ◦ Select Box ◦ Single Line Text ◦ URL ◦ Wide Single LineText ◦ Yes/No

Field	Description
	If you use unsupported variables, Service Bridge might not integrate the data in the right format.
Catalog item	Catalog item that uses the variable.
Application	This is a read only field and is set by default based on the application scope.
Mandatory	Option for making the variable mandatory as part of the ordering process. **Note:** This behavior is applicable only on a page load. You can change it by using client APIs.
Active	This is a read only field and is enabled based on the **Publish**, **Retire**, or **Edit** actions.
Order	Placement order of the variable on the catalog item page. You organize the variables from top to bottom, and from the least to the greatest order value. For example, a variable with an order value of 1 is placed ahead of other variables with higher-order values.
Question	Question that you can ask users who are ordering the catalog item to obtain related information.
Name	Name to identify the question. **Note:** If this field is empty, its value is auto-populated based on the **Question** field for all variable types except Break, Container Split, and Container End.
Tooltip	Tooltip text to display when users point to the variable. Enter a brief note to describe the purpose of the question.
Example Text	Question field hint that appears before a user enters a value. You can use a hint for the following variables: ◦ IP Address ◦ Email ◦ URL ◦ Single Line Text ◦ Wide Single Line Text

Field	Description
	◦ Multi Line Text ◦ Date ◦ Date/Time
Type Specification	Values specific to the type of variables.

5. Click **Submit**.
   Repeat the above steps to create additional variables for the same remote record producer.

Creating entitlements in Service Bridge for Providers

Using consumer criteria associated with record producers and other configurations, Service Bridge automatically generates the entitlement records that are replicated to eligible consumer instances.

Overview

Consumer Criteria records are used to entitle Service Bridge content, such as Remote Record Producers and Remote Task Definitions, to Service Bridge consumers. Consumer criteria enables you to ensure that a consumer has access only to the appropriate Service Bridge content. Using consumer criteria, you can entitle content explicitly to a single customer or to multiple customers.

A few examples of how you configure the consumer criteria are given below. For example, you can entitle content:

- To a specific consumer.
- To all consumers that have an active sold product of a specific model.
- To all consumers that have an active service contract.

The Service Bridge entitlement process runs as a scheduled job each night. During the entitlement process, filters defined in the condition builder of the consumer criteria record are applied to the selected table to find records that match the condition. If a matching record is found, the associated Service Bridge content is entitled to the consumer. For example, when a consumer with an active sold product creates an order, the appropriate Service Bridge content is automatically entitled to the consumer. Entitlements are updated daily, reflecting changes if the data in the tables being queried has changed.

Benefits

Your consumers can see and request the content entitled to them. A scheduled job runs nightly and updates the entitlements, based on any changes made to the tables or records that are queried by the consumer criteria. Additionally, entitlements are checked immediately when updates are made.

You can update Service Bridge entitlements in the following ways:

- Define the consumer criteria in the Remote Record Producer.
- Register a new consumer in Service Bridge.
- Click the **Refresh Entitlements** related link in the Consumer Connections record or the Provider record.

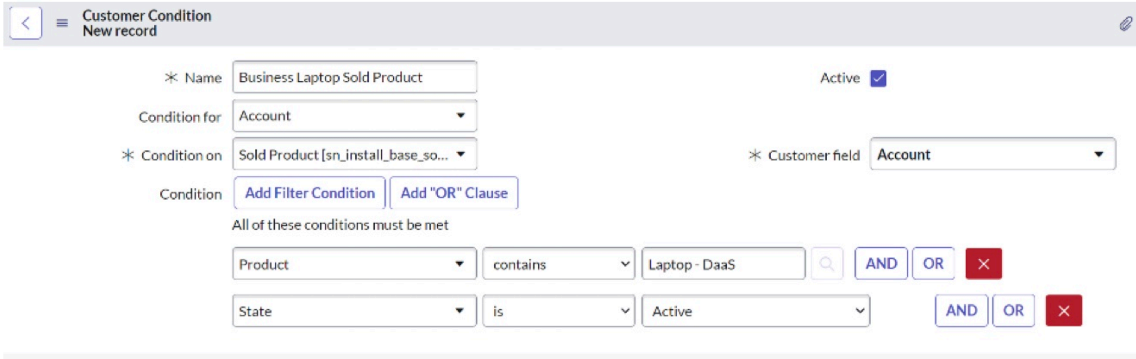
Define a consumer criteria

1. 1. Navigate to **All** > **Service Bridge Provider** > **Remote Catalog Items** or **All** > **Service Bridge Provider** > **Remote Task Definitions**.
2. Select a remote record producer or a remote task definition for which you want to define the consumer criteria.
3. Navigate to the Consumer Criterias tab on the related list and click **New**.
4. You can associate an existing consumer criteria or create a new one.
5. Fill in the fields on the form.

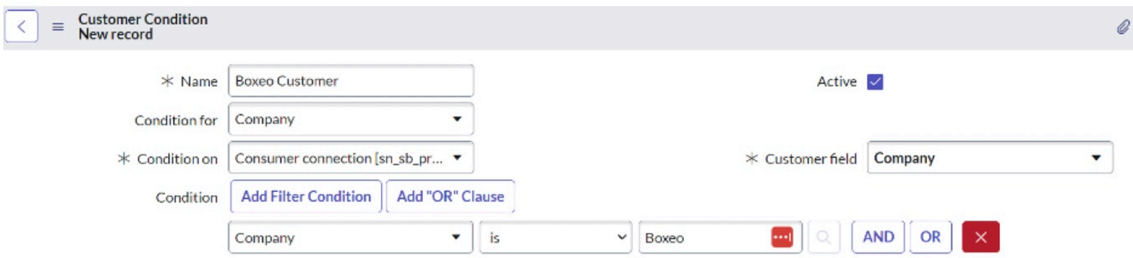
Field	Description
Name	Name of the consumer condition.
Active	Select this check box to enable the consumer condition.
Condition for	Allows you to specify the Company or Account can be used to match the records on the table being queried. Select the corresponding option based on which field (Company or Account) is available on the table being queried. For example, this field can be used on the Sold Product table as the Account field is used to query the table.
Condition on	Field indicates which table is to be queried to find matching records. **Note:** Tables where Customer Field cannot be selected should not be used.
Customer field	Select the field on the table being queried that matches the Company or Account defined on the Service Bridge connection. If the consumer connected through Service Bridge is an Account, you can use either a Company or Account field to match against it. If the consumer connected is only a Company, you will be restricted to Company.
Condition	Details of the filter. For example, Active is True.

The following examples show how consumer criteria can be configured.

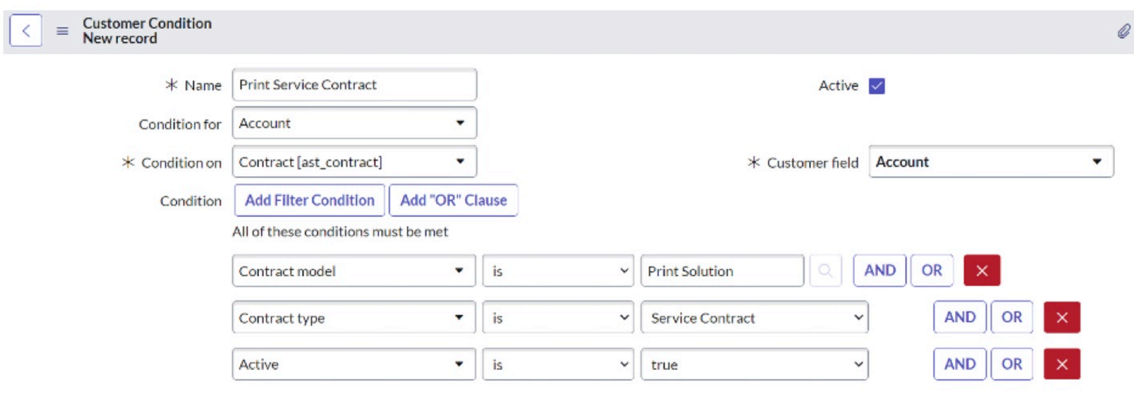
This consumer criteria can be used to entitle content to Service Bridge customers that have an active sold product where product name contains **Laptop – DaaS**.



This consumer criteria entitles content to the Boxeo Service Bridge consumer. It is used to query the Service Bridge Connection table and is filtered with Boxeo as the consumer.



This consumer criteria entitles content to Service Bridge consumers that have an active contract where the Contract model is Print Solution and the Contract Type is Service Contract.



Using variable sets with Remote Record Producers

Use single and multi-row variable sets with remote record producers.

Variable sets allow you to create a collection of variables that can be reused across multiple catalog items and order guides. Using variable sets saves time because you do not have to create the same variables individually for many catalog items. Also, when variables should be modified, you can modify the variable set and the changes are reflected across all the remote record producers that are associated with the variable set.

As a provider, you can create and associate variable sets with remote record producers. Any changes made to these variable sets are automatically synced to the remote record producers that the consumers are entitled to. You can create the following types of variable sets:

- Single-row variable set: Use a single-row variable set to capture data from variables that are grouped together.
- Multi-row variable set: Use a multi-row variable set to capture variable data in a grid layout for a group of entities. For example, for HR during the reorganization of employees, a single remote record producer should be able to capture the relevant information such as the department and manager for a group of employees.

Note:

- Variable sets containing variables with unsupported variable types (Custom, Custom with Label, and UIPage) will not be synced until the invalid variables are removed.
- Variable sets containing variables or UI Policies with scripting will not be synced until all scripting is removed.
- Remote record producers containing invalid variable sets cannot be published. To publish the remote record producer, you must either resolve the validation issues or unassign the invalid variable set from the remote record producer.

For more details on variable sets and how they are used, see Service catalog variable sets.

Create variable sets in Service Bridge for remote record producers

Create variable sets for a remote record producer in Service Bridge for Providers application.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Administration** > **Remote Catalog Items**.
2. Click a record producer that you want to create variables for.
3. Click the **Variable Sets** tab in the Related List and then click **New**.
4. Select one of the following:
   - Single-Row Variable Set: Creates a variable set with variables that are grouped together. Type field is set to `Single Row`.
   - Multi-Row Variable Set: Creates a variable set with multiple rows that captures variable data in a grid layout. Type field is set to `Multi Row`.
5. Fill in the fields on the form.

Field	Description
Title	Title of a variable set.
Internal name	Variable set name for internal use. If this field is left blank, it is auto-populated based on the Title field.
Order	Order number for the variable set.
Type	Type of the variable set. Possible choices are: ◦ Single Row ◦ Multi Row
Application	Applications that can use this variable set.

Field	Description
Display title	If selected, adds a title and an expandable header to the right of the variable set.
Variable Set attributes	Attributes for configuring a multi-row variable set. Use the *`max_rows`* attribute to set a limit to the number of rows that you can add to a multi-row variable set. For example, specify `max_rows=1` as the field value.
Layout	The layout display. Set to **1 Column Wide** or **2 Columns Wide, alternating sides** or **2 Columns Wide, one side, then the other**.
Description	Description of the variable set.

6. Right-click and select **Save**.
7. Create the variables to use in that set.

    a. In the Variables related list, click **New**.

    b. Follow the steps listed in Create variables for remote record producers in Service Bridge for Providers to create variables.

    Note: For a multi-row variable set:

    - The included variables are displayed as columns of a table.
    - The column order is the order of variables defined in the variable set.

8. Click **Submit**.
    Repeat the above steps to create additional variable sets for the same remote record producer.

    For more information on variable sets and the layout, see Variable set layout.

Create remote task definitions in Service Bridge for Providers

As a provider, create remote task definitions that trigger the assignment of a remote task.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Administration** > **Remote Task Definitions**.
2. Click **New**.
3. On the form, fill in the fields.

Remote Task Definition form

Field	Description
Name	Name of the remote task definition record.
Provider table	Any task table that you select from the list. For example, you can choose a case table or an incident table.

Field	Description
Consumer table	Any task table that you select from the list. For example, you can choose a case table or an incident table.
Send attachments	If this is selected, if an attachment is added on the parent record, it is sent to the remote task.
Copy attachment to parent	If an attachment is included with a remote task, a copy is sent to the parent record.
Short description	Brief information about this remote task definition.
Description	More detailed information about this remote task definition.

4. Click **Submit**.
5. Open this new Remote task definition record.
6. On the **Inbound fields** related tab, click **New**.
7. On the form, fill in the fields.
   The inbound fields enable you to receive data from the consumer's instance when a remote task is created or updated.

   Note: If the inbound field values are updated, the updated information is shown in a work note on the parent record.

   Inbound field form

Field	Description
Field label	Field label that appears on the remote task form.
Field name	Field name that is used in the remote task flow and script.
Max length	Maximum length of the source field name.
Sync when	Enables you to specify when a target field on the remote task's parent record is directly updated. You can select: ◦ **Insert:** Updates the target field on the remote task's parent record only when the remote task is initially inserted. ◦ **Insert or Update**: Updates the target field on the remote task's parent record every time the remote task is updated. ◦ **Never**: The inbound field never updates a target field on the remote task's parent record directly. For example, you can use this field for state mapping where a flow is used to convert the incoming value before updating the target field.

Field	Description
	Note: Irrespective of the option you select here, whenever an inbound field is updated, the changes are reflected in a worknote on parent record.
Source Mapping tab	This tab is not displayed if you have selected the **Virtual** check box to define a virtual field mapping.
Source table (read-only)	The Consumer table that you selected while creating the remote task definition.
Source field	Field from the source table that is sent to another ServiceNow instance. Source fields allow for Dot-walking to data in related tables, which is useful when reference data is not available between ServiceNow instances. For example, you can create multiple inbound mappings for change incidents (CIs) to include the name, class, IP address, and asset tag.
Target Mapping tab	Displayed only in the following conditions: ◦ Sync when: You select **Insert** or **Insert or update**. ◦ Virtual: You select this check box to enable virtual field mapping.
Target table (read-only)	The Provider table that you selected while creating the remote task definition.
Target field	Field from the target table that is sent to another ServiceNow instance. **Note:** If you are defining a virtual field mapping, the field you select in the target table is not present in the source table.
Active	This field is enabled by default.
Virtual	Select this check box to enable virtual inbound field mapping. A virtual field is a field that is present in the target table but does not exist in the source table. When a source table doesn't contain a field that exists on a target table, the field is configured as a virtual field. The values specified for the virtual field are passed from the source instance to the target instance. The consumer can create a

Field	Description
	remote task to sync data and update the value of the virtual field in the associated target task record. The target field can be updated either by using the Virtual Inbound option described in the Create a transform in Service Bridge or by using the `updateVirtualField` API.

8. Click **Submit**.
9. On the **Outbound fields** related tab, click **New**.
10. On the form, fill in the fields.
    The outbound fields enable you to send data to the consumer's instance when a remote task is created or updated.

Outbound field form

Field	Description
Field label	Name of the field label that appears on the remote task form.
Field name	Field name that is used in the remote task flow and script.
Max length	Maximum length of the field name.
Sync when suggestion	Enables you (the provider) to suggest to the consumer when a target field on the remote task's parent record should be directly updated. The consumer can change this setting before activating the definition ◦ **Insert:** Updates the target field on the remote task's parent record only when the remote task is initially inserted. ◦ **Insert or Update**: Updates the target field on the remote task's parent record every time the remote task is updated. ◦ **Never**: The inbound field never updates a target field on the remote task's parent record directly. For example, you can use this field for state mapping where a flow is used to convert the incoming value before updating the target field.
Source Mapping tab	This tab is not displayed if you have selected the **Virtual** check box to define a virtual field mapping.
Source table (read-only)	The Provider table that you selected while creating the remote task definition.
Source field	Field from the source table that is sent to another ServiceNow instance.

Field	Description
	Source fields allow for Dot-walking to data in related tables, which is useful when reference data is not available between ServiceNow instances. For example, you can create multiple inbound mappings for change incidents (CIs) to include the name, class, IP address, and asset tag.
Target Mapping tab	Displayed only in the following conditions: ◦ Sync when: You select **Insert** or **Insert or update**. ◦ Virtual: You select this check box to enable virtual field mapping.
Target table (read-only)	The Consumer table that you selected while creating the remote task definition.
Target field	Field from the target table that is sent to another ServiceNow instance. **Note:** If you are defining a virtual field mapping, the field you select in the target table is not present in the source table.
Active	This field is enabled by default.
Virtual	Select this check box to enable virtual inbound field mapping. A virtual field is a field that is present in the target table but does not exist in the source table. When a source table doesn't contain a field that exists on a target table, the field is configured as a virtual field. The values specified for the virtual field are passed from the source instance to the target instance. The target field can be updated either by using the Virtual Outbound option described in the Create a transform in Service Bridge or by using the `updateVirtualField API`.

11. Click **Submit**.
12. On the **Consumer criteria** related tab, click **New**.
13. On the form, fill in the fields.
    Consumer criteria enable you to manage which consumers can use these remote task definitions.

Consumer criteria form

Field	Description
Consumer condition	Customer company or account that you want this remote task definition to be entitled to.
Remote task definition	Name of this remote task definition record. This name is auto-filled.

For more details on consumer criteria, see Creating entitlements in Service Bridge for Providers.

14. Click **Publish**.

    Remote task variables are automatically created when you publish a remote task definition. These variables are the data variables for the inbound fields displayed and can be accessed on the remote tasks.

    Note:

    - Click **Retire** to deactivate a remote task definition that is no longer required. Existing remote tasks can continue to use the retired remote task definition but you cannot use the remote task definition it to create new remote tasks.
    - Click **Delete** to delete a retired remote task definition if it is no longer required.
    - To edit a published remote task definition, click **Edit**. Modify the remote task definition as required and click **Publish**.

Result

A remote task definition record is created on your instance. This record is also synchronized with your customer's instance and is now pending activation on your consumer's instance. If the **Auto activate remote task definition** field has been enabled by the consumer, the remote task definition is automatically activated on your consumer's instance.

Create a remote task using Flow Designer in Service Bridge for Providers

As a provider, proactively create remote tasks for your customers by using Flow Designer.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Flow Designer**.
2. On the Flow Designer landing page's main header, select **New** > **Flow**.
3. In the Flow properties window, fill in the following fields.

Flow properties fields

Field	Action
Flow name	Enter the name of your flow
Description	Description of your flow
Application	Global

Field	Action
Domain	Global
Protection	None
Run As	System User

4. Under the TRIGGER section, select **Add a trigger**.
5. In the Trigger section, fill in the following fields and click **Done**.

Trigger section fields

Field	Value
Trigger	`Created or Updated`.
Table	Table name that you want to create for your consumer. For example, a Case [sn_customerservice_case].
Condition	Details of the filter. For example, `Account` is `consumer-name`.
Run Trigger	For every update

Note: For Advanced Option fields, don't change any values.

6. Under the ACTIONS section, select **Add an Action, Flow Logic, or Subflow**.
7. Click **Action** > **ServiceNow Core** > **Create Record**.
8. Fill in the following fields.

New record fields

Field	Value
Table	Remote Task [sn_sb_pro_remote_task]
Fields	Add the following field values: ◦ **Account** > **Trigger- Record Created or Updated** > **Case Record** > **Account** ◦ **Remote Task Definition** ◦ **Parent** > **Trigger- Record Created or Updated** > **Case Record**
Run Trigger	For every update

9. Select **Done** and click **Save**.

Result
A remote task is created on your (provider) ServiceNow instance and it gets synchronised on the consumer's ServiceNow instance.

Create a transform in Service Bridge

As a provider or a consumer, create a transform in Service Bridge to integrate tasks between connected instances.

Before you begin

Role required: admin

About this task

The following steps describe the transform process for providers. Consumers can navigate to **All** > **Service Bridge Consumer** > **Transforms** and follow the same process.

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Administration** > **Transforms**.
2. Click **New**.
3. On the form, fill in the fields.

Transform form

Field	Description
Number	Auto-generated number for the transform record.
Company	Consumer name for whom this transform is applicable.
All Companies	If this is selected, the transform runs for all companies except those with the same company level transform. Use this field to create a default transform definition that can be applied to all companies. The All companies field eliminates the need to define a specific transform for each customer account even when they have similar requirements. You can use the default definition to transform specific fields across all companies simultaneously. The global transform is applied only to companies that match the configuration and do not have a specific transform already defined. If a company specific transform for the same configuration already exists, this will override the global transform.
Type	◦ **Simple**: Used when the field has a known and stable choice list on each instance. A related list of transform lines is created to match the inbound and outbound values. ◦ **Advanced**: Used for complex criteria that requires a script to determine the new value.

Field	Description
	◦ **Virtual Inbound**: Used to transform a virtual inbound field. Requires a script to determine the new value. ◦ **Virtual Outbound**: Used to transform a virtual outbound field. Requires a script to determine the new value.
Inbound	Option that enables an inbound transformation for this transform.
Outbound	Option that enables an outbound transformation for this transform.
Provider table	Option that designates the provider's task table. For example, Case.
Provider field	Option that designates the provider's field. For example, State.
Consumer table	Option that designates the consumer's task table. For example, Incident.
Consumer field	Option that designates the consumer's field. For example, **State**.
Inbound Field	When Type field is set to **Virtual Inbound**, this field is available to reference the virtual field this transform should populate.
Outbound Field	When Type field is set to **Virtual Outbound**, this field is available to reference the virtual field this transform should populate.

4. Click **Save**.
5. Select one of the following:
   a. **Simple:** Click **New** in the Transform lines related list, and fill in the fields on the form.

      Transform lines form

Field	Description
Provider label	Option that designates the provider's choice label. For example, Open.
Provider value	Option that designates the provider's choice value. For example, 10.
Customer label	Option that designates the customer's choice label. For example, Progress.
Customer value	Option that designates the customer's choice value. For example, 2.

   b. **Advanced**: Use a script to define the outbound and inbound labels and values as shown in the following example:

      ```
      output.value=input.value;
      output.label=input.label;
      ```

```
var ci=new GlideRecord('cmdb_ci');

if(direction=='inbound'){
   if(ci.get('correlation_id',input.value)){
      output.value=ci.sys_id+";
      output.label=ci.getDisplayValue();
      }
}
if (direction=='outbound'){
  if(ci.get(input.value)){
     if(ci.correlation_id){
        output.value=ci.correlation_id+";
        output.label=input.label;
       }
    }
}
```

c. **Virtual Inbound**: Use a script to determine the inbound label and value as shown in the following example:

```
var inputArr = input.value.split(',');
var outputValues = [];
var outputLabels = [];
for (i in inputArr) {
    getInstanceID(inputArr[i]);
}
output.value = outputValues+'';
output.label = outputLabels+'';

function getInstanceID(name) {
    var gr = new GlideRecord('cmdb_ci_server');
    if (gr.get('name', name)) {
        outputValues.push(gr.sys_id+'');
        outputLabels.push(name);
    }
}
```

d. **Virtual Outbound**: Use a script to determine the outbound label and value as shown in the following example:

```
/*
 ** The 'input' object contains the original value and label
 ** 'direction' contains an 'inbound' or 'outbound' value to determine
 transform direction
 ** 'object_data' contains the Remote Task GlideRecord
 ** It is required to set the variables 'output.value' and
 'output.label' with your script.
 */
output.value = 'condev,conprod';
output.label = 'condev,conprod';
```

6. Click **Submit**.
7. On the transform form, click **Activate**.

Result
A transform record is created on your ServiceNow® instance. Any Remote Task's inbound or outbound fields that match a transform will automatically use them. To learn more, see Create remote task definitions in Service Bridge for Providers.

Update settings for Authorized Users

As a provider, you can configure the settings for Authorized Users who have been created on the consumer's instance.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Consumers**.
2. Open the appropriate Consumer Connection form.
3. Under the Related Links, click the **Settings** tab and open the record displayed.
4. Click the **Authorized Users** tab.
   - Max authorized users: This field is available only if the Restrict authorized users flag has been enabled. Specify the maximum number authorized users that can be defined on the consumer's instance.
   - Restrict authorized users: Select the check box if you want restrict the number of authorized users on the consumer's instance.
   - Auto approve authorized users: If this check box is selected, authorized users created on the consumer instance are automatically approved.
5. Click **Update**.

   Note: You can view the settings defined in the Remote Record Producers and Remote Task Definitions tabs but cannot modify them.

Use Service Bridge for providers

As a provider, learn how to use Service Bridge to submit requests from the service catalog, and track order fulfillment from your ServiceNow® instances.

Register a Service Bridge consumer

Registering a new consumer in Service Bridge establishes an instance-to-instance integration between a provider and a consumer.

Before you begin

- Role required: admin
- A provider record must have been created. See Set up a Service Bridge provider record.
- A company or account must exist for the consumer in the provider's instance, and a user or contact with the sn_sb_pro.consumer role must be associated with the company. If this is a production instance, the user must have a valid email address to receive the registration email.
- Run the **Key Management** > **Health (Diagnostics)** to ensure that the Key Management Framework health check has passed. Your administrator must have the sn_kmf.admin and

sn_kmf.cryptographic_manager roles to access the health diagnostics. If your administrator does not have access, follow the instructions in Assign KMF roles to grant the required roles.

About this task

Register a new consumer by creating a registration task for the company and instance you want them to connect with. The company contact will receive an email when this registration task is created in a production instance or any other instance where email sending is enabled. If email sending is not enabled, the provider admin can copy the link from the registration task comments and send it to the consumer admin. The email contains instructions and a link that allows the consumer to complete the registration process.

Note: When setting up two instances for demonstration purposes, it is vital to ensure that the consumer contact matches the user who is currently logged into the provider instance when attempting to complete the registration from the consumer instance. In the consumer instance, selecting the **Connect to Provider** option will open an OAUTH page in the provider instance, where the consumer admin must authenticate the OAUTH token. If the contact listed on the registration task does not match the logged-in user, this process will fail.

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Consumer Registrations** and click **New**.
2. Enter the following details:
   - Select the Company associated with the consumer instance being registered.
   - Select the contact details associated with the Company you have selected.

     Note: This contact must be an admin user in the consumer instance, otherwise the registration process cannot be completed. On the provider instance, only a Service Bridge Consumer role is required.

   - Click the **Lock** icon on the URL field and enter the URL of the consumer ServiceNow instance.
3. Click **Submit**.
   An email is generated and sent to the Consumer Contact specified during registration if email sending is enabled. If not, the admin must either copy the link from the work notes and manually send it to the consumer admin. The Consumer Contact must follow the steps listed in the Registering with a provider to complete the registration process on the consumer instance.

Service Bridge Remote Catalog items

Service Bridge Remote Catalog items are ordered from the consumer's ServiceNow instance and they create provider tasks in each instance. The provider's agent fulfills these provider tasks in their ServiceNow instance. The data in these tasks is synchronized between instances so that they both can track the progress.

Service Bridge remote catalog items

Some common Service Bridge Remote Catalog items are as follows:

- Help requests
- Service-affecting issues
- Requests for changes in service

Service Bridge request fulfillment process

1. The consumer selects a Service Bridge related item from the service catalog.
2. The consumer provides the information in the Service Bridge request form and clicks **Submit**. When the consumer places the request, the Task View appears.

   Within the view, the consumer can add comments that are replicated in the provider's instance.

3. In the consumer's instance, a single tracking task type, the Provider Task, is generated, regardless of the service.
4. The Provider Task is replicated on the provider's instance, triggering a flow that triggers the parent task.
5. The state of the task in the consumer's instance is set to Received.
6. In the provider's instance, an agent takes ownership of the parent task by clicking **Assign to me**.
7. After an agent takes ownership, the state of the Provider Task in the consumer's instance is updated to Work in Progress.

   When the agent posts a comment on the provider's instance, the comment is replicated in the consumer's instance. Comments that the consumer posts are replicated in the provider's instance.

8. After the agent resolves the request, sets a resolution code, and clicks **Propose solution**, the state of the Provider Task in the consumer's instance is updated to Resolved.

   The Actions menu displays the following options, **Accept**, **Reject**, or **Cancel**.

9. If the consumer accepts the resolution, the state of the provider task on the consumer's instance, and the state of the request on the provider's instance, are updated to **Closed**.

Proactive Service Bridge case notification in Service Bridge

After a customer onboards through Service Bridge, that customer gets notified of cases that are created from alert monitoring. Customers proactively receive up-to-date information about issues that affect them, and are informed about the progress of the resolution of those issues.

A proactive case in Service Bridge is similar to the synchronization that occurs between a provider's and customer's instances when the customer submits a service request. However, in this case, the fulfillment process proactively triggers by alert monitoring.

The process is as follows:

1. An alert that is related to an onboarded Service Bridge customer triggers in the provider's instance, and a case record is created.
2. A link to the provider task is added as a comment in that case.
3. An automatic Customer Service Management notification is sent to the primary customer contact, and a link to the provider task is also included.
4. Any state changes or additional comments that are added to the case record in the provider's instance appear in the customer's instance. The status change in the case triggers creation of a case on the provider's instance.

For more information about the Service Bridge synchronization for resolving cases, see Service Bridge Remote Catalog items.

Using the Scratchpad for Service Bridge tasks

The Scratchpad feature facilitates exchange of additional data between provider and consumer instances while performing Service Bridge tasks.

Both providers and consumers can add, update, and remove information to and from the Scratchpad table. Using server side scripts, name-value pairs are associated with Provider Tasks and Remote tasks and this data is automatically synced between the instances. Shared data must be associated with a Provider or a Remote Task, and is automatically synced if the associated task is active.

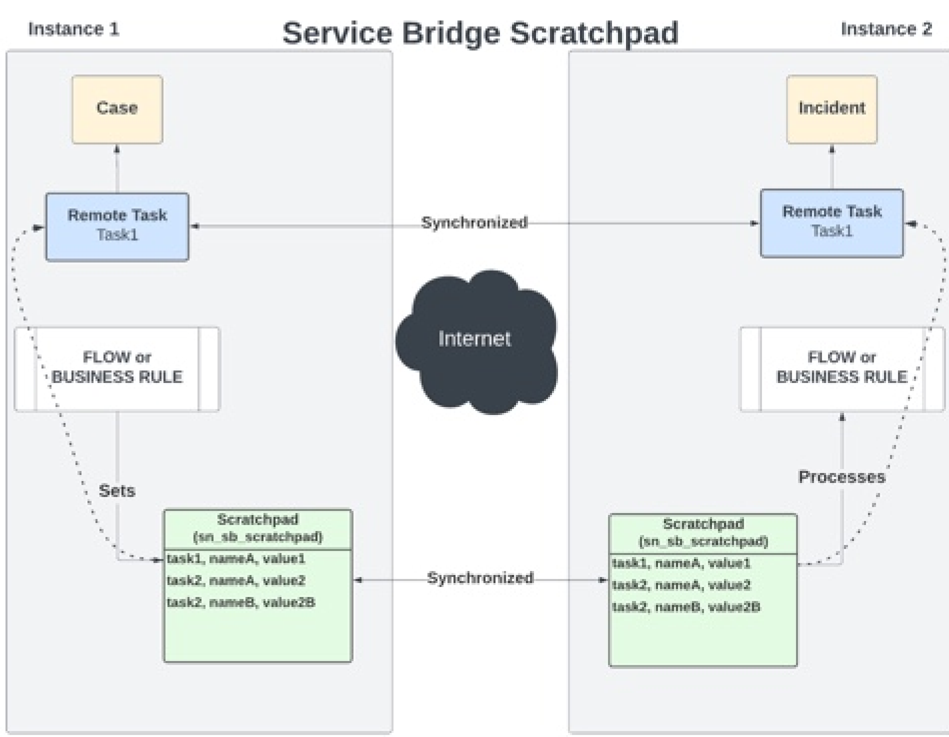
The PSBScratchpadUtil API allows providers to share extra information that is outside of any other Service Bridge service, with their consumers. See PSBScratchpadUtil - Scoped for more details.

The CSBScratchpadUtil API allows consumers to share extra information that is outside of any Service Bridge service with their providers. See CSBScratchpadUtil - Scoped for more details.

Note:

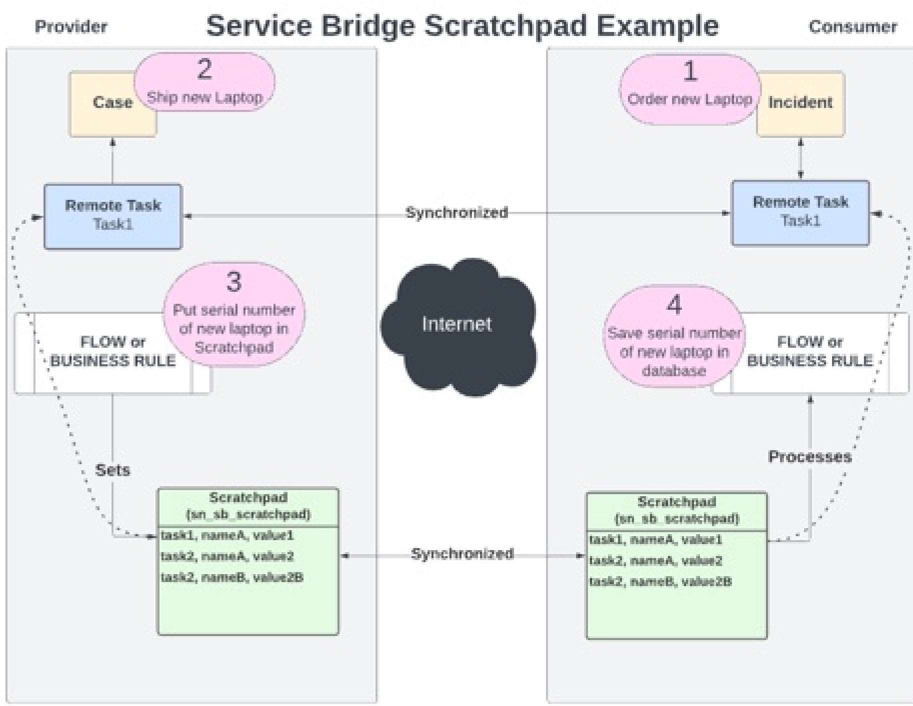
- If the associated task is deactivated or deleted, the scratchpad data is deleted after 3 days. This setting can be modified using the `sn_sb.scratchpad.autodelete.days` property.
- Each task can have a maximum of 50 scratchpad entries.
- Data in the scratchpad cannot exceed 4000 characters.

The following diagram shows how the scratchpad data is synced between the instances.



Example Scratchpad use case: This example shows how data in the Scratchpad is synced between the consumer and provider instances.

- A consumer orders a laptop from the local catalog. The local catalog in this case is a Remote Record Producer.
- This request is immediately forwarded the provider and appears as a Provider Task on the provider's instance.
- The provider then selects a laptop from the inventory, sets it up and adds relevant information like the serial number, model, configuration to the Scratchpad which is automatically sent to the consumer.
- On the consumer's instance, the Scratchpad data is retrieved and updated on the local database.
- The laptop is then assigned to the consumer.



Service Bridge for Consumers

Use the Service Bridge for Consumers application to seamlessly interact and collaborate with your providers .

Overview

As a consumer, you can:

- Review remote catalog items entitled to you from your local catalog and send requests to your provider for fulfillment.
- Bidirectionally integrate your tasks with your provider's tasks.
- Receive proactive tasks from providers for transparency and collaboration.

Explore	Configure	Reference

Learn about the features and capabilities of Service Bridge.

As a consumer, configure your Service Bridge installation.

Get details of domain separation and installed components.

Installing and configuring Service Bridge for Consumers

As a consumer, follow these steps to set up the Service Bridge for Consumers application in your own instance.

Setting up Service Bridge for Consumers

Task	Link
Install the Service Bridge for Consumers application.	See Install Service Bridge for Consumers.
Add Service Bridge roles for consumers.	See Personas for consumers.
Register with a provider.	See Registering with a provider.
Activate entitlements.	See Activate entitlements in Service Bridge.
Add authorized users.	See Add an authorized user.
Create transforms.	See Create a transform in Service Bridge.
Create remote tasks to sync data.	See Create remote tasks to sync data.
Configure settings.	See Configure settings on the consumer instance.

Install Service Bridge for Consumers

If you have an admin role, you can install the Service Bridge for Consumers application. The application includes demo data and installations that are related to ServiceNow® Store applications and plugins.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

About this task

The following plugins are installed with the Service Bridge for Consumers application:

- sn_sb
- sn_sb_rps
- sn_transport

- com.glide.hub.process.sync
- com.snc.ihub_spoke_util_pack

Apart from these, several components including roles, business rules, tables, and flows are also installed. For more information about the components that are installed with this application, see Components installed with Service Bridge for Consumers.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Service Bridge for Consumers application by 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 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. If demo data is available and you want to install it, click **Load demo data**.

   Demo data comprises sample records that describe the application features for common use cases. Load demo data when you first install the application on a development or test instance.

   > **Important:** If you don't load the demo data during installation, it's unavailable to load later.
4. Select **Install**.

Personas for consumers

Learn about the different personas in the Service Bridge application.

Remote record producers can be associated with personas. If a remote record producer does not have a persona, any user with the Service Bridge Requestor role can place an order for the item. However, if one or more personas are assigned to a remote record producer, the user must have the Requestor role and at least one of the listed personas. Personas are assigned to users through the Authorized Users table. To access items protected by personas, the user's Authorized User record must be approved by the provider, activated in the consumer instance, and have the appropriate persona(s).

Consumer personas

Persona	Skills	Tasks	Roles
System administrator	Is a certified ServiceNow system administrator	• Creates provider and connection records. • Installs the Service Bridge applications. • Creates and maintains transforms.	• admin • sn_sb.admin • sn_transport.admin

Consumer personas (continued)

Persona	Skills	Tasks	Roles
		• Activates published remote task definitions and remote record producers. • Troubleshoots Service Bridge transport payloads.	
Service Bridge Requester	Is an IT administrator	• Responsible for some form of IT service that is either completely or in part supported by one or more external vendors. • Requests and monitors the service requests that are placed with the external provider from their own instance.	• itil • sn_sb.requestor
Consumer Requestor	End user	Makes requests from the Remote Catalog.	sn_sb.requestor

Assign roles to groups for Service Bridge

Assign roles to control the actions that are available for each user. In the Service Bridge for Consumers application, you assign roles by group rather than by the individual user so that when the job descriptions of users change, their roles are automatically updated.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Click the group that you want to assign the role to.
3. In the Roles related list, click **Edit**.
4. Add the desired roles to the group.
5. Click **Save**.

Registering with a provider

Complete the registration process to establish a connection to the provider instance.

Before you begin

- Role required: admin
- Run the **Key Management** > **Health (Diagnostics)** to ensure that the Key Management Framework health check has passed. Your administrator must have the sn_kmf.admin and sn_kmf.cryptographic_manager roles to access the health diagnostics. If your administrator does not have access, follow the instructions in Assign KMF roles to grant the required roles.

About this task

Before proceeding, the provider should have requested the contact details of an admin to set as the main point of contact on their registration record. This designated contact person will receive an email either from the provider's instance or directly from the provider's admin, containing a registration link. Clicking on this link will generate a Provider Connection record in your consumer instance. The following steps assume that you have already clicked the registration link.

Note: This version of Service Bridge requires a global script that must be installed before you set up Service Bridge. Follow instructions in KB1225292 on the Now Support instance to install the script.

Procedure

1. Click the **Connect to Provider** link sent in the provider's registration email or follow the link given to you directly by the provider's admin.
   This link will generate the Provider connection record.

   Note: The consumer admin completing the registration process must be the named contact on the provider's registration task or registration will fail during the OAUTH authentication step.

2. Navigate to **All** > **Service Bridge Consumer** > **Provider Connections**.
3. On the Provider Connection form in the consumer instance, select the name of the Company that the provider is associated with and click **Save**.
   The Provider Connection record is displayed.
4. Click **Connect to Provider** in the Provider connection record page.
5. Click **Authenticate** when the Service Bridge registration message appears.
   The OAuth authentication page appears.
6. Click **Allow** and then click **Submit** to proceed with the registration.
   You are redirected to the Registration task where you can view the status. When registration is completed, a connection is established between the provider and the consumer instances, and the registration task State is set to **Closed Complete** on the provider's instance.

Activate entitlements in Service Bridge

Activate entitlements to use a service or product that you have purchased.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Consumer** > **Provider Connections**.
2. Click the Number link to navigate to the Provider connection record.

3. The list of entitlements available is displayed.
4. Click the Remote record producers tab and select a remote record producer to you want to activate.
5. In the Remote record producer page, click **Activate** to activate the entitlement.
6. Click the Remote task definition tab and select a remote task definition to you want to activate.
7. In the Remote task definition page, click **Activate** to activate the entitlement.

Activate the remote task definitions record in Service Bridge

As a consumer, activate the remote task definitions in your instance so that you can create remote tasks.

Before you begin

Before you (the consumer) can activate a remote task definition in your ServiceNow instance, your provider must create it first in their ServiceNow instance. For more information, see Create remote task definitions in Service Bridge for Providers.

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Consumer** > **Remote Tasks**.
2. Click the remote task definition record that you want to activate.
3. On the remote task definition form, review the Simple Trigger section on the form.
   If you set a simple trigger that matches a task record update, a remote task is automatically created for the task record.
4. On the **Inbound fields** related tab, review the variables data.
   The provider defines these inbound fields. When you create a remote task, your provider receives the remote task data through these inbound fields. You can modify the **Field label**, **Sync when**, and **Target field** fields.
5. On the **Outbound fields** related tab, review the variables data.
   Your provider defines these outbound fields. When the provider responds to your remote task, you receive the remote task data through these outbound fields. You can only modify the **Source field** field on these records.
6. On the **Remote task variables** related tab, review the variables data.
   The remote task variables are created from your inbound fields to be displayed on the remote tasks form.
7. Click **Activate**.
8. Verify the mappings of the inbound and outbound variables and click **OK**.
   The pop-up window enables you to verify the inbound and outbound mappings.

Add an authorized user

As a consumer, add new authorized users to control the access to catalog items that are entitled to you by your provider.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Consumer** > **Provider Connections**.
2. On the Provider Connections page, click the **Number** link to open a Provider Connection record.
3. Select the **Catalog Personas** related tab and check if you have any entitled personas from your provider.
4. On the **Authorized Users** related tab, click **New**.
5. On the form, fill in the fields.

Authorized User form

Field	Description
Consumer user	Name of the user. You can select the name from the user's list.
Provider connection	Name of the service provider. This field is auto-filled.
Persona	Persona(s) that you want to add to the user.

6. Right click the form header and click **Save**.
7. Click **Activate**.

Result

The authorized user record syncs to the provider's ServiceNow instance for approval. After it is approved and activated, the user can see the remote record producers with their assigned personas.

Create remote tasks to sync data

Remote tasks provide linked tasks across multiple instances and enable business workflows without any custom integrations.

Before you begin

- Role required: admin
- Remote task definition must already exist.

About this task

As a consumer, you can integrate tasks like incidents, cases, and service requests bi-directionally with your providers using remote tasks.

Procedure

1. Navigate to **All** > **Incidents** > **Open**.
2. Click on the **Number** link to open an incident.
3. Click **Create Remote Task for Provider** in the Related Links section.

   Note: The **Create Task for Provider** link appears in this section only if at least one active and valid remote task definition is available for the provider table associated with the task.

4. The Remote Task page appears.

In the Remote Task page, the Parent field is populated with the task record and the Status field is set to New.

5. Select a Remote Task Definition from the list.

   Note:

   - Only active and valid remote task definitions associated with the parent task are displayed.
   - The Provider Connection field is automatically filled in based on the Remote Task Definition selected.
   - If only one Remote Task Definition is available, the Remote Task Definition field is automatically populated.

6. Click **Submit**.
   When you navigate back to the parent task, you can see the newly created remote task in the Remote Tasks related list.

   Note: The Remote Task is created asynchronously and may not show initially if the parent task form is quickly loaded. You may need to refresh the form to see the newly created Remote Task.

7. Navigate to **Service Bridge Consumer** > **Remote Tasks**.
   The list of remote tasks is displayed. When the newly created Remote Task is received in the provider instance, a new parent task based on the Remote Task is created.
8. Click on the newly created task and then click on the remote task under the Remote Tasks tab in the Related Links section.
   You can see the Status field is set to Connected and that the description has been updated.
9. Navigate back to the parent task.
10. Update the Short Description for the parent task and click **Save**.
11. Log into the consumer instance and open the task.
    You can see that the data has been synced and Short Description field has been updated in the consumer instance. You can also see a work note indicating that the Short Description has been updated by the provider.

    Note:

    - You can create a remote task on the provider instance by following the same steps. Data is synced between the consumer and provider instances and any changes you make in the consumer instance are automatically updated in the provider instance.
    - When you create a remote task on the consumer instance, the Provider Connection field is automatically populated when you select a Remote Task Definition.

Connect and Disconnect remote tasks

Remote tasks associated with active remote task definitions enable you to sync data between two parent tasks on the provider and consumer instances.

When you create a remote task for an active remote task definition, the Status of the remote task is set to **Connected** on the provider and consumer instances if there are no errors. This ensures that the remote task syncs data including field updates, attachments, and comments between the parent tasks.

To stop synching of data between the instances, navigate to the Remote Task page on the provider or consumer instance and click **Disconnect**. When disconnected, the remote task pauses copying or transfer of data including worknotes and comments between the instances.

Note: To resume syncing of data, you can navigate to the Remote Task page and click **Connect**. This option works only if the existing configuration is valid and has not been modified, and the remote task definition is active.

Configure settings on the consumer instance

As a consumer, you can configure an define default settings on your instance.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Consumer** > **Provider Connections**.
2. Click the Number link on the Provider Connections page.
3. Under the Related Links, click the **Settings** tab and click **New**.
4. In the Settings page, click the **Remote Record Producers** tab under the Related Links.
5. Enable the **Auto activate remote record producer** check box if you want the remote record producers to be automatically activated.
6. Click the **Remote Task Definitions** tab.
7. Enable the **Auto activate remote task definition** check box if you want the remote task definition to be automatically activated.
8. Click the **Authorized Users** tab.
    - Max authorized users: This field is available only if the Restrict authorized users flag has been enabled. Specify the maximum number authorized users that can be defined on the consumer's instance.
    - Restrict authorized users: Select the check box if you want restrict the number of authorized users on the consumer's instance.
    - Auto approve authorized users: If this check box is selected, authorized users created on the consumer instance are automatically approved.
9. Click **Update**.

Using the Scratchpad for Service Bridge tasks

The Scratchpad feature facilitates exchange of data between provider and consumer instances while performing Service Bridge tasks.

Both providers and consumers can add, update, and remove information to and from the Scratchpad table. See Using the Scratchpad for Service Bridge tasks for detailed information on how to use the Scratchpad feature.

Service Bridge reference

Reference topics provide additional information about the Service Bridge data model and configuration.

Service Bridge data model

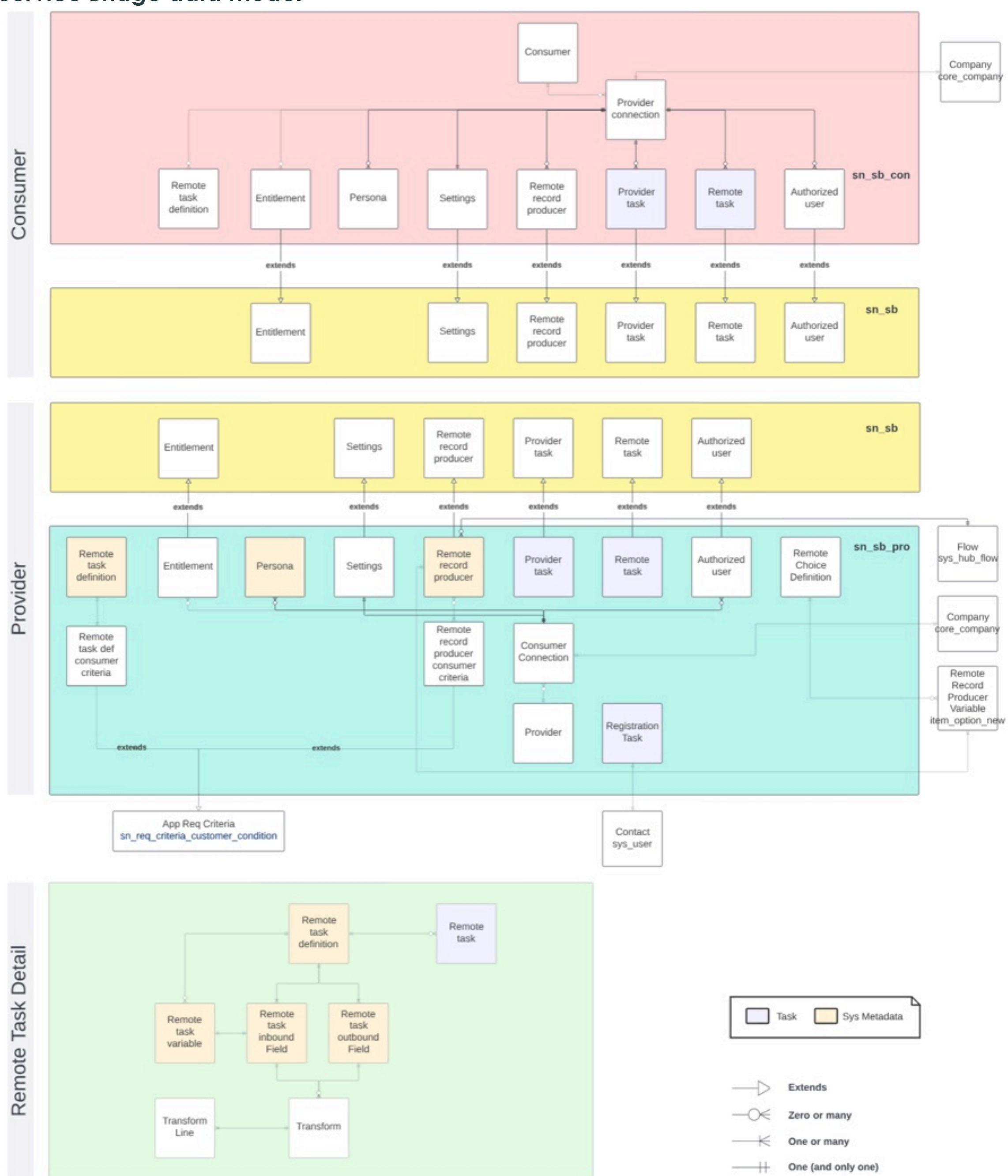
The Service Bridge applications data model provides insight into how the tables that are used in Service Bridge relate to each other.

The data model uses a combination of the following types of tables to store data:

- Service Bridge application tables.
- Now Platform standard tables.

The following diagram provides an overview of the data model for Service Bridge.

Service Bridge data model



The following table lists the Access Control Rights (ACR) for specific Service Bridge base table.

Access to tables by role in the Service Bridge base application

Table	Read	Write	Delete	Create
Authorized user [sn_sb_authorized_user]	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin
Connection [sn_sb_connection]	admin sn_sb.admin	admin	admin	admin
Entitlement [sn_sb_entitlement]	admin sn_sb.admin	admin	None	None
Provider Task [sn_sb_provider_task]	admin sn_sb.admin sn_sb.requestor	admin sn_sb.admin sn_sb.requestor	admin	admin sn_sb.admin sn_sb.requestor
Remote Record Producer [sn_sb_remote_record_ producer	admin sn_sb.admin	admin	admin	admin
Remote Task [sn_sb_remote_task]	admin sn_sb.admin sn_sb.remote_task_creator	None	None	None
Scratchpad [sn_sb_scratchpad]	admin	None	None	None
Transform [sn_sb_transform]	admin sn_sb.admin	None	None	None
Transform Line [sn_sb_transform_line	admin sn_sb.admin	None	None	None

Service Bridge for Providers data model

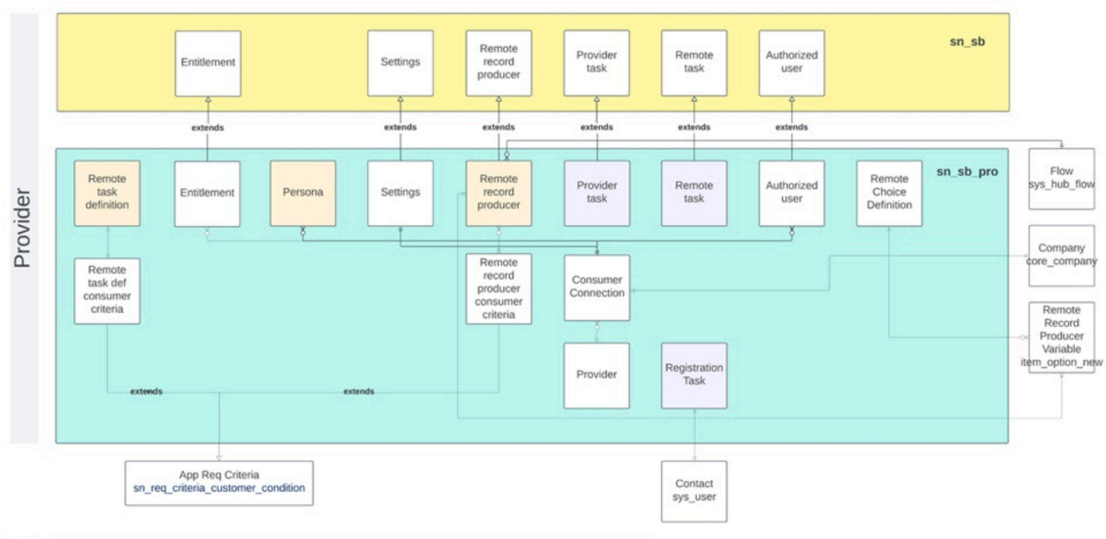
The Service Bridge for Providers data model provides insight into how the tables that are used in the Service Bridge for Providers application relate to each other.

The Service Bridge for Providers application data model uses a combination of the following types of tables to store data:

- Service Bridge of Providers application tables.
- Customer Service Management application tables.
- Now Platform standard tables.

The following diagram provides an overview of the data model for Service Bridge for Providers application.

Service Bridge for Providers data model



The following table lists the Access Control Rights (ACR) for specific Service Bridge for Provider tables.

Access to tables by role in the Service Bridge for Providers application

Table	Read	Write	Delete	Create
Authorized user [sn_sb_pro_authorized_user	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin
Consumer Connection [sn_sb_pro_consumer_ connection]	admin sn_sb.admin	admin	admin	admin
Entitlement [sn_sb_pro_entitlement]	admin sn_sb.admin	None	None	None
Inbound Field [sn_sb_pro_inbound_field]	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin

Access to tables by role in the Service Bridge for Providers application (continued)

Table	Read	Write	Delete	Create
Outbound Field [sn_sb_pro_outbound_field]	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin
Persona [sn_sb_pro_persona]	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin
Provider [sn_sb_pro_provider]	admin sn_sb.admin	admin	admin	admin
Provider Task [sn_sb_pro_provider_task]	admin sn_sb.admin sn_sb.requestor	admin sn_sb.admin sn_sb.requestor	admin	admin sn_sb.admin sn_sb.requestor
Registration [sn_sb_pro_registration]	admin sn_sb.admin sn_sb_pro_consumer	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin
Remote Choice Definition [sn_sb_pro_remote_choice_ definition	admin sn_sb.admin	None	None	None
Remote Record Producer [sn_sb_con_remote_record_ producer]	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin
Consumer Criteria [sn_sn_pro_remote_record_ producer_consumer_criteria]	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin
Remote Service	admin	admin	admin	admin

Access to tables by role in the Service Bridge for Providers application (continued)

Table	Read	Write	Delete	Create
[sn_sb_pro_remote_service]	sn_sb.admin			
Remote Task sn_sb_con_remote_task]	admin sn_sb.admin sn_sb.remote_task_creator	admin sn_sb.admin sn_sb.remote_task_creator	admin sn_sb.admin sn_sb.remote_task_creator	admin sn_sb.admin sn_sb.remote_task_creator
Remote Task Definition [sn_sb_con_remote_task_def]	admin sn_sb.admin sn_sb.remote_task_creator	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin sn_sb.remote_task_creator
Consumer Criteria [sn_sv_pro_remote_task_def_consumer_criteria]	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin
Variable [sn_sb_con_remote_task_variable]	admin sn_sb.admin	admin	admin	admin
Service Bridge Settings [sn_sb_con_service_bridge_settings]	admin sn_sb.admin	admin sn_sb.admin	None	None
Transform [sn_sb_con_transform]	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin

Service Bridge for Consumers data model

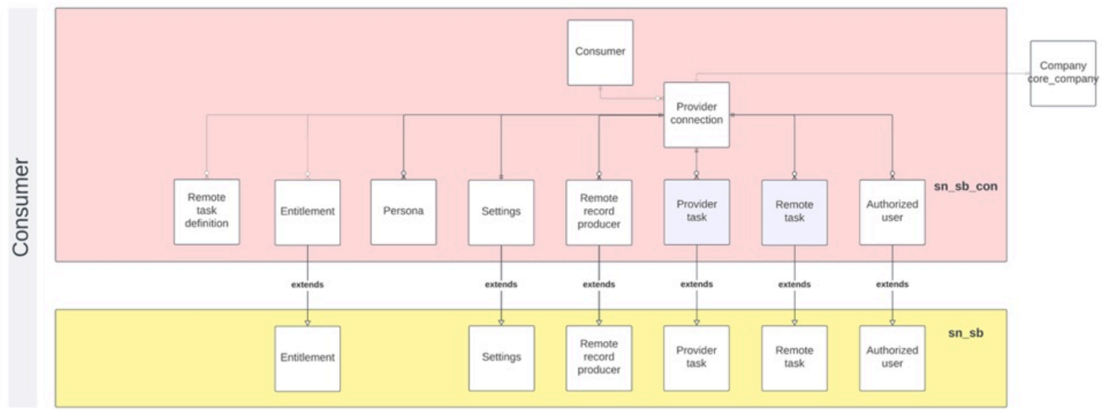
The Service Bridge for Consumers data model provides insight into how the tables that are used in the Service Bridge for Consumers application relate to each other.

The Service Bridge for Consumers data model uses a combination of the following types of tables to store data:

- Service Bridge for Consumers application tables.
- Customer Service Management application tables.
- Now Platform standard tables.

The following diagram provides an overview of the data model of the Service Bridge for Consumers application.

Service Bridge for Consumers data model



The following table lists the Access Control Rights (ACR) for specific Service Bridge for Consumer tables.

Access to tables by role in the Service Bridge for Consumers application

Table	Read	Write	Delete	Create
Authorized User [sn_sb_con_authorized_user]	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin
Consumer [sn_sb_con_consumer	admin sn_sb.admin	admin	admin	admin
Entitlement [sn_sb_con_entitlement]	admin sn_sb.admin	None	None	None
Inbound Field [sn_sb_con_inbound_field]	admin sn_sb.admin	admin sn_sb.admin	None	None
Outbound Field [sn_sb_con_outbound_field]	admin sn_sb.admin	admin sn_sb.admin	None	None
Persona	admin	None	None	None

Access to tables by role in the Service Bridge for Consumers application (continued)

Table	Read	Write	Delete	Create
[sn_sb_con_persona]	sn_sb.admin			
Provider Connection [sn_sb_con_provider_ connection]	admin sn_sb.admin	admin	admin	None
Provider Task [sn_sb_con_provider_task]	admin sn_sb.admin sn_sb_requestor	admin sn_sb.admin sn_sb_requestor	admin	admin sn_sb.admin sn_sb_requestor
Remote Choice Cache [sn_sb_con_remote_choice_ cache	admin	admin	None	None
Remote Record Producer [sn_sb_con_remote_record_ producer]	admin sn_sb.admin sn_sb_requestor	None	admin sn_sb.admin	None
Remote Task [sn_sb_con_remote_task]	admin sn_sb.admin sn_sb_remote_task_ creator	admin sn_sb.admin sn_sb_remote_task_ creator	admin sn_sb.admin sn_sb_remote_task_ creator	admin sn_sb.admin sn_sb_remote_task_ creator
Remote Task Definition [sn_sb_con_remote_ task_def	admin sn_sb.admin sn_sb_remote_task_ creator	admin sn_sb.admin	admin sn_sb.admin	None
Variable [sn_sb_con_remote_ task_variable]	admin sn_sb.admin	None	None	None

Access to tables by role in the Service Bridge for Consumers application (continued)

Table	Read	Write	Delete	Create
Service Bridge Settings [sn_sb_con_service_ bridge_settings	admin sn_sb.admin	admin sn_sb.admin	None	None
Remote Choice [sn_sb_con_st_ remote_choice]	admin sn_sb.admin sn_sb_requestor	None	None	None
Transform [sn_sb_con_transform	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin	admin sn_sb.admin

Components installed with Service Bridge for Providers

Several types of components are installed when you activate the Service Bridge for Providers application, including tables, user roles, and business rules.

The Application Files [sys_metadata] 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.

Roles installed

The following roles are installed with the Service Bridge for Providers application.

Roles installed with the Service Bridge for Providers application

Role title [name]	Description	Contains roles
Service Bridge requester [sn_sb.requestor]	• Enables members of the customer IT staff to request and monitor services from the provider from their service catalog. **Note:** Any member of the customer's staff who needs access to the provider's remote record producers requires this role. • Provides access to the remote record producers and provider tasks.	N/A

Roles installed with the Service Bridge for Providers application (continued)

Role title [name]	Description	Contains roles
Service Bridge read [sn_sb.read]	• Enables the provider's customer service agents to read the contents of the provider task record. • Provides read-only access to the Service Bridge application.	N/A
Service Bridge admin [sn_sb.admin]	• Typically assigned to an administrator for the Service Bridge applications on both the customer and the provider side. • Provides read access to all Service Bridge tables	• sn_sb.requestor • sn_sb.remote_task_creator • sn_sb.read • flow_designer • sn_customerservice.case_viewer • sn_customerservice.customer_data_viewer • catalog

Business rules installed

The following business rules are installed with the Service Bridge for Providers application.

Business rules installed with the Service Bridge for Providers application

Business rule	Table	Description
Abort duplicate remote task insert	sn_sb_pro_remote_task	Aborts insert of remote task if it already exists.
Abort if duplicate transform is found	sn_sb_pro_transform	Aborts insert or update of transform if duplicate found.
Abort if duplicate URL	sn_sb_pro_consumer_ connection	Aborts insert of consumer connection if duplicate URL already exists.
Abort if field name already in use	sn_sb_pro_inbound_field	Aborts insert of inbound field if name is a duplicate.
Abort if field name already in use	sn_sb_pro.outbound_field	Aborts insert of outbound field if name is a duplicate.

Business rules installed with the Service Bridge for Providers application (continued)

Business rule	Table	Description
Abort if remote task def is not editable	sn_sb_pro_remote_task_ def_customer_criteria	Blocks creating or editing consumer criteria if associated remote task def is not in an editable state.
Abort if remote task def is not editable	sn_sb_pro_inbound_field	Blocks insert of inbound fields if associated remote task definition is not in an editable state.
Abort if remote task def is not editable	sn_sb_pro_outbound_field	Blocks insert of outbound fields if associated remote task definition is not in an editable state.
Abort publish if duplicate record	sn_sb_pro_remote_task_def	Blocks publishing of remote task definition if is a duplicate record.
Abort Remote Task Create If Missing Conn	sn_sb_pro_remote_task	Sets connection on remote task if present, or aborts insert if none found.
Abort remote task def delete by provider	sn_sb_pro_remote_task_def	Prevents remote task definition deletion if definition is not in retired state.
Add cat_item name to g_scratchpad	item_option_new	Adds the catalog item name to the scratchpad on display.
Add consumer connection data to session	sn_sb_pro_consumer_ connection	Adds consumer connection data to session data.
Approve approval record	sn_sb_pro_provider_task	Handles record approvals through provider tasks.
Assure deletable	sn_sb_pro_remote_ choice_definition	Checks that a remote task definition is deletable.
Assure persona name uniqueness	sn_sb_pro_persona	Prevents persona records being created with same name.
Assure unique and updatable	sn_sb_pro_remote_choice_ definition	Ensures that only unique remote task definitions are inserted or updated.

Business rules installed with the Service Bridge for Providers application (continued)

Business rule	Table	Description
Assure uniqueness of criteria for RRP	sn_sb_pro_remote_record_ producer_consumer_criteria	Ensures the criteria added to a remote record producer is unique.
Clear remote task client data	sn_sb_pro_remote_task	Clears session data for remote task transactions.
Copy attachment from Provider Task	sys_attachment	Copies attachments from synced provider tasks to parent task.
Copy attachment to Provider Task	sys_attachment	Copies attachments from parent task to provider tasks.
Create default user criteria on Insert	sn_sb_pro_remote_ record_producer	Creates default user criteria on insert of remote record producer.
Create or Update transport connection	sn_sb_pro_consumer_ connection	Manages transport connection on connection changes.
Create parent on synced remote task	sn_sb_pro_remote_task	Creates parent task on synced remote task insert.
Delete associated criteria record	sn_sb_pro_remote_task_def	Deletes associated criteria records on delete of a remote task definition.
Delete associated records	sn_sb_pro_remote_task_def	Deletes inbound and outbound mapping records associated with remote task definition.
Disconnect RT when RTD Deleted	sn_sb_pro_remote_task_def	Disconnects all associated remote tasks when a remote task definition is deleted.
Display Scope mismatch warning	Item_option_new	Shows warning on variable records when in incorrect scope.
Error RT when Parent Deleted	task	When a parent task is deleted, all associated remote tasks status is set to the Error state.

Business rules installed with the Service Bridge for Providers application (continued)

Business rule	Table	Description
Force RRP to Draft State on Edits	catalog_ui_policy_action	Sets remote record producer state to Draft when associated records are edited.
Force RRP to Draft State on Edits	sys_attachment	Sets remote record producer state to Draft when associated records are edited.
Force RRP to Draft State on Edits	catalog_ui_policy	Sets remote record producer state to Draft when associated records are edited.
Force RRP to Draft State on Edits	question_choice	Sets remote record producer state to Draft when associated records are edited.
Force RRP to Draft State on Edits	item_option_new	Sets remote record producer State to Draft when associated records are edited.
Force Updates to Update Sets	item_option_new	Forces update sets to update on record edits.
Force Updates to Update Sets	catalog_ui_policy	Forces update sets to update on record edits.
Force Updates to Update Sets	catalog_ui_policy_action	Forces update sets to update on record edits.
Force Updates to Update Sets	question_choice	Forces update sets to update on record edits.
Gen entitlements for publish/retire RRP	sn_sb_pro_remote_ record_producer	Generates entitlements for remote record producers that are published or retired.
Gen entitlements for update Persona	sn_sb_pro_persona	Generates entitlements for personas when edited.
Generate entitlements for remote task def	sn_sb_pro_remote_ task_def	Generates entitlements for remote task definition changes.

Business rules installed with the Service Bridge for Providers application (continued)

Business rule	Table	Description
Handle authorized user transport	sn_sb_pro_authorized_user	Manages transmission of authorized user changes through the transport layer.
Limit registration tasks by Company and URL	sn_sb_pro_registration	Controls registration tasks by company and URL.
Populate customer details on provider	sn_sb_pro_provider_task	Populates inserted provider task information from consumer connection.
Populate scratchpad	sn_sb_pro_registration	Populates scratchpad with relevant information on registration.
Propagate Service Bridge Version Changes	v_plugin	Adds service bridge version changes on settings record.
Reject approval record	sn_sb_pro_provider_task	Handles rejection through provider tasks.
Remote Choice: Update attributes field	item_option_new	Updates Attributes field on remote choice for variable changes.
Reset Consumer table on mappings	sn_sb_pro_remote_ task_def	Resets the consumer table field on mappings associated with remote task definition when consumer table mappings change.
Reset Provider table on mappings	sn_sb_pro_remote_ task_def	Resets the provider table field on mappings associated with remote task definition on definition provider table change.
Restrict RRP variable types	item_option_new	Restricts the types of variables allowed when associated with a remote task definition.
Retry Errored RT on RTD Activation	sn_sb_pro_remote_ task_def	Retry parent creation for remote tasks if associated remote task definition is

Business rules installed with the Service Bridge for Providers application (continued)

Business rule	Table	Description
		activated and remote task parent is null.
Send auto approval	sn_sb_pro_authorized_user	Manages automatic approvals of authorized users.
Service Bridge bootstrap	sn_sb_pro_registration	Helps manage onboarding for Service Bridge.
Set company on remote task insert	sn_sb_pro_remote_task	Sets the company (and account if present) on remote tasks on insert through sync.
Set copied RRP state to default	sn_sb_pro_remote_ record_producer	Manages setting remote record producer state when copied.
Set default values	sn_sb_pro_authorized_user	Sets default values on authorized users on insert.
Set outbound vars json on insert	sn_sb_pro_remote_task	Sets the outbound vars json field on remote task insert by current instance.
Set Provider task number	sn_sb_pro_provider_task	Sets the provider task number to synced provider task number.
Set Remote task number	sn_sb_pro_remote_task	Sets remote task number on synced remote task number.
Show warning messages	sn_sb_pro_remote_ record_producer	Shows warning messages for remote record producer errors.
Show warning on incomplete Remote Task Definition	sn_sb_pro_remote_task_def	Shows warnings on remote task definition if required related records are missing.
Sync Attachment from Parent Task	sys_attachment	Syncs attachments from parent tasks to associated remote tasks.
Sync comments from provider task	sys_journal_field	Syncs comments from synced provider tasks to parent task.

Business rules installed with the Service Bridge for Providers application (continued)

Business rule	Table	Description
Sync Remote Task Attachment to Parent	sys_attachment	Copies synced remote task attachments to parent task.
Trigger changed attachment transport	sys_attachment	Handles attachment changes syncing through the transport layer.
Trigger entitlement transport	sn_sb_pro_entitlement	Manages entitlements syncing through transport layer
Trigger inserted attachment transport	sys_attachment	Manages attachment insert syncing through the transport layer.
Trigger provider PT transport	sn_sb_pro_provider_task	Manages provider task syncing through the transport layer.
Trigger provider remote task transport	sn_sb_pro_remote_task	Manages remote task insert and delete syncing through the transport layer.
Trigger remote task transport update	sn_sb_pro_remote_task	Manages remote task update syncing through the transport layer.
Trigger SBScratchpad Transport	sn_sb_scratchpad	Manages scratchpad update syncing through the transport layer.
Trigger settings transport	sn_sb_pro_service_bridge_ settings	Manages Service Bridge setting syncing through the transport layer.
Update comments from Task to PT	task	Handles syncing of comments from parent task to provider task.
Update consumer registration	sn_sb_pro_service_bridge_ settings	Updates consumer registration on insert of settings record.
Update Persona RRPs on Change	sn_sb_pro_persona	Updates remote record producer persona when modified.
Validate Authorized Users Field Values	sn_sb_pro_service_bridge_	Validates authorized users field values when updated.

Business rules installed with the Service Bridge for Providers application (continued)

Business rule	Table	Description
	settings	
Validate max authorized user	sn_sb_pro_service_bridge_ settings	Ensures max authorized user number is within valid range.
Validate Provider task	sn_sb_pro_provider_task	Validates a provider task insert or update is allowed.

Tables installed

The following tables are installed with the Service Bridge for Providers application.

Tables installed with the Service Bridge for Providers application

Table	Description
Authorized Users [sn_sb_pro_authorized_user]	Contains the authorized user records.
Consumer Connection [sn_sb_pro_consumer_connection]	Consumer connection record for provider, extends the base connection table.
Entitlement [sn_sb_pro_entitlement]	Provider entitlements associating records to entitled consumers, extends base entitlement table.
Inbound Field [sn_sb_pro_inbound_field]	Manages provider side inbound field mappings for remote task definitions.
Outbound Field [sn_sb_pro_outbound_field]	Manages provider side outbound field mappings for remote task definitions.
Personas [sn_sb_pro_persona]	Manages personas for Service Bridge.
Provider [sn_sb_pro_provider]	Provider association record to tie provider side records together.
Provider Task [sn_sb_pro_provider_task]	Provider tasks on provider side, created by consumers through remote record producers.
Registration [sn_sb_pro_registration]	Service Bridge registration records.
Remote Choice Definition [sn_sb_pro_remote_choice_definition]	Remote choice definitions for remote record producer.
Consumer Criteria [sn_sb_pro_remote_record_producer_ consumer_criteria]	Consumer criteria records attributed to remote record producers, controls which consumers are entitled to a given remote record producer.
Remote service [sn_sb_pro_remote_service]	Remote service record.

Tables installed with the Service Bridge for Providers application (continued)

Table	Description
Remote Task [sn_sb_pro_remote_task]	Remote tasks for managing data transfer between parent tasks on synced instances.
Remote Task Definition [sn_sb_pro_remote_task_def]	Remote task definition, controls creation and processing of remote tasks.
Consumer Criteria [sn_sb_pro_remote_task_def_ consumer_criteria]	Consumer criteria records attributed to remote task definitions, controls which consumers are entitled to a given remote task definition.
Remote Task Variable [sn_sb_pro_remote_task_variable]	Glide variables associated with a remote task, allows displaying incoming synced data
Service Bridge Settings [sn_sb_pro_service_bridge_settings]	Settings record for provider, manages various Service Bridge settings alignment between provider and consumer.
Transform [sn_sb_pro_transform]	Provider side transform records.

Flows installed

The following flows are installed with the Service Bridge for Providers application.

Flows installed with the Service Bridge for Providers application

Flow	Description
Create Proactive Provider task from Case [create_proactive_provider_task_from_case]	Creates provider task from case in proactive use case.
Process Incoming Consumer Provider Task [process_incoming_consumer_provider_task]	Manages incoming provider tasks from consumer.
Process Service bridge registration [process_service_bridge_registration]	Manages service bridge registration.
Service Bridge Attachment Sync to Task [attachment_sync_provider_task_to_task]	Syncs attachments from provider task to parent task.
Service Bridge Case to Provider task Update [service_bridge_case_to_provider_task_update]	Manages creating provider tasks on case update.

Flows installed with the Service Bridge for Providers application (continued)

Flow	Description
Service Bridge Change Request to Provider task Update [service_bridge_change_request_to_provider_task_update]	Manages creating provider tasks on change update.
Service Bridge Incident to Provider task_Update [service_bridge_incident_to_provider_task_update]	Manages creating provider tasks on incident update.
Service Bridge Provider Task to Case Update [service_bridge_provider_task_to_case_update]	Manages processing of provider tasks and creation of associated parent case task.
Service Bridge provider task to Change Request Update [service_bridge_provider_task_to_change_request_update]	Manages processing of provider tasks and creation of associated parent change request task.
Service Bridge provider task to Incident Update [service_bridge_provider_task_to_incident_update]	Manages processing of provider tasks and creation of associated parent incident task.

Subflows installed

The following subflows are installed with the Service Bridge for Providers application.

Subflows installed with the Service Bridge for Providers application

Subflow	Description
Create Case from Provider task [create_case_from_provider_task]	Creates parent task case from a Provider Task.
Create Change from Provider task [create_change_from_provider_task]	Creates parent task change from Provider Task.
Create Incident from Provider task	Creates parent task incident from Provider Task.

Subflows installed with the Service Bridge for Providers application (continued)

Subflow	Description
[create_incident_from_provider_task]	
Create OAuth Client [create_oauth_client]	Creates the OAuth client on onboarding.
Process invalid Provider task [process_invalid_provider_task]	Manages provider tasks that have invalid configurations.
Repair RPS Consumer Connection Error [repair_rps_consumer_connection_error]	Attempts to fix Remote Process Sync errors in the Consumer Connection.

Flow actions installed

The following flow actions are installed with the Service Bridge for Providers application.

Flow actions installed with the Service Bridge for Providers application

Flow action	Description
Copy attachment [copy_attachment]	Copies a given attachment to a given record.
Copy task variables [copy_task_variables]	Retrieves task variable data for use in flows.
Create parent from remote task [create_parent_from_remote_task]	Creates a parent task from a given remote task.
Create remote task for consumer [create_remote_task_for_consumer]	Creates a remote task for a given parent task and consumer.
File Service Bridge registration email event file_service_bridge_registration_email_event]	Files email with information during Service Bridge registration.
Is Transporter User [is_transporter_user]	Checks if current user is transport user.

Flow actions installed with the Service Bridge for Providers application (continued)

Flow action	Description
Parse Provider Task vars_json [parse_provider_task_vars_json]	Parses out the vars json field on the Provider Task.
Repair RPS Consumer Connection [repair_rps_consumer_connection]	Attempts to fix Remote Process Sync errors on Consumer Connection.

Components installed with Service Bridge for Consumers

Several types of components are installed with activation of the Service Bridge for Consumers application including tables, user roles, and business rules.

Note: The Application Files [sys_metadata] 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.

Roles installed

The following roles are installed with the Service Bridge for Consumers application.

Roles installed with the Service Bridge Consumers application

Role title [name]	Description	Contains roles
Service Bridge admin [sn_sb.admin]	• Typically assigned to an administrator for the Service Bridge applications on both the customer and the provider side. • Provides read access to all Service Bridge tables	• sn_sb.read • sn_sb.requestor • sn_sb.remote_task_creator • flow_designer • catalog
Service Bridge read [sn_sb.read]	Provides read-only access to provider tasks	N/A
Service Bridge requester [sn_sb.requestor]	Provides access to remote record producers and provider tasks	N/A

Business rules installed

The following business rules are installed with the Service Bridge for Consumers application.

Business rules installed with the Service Bridge for Consumers application

Business rule	Table	Description
Abort Duplicate Remote Task Insert	[sn_sb_con_remote_task]	Aborts remote task insert if one already exists matching the same parent and remote task definition.
Abort if duplicate transform is found	[sn_sb_con_transform]	Aborts transform insert if duplicate is found.
Abort if duplicate URL	[sn_sb_con_provider_ connection]	Aborts connection record insert if record with same URL is found.
Abort Remote Task Create If Missing Conn	[sn_sb_con_remote_task]	Aborts remote task insert if connection field is empty.
Add provider connection data to session	[sn_sb_con_provider_ connection]	Saves connection data for later use.
Change state to Work in Progress	[sn_sb_con_provider_task]	Updates State to Work in Progress for provider tasks.
Check provider published variable	[item_option_new]	Verifies if the provider side variable published is valid.
Check Remote Task Def Simple Triggers	[task]	Checks if changes to parent task have triggered changes in the Remote Task Definition simple trigger conditions.
Clear Remote Task Client Data	[sn_sb_con_remote_task]	Clears client data associated with remote tasks after the transaction is completed.
Create or Update Transport Connection	[sn_sb_con_provider_ connection]	Manages transport connection insert and update.
Create parent on synced remote task	[sn_sb_con_remote_task]	Creates parent task for synced remote tasks.
Delete associated records	[sn_sb_con_remote_task_def]	Deletes related records when Remote Task Definition is deleted.
Disconnect RT when RTD Deleted	[sn_sb_con_remote_task_def]	Disconnects all associated remote tasks when Remote Task Definition is deleted.
Error RT when Parent Deleted	[task]	Errors out all associated remote tasks when parent task is deleted.
Generate OAuth registry	[sn_sb_con_provider_	Creates OAuth registry for a connection.

Business rules installed with the Service Bridge for Consumers application (continued)

Business rule	Table	Description
	connection]	
Handle authorized user transport	[sn_sb_con_authorized_user]	Sends authorized user records through transport layer.
Inactive Remote Task Definition when archived	[sn_sb_con_remote_task_def]	Deactivates Remote Task Definition on consumer instance when archived by provider.
Populate Company on Consumer	[sn_sb_con_provider_task]	Sets company field on provider tasks on Insert.
Populate Provider task data	[sn_sb_con_provider_task]	Adds extra data on Insert of Provider Task.
Process Deleted Entitlements	[sn_sb_con_entitlement]	Manages entitlement deletion by deleting associated elements.
Process Entitlement attachment changes	[sys_attachment]	Manages changes to attachments for entitlements.
Process New and Updated Entitlements	[sn_sb_con_entitlement]	Manages creation of new entitlements and updates to existing entitlements.
Propagate Service Bridge Version Changes	[v_plugin]	Tracks and updates settings when Service Bridge version is updated.
Remote Choice: cache user selection	[sn_sb_con_provider_task]	Caches user selections to prevent repeat requests for the same data.
Retry Errored RT on RTD Activation	[sn_sb_con_remote_task_def]	Attempts to create parent task creation for remote tasks with errors when the associated remote task definition is activated.
Set company field on remote task insert	[sn_sb_con_remote_task]	Sets the company field for remote tasks during Insert.
Set Connection Id from RRP	[sn_sb_con_provider_task]	Sets the Connection Id from the Remote Record Producer associated with the Provider Task.
Set Customer Version on Settings Insert	[sn_sb_con_service_ bridge_settings]	Sets the Service Bridge for Consumer application version on Settings during the Insert operation.
Set default values	[sn_sb_con_authorized_user]	Sets default values on authorized users when created.

Business rules installed with the Service Bridge for Consumers application (continued)

Business rule	Table	Description
Set outbound vars json on insert	[sn_sb_con_remote_task]	Sets the outbound json field on remote tasks when inserted by current instance.
Set Provider task number	[sn_sb_con_provider_task]	Sets provider task number on insert from client data
Set Remote Task number	[sn_sb_con_remote_task]	Sets remote task number on insert from client data
Set Table Details On Virtual Transform	[sn_sb_con_transform]	Sets table data on virtual transforms.
Sync Attachment from Parent Task	[sys_attachment]	Syncs attachments from parent task to all remote tasks associated with parent task.
Sync Remote Task Attachment to Parent	[sys_attachment]	Syncs attachments from remote task to parent task.
Trigger changed attachment transport	[sys_attachment]	Triggers attachment sync through transport layer when updated.
Trigger consumer PT transport	[sn_sb_con_provider_task]	Triggers provider task sync through transport layer.
Trigger consumer remote taks transport	[sn_sb_con_remote_task]	Triggers remote task sync through transport layer during Insert or Delete operations.
Trigger inserted attachment transport	[sys_attachment]	Triggers attachment sync through transport layer during Insert operation.
Trigger remote task transport update	[sn_sb_con_remote_task]	Triggers remote task sync through transport layer when updated.
Trigger SBScratchpad Transport	[sn_sb_scratchpad]	Triggers scratchpad sync through transport layer.
Trigger settings transport	[sn_sb_con_service_ bridge_settings]	Triggers settings record sync through transport layer.
Update entitlement status on delete	[sn_sb_con_service_ bridge_settings]	Updates entitlement status when deleted.
Update entitlement status on delete	[sn_sb_con_persona]	Updates persona record on entitlement when deleted.

Business rules installed with the Service Bridge for Consumers application (continued)

Business rule	Table	Description
Update entitlement status on delete	[sn_sb_con_remote_task_def]	Updates Remote Task Definition record on entitlement when deleted.
Update entitlement status on update	[sn_sb_con_persona]	Manages persona record on entitlement when updated.
Update entitlement status on update	[sn_sb_con_remote_task_def]	Manages Remote Task Definition record on entitlement when updated.
Update entitlement status on update	[sn_sb_con_remote_ record_producer]	Manages Remote Record Producer record on entitlement when updated.
Validate activation and complete setup	[sn_sb_con_remote_ record_producer]	Validates Remote Record Producer before activation.
Validate request on customer	[sn_sb_con_provider_task]	Checks for valid connection on Provider Task.
Warn if Global Script Include is missing	[sn_sb_con_remote_ record_producer]	Displays warning if global script include is not present when processing Remote Record Producer.

Tables installed

Tables installed with the Service Bridge for Consumers application

Table	Description
Authorized user [sn_sb_con_authorized_user]	Authorized users.
Connection [sn_sb_con_consumer]	Consumer side connection record.
Entitlement [sn_sb_con_entitlement]	Consumer side table extending entitlements.
Inbound Field [sn_sb_con_inbound_field]	Consumer side inbound fields for Remote Task Definitions.
Outbound Field [sn_sb_con_outbound_field]	Consumer side outbound fields for Remote Task Definitions.
Personas	Consumer side persona records.

Tables installed with the Service Bridge for Consumers application (continued)

Table	Description
[sn_sb_con_persona]	
Provider Connection [sn_sb_con_provider_connection]	Provider Connection record linking consumer to provider instance, extending base connection table.
Provider Task [sn_sb_con_provider_task]	Consumer side provider task records, extends Provider Task base table.
Remote Choice Cache [sn_sb_con_remote_choice_cache]	Consumer side cache for remote choice queries.
Remote Record Producer [sn_sb_con_remote_record_producer]	Consumer side Remote Record Producer records.
Remote Task [sn_sb_con_remote_task]	Consumer side remote task records, extends remote task base table.
Remote Task Definition [sn_sb_con_remote_task_def]	Consumer side Remote Task Definition records.
Remote Task Variable [sn_sb_con_remote_task_variable]	Remote Task associated variable table extending glide vars.
Service Bridge Settings [sn_sb_con_service_bridge_settings]	Consumer side Service Bridge setting records, extends settings base table.
Remote Choice [sn_sb_con_st_remote_choice]	Consumer side remote choice records.
Transform [sn_sb_con_transform]	Consumer side transform records, extends transform base table.

Flows installed

The following flows are installed with the Service Bridge for Consumers application.

Flows installed with the Service Bridge for Consumers application

Flow	Description
Process Remote Record Producer Entitlements with Remote Choice Variables [process_remote_record_producer_	Processes entitlements for remote record producers on consumer with remote choice variables included.

Flows installed with the Service Bridge for Consumers application (continued)

Flow	Description
entitlements_with_remote_choice_variables]	

Subflows installed

The following subflows are installed with the Service Bridge for Consumers application.

Subflows installed with the Service Bridge for Consumers application

Subflow	Description
Repair RPS Provider Connection Error [repair_rps_provider_ connection_error]	Handles provider connection errors with Remote Process Sync when in error state.

Flow actions installed

The following flow actions are installed with the Service Bridge for Consumers application.

Flow actions installed with the Service Bridge for Consumers application

Action	Description
Create Parent From Remote Task [create_parent_from_remote_task]	Creates a parent record for a synced remote task.
Create Record Producer and Remote Choice Dependent Variables [create_record_producer_and_entities]	Creates a remote record producer and the associated remote choice dependent variables from a synced entitlement.
Create Remote Task [create_remote_task]	Creates a remote task for a given parent and remote task definition.
Repair RPS Provider Connection [repair_rps_provider_connection]	Attempts to fix Remote Process Sync errors on Provider Connection.

Service Bridge error log

Track errors on recent transactions, provide connection status, run health checks, and provide recommendations.

About this task

Note: The Washington DC release, includes a framework to capture Service Bridge errors. Currently, the table displays the following known errors:

1. Global Script Include check: Checks if this script has been installed and if it is the latest version.
2. During registration for provider: Captures errors from the creation of the registration task through closed complete. An email notification with the list of errors captured in the last one hour along with the cause and solution is sent to the Service Bridge administrator.
3. During Registration for consumer: Captures errors from the creation of the Provider Connection record through closed complete. An email notification with the list of errors captured in the last one hour along with the cause and solution is sent to the Service Bridge administrator.
4. Remote system inbound and outbound errors
5. Heartbeat connection

You can view and diagnose errors and follow the steps provided to resolve the errors. Errors are logged as they occur, and if there have been any new ones in the last hour, an email notification is sent to the Service Bridge administrators. Each error record provides the following details:

- A detailed description of the error.
- Reason the error has occurred.
- Steps to resolve the error.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge Provider** > **Administration** > **Error Log**.
   The list of errors that have occurred is displayed.

   Note: You can view errors on the consumer instance. To do so, login to consumer instance, and navigate to **All** > **Service Bridge Consumer** > **Administration** > **Error Log**.

2. Click on the Number link to view the error.
3. The following details are displayed.

Field	Description
Number	The number assigned to the error.
Known error	Detailed information about the error and how to resolve it. This information is displayed in the fields below.
Error	A detailed description of the error.
Cause	Reason the error has occurred. If this is not a known issue, the Cause is set to **Unknown**.
Solution	A link is provided to the Knowledge Base article that contains the steps that need to be followed to resolve the error.

Field	Description
Connection	This field is populated if the error is caused by connection issue.
Created	Date and time at which the error occurred.

Domain separation and Service Bridge

Domain separation is supported for Service Bridge. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview

The Provider Task and Remote Task tables have domain separation available. When data is added to these tables, Service Bridge inserts them into the domain of the connected instance based on the associated company by default. If necessary, the instance admin can apply their own business rule to redirect the data after the Service Bridge default rule has been applied. However, this should only be done by setting a different company on the records before inserting them.

How domain separation works in Service Bridge

- The Provider Task and Remote Task tables in the application are domain-separated.
- Make sure that the consumer company and account tables are associated to the right domain for the domain separation logic to work.

Use cases

When providers have their consumer data separated by domains, the provider tasks, remote tasks, and the corresponding parent tasks are associated with the respective customer domains.

Related topics

Domain separation for service providers

Service Bridge (legacy)

Learn how you, as either a provider or customer, can use the ServiceNow® Service Bridge applications. If you're a provider, you use the Service Bridge for Providers application. If you're a customer, you use the Service Bridge application.

Note: Service Bridge (legacy) is not available for new customers. See the Service Bridge documentation for detailed information on the latest version of Service Bridge.

The Service Bridge applications help customers and providers connect and track service requests directly between their ServiceNow instances. Customers and providers can both work in their own environments without having to configure and maintain custom integrations.

Explore

Learn about how providers and customers use Service Bridge.

Configure

Plan and configure your implementation.

Use

Using Service Bridge.

Reference

Get details about domain separation and installed components for providers and customers.

Exploring Service Bridge (legacy)

Whether you're a provider or a customer, learn how with Service Bridge, you can establish an integration between your instances. This integration makes it easy for both of you to receive and fulfill service requests in your own instances.

Request apps on the 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.

Overview

As a provider, use Service Bridge for Providers to do the following actions:

- Create and publish product and service catalogs that you can share with your customers.
- Integrate your ServiceNow instance with the ServiceNow instance of your customers.
- Receive and fulfill requests that are generated from the ServiceNow instance of your customers.

Benefits

Creating service product offerings for your customers to access easily

As a provider catalog developer, you can create a scoped remote catalog that contains the services that are associated with the product offerings for your customers.

Integrating a provider's instance with a customer's instance

By integrating your instance with your customer's instance, you can fulfill service requests that were generated from your customer's instance on your own instance.

Synchronizing data

You can synchronize the data between your instance and your customer's instance by using Instance Data Replication (IDR) for a quick request fulfillment.

Requesting fulfillment efficiently

You can synchronously receive and fulfill the service requests that were generated from your customer's instance on your own instance.

Features

Creating and publishing product offerings with specifications

Create and publish product offerings with the required product, service, and resource specifications to sell to your customers.

Establish Service Bridge integrations

Establish integrations between your instance and your customer's instance. Your customers can use the service catalog on their instance to submit service requests and you can receive and fulfill these requests on your instance.

Order Management and Service Bridge

Receive and fulfill product or service requests that were generated from the instances of your customers. Order Management for Telecommunications, Media, and Technology supports the verification, enrichment, decomposition, and fulfillment of these customer orders.

Service Bridge applications

The following diagram and table list the features of the Service Bridge, Service Bridge for Providers and the Service Bridge applications.

Now Service Bridge

Service Bridge applications

Application	Features
Service Bridge for Providers	• Author and publish service catalogs for your customers on their instance. • Integrate your instance with your customer's instance. • Receive and fulfill service requests on your instance from your customer's ServiceNow instance.
Service Bridge	• Your customers can use your service catalog to submit service requests to you, the provider, from their instance. • Your customers can monitor service requests from their instance.

Personas and roles for Service Bridge for Providers (legacy)

Learn about the roles, skills, and tasks for the different personas in the Service Bridge for Providers application.

Overview

A persona role is a pre-configured role in the application that is made up of multiple granular roles. The persona roles are designed to correspond to the common job titles for managers, analysts, and service owners in an IT organization. If you want your users and groups to have more access than a role permits, you can add more granular roles to your users and groups. If you want to limit the access for specific users and groups at the task level, you can remove the granular roles. Also, you can build custom roles to suit your needs.

Personas and roles

Persona	Skills	Tasks	Roles
Application developer	• Is a certified ServiceNow administrator • Is a certified ServiceNow application developer	• Creates provider records • Creates and maintains Service Bridge remote catalogs • Creates and maintains record producers that are associated with remote catalogs • Creates and maintains Flow Designer flows to determine the request fulfillment processes • Publishes Service Bridge remote catalogs to the customer's instance	admin
System administrator	Is a certified ServiceNow system administrator	• Configures and validates the Instance Data Replication configuration • Completes the Service Bridge registration requests • Approves the Instance Data Replication (IDR) configuration • Assists the customer's system administrator in creating a provider record	• admin • ebonding_admin

Personas and roles (continued)

Persona	Skills	Tasks	Roles
Customer care agent	Has customer care agent skills	• Resolves customer questions and issues • Engages in network operations when needed	• itil • sn_nowebonding.requestor • sn_customerservice_agent • incident_read • problem_read • change_read

Personas and roles for Service Bridge (legacy)

Learn about the roles, skills, and tasks for the different personas in the Service Bridge application.

Overview

A persona role is a pre-configured role in the application that is made up of multiple granular roles. The persona roles are designed to correspond to the common job titles for managers, analysts, and service owners in an IT organization. If you want your users and groups to have more access than a role permits, you can add more granular roles to your users and groups. If you want to limit the access for specific users and groups at the task level, you can remove the granular roles. Also, you can build custom roles to suit your needs.

Personas and roles

Persona	Skills	Tasks	Roles
System administrator	Is a Certified ServiceNow system administrator	• Creates provider and connection records • Activates the Instance Data Replication consumer replication set • Installs the Service Bridge applications • Publishes the record producers to the service catalog	• admin • service bridge_admin
Service Bridge Requester	Is an IT administrator	• Responsible for some form of IT service that is either completely or in	• itil • sn_nowservice bridge.requestor

Personas and roles (continued)

Persona	Skills	Tasks	Roles
		part supported by one or more external vendors • Requests and monitors the service requests that are placed with the external provider from their own instance	

Enable authorized users to access services in the product catalog (legacy)

The Authorized Users feature enables a provider to categorize the services by user personas so that only authorized users can access the provider's catalog items with the attached persona. It also helps customers to define the access criteria in their instances so that they can sync with their provider's services.

When a provider and a customer initially register the Service Bridge application, the active contacts on the customer's account in the provider's ServiceNow instance are automatically added to the Authorized Users table and synced with the customer's ServiceNow instance.

By using the Authorized Users feature, you can identify the specific users between the provider and customer instances to manage the customer requests for the provider's services. You can then assign personas to the authorized users so that you can control the access to remote catalog items.

To learn more, see Add a new authorized user (legacy).

Remote tasks to fulfill customer requests (legacy)

Learn how you, as a provider, can resolve and fulfill multiple customer tasks, such as incidents, cases, and service requests, by using remote tasks. Also as a customer, you can assign the incidents to multiple providers for its resolution.

Overview

Remote tasks enable you to assign and synchronize the task's data on separate instances so that you can quickly fulfill the service requests from your customer. Some examples of the customer requests are as follows:

1. Request help for issues that your customers are having with your services.
2. Request for service changes to the services that your customers have purchased.
3. Request to assign the existing tasks to you so that you can support your customer's issues.

How a remote task works

As a provider, you have to first create and publish the remote task definitions that your customers can use for creating a remote task. You entitle these definitions to your customers who can adjust the mappings and field data rules or simply activate the definition. Your customers can apply a trigger on the definition or manually create a remote task for you, the provider, based on an active definition.

For more information, see Create remote task definitions in Service Bridge for Providers (legacy).

The remote task feature includes a Remote Task table, which is an extension of the Tasks table in the Now Platform. With remote tasks, you can enable bidirectional linking of workflows between multiple ServiceNow instances.

For example, an incident on a customer instance must be assigned to a provider's instance as a case. The Remote Task record in each instance facilitates the bidirectional flow of the task's data between the case and the incident.

Using remote choice fields to directly access catalog items (legacy)

You can enable your customers, in their own ServiceNow instance, to read the choice list of a remote choice field directly from your (provider) ServiceNow instance.

Overview

Remote choice fields provide your customers direct access to your (provider) data in real time while they submit a remote record producer service request.

By using remote choice fields, you have the following advantages:

- Removes the need to replicate foundation data.
- Reduces the cost and maintenance of integrations.

You can control the data that your customers access by defining a remote choice field. To learn more, see Create remote choice definitions in Service Bridge for Providers (legacy).

Transform remote task data with a Transform Framework (legacy)

You can integrate tasks between a ServiceNow instance with your customer's instance by using a Transform Framework to transform the remote task data in the Service Bridge application.

Overview

As a provider, you can use a Transform Framework to transform your inbound and outbound data (such as incidents, cases, and service requests) of the remote tasks between your ServiceNow instance and your customer's instance. To learn what a remote task is, see Remote tasks to fulfill customer requests (legacy).

While using the Service Bridge application, you and your customer exchange the remote tasks data through tables, forms, and fields. The Transform Framework helps you to convert the data between those tables, forms, and fields so that you and your customer can easily communicate with each other while resolving the incidents, cases, and customer requests.

You can use two transform types in the Transform Framework for your remote tasks:

1. Simple: You choose a simple transform where you use the predefined values of the inbound and outbound fields for your remote tasks. For example, by using this transform type, you're converting the Open state of an incident in the provider's ServiceNow® instance to the In Progress state in the customer's ServiceNow® instance.

2. Advanced: You use an advanced transform where you run a script to determine the values of the inbound and outbound data for your remote tasks. For example, you use this transform type when you're converting an incoming sys_id into a correlated sys_id for a reference field.

To learn how to create a transform, see Create a transform in Service Bridge for Providers (legacy).

Configuring Service Bridge (legacy)

Whether you're a customer or provider, learn how to configure Service Bridge. If you're a customer, you can create and monitor the status of service requests from your own ServiceNow Service Portal. If you're a provider, you can fulfill those requests from your ServiceNow instance.

Installation and configuration of Service Bridge for Providers (legacy)

As a provider, you can set up the Service Bridge for Providers (sn_nowebonding_pro) application.

Configure the Service Bridge for Providers application as follows:

1. On the Now Support Portal, request installation of the **Instance Data Replication** plugin. Open the change request that was created, and add the following to the change request comments **"Requesting IDR installation for use with Service Bridge."**.
2. Install the Service Bridge for Providers application. To learn how, see Install Service Bridge for Providers (legacy).
3. Set up a new provider record and create a producer replication set for IDR. To learn how, see Set up a provider record and create a producer replication set in Service Bridge for Providers (legacy).
4. Assign roles for Service Bridge for Providers. To learn how, see Assign roles for Service Bridge for Providers (legacy).
5. Create a catalog record in Service Bridge to link to a remote catalog record in the ServiceNow Studio. To learn more, see Create a remote catalog record (legacy).
6. Create remote catalogs to automate the task fulfillment for your customers. To learn more, see Creating remote catalogs in Service Bridge for Providers (legacy).
7. Create clone definitions to preserve or exclude Service Bridge tables. To learn more, see Cloning instances with Service Bridge (legacy).

Install Service Bridge for Providers (legacy)

If you have an admin role, you can install the Service Bridge for Providers (sn_nowebonding_pro) application. The application includes the demo data and installations that are related to ServiceNow® Store applications and plugins.

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.
- Ensure that the following plugins are activated before you activate the Service Bridge for Providers plugin:

- com.glide.idr
- com.glideapp/user_criteria.scoped.api

Note: To activate the Instance Data Replication (IDR) plugin, make a request to ServiceNow® personnel by using Now Support portal. For more information, see Request an Instance Data Replication (IDR) subscription.

Role required: admin

About this task

The following items are installed with the Service Bridge for Providers application:

- Plugins
- Roles
- Tables

For more information about the components that are installed with this application, see Components installed with Service Bridge for Providers (legacy).

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Service Bridge for Providers application (sn_nowebonding_pro) by 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 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. In the application installation dialog, review the application dependencies.

   This listing indicates, for each dependent plugin and application if it's being installed, is already installed, or must be installed. If any plugins or applications must be installed, you must install them before you can install Service Bridge for Providers.
4. If demo data is available and you want to install it, click **Load demo data**.
   Demo data contains the sample records that describe the application features for common use cases. Load demo data when you first install the application on a development or test instance. If you don't load the demo data during installation, it's unavailable to load later.
5. Select **Install**.

Set up a provider record and create a producer replication set in Service Bridge for Providers (legacy)

Set up a new provider record to establish a unique identifier for the Service Bridge for Providers (sn_nowebonding_pro) application.

Before you begin

Role required: admin

About this task

This one-time setup task is completed from your ServiceNow instance.

Procedure

1. Navigate to **All** > **Service Bridge** > **Provider** > **Setup Provider**.
2. Enter your provider name by following these guidelines:
   - The Now Platform uses this name to generate and configure an Instance Data Replication (IDR) producer replication set.
   - This name must adhere to IDR naming requirements, which allow only alphanumeric characters and dashes. Names that include spaces or special characters result in an error.
3. Right-click the form header and select **Save**.
4. Click **Create Replication Set**.

   Note: You can also create a replication set later after you define the catalogs and are ready to integrate with another instance.

   - The Now Platform generates a replication set with the same name as the provider record.
   - The **Inbound Status** and **Outbound Status** change to In Draft.
   - The following message appears at the top of the form: `Replication set created. Please make sure to activate to begin replication..`
5. Navigate to **All** > **Instance Data Replication** > **Producer Replication Sets**.
6. Find and select the provider record that you created.
7. Verify the record settings:
   - Check that the producer ID is unique.
   - Select the **Bi-Directional** check box.
   - Select the **Discrete** check box.
8. Click **Activate**.
   Confirm that both the **Inbound Status** and **Outbound Status** fields are set to Active Replication.

Assign roles for Service Bridge for Providers (legacy)

Assign roles to control the actions that are available for each user. In Service Bridge for Providers (sn_nowebonding_pro), you assign roles by group rather than by individual user. When the job descriptions of users change, their roles are automatically updated.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Click the group that you want to assign the role to.
3. In the Roles related list, click **Edit**.
4. Add the roles to the group.
5. Click **Save**.

Creating remote catalogs in Service Bridge for Providers (legacy)

As a provider, you can use Service Bridge for Providers to create remote catalogs to automate the task fulfillment for your customers.

Remote catalog creation and publication

As an application developer for the provider, you can create a remote catalog that contains the services for your entitled customers. After you create a remote catalog, an administrator at the customer site publishes the remote catalog to the production instance, just as they would any catalog item.

For example, let's say that you have multiple SD-WAN product offerings: Gold, Silver, and Bronze. Your remote catalog contains 20 services that are associated with the SD WAN products.

- The Gold product offering enables your customer to have rights to all 20 services.
- The Silver product offering enables your customer to have rights to 15 of the 20 services.
- The Bronze product offering enables your customer to have rights to only 10 of the 20 services.

You can package all 20 of those services in a single catalog. The customers for each product offering only have the rights to those services that their product offering entitles them to.

Catalog creation process

The process for providers to create a remote catalog is as follows:

1. Create a catalog record. See Create a remote catalog record (legacy).
2. Create a remote record producer in a remote catalog. See Create remote record producers in a remote catalog in Service Bridge for Providers (legacy).
3. Create variables for remote record producers. See Create variables for remote record producers in Service Bridge for Providers (legacy).
4. Associate flows to the record producers.

Create a remote catalog record (legacy)

Create a catalog record in Service Bridge for Providers. By creating this record, you create a link to a remote catalog record in the ServiceNow Studio. It acts as a container for the record producers that you created and maintained within that application.

Before you begin
Role required: admin

About this task
Before you can create a catalog record in Service Bridge for Providers, you must create a provider record. For more information, see Set up a provider record and create a producer replication set in Service Bridge for Providers (legacy).

At the top right side of the form, make sure that the application scope is set to Global.

Procedure

1. Navigate to **All** > **Service Bridge** > **Provider** > **Remote Catalog**.
2. Click **New**.
3. On the form, fill in the fields.

Remote Catalog form

Field	Description
Name	Name that you choose for your catalog.
Provider	Provider record that is associated with this catalog.

4. Right-click in the form header and click **Save**.
The **Remote Catalog** field automatically populates with the catalog name.

Remote record producers in Service Bridge (legacy)

Remote record producers in Service Bridge for Providers are the service requests that are published in customer instances. They enable your customer to request provider services through their IT service catalog.

Overview of record producers

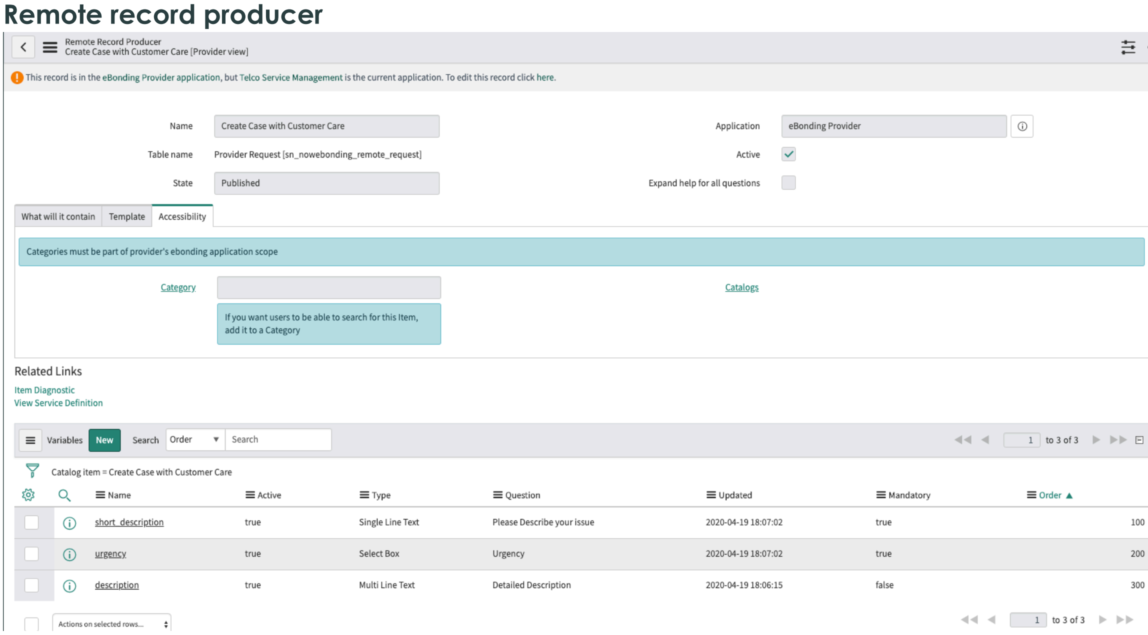
Remote record producers contain the variables that determine the information that a customer can or must provide to submit a request. When a remote record producer is submitted from the customer's IT service catalog, it generates a provider request record on the provider's instance and triggers a Create Case, Create Incident, or Create Change Request fulfillment task.

As the task moves through the fulfillment flow in the provider's instance, updates are visible in the ServiceNow instances of both the provider and the customer.

The remote record producer table is an extension of the sc_cat_item_producer table and uses the sn_nowebonding_remote_request table.

The following example shows a sample form that you use when you create a remote producer's record.

Remote record producer



Create remote record producers in a remote catalog in Service Bridge for Providers (legacy)

Create remote record producers as part of creating a remote catalog in Service Bridge for Providers.

Before you begin

Make sure that the catalog scope is set to Global.

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge** > **Provider** > **Remote Record Producers**.
2. Click **New**.
3. On the form, fill in the fields.

Remote Record Producer New Record form

Field	Description
Name	Name of the remote record producer.
Application	Application that is set from the record producer.
State	Status of the record producer. The UI action supports the following states: Draft The form is ready with all the information and you save it. Published The form is published. Publishing The form is yet to receive more information.
Table name	Table name is Provider Request.
Remote Catalog	Name of the remote catalog that you create.
Flow	Option that you can choose to make one of the flows that is provided on Provider Request table or to create your own flow if required.
Active	Option for making the remote record producer active, which also causes it to appear in the service catalog.
Expand help for all questions	Help information that you can expand for all questions on loading the page.
Persona	Catalog persona that you want to assign to this record producer.

Field	Description
	Note: Only catalog personas that are associated with Remote Record Producers are synced with the consumer instance.
Short Description	Short description for the record producer.
Description	Detailed description for the record producer.

4. Click **Submit**.

Create variables for remote record producers in Service Bridge for Providers (legacy)

Create the variables for a remote record producer in Service Bridge for Providers application.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Bridge** > **Provider** > **Remote Record Producers**.
2. Click a record producer that you want to create variables for.
3. Click **New** next to **Variables**.
4. On the form, fill in the fields.

Variable New Record form

Field	Description
Map to field	Variable that is mapped to a specific field on the table for the record producer.
Type	Supported variable types are as follows: ◦ Break ◦ CheckBox ◦ Container End ◦ Container Split ◦ Container Start ◦ Date ◦ Date/Time ◦ Duration ◦ Email ◦ HTML ◦ IP Address ◦ Label ◦ Masked ◦ Multi line text

Field	Description
	◦ Multiple Choice ◦ Numeric Scale ◦ Requested For ◦ Rich Text Label ◦ Select Box ◦ Single Line Text ◦ URL ◦ Wide Single LineText ◦ Yes/No. **Note:** The **Attachment** variable type is not supported. If you use unsupported variables, Service Bridge might not integrate the data in the right format.
Catalog item	Catalog item that uses the variable.
Application	Field that indicates which applications can use this variable.
Mandatory	Option for making the variable mandatory as part of the ordering process. **Note:** This behavior is applicable only on a page load. You can change it by using client APIs.
Active	Option to make the record producer active.
Order	Placement order of the variable on the catalog item page. You organize the variables from top to bottom, and from the least to the greatest order value. For example, a variable with an order value of 1 is placed ahead of other variables with higher-order values.
Question	Question that you can ask users who are ordering the catalog item to obtain related information.
Name	Name to identify the question. **Note:** If this field is empty, its value is auto-populated based on the **Question** field for all variable types except Break, Container Split, and Container End.

Field	Description
Tooltip	Tooltip text to display when users point to the variable. Enter a brief note to describe the purpose of the question.
Example Text	Question field hint that appears before a user enters a value. You can use a hint for the following variables: ◦ IP Address ◦ Email ◦ URL ◦ Single Line Text ◦ Wide Single Line Text ◦ Multi Line Text ◦ Date ◦ Date/Time
Type Specification	Values specific to the type of variables. You can provide the values to the following variable types: ◦ Remote choice dependent on- The list of options available in the drop-down is directly dependent on the defined variables in the remote record producer with the status 'Active'. Some of the options are: ▪ None ▪ Select category ▪ Select company ▪ Select subcategory ◦ Remote choice dependent field- As per the selection in the **Remote choice dependent on** field, you will provide the value here. **Note:** When you enable the remote choice dependency fields, it helps your customer to quickly select the catalog request with more accurate details while filling the product request form.

5. Click **Submit**
   Repeat the above steps to create additional variables for the same remote record producer.

Creating entitlements in Service Bridge for Providers (legacy)

You can use Service Bridge for Providers entitlements to create a remote catalog that contains the services for multiple different product lines.

Overview

Entitlements ensure that your customers have access only to the record producers that are associated with the service that they purchased. Here are some ways that entitlements are created:

- When you create a record producer, you associate the customer criteria for the remote record producer.
- By using the configurable customer criteria that is associated with the record producer, Service Bridge automatically generates the entitlement records that are replicated to eligible customer instances.

Benefits

Your customers can see and request the record producers that are associated with the products that they purchased. A scheduled job runs nightly and updates the entitlements, based on the changes that you made to the record producers.

You can create Service Bridge entitlements in the following ways:

- Add a record to the Sold Products table.
- Define the customer criteria in the Remote Record Producer by using the Sold Products table.
- Register a new customer in Service Bridge.
- Click the Refresh Entitlements related link in the Customer record or Provider record.

Note: Customers that aren't entitled to a service request can't submit that service request from their service catalog. However, these customers can install and view the record producer for that entitlement in their ServiceNow instance.

Example: Entitlements for catalogs

You have 20 services associated with SD-WAN products, and multiple SDWAN paid product offerings:

- SD WAN Gold
- SD WAN Silver
- SD WAN Bronze

These products have different access levels:

- The SD-WAN Gold product enables your customer to access all 20 services.
- The SD-WAN Silver product enables your customer to access only 15 of the 20 services.
- The SD-WAN Bronze product enables your customer to access only 10 of the 20 services.

You can package all 20 of these services in a catalog. Entitlement filtering ensures that customers only have access to the services to which they're entitled, based on their purchased product.

Create remote task definitions in Service Bridge for Providers (legacy)

As a provider, create remote task definitions that trigger the assignment of a remote task.

Before you begin

Role required: admin

Procedure

1. Navigate to **Service Bridge** > **Provider** > **Remote Task Definitions**.
2. Click **New**.
3. On the form, fill in the fields.

Remote Task Definition form

Field	Description
Name	Name of the remote task definition record.
Provider table	Any task table that you select from the list. For example, you can choose a case table or an incident table.
Customer table	Any task table that you select from the list. For example, you can choose a case table or an incident table.
Provider	Name of the provider. The name is auto-assigned.
Attachment sync	Remote instance from the remote task's parent. The default is that the check box is selected.
Short description	Brief information about this remote task definition.
Description	More detailed information about this remote task definition.

4. Click **Submit**.
5. Open this new Remote task definition record.
6. On the **Inbound fields** related tab, click **New**.
7. On the form, fill in the fields.
   The inbound fields enable you to receive data from the customer's instance when a remote task is created or updated.

Inbound field form

Field	Description
Field label	Field label that appears on the remote task form.
Field name	Field name that is used in the remote task flow and script.
Max length	Maximum length of the source field name.

Field	Description
Sync when	Field value that enables you to manage when a target field on the remote task's parent record is directly updated by the inbound source field. Insert Updates the target field on the remote task's parent record only when the remote task is initially inserted. Insert or Update Updates the target field on the remote task's parent record every time the remote task is updated. Never The inbound field never updates a target field on the remote task's parent record directly. For example, you can use this field for state mapping where a flow is used to convert the incoming value before updating the target field. **Note:** If you set the field value of **Sync when** to **Insert** or **Insert or Update**, Target Mapping is available. When you set the field value to **Never**, target mapping doesn't appear.
Source Table (read-only)	Table that you select in the Customer table field while creating the remote task definitions.
Source field	Field from the source table that is sent to another ServiceNow instance. Source fields allow for Dot-walking to data in related tables, which is useful when reference data is not available between ServiceNow instances. For example, you can create multiple inbound mappings for change incidents (CIs) to include the name, class, IP address, and asset tag.

8. Click **Submit**.
9. On the **Outbound fields** related tab, click **New**.
10. On the form, fill in the fields.
The outbound fields enable you to send data to the customer's instance when a remote task is created or updated.

Outbound field form

Field	Description
Field label	Name of the field label that appears on the remote task form.
Field name	Field name that is used in the remote task flow and script.
Max length	Maximum length of the field name.
Sync when suggestion	Field value that enables you (the provider) to suggest to the customer when a target field on the remote task's parent record should be directly updated by the inbound source field. The customer can change this setting before activating the definition. Insert Updates the target field on the remote task's parent record only when the remote task is initially inserted. Insert or Update Updates the target field on the remote task's parent record every time the remote task is updated. Never The inbound field never updates a target field on the remote task's parent record directly. For example, use this field for state mapping where a flow is used to convert the incoming value before updating the target field. **Note:** If you set the field value of **Sync when** to **Insert** or **Insert or Update**, target mapping is available. When you set the field value to **Never**, the target mapping doesn't appear.
Source Table (read-only)	Table that is auto-filled from the Provider table field while creating the remote task definitions.
Source field	Field from the source table that is sent to another ServiceNow instance. Source fields allow for Dot-walking to data in related tables, which is useful when reference data is not available between ServiceNow instances. For example, you

Field	Description
	can create multiple inbound mappings for change incidents (CIs) to include the name, class, IP address, and asset tag.

11. Click **Submit**.
12. On the **Customer criteria** related tab, click **New**.
13. On the form, fill in the fields.
    Customer criteria enable you to manage which customers can use these remote task definitions.

    Customer criteria form

Field	Description
Remote Customer Criteria	Customer account that you want these remote task definitions to be entitled to.
Remote task definition	Name of this remote task definition record. This name is auto-filled.

14. Click **Publish**.
    If you no longer need a remote task definition and want to deactivate it, click **Archive**. If you want to edit a remote task definition, click **Edit**.

    Note: Do not delete any existing remote tasks. When a remote task is deleted, duplicate parent tasks are created.

Result

A remote task definition record is created on your instance. This record is also synchronized with your customer's instance and is now pending activation on your customer's instance.

Note: The remote task variables are the data variables for the inbound fields that are displayed and accessed on the remote tasks. The variables are automatically created when you publish these definitions.

Create a remote task using Flow Designer as a provider in Service Bridge for Providers (legacy)

As a provider, proactively create remote tasks for your customers by using Flow Designer.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Flow Designer**.
2. On the Flow Designer landing page's main header, select **New** > **Flow**.
3. In the Flow properties window, fill in the following fields.

    Flow properties fields

Field	Action
Flow name	Enter the name of your flow

Field	Action
Description	Description of your flow
Application	Global
Domain	Global
Protection	None
Run As	System User

4. Under the TRIGGER section, select **Add a trigger**.
5. In the Trigger section, fill in the following fields and click **Done**.

Trigger section fields

Field	Value
Trigger	`Created or Updated`
Table	Table name that you want to create for your customer. For example, a Case [sn_customerservice_case].
Condition	Details of the filter. For example, `Account` is `customer-name`.
Run Trigger	For every update

Note: For Advanced Option fields, don't change any values.

6. Under the ACTIONS section, select **Add an Action, Flow Logic, or Subflow**.
7. Click **Action** > **ServiceNow Core** > **Create Record**.
8. Fill in the following fields.

New record fields

Field	Value
Table	Remote Task [sn_nowebonding_remote_task]
Fields	Add the following field values: ◦ **Account** > **Trigger- Record Created or Updated** > **Case Record** > **Account** ◦ **Remote Task Definition** ◦ **Parent** > **Trigger- Record Created or Updated** > **Case Record**
Run Trigger	For every update

9. Select **Done** and click **Save**.

Result
A remote task is created on your (provider) ServiceNow instance and it gets synchronised on the customer's ServiceNow instance.

Create remote choice definitions in Service Bridge for Providers (legacy)

As a provider, define the remote choice fields that can make the choice list for a catalog reference field available to your customers on their Service Portal.

Before you begin

Ensure that you've generated a service account. To learn more, see Create a provider record in the customer's instance (legacy).

Role required for creating Remote Choice Definitions: security_admin

Role required for creating Remote Choice fields: admin

Role required: admin

Procedure

1. Elevate your role to security_admin.
2. Navigate to **Service Bridge** > **Provider** > **Remote Choice Definitions**.
3. Click **New**.
4. On the form, fill in the fields.

Remote Choice Definitions form

Field	Description
Table	Name of the table that's available to your customers to query for while they are selecting a catalog item on their service portal.
Name	Auto-assigned name that can be changed when the customer selects the table.
GlideRecordSecure	When this option is selected, all queries for this table follow the access control list (ACL) restrictions. When this option isn't selected, queries for this table ignore all ACL restrictions, and the reference qualifier conditions are required on each remote choice variable against this table to limit the data access.
AccountSecure	When this option is selected, all queries for this table limit the results that are based on the querying service account's **Company** field and the table's **Company** or **Account** field. This flag is available only on the tables with references to the company or account where the field is named account, u_account, company, or u_company.
Short description	Additional information about the table.
Filter	Filter conditions that define the base conditions on the table.

Field	Description
	Note: Developers must use this filter while they are creating remote choice fields.

5. Click **Save**.
6. Navigate to **Service Bridge** > **Remote Record Producers**.
7. Select a remote record producer and click **Edit**.
8. In the Remote Choice Variables related list, click **New**.
9. On the form, fill in the fields.

Remote Choice Variable form

Field	Description
Map to field	Option that you can keep selected to show the value of the field.
Field	Reference field. For example, the table **Configuration item** field.
Record producer table	Auto-selected table that appears when you select the field. This table can be selected manually if it isn't mapped to a field.
Type	Reference type.
Remote choice enabled	Option that you can select for a remote choice.
Catalog item	Name of the remote record producer.
Question	Questions that appear in a catalog record on your customer's service portal.
Type Specifications	◦ Remote choice reference that includes the remote choice definition that you use for customer queries for this variable. ◦ Remote choice display field that includes the primary data value that appears to your customers in their querying results. ◦ Remote choice additional info field that includes the secondary data value that appears to your customers in their querying results. ◦ Reference qualifier condition that includes the filter options that you define to limit the data that is returned by the definition.

10. Click **Submit**.

Result

A remote choice definition with the configured variables gets created.

Create a transform in Service Bridge for Providers (legacy)

As a provider, create a transform in the Service Bridge for Providers application so that you can integrate tasks between a ServiceNow instance with your customer's instance.

Before you begin

Role required: admin

Procedure

1. Navigate to **Service Bridge** > **Provider** > **Transforms**.
2. Click **New**.
3. On the form, fill in the fields.

Transform form

Field	Description
Number	Auto-generated number for the transform record.
Account	Customer name for whom this transform is applicable.
Type	Simple: Used when the field has a known and stable choice list on each instance. A related list of transform lines is created to match the inbound and outbound values. Advanced: Used for complex criteria that requires a script to determine the new value.
Inbound	Option that enables an inbound transformation for this transform.
Outbound	Option that enables an outbound transformation for this transform.
Provider table	Option that designates the provider's task table. For example, Case.
Provider field	Option that designates the provider's field. For example, State.
Customer table	Option that designates the customer's task table. For example, Incident.
Customer field	Option that designates the customer's field. For example, **State**.

4. Click **Save**.
5. Select either **Simple** or **Advanced**.
   If you selected Simple, go to step 5a next. If you selected Advanced, go to step 5b next.

a. i. If you selected Simple, click **New** in the Transform lines related list, and fill in the fields on the form.

Transform lines form

Field	Description
Provider label	Option that designates the provider's choice label. For example, Open.
Provider value	Option that designates the provider's choice value. For example, 10.
Customer label	Option that designates the customer's choice label. For example, Progress.
Customer value	Option that designates the customer's choice value. For example, 2.

ii. Click **Submit**.

b. i. If you selected Advanced, use a script to define the outbound and inbound labels and values as shown in the following example:

```
output.value=input.value;
output.label=input.label;

var ci=new GlideRecord('cmdb_ci');

if(direction=='inbound'){
   if(ci.get('correlation_id',input.value)){
      output.value=ci.sys_id+";
      output.label=ci.getDisplayValue();
      }
}
if (direction=='outbound'){
  if(ci.get(input.value)){
     if(ci.correlation_id){
        output.value=ci.correlation_id+";
        output.label=input.label;
       }
    }
}
```

ii. Click **Submit**.

6. On the transform form, click **Activate**.

Result
A transform record is created on your ServiceNow® instance. Any Remote Task's inbound or outbound fields that match a transform will automatically use them. To learn more, see Create remote task definitions in Service Bridge for Providers (legacy).

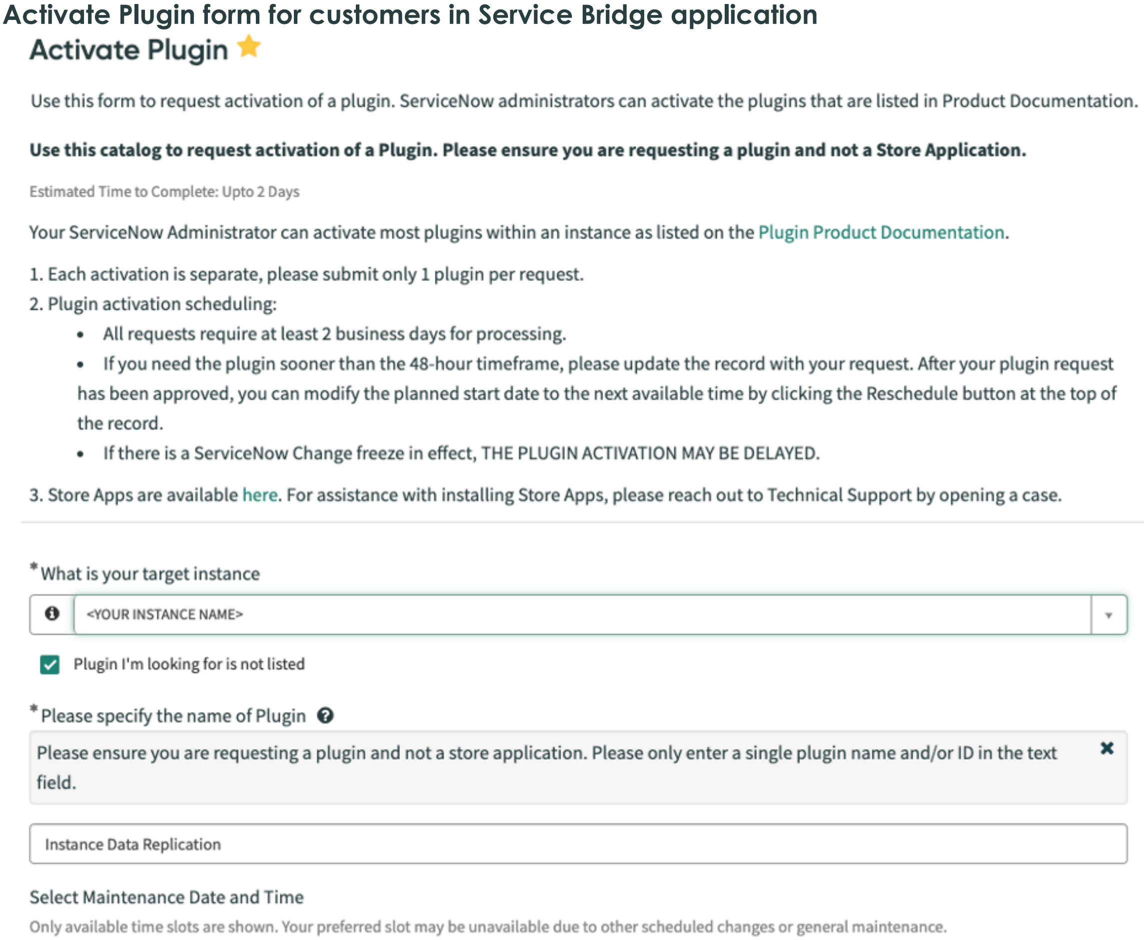
Installation and configuration of Service Bridge in customer instances (legacy)

As a customer, you can set up the Service Bridge (sn_nowebonding) application in your own instance.

You can configure the Service Bridge application as follows:

1. On the Now Support Portal, request installation of the **Instance Data Replication** plugin with the **Activate Plugin** catalog item.
2. Fill in the Activate Plugin form.
   a. Enter your Service Bridge instance name.
   b. Check the box for 'Plugin I'm looking for is not listed' (even if you can see Instance Data Replication in the list).
   c. Enter 'Instance Data Replication' in the name of Plugin field.

   Activate Plugin form for customers in Service Bridge application

   Activate Plugin

   Use this form to request activation of a plugin. ServiceNow administrators can activate the plugins that are listed in Product Documentation.

   Use this catalog to request activation of a Plugin. Please ensure you are requesting a plugin and not a Store Application.

   Estimated Time to Complete: Upto 2 Days

   Your ServiceNow Administrator can activate most plugins within an instance as listed on the Plugin Product Documentation.

   1. Each activation is separate, please submit only 1 plugin per request.
   2. Plugin activation scheduling:
      - All requests require at least 2 business days for processing.
      - If you need the plugin sooner than the 48-hour timeframe, please update the record with your request. After your plugin request has been approved, you can modify the planned start date to the next available time by clicking the Reschedule button at the top of the record.
      - If there is a ServiceNow Change freeze in effect, THE PLUGIN ACTIVATION MAY BE DELAYED.
   3. Store Apps are available here. For assistance with installing Store Apps, please reach out to Technical Support by opening a case.

   * What is your target instance

   <YOUR INSTANCE NAME>

   Plugin I'm looking for is not listed

   * Please specify the name of Plugin

   Please ensure you are requesting a plugin and not a store application. Please only enter a single plugin name and/or ID in the text field.

   Instance Data Replication

   Select Maintenance Date and Time

   Only available time slots are shown. Your preferred slot may be unavailable due to other scheduled changes or general maintenance.

3. Open the change request that was created, and add the following to the change request comments **"Requesting IDR installation for use with Service Bridge."**.
4. Install the Service Bridge application. To learn how, see Install Service Bridge (legacy).
5. Assign roles to groups in the Service Bridge application. To learn how, see Assign roles to groups for Service Bridge (legacy).
6. Create clone definitions to preserve or exclude Service Bridge tables. To learn more, see Cloning instances with Service Bridge (legacy).

Install Service Bridge (legacy)

If you have an admin role, you can install the Service Bridge application (sn_nowebonding). The application includes demo data and installations that are related to ServiceNow® Store applications and plugins.

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.
- Ensure that the following plugins are activated before you activate the Service Bridge application plugin:
  - com.sn_cs_sm_request
  - com.glide.idr

Note: To activate the Instance Data Replication (IDR) plugin, make a request to ServiceNow® personnel by using Now Support portal. For more information, see Request an Instance Data Replication (IDR) subscription.

Role required: admin

About this task

The following items are installed with the Service Bridge:

- Plugins
- Roles
- Tables

For more information about the components that are installed with this application, see Components installed with Service Bridge (legacy).

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Service Bridge application (sn_nowebonding) by 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 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. In the application installation dialog box, review the application dependencies.

   This listing indicates, for each dependent plugin and application if it's being installed, is already installed, or must be installed. If any plugins or applications must be installed, you must install them before you can install the Service Bridge in customer instances.
4. If demo data is available and you want to install it, click **Load demo data**.

   Demo data comprises sample records that describe the application features for common use cases. Load demo data when you first install the application on a development or test instance.

Important: If you don't load the demo data during installation, it's unavailable to load later.

5. Select **Install**.

Assign roles to groups for Service Bridge (legacy)

Assign roles to control the actions that are available for each user. In the Service Bridge (sn_nowebonding) application, you assign roles by group rather than by the individual user so that when the job descriptions of users change, their roles are automatically updated.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Click the group that you want to assign the role to.
3. In the Roles related list, click **Edit**.
4. Add the desired roles to the group.
5. Click **Save**.

Add a new authorized user (legacy)

As a customer, add new authorized users to control the access to catalog items that are entitled to you by your provider.

Before you begin
Ensure that your provider has entitled catalog personas to you. To learn more, see Create a remote catalog record (legacy) and Create remote record producers in a remote catalog in Service Bridge for Providers (legacy).

Role required: admin

Procedure

1. Navigate to **Service Bridge** > **Customer** > **Service Provider**.
2. Select the **Catalog Personas** related tab and check if you have any entitled personas from your provider.
3. On the **Authorized Users** related tab, click **New**.
4. On the form, fill in the fields.

Authorized User form

Field	Description
Customer User	Name of the user. You can select the name from the user's list.
Service Provider	Name of the service provider. This field is auto-filled.

Field	Description
Persona	Persona that you want to add to the user.

5. Click **Submit**.

Result

The authorized user record syncs to the provider's ServiceNow instance for approval. After it's approved, the new user gets added to the list of authorized users on your instance and on your provider's instance and the user can see the remote record producers with their assigned personas.

Activate the remote task definitions record in Service Bridge (legacy)

As a customer, activate the remote task definitions in your instance so that you can create remote tasks.

Before you begin

Before you (the customer) can activate a remote task definition in your ServiceNow instance, your provider must create it first in their ServiceNow instance. For more information, see Create remote task definitions in Service Bridge for Providers (legacy).

Role required: admin

Procedure

1. Navigate to **Service Bridge** > **Customer** > **Remote Task Definitions**.
2. Click the remote task definition record that you want to activate.
3. On the remote task definition form, review the Simple Trigger section on the form.
   If you set a simple trigger that matches a task record update, a remote task is automatically created for the task record.
4. On the **Inbound fields** related tab, review the variables data.
   The provider defines these inbound fields. When you create a remote task, your provider receives the remote task data through these inbound fields. You can modify the **Field label**, **Sync when**, and **Target field** fields.
5. On the **Outbound fields** related tab, review the variables data.
   Your provider defines these outbound fields. When the provider responds to your remote task, you receive the remote task data through these outbound fields. You can only modify the **Source field** field on these records.
6. On the **Remote task variables** related tab, review the variables data.
   The remote task variables are created from your inbound fields to be displayed on the remote tasks form.
7. Click **Activate**.
8. Verify the mappings of the inbound and outbound variables and click **OK**.
   The pop-up window enables you to verify the inbound and outbound mappings.

Using Service Bridge (legacy)

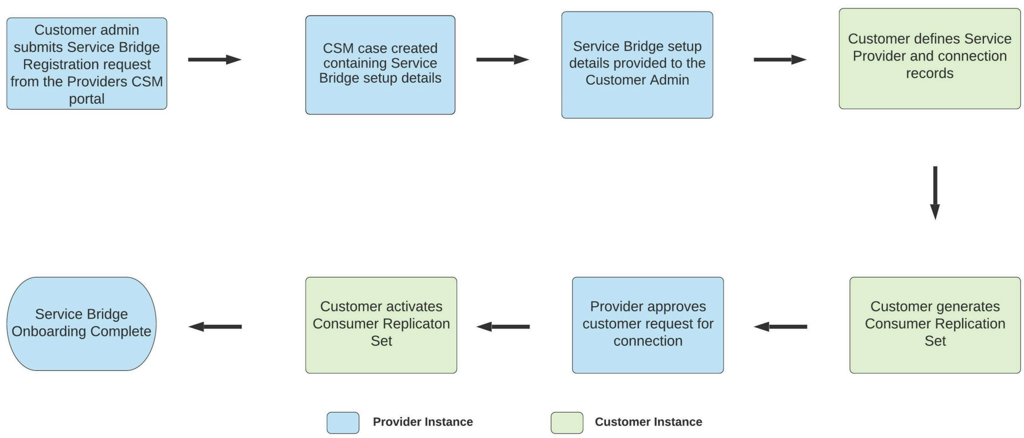
Whether you're a customer or provider, learn how to use Service Bridge to submit requests from the service catalog, and track order fulfillment from your ServiceNow instances.

Onboarding a new customer in Service Bridge (legacy)

Onboarding a new customer in Service Bridge establishes an instance-to-instance integration between a provider and a customer.

The process for onboarding a new customer to Service Bridge is described in Onboard a new Service Bridge customer (legacy) and shown in the following diagram.

Customer integration onboarding



Onboard a new Service Bridge customer (legacy)

As a service provider, onboard a new customer by establishing a new Service Bridge integration with that customer. Register a customer-initiated request to establish a Service Bridge integration.

Before you begin

As a provider, you must create a provider record during the initial setup of the Service Bridge for Providers application. For more information, see Set up a provider record and create a producer replication set in Service Bridge for Providers (legacy).

Role required: admin

About this task

Onboarding a new customer in Service Bridge establishes an instance-to-instance integration between the provider and the customer. This task involves actions by both the provider and the customer.

Procedure

1. On your Customer Service Management (CSM) portal, navigate to **Get help** > **Service Bridge** > **Service Bridge Registration**.
   Use the Service Bridge Registration catalog item to enroll a new customer. There are many records and relationships that are created and setting up the records individually is not recommended.
2. On the form, fill in the fields.

Service Bridge Registration form

Field	Description
Account	Name of the customer account.

Field	Description
Contact	Name of the customer contact (usually the administrator).
Customer instance URL	URL of the customer's ServiceNow instance.
Customer instance ID	Customer instance ID that is listed in the Service Providers `instance_id`system property.
Service Account Password	Password that is used for a service account on the customer's ServiceNow instance to integrate with your (provider's) ServiceNow instance to use the Remote Choice feature.

Your customer can also directly submit the Service Bridge Registration item within the provider's CSM portal if you (provider) enable it.

The Service Account is used for the Remote Choice feature of the Service Bridge application. The Service Account will be created on the your (provider's) ServiceNow instance and a connection is created on the Customers ServiceNow instance using those credentials.

3. Click **Submit**.

Result

The following actions take place:

- A case record is automatically generated in your ServiceNow instance.
- Your customers receive instructions on how to install the Service Bridge application from the ServiceNow® Store and how to complete the registration for it.
- The agents and Service Bridge administrators receive the detailed work notes that help them aid their customers with the installation and configuration process.
- Your customer contact receives a standard Customer Service Management notification.

Create a provider record in the customer's instance (legacy)

If you're a customer, create a provider record in the Service Bridge application on your ServiceNow instance to complete the registration process.

Before you begin

You or your provider must first initiate the registration process in the provider's ServiceNow instance by using the Service Bridge Registration catalog item. For more information, see Onboarding a new customer in Service Bridge (legacy).

Role required: admin

Procedure

1. On the customer's ServiceNow instance, navigate to **All** > **Service Bridge** > **Customer** > **Service Providers**.
2. Click **New**.
3. Provide the vendor name and customer ID values from the details in the case notes instructions.
4. Create a Connection record, which includes the details of the provider replication set.

You can find details such as the provider set name, provider instance URL, and the provider ID, in the case record.

5. Right-click in the form header and choose **Save**.
6. Create the Service Account by using the details in the registration case and the password that you created during the registration.
7. Right-click in the form header and choose **Save**.
8. Click **Validate Service Account** UI action to ensure that the service account is correct.
9. Right-click in the form header and choose **Save**.
10. Click the **Create Replication Set**.
    The following results take place:
    - The **Consumer Replication Set** field is populated with the name of the newly created replication set.
    - The **Consumer Approval Status** fields are set to Approval Pending.
    - An approval request is sent to the provider agent who is working on the case.

Approve the customer request in the provider's instance (legacy)

Approve the customer's request in the provider's ServiceNow instance.

Before you begin

Your customer must first create an approval request record. For more information, see Create a provider record in the customer's instance (legacy).

Role required: admin

Procedure

1. On the provider's ServiceNow instance, navigate to **All** > **Service Bridge** > **Provider** > **Customers**.
2. Open the appropriate customer record.
3. In the Customer record, find the Registration Case and navigate to that Case record.
4. In the work notes in the case record, click the link to the approval record.
5. In the Replication Subscription record, click **Approve**.
6. In the confirmation dialog box, click **Yes**.

Activate the replication set in the customer's instance (legacy)

Activate the replication set in the customer's ServiceNow instance.

Before you begin

Your providers must first approve the Replication Subscription. For more information, see Approve the customer request in the provider's instance (legacy).

Role required: admin

Procedure

1. On the customer's ServiceNow instance, navigate to **All** > **Service Bridge** > **Customer** > **Service Providers**.
2. Open the appropriate provider record.
   In the Service Provider record on the customer's instance, the **Consumer Approval Status** changes to Approved.

3. In the **Consumer Replication Set** field, click the information icon (ⓘ) and click **Open Record**.
4. In the Consumer Replication Set record, click **Activate**.
   In the Service Provider record, the **Inbound Status** and **Outbound Status** fields are set to Activation Requested.
5. Right-click in the form header and from the context menu, choose **Reload form**.
   The background Instance Data Replication processing sets the **Inbound Status** and **Outbound Status** status to Active Replication.

Result
The integration between the provider and the customer is established.

Service request fulfillment in Service Bridge (legacy)

Service Bridge service requests are initiated from the customer's ServiceNow instance. The provider's agent fulfills these requests in their ServiceNow instance. The data in the request then synchronizes the agent and customer instances so that they both can track its progress.

Sample Service Bridge service requests

Some common Service Bridge service requests are as follows:

- Help requests
- Service-affecting issues
- Requests for changes in service

Service Bridge request fulfillment process

1. The customer selects a Service Bridge related item from the service catalog.
2. The customer provides the information in the Service Bridge and clicks **Submit**. When the customer places the request, the Ticket View appears.

   Within the view, the customer can add comments that are replicated in the provider's instance.

3. In the customer's instance, a single tracking task type, the provider request, is generated, regardless of the service.
4. The provider request is replicated on the provider's instance, triggering a flow that triggers a fulfillment task.
5. The state of the request in the customer's instance is set to Received.
6. In the provider's instance, an agent takes ownership of the case by clicking **Assign to me**.
7. After an agent takes ownership, the state of the provider request in the customer's instance is updated to Work in Progress.

   When the agent posts a work note on the provider's instance, the note is replicated in the customer's instance. Notes that the customer posts are replicated in the provider's instance.

8. After the agent resolves the request, sets a resolution code, and clicks **Propose solution**, the state of the provider request in the customer's instance is updated to Resolved.

The Actions menu displays the following options, such as **Accept**, **Reject**, or **Cancel**.

9. If the customer accepts the resolution, the state of the provider request on the customer's instance, and the state of the request on the provider's instance, are updated to Closed.

Proactive Service Bridge case notification in Service Bridge (legacy)

After a customer onboards through Service Bridge, that customer gets notified of cases that are created from alert monitoring. Customers proactively receive up-to-date information about issues that affect them, and are informed about the progress of the resolution of those issues.

A proactive case in Service Bridge is similar to the synchronization that occurs between a provider's and customer's instances when the customer submits a service request. However, in this case, the fulfillment process proactively triggers by alert monitoring.

The process is as follows:

1. An alert that is related to an onboarded Service Bridge customer triggers in the provider's instance, and a case record is created.
2. A link to the provider request is added as a comment in that case.
3. An automatic Customer Service Management notification is sent to the primary customer contact, and a link to the provider request is also included.
4. Any state changes or additional comments that are added to the case record in the provider's instance appear in the customer's instance. The status change in the case triggers creation of a case on the provider's instance.

For more information about the Service Bridge synchronization for resolving cases, see Service request fulfillment in Service Bridge (legacy).

Service Bridge reference (legacy)

Reference topics provide additional information about the Service Bridge data model and configuration.

Service Bridge data model (legacy)

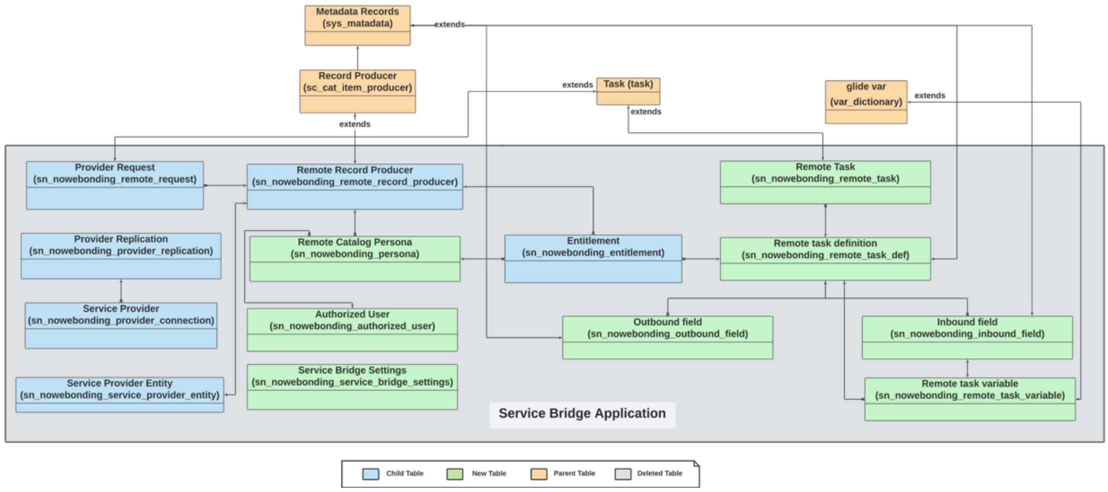
The Service Bridge applications data model provides insight into how the tables that are used in Service Bridge relate to each other.

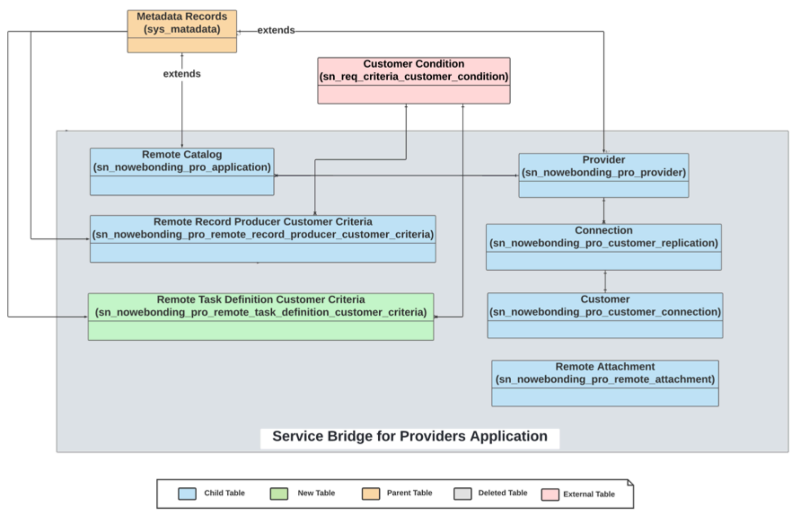
The data model uses a combination of the following types of tables to store data:

- Service Bridge application tables.
- Customer Service Management application tables.
- Now Platform standard tables.

The following diagram provides an overview of the data model for Service Bridge.

Service Bridge data model





Service Bridge for Providers data model (legacy)

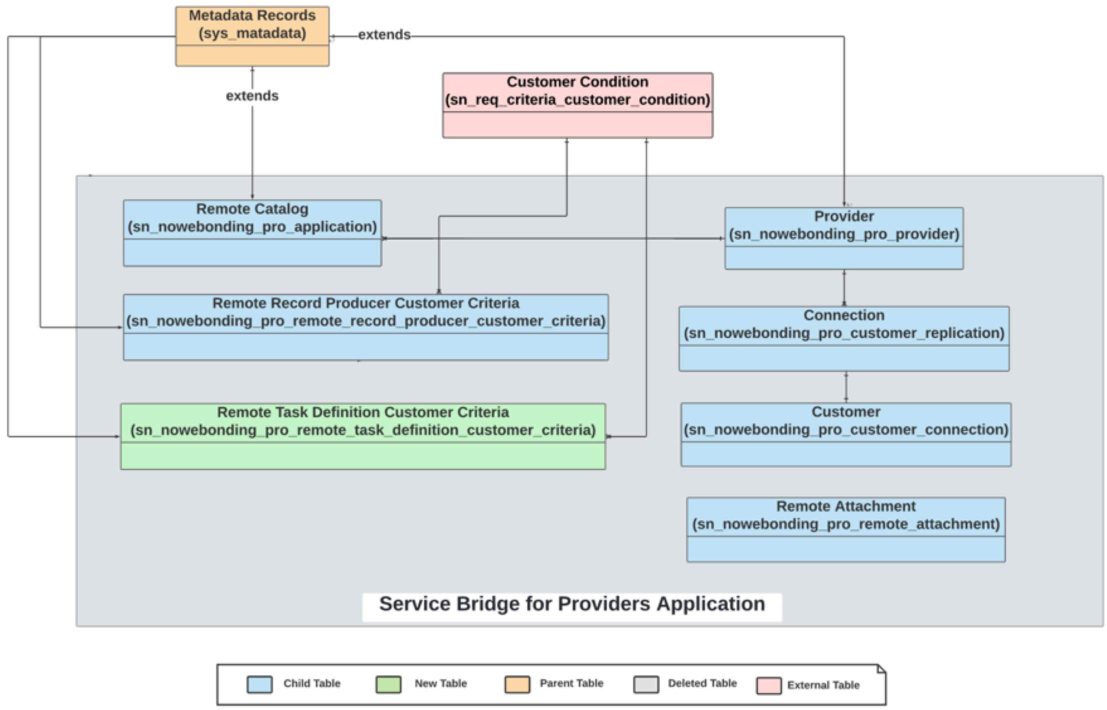
The Service Bridge for Providers data model provides insight into how the tables that are used in the Service Bridge for Providers (sn_nowebonding_pro) application relate to each other.

The Service Bridge for Providers application data model uses a combination of the following types of tables to store data:

- Service Bridge of Providers application tables.
- Customer Service Management application tables.
- Now Platform standard tables.

The following diagram provides an overview of the data model for Service Bridge for Providers application.

Service Bridge for Providers data model



The following table lists the Access Control Rights (ACR) for specific Service Bridge for Provider tables.

Access to tables by role in the Service Bridge for Providers application

Table	Read	Write/Create	Delete
Remote Catalog [sn_nowebonding_pro_application]	admin	admin	admin
Customer [sn_nowebonding_pro_customer_connection]	admin sn_nowebonding.admin sn_customerservice.customer,	admin sn_customerservice.customer,	admin
Connection [sn_nowebonding_pro_customer_replication]	admin sn_nowebonding.admin	admin	admin
Provider [sn_nowebonding_pro_provider]	admin sn_nowebonding.admin sn_customerservice.customer,	admin	admin
RemoteAttachment [sn_nowebonding_pro_remote_attachment]	admin sn_nowebonding.admin	admin	admin

Access to tables by role in the Service Bridge for Providers application (continued)

Table	Read	Write/Create	Delete
Remote Record Producer Customer Criteria [sn_nowebonding_pro_remote_record_producer_customer_criteria]	admin sn_nowebonding.admin	admin	admin

Service Bridge data model (legacy)

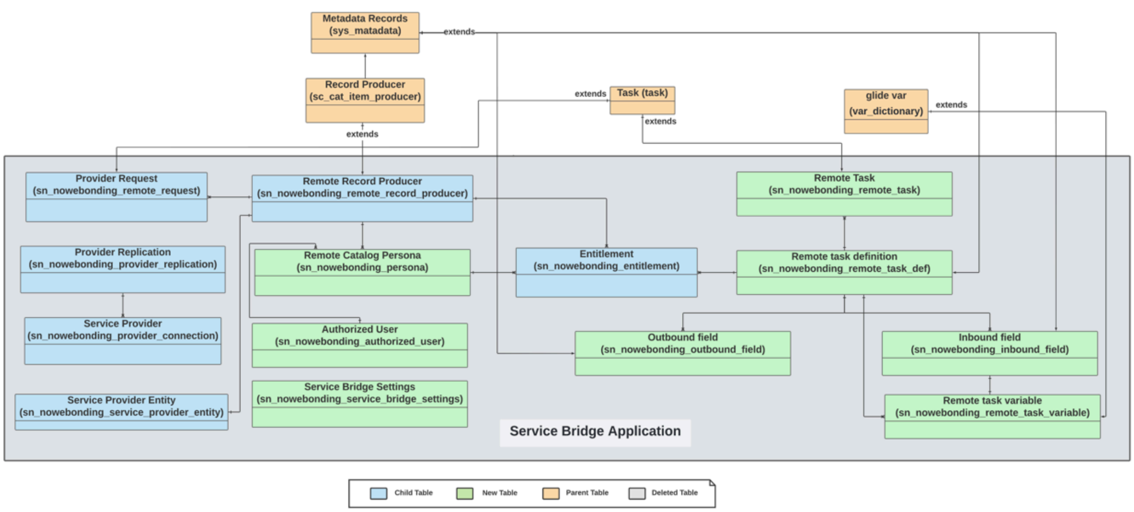
The Service Bridge data model provides insight into how the tables that are used in the Service Bridge relate to each other.

The Service Bridge data model uses a combination of the following types of tables to store data:

- Service Bridge application tables.
- Customer Service Management application tables.
- Now Platform standard tables.

The following diagram provides an overview of the data model for Service Bridge.

Service Bridge customer data model



The following table lists the Access Control Rights (ACR) for specific Service Bridge tables.

Access to tables by role in Service Bridge

Table	Read	Write/Create	Delete
Service Bridge Entitlement [sn_nowebonding_entitlement]	admin sn_nowebonding.admin	None	None
Remote Record Producer [sn_nowebonding_remote_record_producer]	admin sn_nowebonding.admin	admin	admin

Access to tables by role in Service Bridge (continued)

Table	Read	Write/Create	Delete
	sn_nowebonding.requestor		
Service Provider [sn_nowebonding_provider_connection]	admin sn_nowebonding.admin	admin	admin
Provider Replication [sn_nowebonding_provider_replication]	admin sn_nowebonding.admin	admin	admin
Provider Request [sn_nowebonding_remote_request]	admin sn_nowebonding.read sn_nowebonding.admin sn_nowebonding.requestor	admin	admin

Components installed with Service Bridge for Providers (legacy)

Several types of components are installed when you activate the Service Bridge for Providers (sn_nowebonding_pro) application, including tables, user roles, and business rules.

The Application Files [sys_metadata] 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.

When you install the Service Bridge for Providers application, the Service Bridge application is also automatically installed. To view the additional components that are installed, see Components installed with Service Bridge (legacy).

Note: Activate the Instance Data Replication (IDR) plugin through a request to ServiceNow personnel. For more information, see Request an Instance Data Replication (IDR) subscription.

Demo data is available for this feature.

Roles installed

The following roles are installed with the Service Bridge for Providers application.

Roles installed with the Service Bridge for Providers application

Role title [name]	Description	Contains roles
Service Bridge requester [sn_nowebonding.requestor]	• Enables members of the customer IT staff to request and monitor services from the provider from their service catalog.	itil

Roles installed with the Service Bridge for Providers application (continued)

Role title [name]	Description	Contains roles
	Note: Any member of the customer's staff who needs access to the provider's remote record producers requires this role. • Provides access to the remote record producers and provider requests.	
Service Bridge read [sn_nowebonding.read]	• Enables the provider's customer service agents to read the contents of the provider request record. • Provides read-only access to the Service Bridge application.	N/A
Service Bridge admin [sn_nowebonding.admin]	• Provides read access to all Service Bridge tables • Typically assigned to an administrator for the Service Bridge application on both the customer and the provider side.	• idr_read • flow_designer • sn_customerservice.case_viewer • sn_customerservice.customer_data_viewer • catalog

Business rules installed

The following business rules are installed with the Service Bridge for Providers application.

Business rules installed with the Service Bridge for Providers application

Business rule	Table	Description
Validate application	sn_nowebonding_pro_application	Validates that the custom application can't be changed once it's associated to a Service Bridge application record.
Set state and protection policy	sn_nowebonding_remote_record_producer	On insert, sets the state to Draft.

Business rules installed with the Service Bridge for Providers application (continued)

Business rule	Table	Description
Populate customer details on provider	sn_nowebonding_remote_request	Populates customer details such as the company, opened_by, and provider fields on the provider ServiceNow instance.
Provider request customer approval	sysapproval_approver	Updates the provider request with the appropriate state when an approval is added for a Service Bridge task.
Set customer ID and provider ID	sn_nowebonding_pro_customer_connection	Sets the customer_id, provider_id, and customer instance URL values.
Delete Service Bridge Entitlement	sn_install_base_sold_product	Deletes an entitlement record for the customer.
Update reg case work note for consumer status	idr_subscription	Updates the registration case work note when the IDR subscription state changes to active.
Update reg case work note for approval	idr_subscription	Updates the registration case work note when the IDR subscription state changes to approval_pending.
Create Service Bridge entitlement	sn_install_base_sold_product	Creates Service Bridge entitlements for the customer when the customer purchases a product that has applicable Service Bridge record producers.
Validate name and only one provider	sn_nowebonding_pro_provider	Validates the provider name and makes sure that only one provider record exists.
Put vendor details on scratchpad	sn_nowebonding_pro_application	Sets vendor details on the scratchpad. This information is used in the Create Application UI action.

Business rules installed with the Service Bridge for Providers application (continued)

Business rule	Table	Description
Set scratchpad for existing provider	sn_nowebonding_pro_provider	Sets the Service Bridge provider app ID on the scratchpad. This information is used in the Create Replication Set UI action.
Reject approval record	sn_nowebonding_remote_request	If the customer rejects the change, it updates the sysapproval_approver record to Rejected.
Display scope mismatch warning	item_option_new	Displays the Scope mismatch warning for Remote Record Producer Variables.
Approve approval record	sn_nowebonding_remote_request	Updates the sysapproval_approver record to Approved when the customer approves the change.
Perform update on Service Bridge state	idr_subscription	Creates Discrete Mapping values for the consumer on the IDR approval request.
Create user criteria	sn_nowebonding_remote_record_producer	Creates user criteria with the sn_nowebonding.requestor role for the remote record producer. This user criteria is used on the customer instance to control the record producer access.
Update registration case comment	idr_subscription	Updates the Service Bridge registration case comment when an admin approves the customer IDR subscription.
Create case for OnBoarding	sn_nowebonding_pro_customer_connections	Creates a case for the Service Bridge registration request.
Put state on scratchpad	item_option_new	Sets the remote record producer state, sys_id, and

Business rules installed with the Service Bridge for Providers application (continued)

Business rule	Table	Description
		class name values on the scratchpad.
Delete attachment	sn_nowebonding_pro_remote_attachment	Deletes the remote request attachment from the provider.
Check Edits for UI Policy for Published.	catalog_ui_policy	Aborts edits on Provider owned UI Policy.
Check Edits for Action for Published.	catalog_ui_policy_action	Aborts edits on Provider owned UI Policy action.
Check Edits for Question for Published.	question_choice	Aborts edits on Provider owned question choice.
Check Edits for Variable for Published.	item_option_new	Aborts edits on Provider owned variables.
Show warning when missing variables.	sn_nowebonding_remote_record_producer	Shows warning message if variables are missing on Publish action.
Show warning message	sn_nowebonding_remote_record_producer	Shows warning message if customer criteria is missing on publish action.

Tables installed

The following roles are installed with the Service Bridge for Providers application.

Tables installed with the Service Bridge for Providers application

Table	Description
Remote Record Producers [sn_nowebonding_remote_record_producer]	Enables the provider to define the services for the products they sell. Each service can be tied to one or more products. This table also references the remote record producer and a subflow. (The remote record producer is how the service can be enabled and requested from the customer ServiceNow instance.) • The subflow includes the logic to create the corresponding fulfillment task on the provider ServiceNow instance. • When invoked on the customer ServiceNow instance, it could result in the creation of a case. Extends the Application File [sys_metadata] table.

Tables installed with the Service Bridge for Providers application (continued)

Table	Description
Service Bridge application [sn_nowebonding_pro]	Contains the reference to the remote catalog and provider records. Extends the Application File [sys_metadata] table.
Provider [sn_nowebonding_pro_provider]	Enables the provider to create a unique ID to identify themselves: • Creates a one-to-many relationship between the provider and Service Bridge applications. • Contains the association with the provider IDR producer replication set, based on whether provider data synchronization is established to their customer instance. • Extends the Application File [sys_metadata] table.
Connections [sn_nowebonding_pro_customer_replication]	Represents the different customer connections for a provider. Associates the IDR consumer subscription so the data is replicated between the provider ServiceNow instance and the customer ServiceNow instance.
Customer [sn_nowebonding_pro_customer_connection]	Tracks all customers that a provider is on Service Bridge with their ServiceNow instance. It contains the following information. • Unique provider ID • Unique customer ID • Connections table reference [sn_nowebonding_pro_customer_replication] through which the data synchronization is established • Customer account • Primary contact reference.
Remote Attachment [sn_nowebonding_pro_remote_attachment]	References the provider request attachment and handles the update or deletion of an attachment.

Flows installed

The following flows are installed with the Service Bridge for Providers application.

Flows installed with the Service Bridge for Providers application

Flow	Description
Service Bridge Provider Request to Change Request Update	Synchronizes the Service Bridge provider request updates to the change request.
Service Bridge Provider Request to Case Update	Synchronizes the Service Bridge provider request updates to the case.
Create Proactive Provider Request from Case	Creates a proactive provider request from a case.
Create case for OnBoarding	Creates a case for a Service Bridge registration request.
Process Incoming Provider Request	Validates and processes the incoming provider request. If the request is invalid, it creates a case or incident to track the failure. If the request is valid, it creates a fulfillment task.
Handling invalid provider request	Creates a case from an invalid provider request for tracking purposes.
TEMPLATE: Service definition subflow	Flow template that calls the service definition subflow.
Delete Attachment	Deletes all attachments.
Create Incident from provider request	Creates an incident as a fulfillment task from an incoming provider request.
Create case from provider request	Creates a case as a fulfillment task from an incoming provider request.
Create change from provider request	Creates a change as a fulfillment task from an incoming provider request.
Process Entitlements	Runs every day to refresh the Service Bridge entitlements for all customers (a scheduled job).
Create Entitlement For Consumer	Creates Service Bridge entitlements for the customer when customers activate their consumer replication set.
Attachment Sync Task to Provider Request	Synchronizes the Service Bridge change/ case/incident attachment to the related provider request.

Flows installed with the Service Bridge for Providers application (continued)

Flow	Description
Attachment synchronize Provider Request to Task	Synchronizes the provider request attachment to the related task.
Service Bridge Incident to Provider Request Update	Synchronizes the Service Bridge incident updates to the provider request.
Service Bridge Change Request to Provider Request Update	Synchronizes the Service Bridge change request updates to the provider request.
Service Bridge Case to Provider Request Update	Synchronizes the Service Bridge case updates to the provider request.
Check and Create Proactive Provider Request from Case	Checks and creates a proactive provider request from a case.
Service Bridge Provider Request to Incident Update	Synchronizes the Service Bridge provider request updates to the incident.

Components installed with Service Bridge (legacy)

Several types of components are installed with activation of the Service Bridge application for customers, including tables, user roles, and business rules.

Note: The Application Files [sys_metadata] 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.

Roles installed

The following roles are installed with the Service Bridge application for customers.

Roles installed with the Service Bridge application for customers

Role title [name]	Description	Contains roles
Service Bridge admin [sn_nowebonding.admin]	Provides read access to all Service Bridge tables	idr_read
Service Bridge read [sn_nowebonding.read]	Provides read-only access to provider requests	N/A
Service Bridge requester [sn_nowebonding.requestor]	Provides access to remote record producers and provider requests	N/A

servicenow

Business rules installed

The following business rules are installed with the Service Bridge application for customers.

Business rules installed with the Service Bridge application for customers

Business rule	Table	Description
Set provider details in scratchpad	[sn_nowebonding_provider_connection]	Sets the provider set name and provider from the ServiceNow instance URL in the scratchpad. The Create Replication Set UI action uses this data.
Populate provider request data	[sn_nowebonding_remote_request]	Populates the customer_id, provider_id, and Opened By values on the provider request. It also validates whether the customer is entitled to the service request.
Validate provider details	[sn_nowebonding_provider_replication]	Validates the provider ServiceNow instance URL with a slash (/) character at the end.
Validate request on customer	[sn_nowebonding_remote_request]	Validates the provider_id, customer_id, provider_connection, and record producer values. If these values aren't correct when updating the application, it updates them to the correct values.
Change state to Work in Progress	[sn_nowebonding_remote_request]	When the user enters comments, it changes the state from Awaiting Info to Work in Progress.

Tables installed

Tables installed with the Service Bridge application for customers

Table	Description
Remote Record Producer [sn_nowebonding_remote_record_producer]	Remote record producers are packaged in a provider remote catalog that is published to the ServiceNow Store, from which the

Tables installed with the Service Bridge application for customers (continued)

Table	Description
	customer installs the application onto their instances. This table extends the Record producer [sc_cat_item_producer] table. The provider uses it to define the service requests that are enabled on their Service Bridge customer ServiceNow instances.
Provider Request [sn_nowebonding_remote_request]	Creates a provider request when a customer submits a request using the remote record producer. • Used for task tracking for the customer and enables customers to add comments and attachments. • Synchronized bidirectionally synchronized between the customer ServiceNow instance and the provider ServiceNow instance. • Depending on which flow is invoked, the service definition sys_id and remote record producer sys_id are linked to it.
Provider Replication [sn_nowebonding_provider_replication]	Enables the customer to track the providers with which they're connected through Service Bridge. This table contains the following information. • Unique provider ID • Provider's ServiceNow instance URL • Reference to the IDR Consumer Replication Set through which the data synchronization is established with their providers.
Service Provider [sn_nowebonding_provider_connection]	Enables the customer to track all the Service Bridge providers with whom they're connected on their ServiceNow instance. It contains the following information. • Unique customer ID • Connections table reference [sn_nowservicebridge_provider_replication] through which the data synchronization is established

Tables installed with the Service Bridge application for customers (continued)

Table	Description
Service Bridge Entitlement [sn_nowebonding_entitlement]	Contains the customer entitlement data and the record producers that are enabled on the customer's ServiceNow instance. This table also contains the following information. • Unique provider ID • Unique customer ID • Remote record producer reference
Service Provider Entity [sn_nowebonding_service_provider_entity]	Stores the entities that are defined by the provider. Tracks provider items synced through the Instance Data Replication (IDR) to the customer instance. Helps providers to track and stop any updates from the customer instance on the provider-owned entities.

Flows installed

The following flows are installed with the Service Bridge application for customers.

Flows installed with the Service Bridge application for customers

Flow	Description
Set state to Received for Proactive Request	Sets the state of the proactive request to Received.
Create Remote Record Producer	Creates the remote record producer and related entities.
Service Bridge Provider Order line item to requested item	Updates the sync provider line item to the requested item.
Service Bridge Order to Request	Synchronizes the state and comments updated from the provider order to the request.
Create Provider Product offering	Creates an entitlement for a product offering.

Domain separation and Service Bridge (legacy)

Domain separation is supported for Service Bridge. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview

Domain separation is available only for the Provider Request [sn_nowebonding_remote_request] table and not to any of the configuration tables in the application.

How domain separation works in Service Bridge

- Only the Provider Request [sn_nowebonding_remote_request] table in the application can be domain-separated.
- Make sure that the customer company and account tables are associated to the right domain for the domain separation logic to work.

Use cases

When providers have their customer data separated by domains, the provider requests and corresponding fulfillment tasks are associated with the respective customer domains.

Related topics

Domain separation for service providers

Cloning instances with Service Bridge (legacy)

When installing Service Bridge, certain tables must be preserved or excluded to maintain connectivity after a clone.

Before cloning, verify that the IDR tables are also preserved or excluded. See Cloning with Instance Data Replication for details. To learn more about cloning, see Request a clone.

Service Bridge tables to preserve

Add the following Service Bridge tables to the Clone Data Preservers list if they are missing. Remove any Service Bridge tables that are not in this list.

- sn_nowebonding_pro_application
- sn_nowebonding_pro_customer_replication
- sn_nowebonding_pro_customer_connection
- sn_nowebonding_pro_provider

- sn_nowebonding_provider_connection
- sn_nowebonding_provider_replication
- sn_nowebonding_service_bridge_settings
- sn_nowebonding_authorized_user
- sn_nowebonding_entitlement
- sn_nowebonding_inbound_field
- sn_nowebonding_outbound_field
- sn_nowebonding_persona
- sn_nowebonding_remote_record_producer
- sn_nowebonding_remote_request
- sn_nowebonding_remote_task_def
- sn_nowebonding_remote_task_variable
- sn_nowebonding_remote_task
- sn_nowebonding_service_provider_entity
- sn_nowebonding_st_remote_choice
- sn_nowebonding_transform_line
- sn_nowebonding_transform
- sn_nowebonding_pro_remote_attachment
- sn_nowebonding_pro_remote_choice_definition
- sn_nowebonding_pro_remote_record_producer_customer_criteria
- sn_nowebonding_pro_remote_task_def_customer_criteria
- customer_contact
- item_option_new
- catalog_ui_policy
- catalog_ui_policy_action

Service Bridge tables to exclude

Add the following Service Bridge tables to the Clone Exclude Tables list if they are missing. Remove any Service Bridge tables that are not in this list.

- sn_nowebonding_pro_application
- sn_nowebonding_pro_customer_replication
- sn_nowebonding_pro_customer_connection
- sn_nowebonding_pro_provider
- sn_nowebonding_provider_connection
- sn_nowebonding_provider_replication
- sn_nowebonding_service_bridge_settings
- sn_nowebonding_authorized_user
- sn_nowebonding_entitlement
- sn_nowebonding_inbound_field

- sn_nowebonding_outbound_field
- sn_nowebonding_persona
- sn_nowebonding_remote_record_producer
- sn_nowebonding_remote_request
- sn_nowebonding_remote_task_def
- sn_nowebonding_remote_task_variable
- sn_nowebonding_remote_task
- sn_nowebonding_service_provider_entity
- sn_nowebonding_st_remote_choice
- sn_nowebonding_transform_line
- sn_nowebonding_transform
- sn_nowebonding_pro_remote_attachment
- sn_nowebonding_pro_remote_choice_definition
- sn_nowebonding_pro_remote_record_producer_customer_criteria
- sn_nowebonding_pro_remote_task_def_customer_criteria
- customer_contact
- item_option_new
- catalog_ui_policy
- catalog_ui_policy_action