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Washington DC Account Lifecycle Events

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Exploring Account Lifecycle Events

The Account Lifecycle Events application provides a structured, onboarding experience for technology industry providers.

When a customer account is created, an account onboarding case is generated and the playbook is initiated. You can configure various tasks in the playbook that involve identifying the key people handling the case, import data, and create collaborative tasks.

Overview

Account Lifecycle Events provides a Playbooks playbook, an Account Lifecycle Events case type, and defined case tasks for onboarding that support this important process. You can use the playbook as a template or as a starting point to build your onboarding experience.

Account Lifecycle Events includes the following:

- Dedicated case type and tasks: A central record for the onboarding team including dedicated tasks to assign work, automate, and capture data.
- Playbook: A playbook that serves as a starting point to build a repeatable onboarding process that meets business requirements.
- Data Capture: Import, manage, and publish data as part of a case task.

Account Lifecycle Events workflow

The Account Lifecycle Events high-level workflow involves the following stages:

- The Customer Service Management creates a customer account. This task automatically creates an account onboarding case.
- The Account Lifecycle Events playbook is launched.
- The case is managed by the onboarding manager who uses the playbook to manage the end-to-end workflow.

About the Account Lifecycle Events playbook

The Account Lifecycle Events application enables technology industry providers to define a structured, repeatable, onboarding experience. The Account Lifecycle Events application enables collaboration, transparency, and insight for both internal staff members and external customers involved in the onboarding process.

For a detailed description of the playbook, see Using the Account Lifecycle Events playbook.

Playbook overview

A playbook visualizes a workflow in a simple, task-oriented view. The workflow for a playbook is generally created using the Process Automation Designer. A playbook takes a workflow and breaks it into multiple stages or lanes. Stages can also include automated activities, such as sending an email to a customer when a stage or activity is complete. Each lane in a playbook includes the following:

- A list of activities that you review.
- Status indicators that display the current state of each activity.
- Check marks that indicate where you are in the workflow.

As you mark an activity complete in a lane, you move to the next activity. You can save an activity at any time and return to the playbook later. After you complete all the activities in a lane, you move to the next lane. As you complete activities and lanes, the status is reflected in the contextual side panel. An Activity log in the contextual side panel shows all the data that you've entered for each activity.

Playbook layout

A playbook is made up of several areas, including the playbook lifecycle, the playbook work area, and the contextual side panel. The activity view determines how the stages and activities appear in the playbook. The layout consists of the following:

- Playbook header
- Playbook lifecycle
- Playbook work area
- Contextual side panel

The activity view determines how the stages and activities are displayed in the playbook. The playbook lifecycle displays either the stages or the stages and activities included in the playbook, depending on the configured activity view. For more details, see Playbook life cycle ◪ .

Account Lifecycle Events users and roles

An overview of the tasks that can be performed by the different Account Lifecycle Events users and their required roles and user criteria.

Users and roles

Users	Description	Roles
Onboarding manager	Responsible for the end-to-end workflow from onboarding customer until account go-live.	sn_acct_lc.agent
Foundational data analyst	Subject matter expert who ensures that the data being imported in the correct format and meets the quality standards required for publishing.	sn_acct_lc.agent
ServiceNow admin/ developer	Responsible for configuring playbook, case type, emails, transform maps, and other necessary components.	sn_acct_lc.agent
Onboarding point of contact (customer)	Primary customer contact responsible for managing the customer team involved in the onboarding process.	sn_customerservice.customer
ServiceNow admin/ developer (customer)	Responsible for the managing customer's ServiceNow instance and setting up the Service Bridge application.	sn_customerservice.customer_admin
Foundational Data SME (Subject matter expert)	Responsible for providing necessary information like contact information, and locations. Ensures that the data meets the format	sn_customerservice.customer_manager

Users and roles (continued)

Users	Description	Roles
	required by the provider organization.	

Configuring Account Lifecycle Events

Set up and configure the Account Lifecycle Events application.

Activate Account Lifecycle Events

The Account Lifecycle Events (com.sn_acct_lc) plugin is available as a separate subscription. This plugin activates related plugins, if they aren't already active.

Before you begin
Role required: sn_customerservice.customer_admin

About this task
The Account Lifecycle Events plugin activates these related plugins, if they aren't already active.

Plugins for Account Lifecycle Events

Plugin	Description
Technology core [com.sn_ti_core]	Technology industry vertical Customer Service Management extensions.
Customer Service [com.sn_customerservice]	Automate your processes and give service agents visibility into the customer systems and tools that they require to deliver proactive services to your customers.
Customer Service Install Base Management [com.snc.install_base]	Enables customers to capture the current state of their install base and establish the relationship to any downstream entities that might impact their functioning.
Playbook Experience Core [com.glide.playbook_experience.config]	Enables you to customize the default Playbook user experience to create your desired business process workflow.
Playbooks for Customer Service Management [com.sn_csm_playbook]	Guides customer service agents through the various tasks to resolve customer issues, and visualizes the entire lifecycle across diverse and siloed processes.
Customer Service Case Types (com.snc.csm_case_types)	Activating this plugin enables the system administrator to create and manage case types.
Dynamic Related Records for Configurable Workspace [com.snc.uib.sn_dyn_rel_rec]	Framework to display the contextual dynamic Related Records section in a configurable workspace.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.

2. Find the plugin using the filter criteria and search bar.
   You can search for the plugin by its name or ID. If you can't find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install**, and then in the Activate Plugin dialog box, select **Activate**.

   ⓘ **Note:** When domain separation and delegated admin are enabled in an instance, you must be in the **global** domain. Otherwise, the following error appears:

   ```
   Application installation is unavailable because another operation
    is running: Plugin Activation for <plugin name>
   ```

   .

Configure playbook using Playbooks

Use the Playbooks to configure the Account Lifecycle Events playbook.

In Playbooks, an activity represents one step in your overall business process. You can sequence many activities together in the stages of your process. A stage is made up of many sequenced activities that are grouped in a logical way. You can add or create your own activity definitions, or delete an activity that is not required.
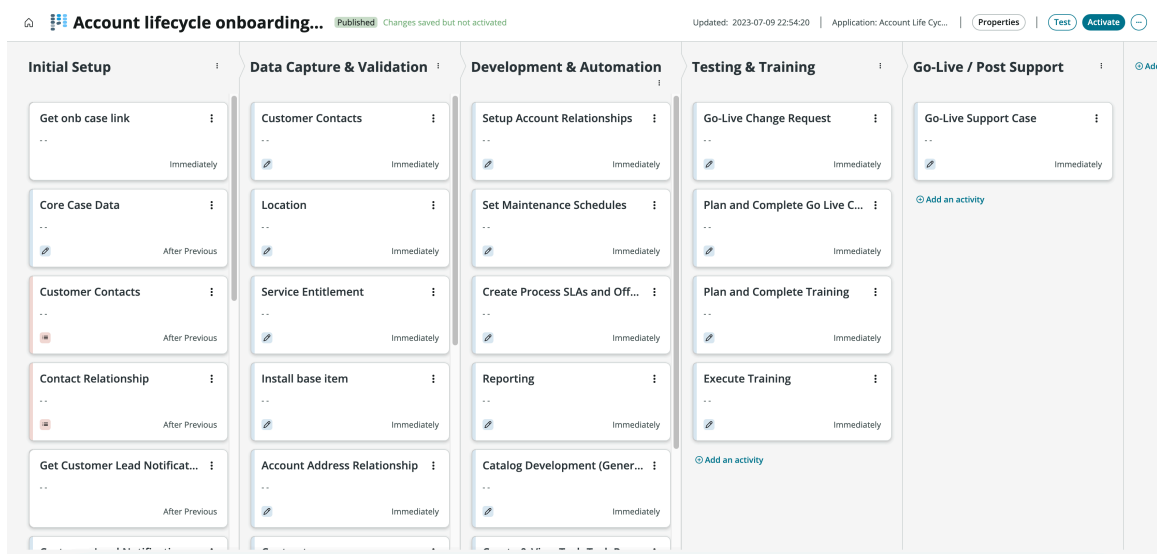
Configure simple Account Lifecycle Events playbook tasks

You can configure simple playbook tasks using the Playbooks.

Before you begin
Role required:

- sn_acct_lc.agent

- One or more Playbooks roles. See Playbooks roles ↗ for details.

About this task
You can add, modify, and delete any tasks for the Account Lifecycle Events playbook using the Process Automation Designer. For example, if you want to configure one of the tasks in the Development & Automation lane, perform the following steps.

Procedure

1. Navigate to **All** > **Process Automation Designer**.

2. Select the **Account lifecycle onboarding process**.

3. Navigate to the Development & Automation lane and select the Setup Account Relationships activity.

4. In the Activity properties window, select **View all properties** and select **Advanced**.

5. In the General tab, enter the label name and description.

6. In the When to start field, select **With Previous**.
   This option enables you to execute all activities in the task in parallel.

7. Select the Automation tab and select **Accounts Lifecycle Task** table.

8. Add all required fields and any other fields that must be populated for this task in the Account Lifecycle Events playbook.

9. Select **Done** and then **Activate**.

Configure the Account Lifecycle Events playbook data import task

Configure the data import task of Account Lifecycle Events using Playbooks.

To configure the data import task, you must have the following roles:

- sn_acct_lc.agent
- One or more Playbooks roles. See Playbooks roles ↗ for details.

The following table shows the various tasks involved in configuring the data import task.

Data import tasks

Task	Section
Create the Excel template to import data to the target table.	Create Excel template
Create the staging table in which the import data can be stored before it's moved to the target table.	Create the staging table
Create the data source and attach the template file to the record.	Create the data source
Configure the transform map.	Configure the transform map
Add the playbook activity to the Playbooks process.	Add the data import task

ⓘ **Note:** The following sections describe how to configure the data import task for the location table available with the base system. The names and values used in these sections are examples but you can follow this process to configure any tables used for the data import task.

Create Excel template

Create the Excel template to import data to the target table:

1. Navigate to **All** and enter *cmn_location.list* in the Search filter.

2. Select the **Personalize** icon and select the columns that are to be included in the template. Enter filter conditions if necessary, select the Column options icon, and then select **Export to Excel (.xlsx)**.

3. Select **Download** to download the exported file.

4. Open the downloaded Excel file, clear any existing data, and select **Save**.

5. You can see that the file contains the columns you selected earlier. This file can be used as your Excel template for importing data.

Create the staging table

Create the staging table in which the import data can be stored before it's moved to the target table:

1. Navigate to **All** > **System Definition** > **Tables**.

2. Select **New** and enter the following details:

   ◦ Label: Enter a name for the location table, for example Data import for location.

   ◦ Name: Enter the internal name of the table. For example, `sn_acct_lc_account_onb_import_locations`.

   ◦ Extends table: Select Technology import row.

3. Deselect the Create module check box and select the **Controls** tab.

4. In the User role field, enter `sn_acct_lc.agent` and select **Save**.

5. Select the Columns tab and select New. Enter the following details:

   ◦ Type: String. All the columns must be of type String.

   ◦ Column label: Enter a field name (column name) from the template file.

   ◦ Column name: Enter the Column label with the u_ prefix. For example, if you entered the Column label as Street, enter u_street here.

   ◦ Max length: Specify the maximum length for the column as required.
   Follow the preceding steps to add all the columns from the template file.

6. Select Layout List under the Related Links. From the List view drop-down, select **New** and create two list views for this table:

   ◦ ready_to_publish: Add all the logical fields to this view. This view appears when you select the Ready to publish bucket in the Data Import task record.

   ◦ needs_attention: Add all the logical fields plus the Comments field to this view. This view appears when you select the Needs attention bucket in the Data Import task record.

7. Select the Layout Form under the Related Links.

8. From the View name drop-down, select **New** and create the import_view. Add all the logical fields plus the Comments field to this view. This view is displayed when you try to open the staging table record from the Data Import tab

Create data source

Create the data source and attach the template file to the record.

1. Navigate to **All** > **Administration** > **Data sources**.

2. Select **New** and enter the following details:

- Name: Enter a name for the data source.

- Import set table name: Enter the internal table name. For example, `sn_acct_lc_account_onb_import_locations`.

3. Attach the template file to the data source record that you've created.

Configure the transform map

Transformation converts raw field input values into standardized values that are more meaningful to an organization. Administrators control when transformation happens by defining rules and conditions for specific fields.

As part of the data import configuration, you must configure the following required transform scripts that are provided with the base system. To configure the transform scripts, follow these steps:

1. Navigate to **All** > **Transform maps**.

2. Search for the Account Lifecycle Events application.

3. Select the Account Onboarding Customer Location transform map.

Select the Transform Scripts tab. You can see the following scripts:

- onComplete

- onAfter

- onBefore

4. Select one of the scripts and modify it as required and select **Update** to save the changes.

onComplete script

```
(function runTransformScript(source, map, log, target /*undefined
onStart*/ ) {
//Check if there is any Needs Attention Record is present or not.
//If Yes, then script will create a new import set record and attach all
the Needs Attention records to the new Import Set.
//Also, it will update the new import set reference on the import Task
Table.
var util = new sn_acct_lc.AlonStagingRecordState();
util.onCompleteTransformMap(source, import_set);
})(source, map, log, target);
```

onAfter script

```
(function runTransformScript(source, map, log, target /*undefined
onStart*/ ) {

// Add your code here

var alonStagingUtil = new sn_acct_lc.AlonStagingRecordState();
alonStagingUtil.afterTransform(source);
if(source.sys_import_state ==
TechOnbEditableContants.SN_IMPORT_TRANFORM_IGNORED) {
 return;
}


})(source, map, log, target);
```

onBefore

```
(function runTransformScript(source, map, log, target /*undefined
 onStart*/ ) {


// Add your code here
var alonStagingUtil = new sn_acct_lc.AlonStagingRecordState();
var status = alonStagingUtil.beforeTransform(source.import_state);
if(status == TechOnbEditableContants.SN_IMPORT_TRANFORM_IGNORE) {
  ignore = true;
 }


})(source, map, log, target);
```

Add the data import task

Add the data import task that you've configured to the **Account lifecycle onboarding process** defined in the Process Automation Designer.

1. Navigate to **All** > **Process Automation Designer**.

2. Select the **Account lifecycle onboarding process**.

3. Navigate to the Data Capture & Validation lane and select **Add an activity**.

4. Select **Account lifecycle events** and select the **Create & View Tech Task Record**.

5. Select the **Edit** icon on the newly added task to view the properties.

6. Select **View all properties** and select **Advanced**.

7. In the General tab, enter the label name and description.

8. In the When to start field, select **With Previous**. This option enables you to execute all the activities in the task in parallel.

9. Select the Automation tab and in the Inputs section, enter the following:

   ◦ Table: The table for which the record is being created. Select **Account Lifecycle Import Task (sn_ti_core_imp_task)**.

   ◦ Canceled Conditions: Specify the conditions that must be met before the task moves into the canceled state.

   ◦ Closed Conditions: Specify the conditions that must be met before the task moves into the Closed state.

   ◦ Onboarding Case: Select the Account Onboarding Case Record trigger to associate this record with the account onboarding case.

   ◦ Record View: The name of the Form View that is to be displayed in the Account Lifecycle Events playbook. Enter `tech_pad_imp_task_view` here.

   ◦ Responsibility Name: Select the ServiceNow Developer/Admin user role from the list. This role is assigned to the internal team members (defined in the Assign internal team responsibilities task of the **Initiate** stage of the playbook. See Using the Account Lifecycle Events playbook for details). Users with this role can perform the data import task.

10. Select **Add Field** and enter data in the following fields from the Account Lifecycle Events Import Task table.

    ◦ Source Table: Add the internal name of the staging table. For example, `sn_acct_lc_account_onb_import_locations`.

    ◦ Target Table: Add the internal name of the target table. For example, `cmn_location`.

    ◦ Data Source: Select the data source. For example, `cmn_location_template.xlsx`.

- Data Import State: The default value is set to 1 (Data not loaded yet).

- State: The default state is set to 1 (Open).

- Type: Select **Data capture**.

- Account: Select the account onboarding case associated with the case task.

- Parent: Select the parent record associated with the account onboarding case.

- Visible: Set this **False.**

11. Enter the Subject and Description as required and select **Done** and then select **Activate**.

After the data import task has been configured, the Account Lifecycle Events playbook can be used to onboard customers. See Using the Account Lifecycle Events playbook for details.

Configure the validation script

Use the `DataImportValidationConfig` script include to configure the validation rules for the staging table.

Before you begin
Role required: sn_customerservice.customer_admin

About this task
Define the field and record level validation rules for the staging tables. These validation rules are triggered when the agent selects the **Validate** button after importing data to the staging table. See Import data into the Account Lifecycle Events playbook for details.

Procedure

1. Navigate to **All** > **Administration** > **Script Includes**.

2. Search for the Account Life cycle Events application and select the `DataImportValidationConfig` script include.
   You can see the validation rules that have been defined for the default tables provided with the base system.

3. You can define three types of validation rules:

- Mandatory fields: Specify the mandatory fields that should be present in the staging table.

  For example: In the *"sn_acct_lc_account_onb_import_contacts* table, you can specify that the following fields are mandatory:

  ```
  'u_account', 'u_email', 'u_last_name'
  ```

- Reference fields: Specify the reference fields in the staging table. A reference field stores a reference to a field on another table. When you define a reference field, a relationship is created between the two tables.

  For example: For the `sn_acct_lc_account_onb_import_contacts` table, you can define the reference field validation as follows:

  ```
  "sn_acct_lc_account_onb_import_contacts": {
    'u_account': {
     'table_name': 'customer_account',
     'reference_field': 'name'
    }
  ```

Where `u_account` is the name of the field on the staging table, and `customer_account` is the table and `name` is the reference field with which it's associated.

  ◦ Custom validations: Define custom scripts to validate the staging table records. The following is an example of a custom validation script:

```
dataImportCustomValidationForCustomerContacts:
 function(stagingTableGr){
  try{
          if(this.debuggingEnabled)
             this.logs.push('Inside
dataImportCustomValidationForCustomerContacts');
   //Check the Account field's value coming from Excel is matching the
corresponding Task or not.
   while(stagingTableGr.next()){
    if (global.JSUtil.notNil(stagingTableGr.task) &&
global.JSUtil.notNil(stagingTableGr.u_account)){
     if (stagingTableGr.task.company.name !=
stagingTableGr.u_account){

sn_acct_lc.DataImportValidationFunctions.updateStagingTableRecordVali
dationComments(stagingTableGr, false, 'The Account is not matching
with the Case Account.');
     }
    }
   }
  }
  catch (err){
   gs.error('Error while executing -
dataImportCustomValidationForCustomerContacts - '+err);
   if(this.debuggingEnabled)
    this.logs.push('Error while executing -
dataImportCustomValidationForCustomerContacts - '+err);
   //Update the Validation Comments with the Error

sn_acct_lc.DataImportValidationFunctions.updateStagingTableRecordVali
dationComments(stagingTableGr, false,
 gs.getMessage('sn_acct_lc.DataImportValidationUtil.ValidationFailed',
 'Custom'));
  }
 },
```

In the preceding example, `dataImportCustomValidationForCustomerContacts` is the custom validation script. The function calls the `stagingTableGr` variable (GlideRecord variable) that contains all the records that have been uploaded to the staging table. The script checks the specified conditions using `DataImportValidationFunctions` and validates the data.

You can define one or more scripts for new staging tables in the format shown in the preceding example.

4. Select **Update** to save any changes made to the script include.

Using Account Lifecycle Events

The Account Lifecycle Events application provides service providers with a structured, repeatable, onboarding experience for their customers, and process transparency to internal

and external teams. The onboarding playbook is a starting point that can be configured to meet business requirements.

Create an account onboarding case

When the customer service agent creates an account, an account onboarding case is generated.

Before you begin
Role required: sn_acct_lc.agent

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace** and select the **List** icon.

2. Navigate to the **Customer** menu item in the list and select **Accounts**.

3. Select **New** to create a customer account.

4. Follow the instructions to create an account and select **Save**.

5. Navigate to the account that you've created and select the **Cases** tab to view the newly created account onboarding case.

6. Select the link to launch the Account Lifecycle Events playbook.
   See Using the Account Lifecycle Events playbook for details.

Using the Account Lifecycle Events playbook

The Account Lifecycle Events playbook provides a simplified experience to import, stage, manage, and publish account data.

The Account Lifecycle Events playbook provides a structured onboarding experience with several predefined activities. It serves as a template and can be configured by service providers to meet their business requirements.

The Account Lifecycle Events playbook includes the following stages and activities that can be used in the account onboarding process.

Account Lifecycle Events playbook stages

Stage	Activity	Details

Initiate	Enter onboarding related info	The first activity in the playbook involves gathering onboarding related information.
		
		• Assigned to: Select the provider agent who is working on this case.
		
		• Service Bridge customer: Select one of the following options:
		
		  ◦ No: No Service Bridge integration is required.
		
		  ◦ Remote catalog only: A Service Bridge integration for the remote catalog feature is required.

Account Lifecycle Events playbook stages (continued)

Stage	Activity	Details
		◦ Full: A Service Bridge integration for the remote task, remote catalog, and / or transform map features is required. • Type: Select one of the following: ◦ Phased: A specific part of the onboarding process for this customer is managed through this Account Lifecycle Events onboarding case. ◦ Full: The entire onboarding process for this customer is by this Account Lifecycle Events onboarding case. • Specify the Go live date and select **Mark complete** to proceed with the next activity.
	Add customer POC and team	Add the customer contacts who will work on the account onboarding case. • Select **Add new** to create a customer contact. Enter the name and email address of the customer and select **Save**. • Select **Mark complete** to move to the next step.
	Assign customer team responsibilities	Assign responsibilities to each of the customer contacts that have been added. • Select **Assign new**. In the Create New Contact Relationship form, select the Contact you've added in the previous step. • In the Responsibility field, select one of the predefined user roles and select **Save**. • Select **Mark complete** to move to the next step. When this step is completed, two emails are automatically generated. The first email identifies the primary point of contact for the account onboarding case.

Account Lifecycle Events playbook stages (continued)

Stage	Activity	Details
		The second email identifies the key team members participating in the onboarding process.
	Assign internal team responsibilities	Add and assign responsibilities to the internal team members (service providers) working on the account onboarding case. This includes the ServiceNow administrator handling the case. • Select **Assign new**. In the Create New Account Team Member form, select a predefined user role in the **Responsibility** field. • Select a user who is assigned this role. • Select **Mark complete**. You can move to the next stage in the playbook lifecycle. ⓘ **Note:** By default, all tasks in the playbook are assigned to the provider's ServiceNow administrator.
Data Capture & Validation		In this task, select the Type of activity being performed: • Data capture: Denotes important data being imported into the system. • Risk mitigation: Denotes a risk associated with the onboarding of this customer that must be managed. • Development: Tracks an internal or external development action that is required. • Training: Denotes a training activity required before the go-live date. • Testing: Denotes a testing activity required before the go-live date. The following default tables are available with the base system: • Customer contacts • Location

Account Lifecycle Events playbook stages (continued)

Stage	Activity	Details
		• Service entitlement • Install base item • Account address relationship • Contract • Sold products • Install base M2M sold products Custom conditions have been defined and field values in these tables like source table, target table, and data source are auto populated in each of these tables. You can use these flows by directly importing data into these tables and publish them when they're ready. For details on importing data into these tables, see Import data into the Account Lifecycle Events playbook. These tables have been configured with specific conditions and field values have been auto populated. You can modify these tables, add new tables, and activities depending on your requirements using the Process Automation Designer. See Configure the Account Lifecycle Events playbook data import task for details.
Development & Automation		The following tasks are available with the base system: • Setup account relationships • Set maintenance schedules • Create process SLAs and offerings • Reporting • Catalog development (general) These are demo tasks and can be configured according to your requirements. You can add or delete tasks, and modify them as required. See Configure simple Account Lifecycle Events playbook tasks for details on simple configuration tasks.

Account Lifecycle Events playbook stages (continued)

Stage	Activity	Details
Testing & Training		The following tasks are available with the base system: • Go-live change request • Plan and complete go-live communications • Plan and complete training • Execute training
Go-Live /Post Support		Go-live support case

Import data into the Account Lifecycle Events playbook

As part of the Account Lifecycle Events process, you can import, configure, and publish data.

Before you begin

• Role required: admin

• The following items must be present:

  ◦ Target table to which the data is to be imported.

  ◦ Excel template to import the data into the target table.

  ◦ Staging table in which the imported data can be modified before it's uploaded to the target table.

  ◦ Transform map to transform and transfer the data from the staging table to the target table.

  ◦ Data source on which the staging table information and the Excel template is present must be configured.

About this task
After completing the first stage in the Account Lifecycle Events playbook, you can continue with the **Data Capture & Validation** stage. Several default tables have been configured with the base system. To import data into these default tables, follow these steps:

Procedure

1. Open the first table and select**Open record**.

2. In the Data Import page, select the **Details** tab.
   In the Contact field, select the customer contact who is working on this case.

3. Download the attached template, review, and add information in the appropriate columns.

4. Select **Add File** to add the attachment to the task for review by the onboarding team.
   The ServiceNow administrator assigned to this case gets a notification that the data file has been uploaded.

5. Select the **Import from attachments**, option, choose the file, and select **Select**.

Data is loaded to the staging table and validated. After validation, data is moved into one of the following state:

- Ready to publish: The records have no validation errors and can be published.

- Needs attention: Records in this state have some issues that must be addressed.

- Yet to validate: Records in this state haven't been validated.

> **ⓘ Note:**
>
> - If you have additional files that must be added, select **Add more**, and select a new file that is to be uploaded to the staging table.
>
> - If the imported data is corrupted or has several errors, select **Clear data**. This action clears all the uploaded data in the staging table. You can upload a different file and restart the validation errors.

6. Review the records in the Needs attention state, fix the errors, and select **Save**. These records are moved to the Yet to validate state.

7. Select **Validate** to validate the records in the Yet to validate state.

8. When all the data is the Ready to Publish state, select **Publish** to publish the data.

> **ⓘ Note:** You can choose to publish data before all the errors have been fixed, or if there are records in the Yet to Validate state. In this case, when you select **Publish**, a message indicating that the data has been partially published with errors is displayed. You must resolve all the errors, select **Validate**, and then select **Publish**.

All the published data is moved to the target table.

9. Select **Close**.

10. Follow these steps for all the tables in this stage.

11. Review the Data Import Summary, enter Close Notes for each task, and select **Mark complete** to continue with the next stage in the playbook.

Account Lifecycle Events reference

Reference topics provide additional information about Account Lifecycle Events application.

Account Lifecycle Events data import flow

This section describes how the data is imported from an external file, validated, and published to the target table.

See the following diagram to view the flow of data from the upload stage to the final stage when it's published.
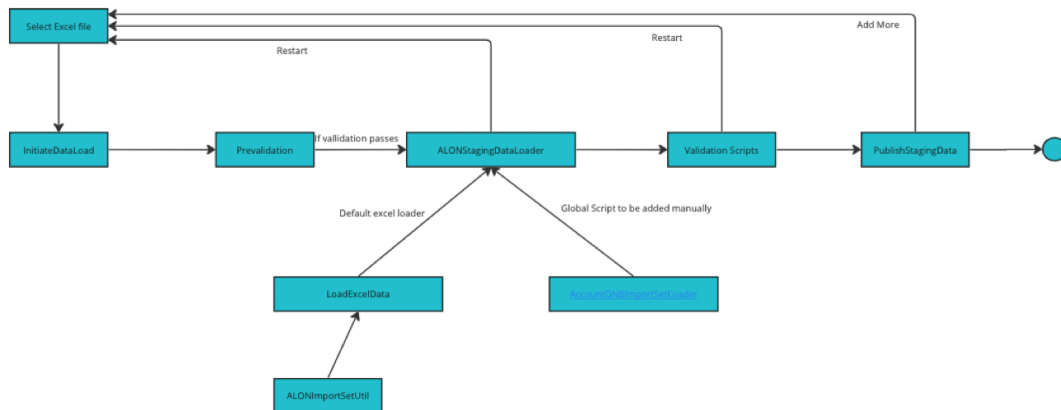
The data import flow involves the following steps:

1. The customer uploads an Excel file as an attachment.

2. The `InitiateDataLoad` script processes the file and pre-validates the data. It verifies if the columns in the data file match the columns in the staging table. If the data file contains additional, duplicate, or missing columns, the data load process fails.

3. After the pre-validation process, the `ALONStagingDataLoader` script loads data into the staging table using one of the following scripts:

   ◦ `LoadExcelData`

   ◦ `AccountONBImportSetLoader` (global script include): See KB1358053 ↗ on Now Support for details.

   If the global script include isn't available, the *LoadExcelData* script is used. The global script include contains base system APIs that are used to load the data to the staging table. If the global script include isn't available, the *LoadExcelData* custom script verifies the data, checks for exceptions, and then loads the data to the staging table.

4. Validation scripts that validate the data loaded to the staging table are executed. Validation fails if some required or reference data is missing in the uploaded data.

5. When the validation has been completed, the records in the staging table move into the following states:

   ◦ Ready to publish

   ◦ Needs attention: Review the records that are in the **Needs attention** state, resolve the errors, and select **Save**. These updated records are moved into the **Yet to validate** state.

6. During the publish process, any records that are in the **Yet to validate** state are validated again, and records that move to the **Ready to publish** state are published to the target table.

   ⓘ **Note:**
   - If the data being uploaded is corrupted, or has errors, select **Clear All** to cancel and restart the process.
   - After the data is published, select **Add more records** to add additional records to the table.

Run scheduled job to back up staging table

You can take a backup of the data on the staging table at periodic intervals.

![servicenow]

Before you begin
Role required: admin

About this task
Data present in the staging table backed up if:

- Import tasks are in an **Active** state.

- Data creation date is earlier than the current date.

ℹ Note: Import tasks that are in a **Canceled** or **Closed** state aren't backed up.

Procedure

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

2. Find the **Scheduled Staging Data Backup Job** scheduled job.

ℹ Note: The job is inactive by default. Select the **Active** check box to run the scheduled job at the scheduled time.

3. Select **Execute Now**.
To configure the backup period, specify a number in the Value field for the `sn_accct_lc.BackupDays` system property. For example, if the Value field is set to 2, data that is more than two days old is included in the backup.

Result
A CSV file is created and attached to the import task. The file name includes the name of the staging file and the creation date in the format `stagingTable-dateCreated.csv`.