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Integrate Webex Contact Center with ServiceNow (Version 2-New)

Feedback?

When you integrate Webex Contact Center with ServiceNow, you can launch Desktop from within ServiceNow.

Requirements

Before you integrate Webex Contact Center with the ServiceNow console, ensure that you have the following:

- System Administrator access to ServiceNow instance.
- HI account to install from <https://store.servicenow.com> (for installing into Enterprise licensed instances).
- Access to the following files at <https://github.com/webex/webex-contact-center-crm-connectors/blob/main/servicenow/updateSet.xml>:
 - Cisco Click-to-dial Update Set (XML)
 - https://github.com/webex/webex-contact-center-crm-connectors/blob/main/servicenow/Global_WxCC_ClickToDial_UIMacro_UpdateSet_1.0.xml

The update sets are only for developer instances.

Integrate

Follow one of the two methods below:

For developer instances, we recommend following the steps under the developer instance guide.

If you own an Enterprise licensed instance, follow the guidelines for enterprise-licensed instances.

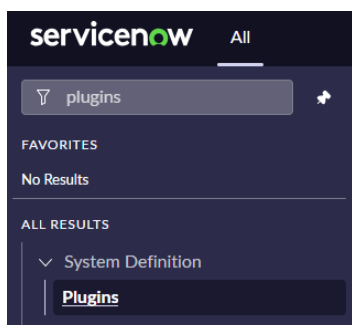
We do not recommend mixing the enterprise-licensed app with developer sandbox instances.

Install ServiceNow for developer instances

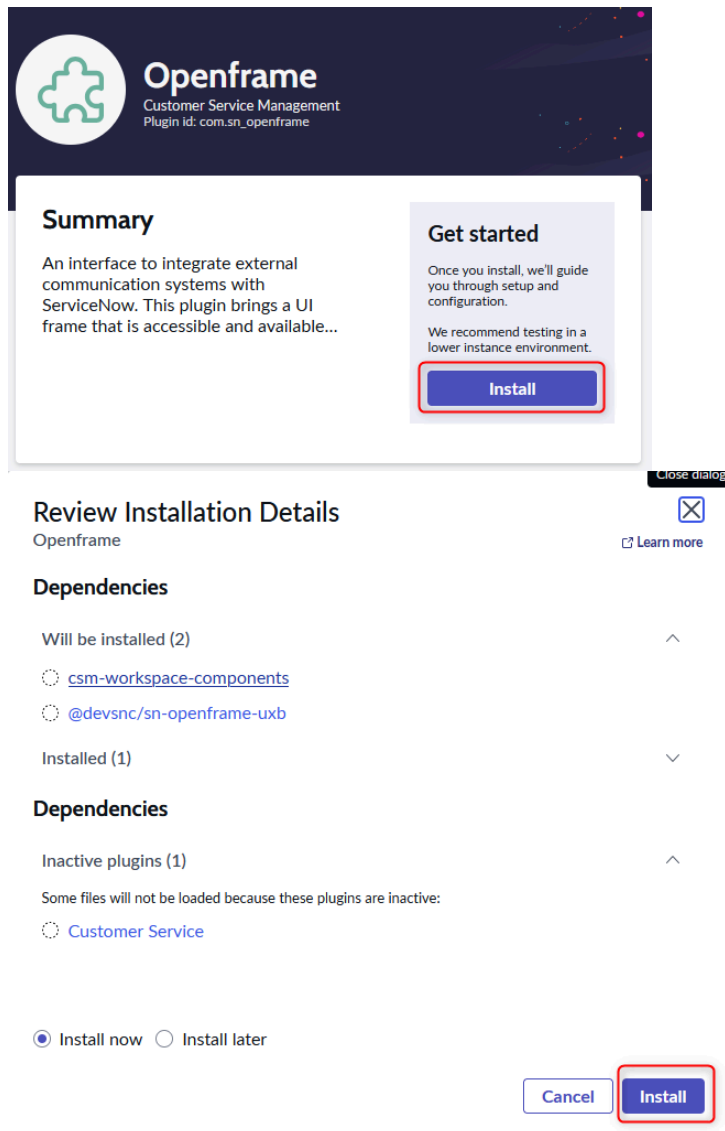
The following sections describe the steps to install the ServiceNow connector for developer instances.

Install the ServiceNow Openframe plugin

- 1 Sign into your ServiceNow instance as a System Administrator.
- 2 Go to **All > System Definition > Plugins**.



- 3 Search for Openframe and install the plugin.

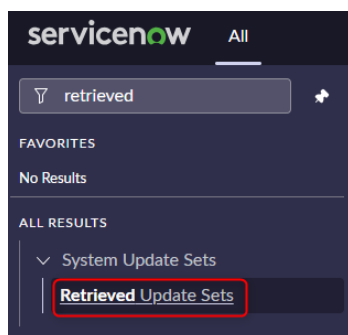


Commit the Update Set

- 1 Download the latest System Update Set XML file available on the github repo at this location: <https://github.com/webex/webex-contact-center-crm-connectors/blob/main/servicenow/updateSet.xml>.

File Name: webexcc-servicenow-update-set.xml

- 2 Log into your ServiceNow instance as an Administrator.
- 3 Go to **All > Retrieved Update Sets**.



- ④ Click **Import Update Set** from XML and choose a file to load the .xml file.

ServiceNow All Favorites ServiceNow

< Import XML

Importing records from an XML file will not run Business Rules

Step 1: Choose file to upload

* XML file Choose File updateSet.xml

Step 2: Upload the file

Upload

- ⑤ Click **Upload**.

- ⑥ Click on the created update set name and click **Preview Update Set**.

< Retrieved Update Set Cisco Webex Contact Center Update Delete Preview Update Set

Name Cisco Webex Contact Center Committed

Application Cisco Webex Contact Center Inserted

Update source Deleted

Parent

- ⑦ Finish by clicking **Commit Update Set**.

< Retrieved Update Set Cisco Webex Contact Center Update Delete Run Preview Again Commit Update Set

Name Cisco Webex Contact Center Committed

Application Cisco Webex Contact Center Inserted 0

Update source Updated 57

Parent Deleted 0

State Previewed Collisions 1

Assign Contact Center Agent Role

- ① Go to **All > System Security > Groups**.

groups

> System Definition

> System Mailboxes

> System Security

> Users and Groups

Users

Groups

Roles

Access Role Detail View

> Reports

Groups Membership

> User Administration

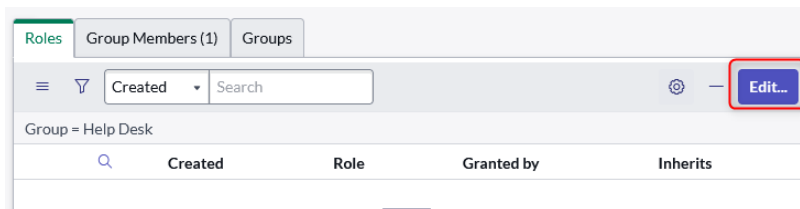
- ② Search for the Group you want to edit and click the name.

Groups Name Search Actions on selected rows... New

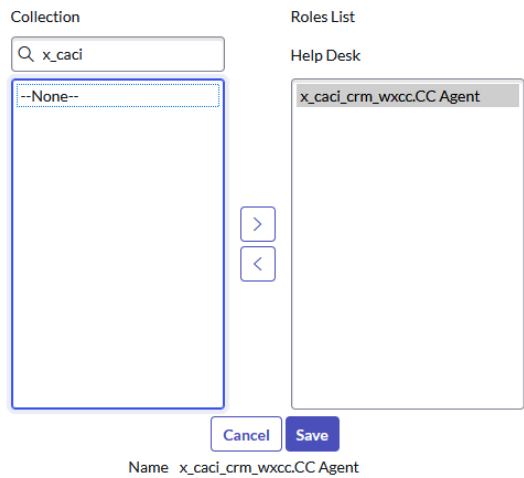
All > Name contains help

Name	Description	Active	Manager	Parent	Updated
Help Desk	Search	true	ATF Change Management	(empty)	2024-06-24 02:50:32

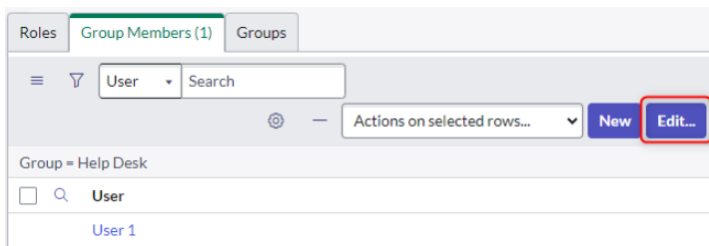
- ③ Click **Edit** to change the roles.



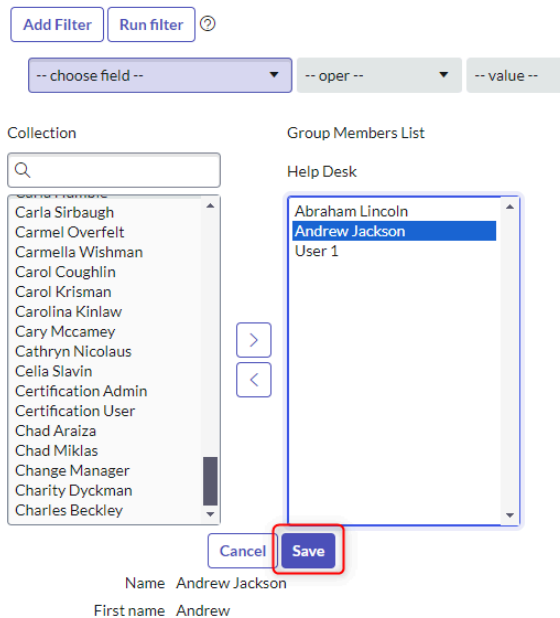
- ④ Add the `x_caci_crm_wxcc.CC Agent` role and click **Save**.



- ⑤ Click the **Group Members** tab and then **Edit** to add your users.

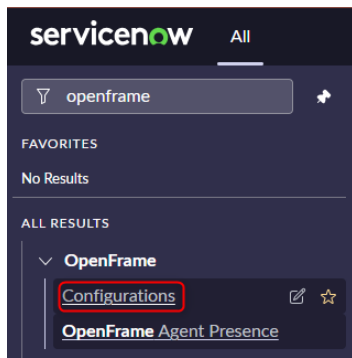


- ⑥ Add the users to the list and click **Save** when finished.

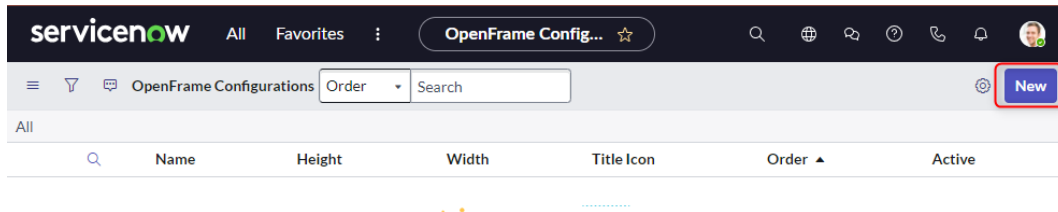


Create the Openframe Configuration

- 1 Go to **All > Openframe > Configurations**.



- 2 Click **New**.



3 Enter the following minimum values:

- a Name: WxCC for ServiceNow
- b Title: Wxcc
- c Subtitle: for ServiceNow
- d Active: true
- e Width: 300
- f Height: 500
- g Icon Class: icon-phone
- h User Group (phone icon will only show for these users): [select the User Group with CC Agent role]
- i URL: x_caci_crm_wxcc_gadget.do
- j Configuration (see Customization tab for more):

```
[  
  { "Key": "region", "Value": "us1" },  
]
```

< ≡

OpenFrame Configuration
WxCC for ServiceNow

🔗 ⚙️ ⋮

Update Delete

Name

WxCC for ServiceNow

Title

WxCC

Subtitle

for ServiceNow

Order

100

Active

☒

* Width

300

* Height

500

Icon Class

icon-phone

Title Icon

🔒

Enable collapsed view

☐

Show presence indicator

☐

User Group

Available

Selected

User Group: selecting no group is equivalent to selecting all groups

URL

x_caci_crm_wxcc_gadget.do

🔒

Configuration

- +

```
[  
  { "Key": "region", "Value": "us1" }  
]
```

Update

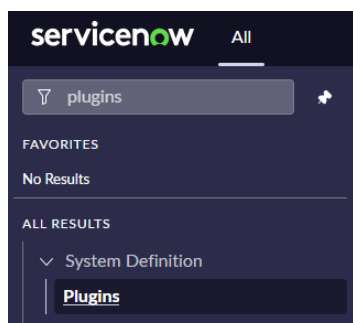
Delete

Install ServiceNow for Enterprise licensed instances

The following sections describe the steps to install the ServiceNow connector for production instances.

Install the ServiceNow Openframe plugin

- 1 Sign into your ServiceNow instance as a System Administrator.
- 2 Go to **All > System Definition > Plugins**.



- ③ Search for Openframe and install the plugin.

The image shows two screenshots from a ServiceNow interface. The top screenshot is a modal dialog for the 'Openframe' plugin (id: com.sn_openframe). It has a 'Summary' section describing it as an interface for external communication systems, and a 'Get started' section with an 'Install' button highlighted by a red rectangle. The bottom screenshot is the 'Review Installation Details' page for the 'Openframe' plugin. It shows dependencies: 'Will be installed (2)' including 'csm-workspace-components' and '@devsnc/sn-openframe-uxb', and 'Installed (1)'. It also shows 'Inactive plugins (1)' including 'Customer Service'. At the bottom, there are radio buttons for 'Install now' (selected) and 'Install later', and 'Cancel' and 'Install' buttons, with the 'Install' button highlighted by a red rectangle.

Install the Webex Contact Center application

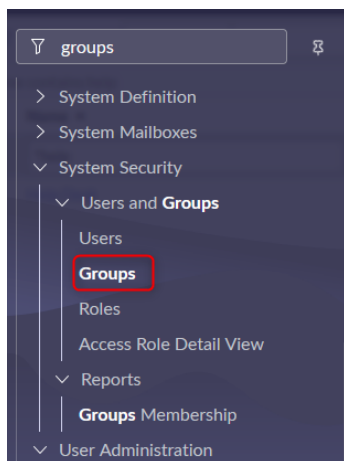
Instances that have enterprise licenses can install the Webex Contact Center application directly from the ServiceNow Store.

Download and install the Webex Contact Center package from the ServiceNow store: <https://store.servicenow.com/>

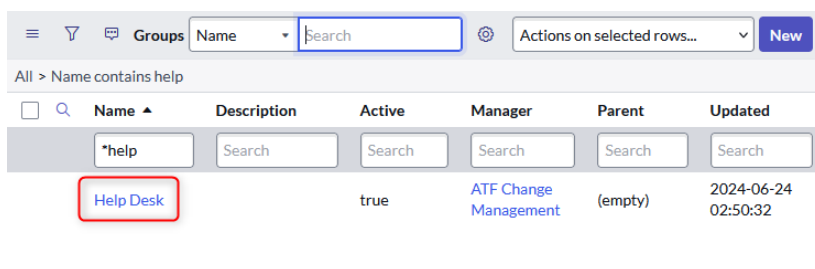
The image is a screenshot of the ServiceNow Store. The search bar contains 'webex contact center'. The results show 'Integrations (1)' with a card for 'Webex Contact Center' by Cisco Systems Inc. The card includes the Webex logo and the tagline 'Delivering the future of customer experience'. On the left, there is a 'Listing Type' filter menu with checkboxes for Applications, Integrations, Built With ServiceNow, OEM Solutions, Ancillary Software, Content, Template, and Utility/Tool. Below that is an 'Offered By' filter menu with checkboxes for Partners and ServiceNow. The top navigation bar includes links for Apps and Solutions, ServiceNow Products, Integrations, Innovation Lab, and Events. The top right corner has a 'Log In' button.

Assign Contact Center Agent Role

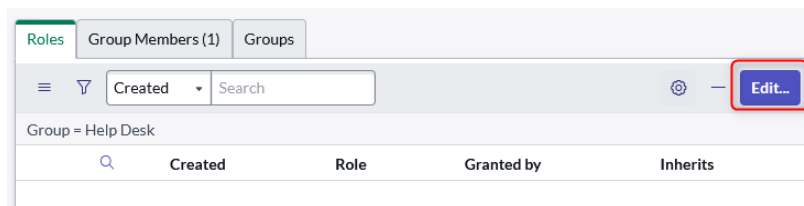
- 1 Go to **All > System Security > Groups**.



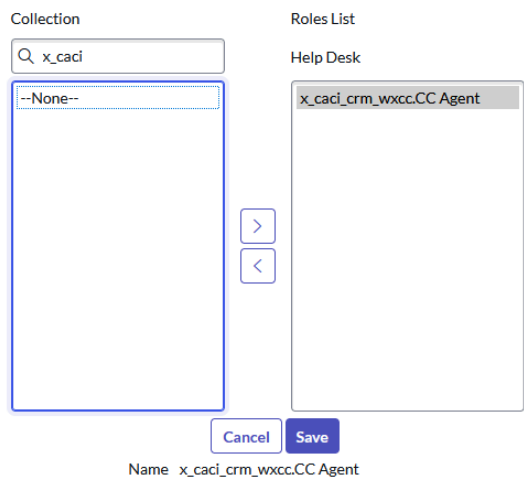
- 2 Search for the Group you want to edit and click the name.



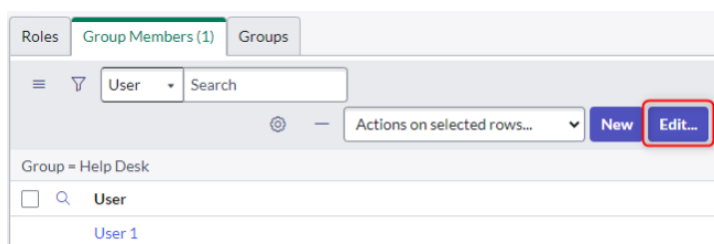
- 3 Click **Edit** to change the roles.



- 4 Add the `x_caci_crm_wxcc.CC Agent` role and click **Save**.



- 5 Click the **Group Members** tab and then **Edit** to add your users.



- ⑥ Add the users to the list and click **Save** when finished.

Buttons: Add Filter, Run filter ⓘ

Dropdowns: -- choose field --, -- oper --, -- value --

Collection

Search:

- Carla Sirbaugh
- Carmel Overfelt
- Carmella Wishman
- Carol Coughlin
- Carol Krisman
- Carolina Kinlaw
- Cary Mccamey
- Cathryn Nicolaus
- Celia Slavin
- Certification Admin
- Certification User
- Chad Araiza
- Chad Miklas
- Change Manager
- Charity Dyckman
- Charles Beckley

Group Members List

Help Desk

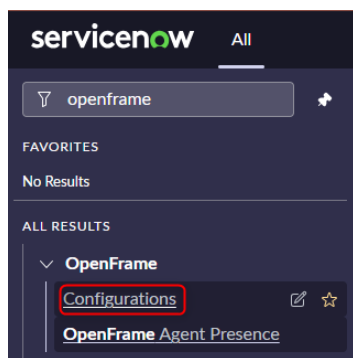
- Abraham Lincoln
- Andrew Jackson
- User 1

Buttons: Cancel, Save

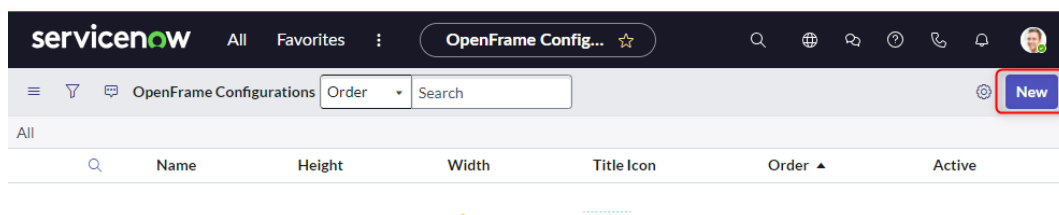
Name: Andrew Jackson
First name: Andrew

Create the Openframe Configuration

- ① Go to **All > Openframe > Configurations**.



- ② Click **New**.



3 Enter the following minimum values:

- a Name: WxCC for ServiceNow
- b Title: Wxcc
- c Subtitle:for ServiceNow
- d Active: true
- e Width: 300
- f Height: 500
- g Icon Class: icon-phone
- h User Group (phone icon will only show for these users): [select the User Group with CC Agent role]
- i URL: x_caci_crm_wxcc_gadget.do
- j Configuration (see Customization tab for more):

```
[  
  
  { "Key": "region", "Value": "us1" },  
  
]
```

< ≡

OpenFrame Configuration
WxCC for ServiceNow

≡ ...

Update Delete

Name

WxCC for ServiceNow

Title

WxCC

Subtitle

for ServiceNow

Order

100

Active

☒

* Width

300

* Height

500

Icon Class

icon-phone

Title Icon

Enable collapsed view

☐

Show presence indicator

☐

User Group

Available

Selected

User Group: selecting no group is equivalent to selecting all groups

URL

x_caci_crm_wxcc_gadget.do

Configuration

- +

```
[  
  {  
    { "Key": "region", "Value": "us1" }  
  }  
]
```

Update Delete

Customize

The following section explains how to configure and customize the Webex Contact Center ServiceNow Agent Desktop application. You can tailor and automate various workflows to assist agents in managing inbound and outbound calls within the Webex Contact Center Agent Desktop.

Openframe Configuration property customizations

The table below details how to customize the properties of the custom desktop layout file. Tailor the behavior of ServiceNow to fit your specific business needs.

Openframe Configuration key property	Description	Values
region	Wxcc Region used by agent	<ul style="list-style-type: none">North America: us1Canada: ca1UK: eu1EU: eu2APJC: anz1Japan: jp1Singapore: sg1

Openframe Configuration key property	Description	Values
shareRecordVariable	CAD variable to save the Sys_Id of the Phone Log and is used to change the ownership of the record for transferred calls.	[Default:sharedRecordId] Any CAD variable
enableNotifications	Enable browser-based pop-up notifications.	[Default:false] true or false
screenPopOnNoMatch	Auto-click "New record link" when no match for new customer or new case when not found (depending on screenPopIncomingMode)	[Default:false] true or false
screenPopIncomingMode	What record type to search on incoming call. Aligns with customerTable or caseTable.	[Default:Customer] Customer or Case
customerTable	The table to search for customers and to create new customer records with "New Record link". User (ITSM) = sys_user Contact (CSM) = customer_contact	[Default:Users] Users or contact
caseTable	The table to search for cases and to create new case records with "New record link". Incident (ITSM) = incident Case (CSM) = sn_customerservice_case	[Default:Incidents] Cases or Incidents
lookupFields	Comma separated field(s) to query on Table. Example:phone number	[Default:phone,mobile_phone] Any field on table defined in customerTable or caseTable
lookupVariable	Value to query tables for inbound call. Example: CADIncidentNumCollected	[Default:ANI] ANI or any CAD variable
lookupResultFields	Labels to display at top of connector for lookup results on active phone call. Example: name, location	[Default:name,title,department] Up to any three fields on table defined in customerTable or caseTable.
countryCodeRemoval	Comma separated prefixes to be removed from ANI or CAD variable before performing lookup. Example: +1,+49,+41	[Default:] Any country code
customerRecordMapping	Mapping to create new customer record with "New record link" and populate CAD Variable data. Example: caller_id={ani};employee_number={CADVariable3}	
caseRecordMapping	Mapping to create new case record with "New record link" and populate data. Example: caller_id={ani};u_cisco_queue={QueueName}	
activityRecordMapping	Mapping for Phone Log data population. Example: caller_id={ani};u_call_disposition={CADCallResult}	
omniReasonCrm[A(10)]	"Unavailable" AWA ServiceNow Presence State on CRM channel when receiving voice call. To get this value, go to Advanced Work Assignment > Settings > Presence States. Right click the desired Presence State and click "Copy sys_id". Example: 7f888794dbd28e10999d8c3b1396198b	Any AWA Presence State Sys_Id
omniReasonVoice	ID of the WxCC "Idle" Auxiliary code used when the agent receives inbound chat. Example: cff0ca82-c623-4cde-aaf1-4e17f268f7f7	Any WxCC Idle Auxiliary Code
noteField	Field name for the Phone Log notes created by the agent. If the config value is empty, the note feature is disabled and doesn't appear on the "LOG" tab in connector. Example: u_comment	Any field on Phone Log table

Example Configuration

Here is a config sample that allows:

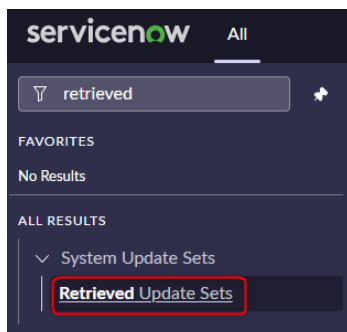
- Doing a lookup on the Incidents table (based on incident number collected on the IVR)
- Record Creation on No Match
- State change for OmniChannel
- Saving notes on a custom field on the Phone Log table

```
[
{
  "Key": "region",
  "Value": "eu2"
},
{
  "Key": "screenPopIncomingMode",
  "Value": "Case"
},
{
  "Key": "customerTable",
  "Value": "Users"
},
{
  "Key": "customerRecordMapping",
  "Value": "phone={ani};mobile_phone={ani}"
},
{
  "Key": "caseTable",
  "Value": " Incidents"
},
{
  "Key": "caseRecordMapping",
  "Value": "product=8583ce8237732000158bbfc8bcbe5dd9;short_description={ani}"
},
{
  "Key": "lookupFields",
  "Value": " numbephoner"
},
{
  "Key": "lookupVariable",
  "Value": "IVR_Incident_Number"
},
{
  "Key": "lookupResultFields",
  "Value": "short_description,caller_id,priority"
},
{
  "Key": "enableNotifications",
  "Value": "true"
},
{
  "Key": "omniReasonCrm",
  "Value": "7f888794dbd28e10999d8c3b1396198b"
},
{
  "Key": "omniReasonVoice",
  "Value": "868643ae-c1ed-4849-a5be-a3deaa54f97b"
},
{
  "Key": "screenPopOnNoMatch",
  "Value": "true"
},
{
  "Key": "noteField",
  "Value": "u_wxcc_notes"
}
]
```

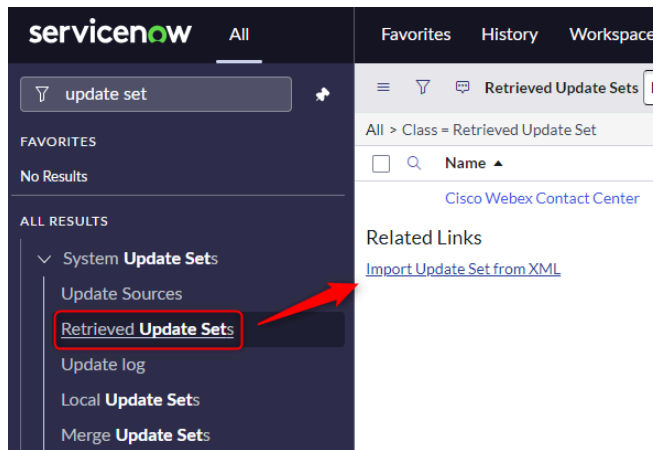
Click-to-dial UI Macro (Classic UI)

When using ServiceNow's Configurable Workspaces, click to dial on phone records will automatically be enabled. When using the Classic UI view, an update set must be imported to get the same functionality on phone records. Download the Click to dial Update Set and follow these steps to add the click-to-dial functionality to Classic UI.

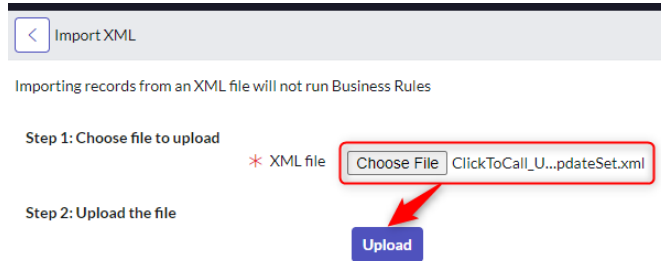
- 1 Go to **All > System Update Sets > Retrieved Update Sets**.



- ② Click **Import Update Set from XML**



- ③ Click **Choose File**, select the downloaded **Click-to-dial UI** macro .xml file and click **Upload**.



- ④ Click on the name once uploaded to open the **Update Set**.

Retrieved Update Sets							
All > Class = Retrieved Update Set							
	Name	Application	State	Update source	Description	Loaded	Comn
	Cisco Webex Contact Center	Cisco Webex Contact Center	Committed	(empty)		2024-07-25 08:22:17	2024-18:50
	CiscoClickToCallUiMacro1.2.0	Global	Loaded	(empty)		2022-09-13 02:17:52	(empt

- ⑤ Click **Preview Update Set** and **Close** once finished.

Retrieved Update Set
CiscoClickToCallUiMacro1.2.0

Name: CiscoClickToCallUiMacro1.2.0
Application: Global
Update source:
Parent:
State: Loaded
Loaded: 2022-09-13 02:17:52

Update Set Actions: Update, Delete, Preview Update Set

- ⑥ Click **Commit Update Set** and **Close** once finished.

Retrieved Update Set
CiscoClickToCallUiMacro1.2.0

Name: CiscoClickToCallUiMacro1.2.0
Application: Global
Update source:
Parent:
State: Previewed
Loaded: 2022-09-13 02:17:52
Description:

Update Set Actions: Update, Delete, Run Preview Again, Commit Update Set

Summary:

Committed	
Inserted	1
Updated	0
Deleted	0
Collisions	0
Total	1

- 7 Open an existing record to configure click-to-dial.

The screenshot shows the 'User - Josh Davis' profile page. The 'Business phone' field is highlighted with a red box. The page includes various user details and settings.

Field	Value
User ID	josh.davis
First name	Josh
Last name	Davis
Title	Director
Department	
Language	-- None --
Calendar integration	Outlook
Time zone	System (America/Los_Angeles)
Date format	System (yyyy-MM-dd)
Zip / Postal code	
Business phone	(555) 555-5555
Mobile phone	

Active: ☒

- 8 Right-click on the phone record name and click **Configure Dictionary**.

The screenshot shows the 'User - Josh Davis' profile page with a right-click context menu open over the 'Business phone' field. The 'Configure Dictionary' option is highlighted with a red box.

Field	Value
User ID	josh.davis
First name	Josh
Last name	Davis
Title	Director
Department	
Language	-- None --
Calendar integration	Outlook
Time zone	System (America/Los_Angeles)
Date format	System (yyyy-MM-dd)
Zip / Postal code	
Business phone	(555) 555-5555
Mobile phone	

Active: ☒

- 9 Click **New** on the **Attribute** tab under **Related Links**.

The screenshot shows the 'Related Links' section. The 'Attributes' tab is selected, and the 'New' button is highlighted with a red box.

Attribute	Value
No records to display	

- 10 Select **Field Decorations** as the attribute, type `wxcc_click_to_call_wxcc` as the value and click **Submit**.

The screenshot shows the 'Dictionary Attribute' form. The 'Field decorations' attribute is selected, and the value 'wxcc_click_to_call_wxcc' is entered.

Attribute	Value
Field decorations	wxcc_click_to_call_wxcc

Dictionary entry: Business phone

Submit

- 11 The **Click-to-dial** button should now be visible on the record page.

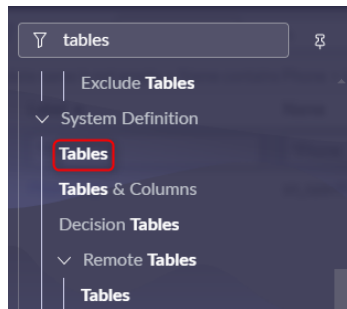
User ID: josh.davis
First name: Josh
Last name: Davis
Title: Director
Department: [Search]
Email: [Search]
Language: -- None --
Calendar integration: Outlook
Time zone: System (America/Los_Angeles)
Date format: System (yyyy-MM-dd)
Zip / Postal code: [Search]
Business phone: (555) 555-5555
Mobile phone: [Search]
Photo: Click to add...

- 12 Repeat for any other phone fields.

Adding Notes to Phone Logs

Follow these steps to create a custom notes field on the Phone Log record. This will allow agents to write and save information about the call.

- 1 Go to **All > System Definition > Tables**.



- 2 Search and open the Phone Log table.

Label	Name	Extends table	Extensible	Updated
*Phone Log	*Phone	Search	Search	Search
Phone Log	sn_openframe_phone_log	(empty)	false	2024-08-19 18:43:35

- 3 From the **Columns** tab, click **New**.

Table: Phone Log

This record is in the **openframe** application, but **Global** is the current application. To edit this record click [here](#).

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

Label: Phone Log
Name: sn_openframe_phone_log
Application: openframe

Table Columns: for text

1 to 16 of 16

Column label	Type	Reference	Max length	Default value	Display
Call ID	String	(empty)	40		false
Created by	String	(empty)	40		false

- ④ Choose **Journal** Input as field type. Type in a Column Label, Max length and click **Submit**.

The screenshot shows the 'Dictionary Entry' form for a new record. At the top, there's a header with a back arrow, a menu icon, the title 'Dictionary Entry New record', and a 'Submit' button. Below the header is a blue informational box explaining that dictionary entries manage how ServiceNow stores data in tables and fields, and provides instructions on selecting a table, field type, column label, column name, and max length. The form fields are as follows: 'Table' is set to 'Phone Log [sn_openfra...]', 'Application' is 'Global', 'Type' is 'Journal', 'Active' is checked, 'Function field' is unchecked, 'Read only' is unchecked, 'Mandatory' is unchecked, and 'Display' is unchecked. A red box highlights the 'Column label' field with the value 'WxCC Notes', the 'Column name' field with the value 'u_wxcc_notes', and the 'Max length' field with the value '100'.

- ⑤ Open a phone log record and go to **Configure > Form Layout**.

The screenshot shows a 'Phone Log' record configuration page. At the top, there's a header with a back arrow, a menu icon, the title 'Phone Log', a timestamp '20:34:27', and buttons for 'Update' and 'Delete'. Below the header is a form with fields for 'Call Type' (set to 'Incoming'), 'Contact' (with a search icon), 'Phone Number' (set to 'North America'), and 'Agent' (set to 'System Administrator'). A red arrow points to the 'Configure' button in the left sidebar. A dropdown menu is open from 'Configure', showing options: 'Form Builder', 'Form Design', 'Form Layout' (highlighted with a red box), 'Related Lists', 'All', 'Table', 'Security Rules', 'Business Rules', 'Client Scripts', 'UI Policies', 'Data Policies', and 'UI Actions'.

- ⑥ Add the new field, activities (filtered) and click **Save**.

The screenshot shows a dialog for selecting fields. It has two columns: 'Available' and 'Selected'. The 'Available' column lists various fields like 'Contact [+]', 'Created', 'Created by', 'Task [+]', 'Updated', 'Updated by', 'Updates', '|- begin_split -|', '|- split -|', '|- end_split -|', '* Annotation', '* Chart', 'Contextual Search Results', 'Ratings', 'Attachments', and 'Goal relationships'. The 'Selected' column lists fields like '|- begin_split -|', 'Start Time', 'End Time', 'Duration', '|- split -|', 'Contact', 'Call Type', 'Phone Number', '|- end_split -|', 'Recording URL', 'WxCC Notes', and 'Activities (filtered)'. A red box highlights 'WxCC Notes' and 'Activities (filtered)' in the 'Selected' column. At the bottom, there are 'Cancel' and 'Save' buttons.

- ⑦ Click the **Activity** filter and configure available fields.

The screenshot shows a 'Phone Log' record configuration page. At the top, there's a header with a back arrow, a menu icon, the title 'Phone Log', a timestamp 'Created 2024-08-21 20:58:09', and buttons for 'Update' and 'Delete'. Below the header is a form with fields for 'Start Time' (set to '2024-08-21 20:58:11'), 'End Time' (set to '2024-08-21 20:58:21'), 'Duration' (set to '0'), 'Contact' (with a search icon), 'Call Type' (set to 'Incoming'), 'Phone Number' (set to 'Other / Unknown'), and 'Recording URL'. A red box highlights the 'Activities' filter in the left sidebar. A dropdown menu is open from 'Activities', showing options: 'All', 'Attachments', and 'Configure available fields' (highlighted with a red box). At the bottom, there are 'Cancel' and 'Save' buttons.

- 8 Add the newly created note field and click **Save**.

Available

Selected

- End Time
- Phone Number
- Recording URL
- Start Time
- Tags
- Task
- Updated
- Updated by
- Updates
- WxCC Notes**
- Attachments
- Emails - correspondence
- Sidebar discussion
- Emails - autogenerated
- Relationship changes
- Sidebar posted message

Cancel Save

- 9 In the Openframe Configuration, add the key:

a { "Key": "noteField", "Value": "u_wxcc_notes" }

URL x_caci_crm_wxcc_gadget.do

Configuration

```
[
  { "Key": "region", "Value": "us1" },
  { "Key": "countryCodeRemoval", "Value": "+1" },
  { "Key": "lookupFields", "Value": "phone,mobile_phone,home_phone" },
  { "Key": "noteField", "Value": "u_wxcc_notes" }
]
```

Was this article helpful?

Yes, thank you!

Not really