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Gplus Adapter for ServiceNow Administrator's Guide

9/12/2025

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Getting started

Contents

Concepts and procedures relevant to contact center administrators to implement the Gplus Adapter for ServiceNow.

The integrated solution presents a complete customer view allowing your contact center agents to service your customers.

See Prerequisites and browser support for a list of the Adapter’s preconditions and supported browsers.

Classic UI and Agent Workspace

The Gplus Adapter for ServiceNow equally works with **ServiceNow Classic UI** and **Agent Workspace**. Watch the videos featured in Get started with Gplus Adapter for an overview.

How do I install the Adapter in ServiceNow?

You can set up the Gplus Adapter by following the procedure described in How to install the Gplus Adapter.

How do I access the Adapter?

Using the ServiceNow OpenFrame plugin, the Adapter is loaded and displayed during the ServiceNow login sequence. Log in to your ServiceNow account, then continue logging in to the Adapter with Genesys credentials.

Prerequisites and browser support

Contents

Preconditions and browser requirements of the Gplus Adapter for ServiceNow.

Prerequisites

The Gplus Adapter for ServiceNow is an integrated solution based on **Genesys** and ServiceNow, rendered within the OpenFrame area.

The Adapter has the following prerequisites:

- **Engage Cloud** must be enabled.
- **ServiceNow with the OpenFrame plugin** must be installed.

Browser support

The Gplus Adapter for ServiceNow can be used with the following browsers:

- **Google Chrome**
- **Microsoft Edge**

To learn about the Adapter installation, see How to install the Gplus Adapter.

How to install the Gplus Adapter

Contents

Steps to install or update the Gplus Adapter in ServiceNow.

We assume that ServiceNow has been configured with the OpenFrame plugin and that you own a ServiceNow login with administrator privileges.

> **Important**
> If you have already installed a **previous version of the Gplus Adapter** and want to update it, follow the same procedure below. Please note: it is essential that you **do not delete the previous Web Resources XML package**.

This section explains how to install the Gplus Adapter for ServiceNow and consists of two main steps:

- Deploy the Adapter Web Resources in ServiceNow,
- Enable the OpenFrame menu in ServiceNow.

Deploy the Adapter Web Resources in ServiceNow

This is the procedure you have to follow to deploy the Adapter Web Resources in ServiceNow. The package includes the following solution to be imported:

- **Gplus_Adapter_ServiceNow_9_0_002**.

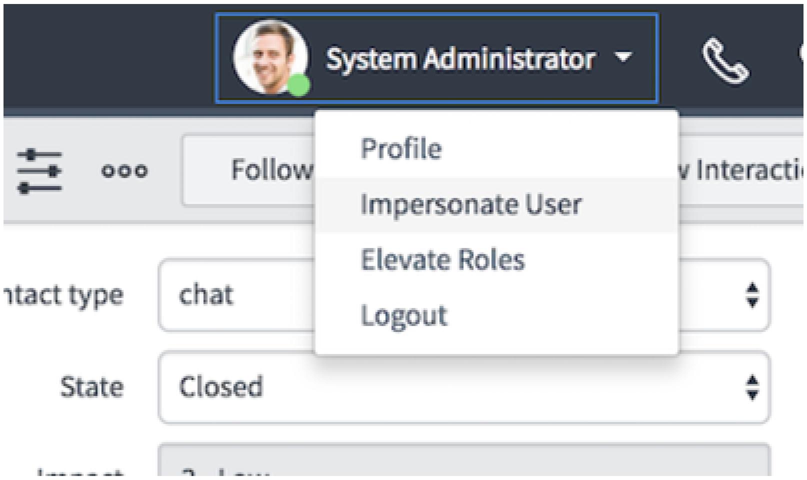
This managed solution implements the:

- Adapter core module,
- Out-of-the-box use case scenarios.

> **Important**
> The **Gplus_Adapter_ServiceNow_9_0_002** package equally enables the ServiceNow Classic UI and Agent Workspace.

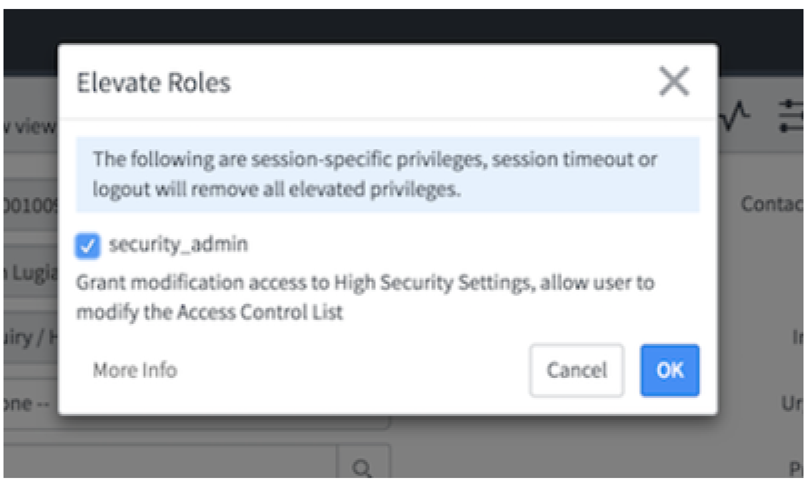
Installation steps:

- Log in to ServiceNow with administrator rights and choose **Elevate Roles** in the user drop-down menu.



- Confirm **Elevate Roles**.

> **Important**
> This permission is temporary and should only be applied for installation purposes, as explained in the popup message shown underneath.



- Click **OK** to complete the procedure.

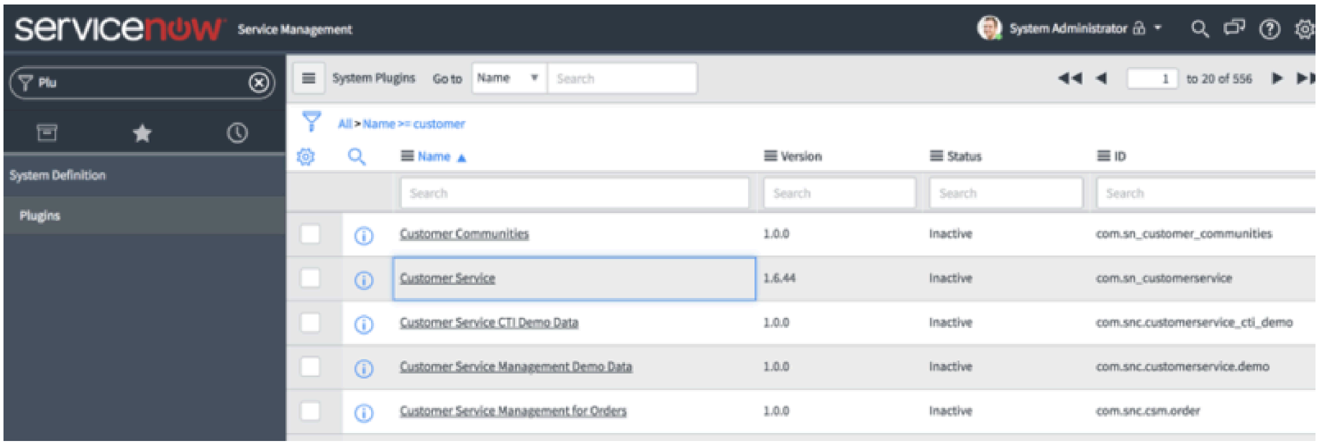
Enable the OpenFrame menu in ServiceNow

For the Adapter to work, you need to enable the OpenFrame menu in ServiceNow.

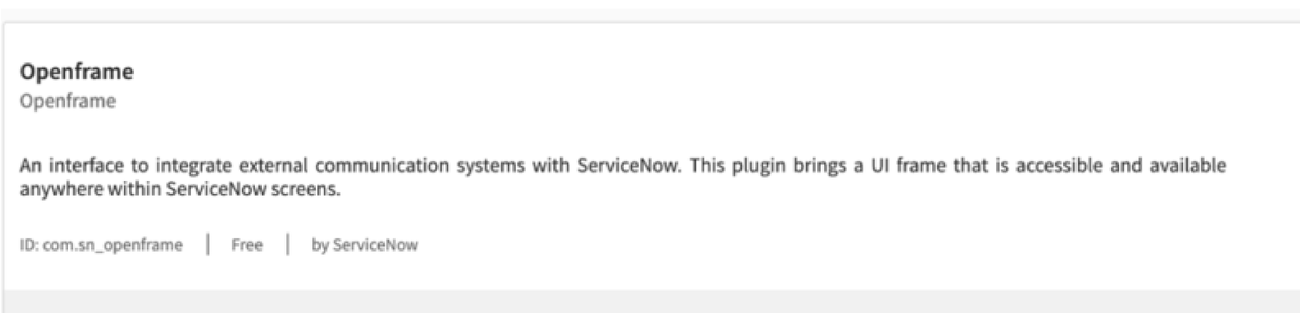
The OpenFrame provides an interface accessible and available anywhere in ServiceNow where it is possible to integrate third-party communication systems.

To enable the OpenFrame plugin, follow these steps.

- Search for and select the **Plugins** section in the search area in the left-hand panel.



- Search for the **OpenFrame** plugin and install it.



- After these steps, the OpenFrame menu will be enabled in your system.

If you are interested in setting up the Adapter, see How to configure the Gplus Adapter.

How to configure the Gplus Adapter

Contents

Procedure to configure the Adapter with ServiceNow.

If you have already installed the Gplus Adapter , the following procedure explains how to import the Gplus Adapter in ServiceNow.

Important

Before proceeding with the following steps, make sure that the OpenFrame plugin is enabled in ServiceNow. If it is not, comply with the indications provided in How to install the Gplus Adapter.

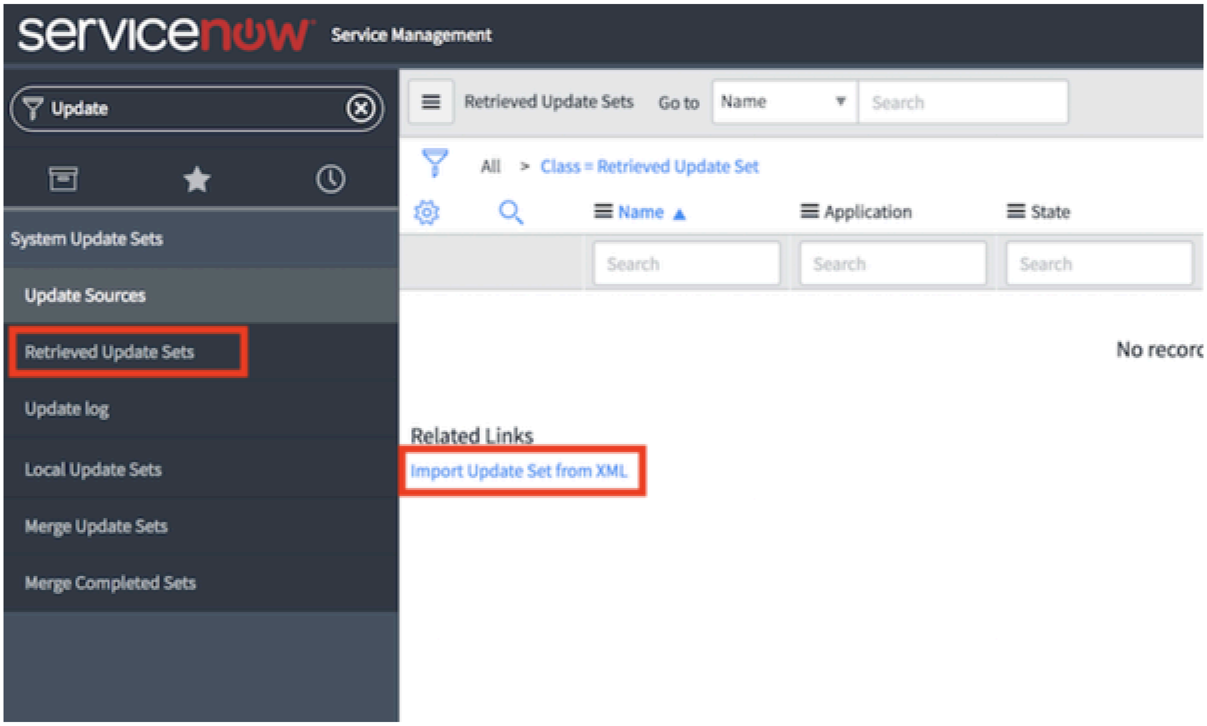
Important

The Adapter will not encounter any conflicts with preexisting customizations or specific configurations.

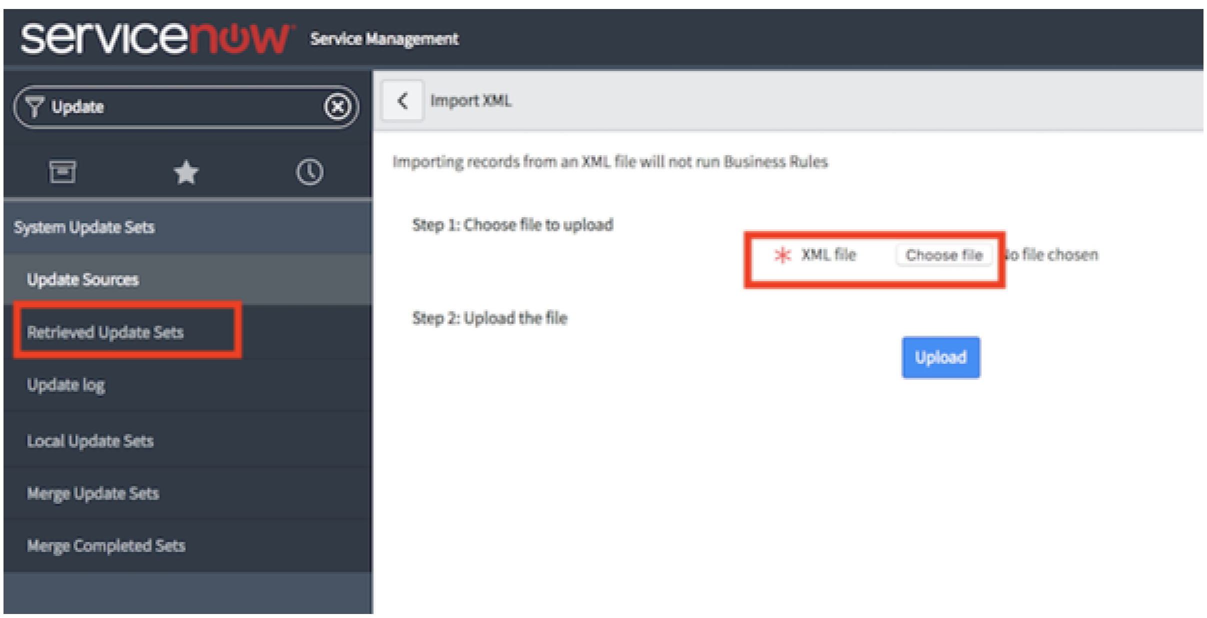
Deploy the Adapter System Update Set in ServiceNow

To install the System Update Set, follow this procedure:

- Elevate your user's roles as described in the procedure used to deploy the Adapter Web Resources in ServiceNow.
- Search for **Update Sets** and go to **Retrieved Update Sets**.
- Click **Import Update Set from XML**.



- Choose and upload the XML file provided (**Gplus_Adapter_ServiceNow**_VERSION>**.xml**).



- Once it is uploaded, open it and click **Preview Update Set** in the upper right to deploy the environment changes.

> **Important**
> In the case of conflicts, you can perform several actions such as skipping, deleting or accepting them.

- Click **Commit Update Set**.

You have imported the solution into ServiceNow. Check it searching for the **Studio** section and clicking it. It will open in a new tab and display the **Gplus-Adapter-ServiceNow** under the available applications.

Configure the OpenFrame page in ServiceNow

Before proceeding and checking the instance, you need to fully enable the solution by creating the configuration that will load it for any desired user.

- Search for **OpenFrame** in the search area and choose **Configurations**.

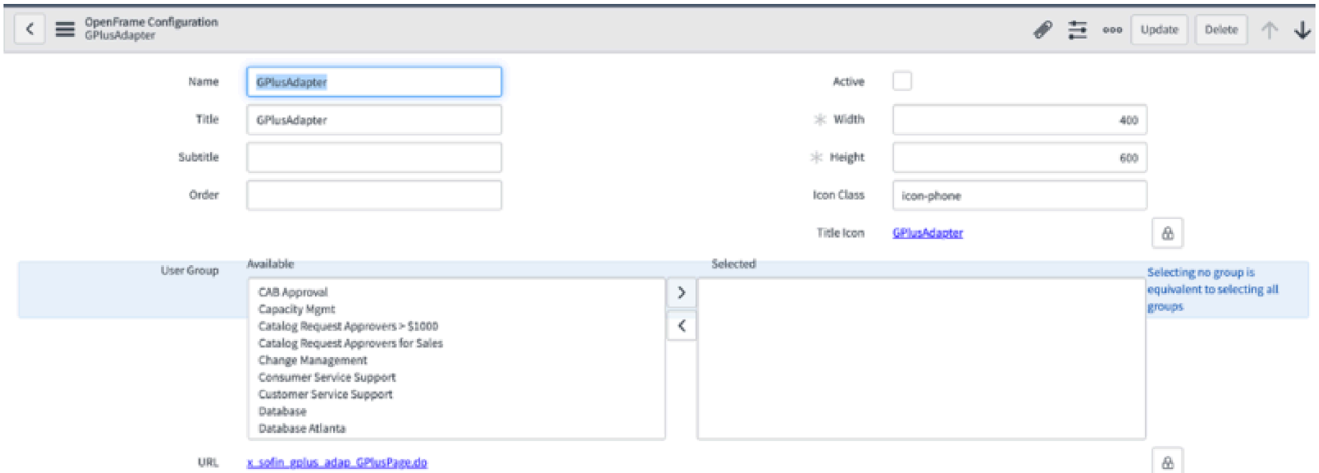
> **Important**
> If the OpenFrame menu is not visible, it means the **Customer Service plugin** is missing. Before proceeding with the following steps, make sure that the **OpenFrame plugin** is enabled in ServiceNow. If it is not, comply with the indications provided in How to install the Gplus Adapter.

- Click **New** and fill all required fields.

> **Important**
> If you are using the **Agent Workspace**, remember to check the **Show presence indicator** box.

> **Important**
> User Groups are a useful feature, enabling you to associate the Adapter only to specific agents or agent groups. If you do not need this, you can just leave the default settings.

- Fill in the following URL in the dedicated field: **x_inics_gplus_adap_gpluspage.do**



- Provide the following parameters in the configuration tab:

```
{"instance": "https://", "branding": "genesys_logo.png", "language": "en-US", "screenpopnew":
false, "defaultEntity": "incident", "defaultContact": "sys_user" , "customContactField": "",
"customContactValue": ""}
```

> **Important**
> When filling out these parameters, you have to replace with your own.

Key	Value	Description
instance	default: none	The full Genesys Engage Cloud GWS toolkit url including full path to api.js. AWS: https:///ui/wwe/api.js Azure: https:///api.js
screenpopnew	default: false	Search for associated Cases or Incidents for every new interaction: • One Case/Incident found: entity is opened • Multiple Cases/Incidents found: list is displayed • No Cases/Incidents found: new Case/Incident is created

Key	Value	Description
defaultEntity	default: incident possible values: • incident • sn_customerservice_case • interaction	• incident: default entity is Incident • sn_customerservice_case: default entity is Case • interaction: default entity is interaction
defaultContact	default: sys_user possible values: • sys_user • customer_contact	• sys_user: search for Contacts in sys_user table (typically applies to Incidents) • customer_contact: search for Contacts in customer_contact table (typically applies to Cases)
customContactField	default: none	This parameter enable the customer search based on specific contact table fields. It can be a custom parameter or a standard parameter. The value must match the contact table column name (technical name used for identification) for example the **employee_number**
customContactValue	default: none	This parameter take effect when the previous customContactField is configured. It must contain the Genesys attached data key name that stores the information to perform the custom search. for example **EMP_NUMBER** must contain the employee number collected by the IVR before routing the interaction to the Agent using the Gplus.

To save the configuration, **right-click the upper bar** and select **Save** from the drop-down menu.

Now **refresh** the page: if a telephone icon appears in the upper right, you are all set. Click it for the OpenFrame area to appear.

While the system administrator has all required permissions, users do not. Therefore, you have to assign the OpenFrame user role (**sn_openframe_user**) to any user or group that will work with the Gplus Adapter for ServiceNow.

- Click the Role module in the User Administration application menu.
- Select New to create a new role.

- Fill the Name field with sn_openframe_user and optionally enter a description.
- Click Submit and the role is created.
- Choose the Contains Role tab and then Edit.
- Assign it to the desired agent or group of agents and click Save.

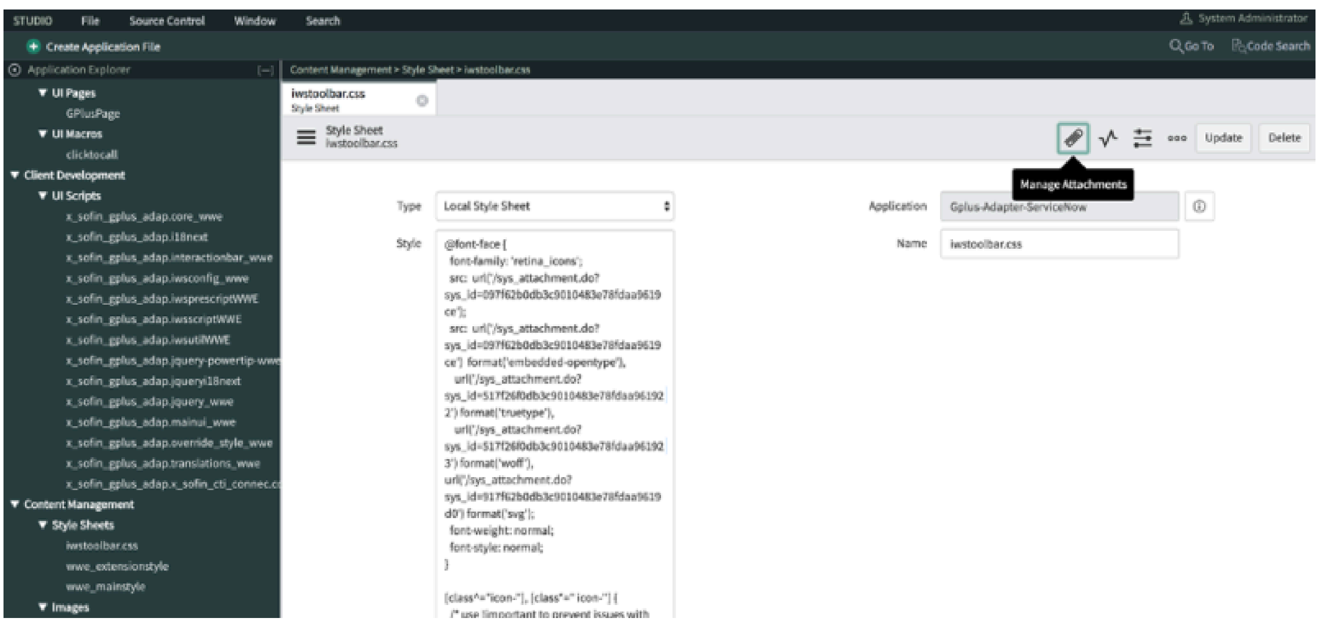
This will grant the selected users or groups to work with the Adapter.

> **Important**
>
> If a user is not assigned the **“sn_openframe_user”** role, they will not be able to work with the Gplus Adapter for ServiceNow.

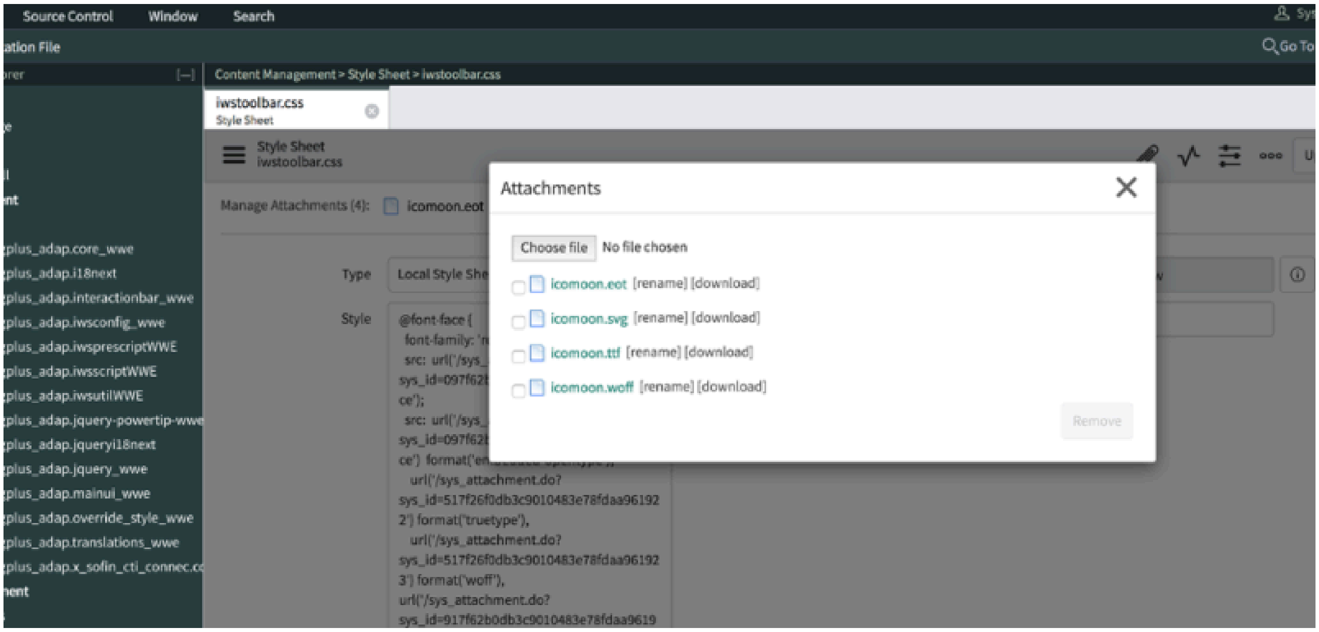
Configure the Gplus Adapter CSS images

The following procedure helps you configuring the CSS images for the Gplus Adapter:

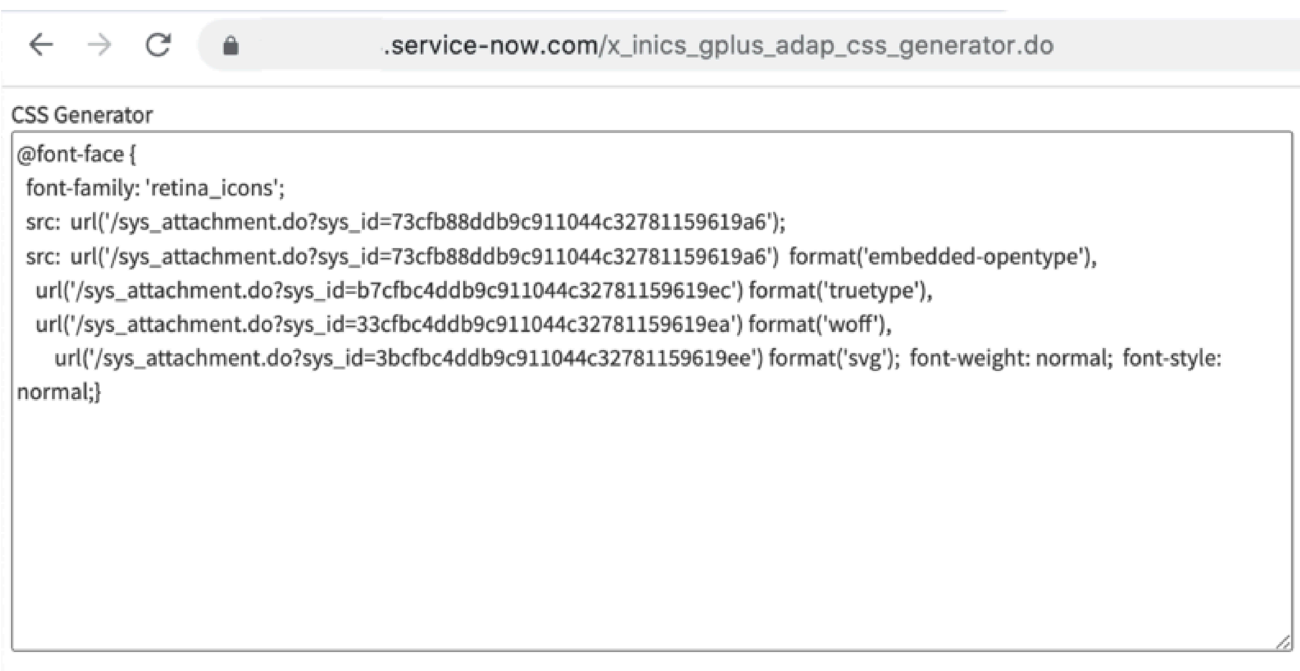
- Open the **ServiceNow Studio**.
- Select the **Gplus-Adapter-ServiceNow** application.
- Pick **iwstoolbar.css** in the left-hand panel and click **Manage Attachment** in the upper right.



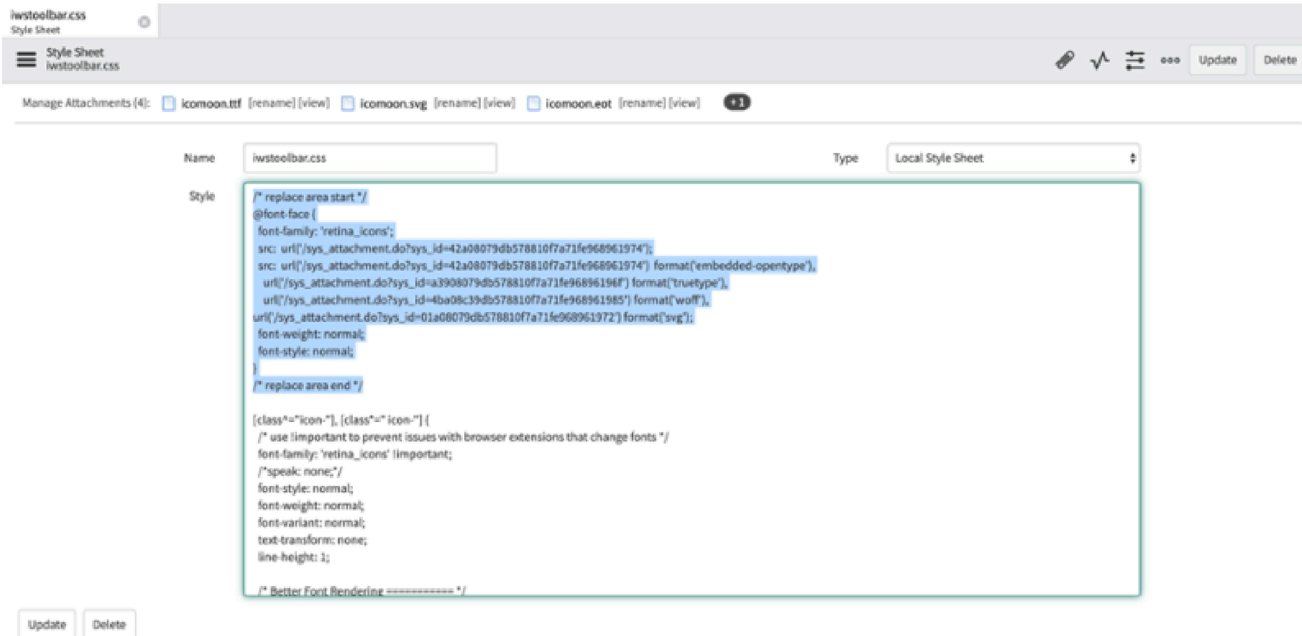
- Choose all files in the **Attachments** folder provided with the installation package as shown in the image below, then close the pop-up window.



- In the URL field, provide the ServiceNow instance adding **"/x_inics_gplus_adap_css_generator.do"** in its end (https://.service-now.com/x_inics_adap_css_generator.do) to retrieve the CSS code snippet.



- In the ServiceNow Studio, replace the code into the **iwstoolbar.css** style under the **/* replace area start */** tag.



- Click Update to save the configuration.

Packages

Download the Gplus Adapter for ServiceNow package here.

To download the Gplus Adapter for ServiceNow package, click the following link:

- Gplus_Adapter_ServiceNow_9_0_002
- Gplus_Adapter_ServiceNow_9_1_002
- Additional Icons

Screen pops

Contents

Screen pops display a relevant record from ServiceNow when agents receive or make calls.

The out-of-the-box use cases are deployed with the XML file configuration as described in the Gplus Adapter installation in ServiceNow. However, if they do not fit your requirements, you can customize them. To learn more on this topic, continue reading.

How screen pop records are retrieved

Before you manage and customize them, get familiar with how screen pop records are selected and displayed to agents. Here is how they typically work in an out-of-the-box scenario.

When a call is established, a search based on the **Automatic Number Identification (ANI)** is automatically launched. If an associated contact is found, a screen pop is triggered inside ServiceNow: the contact detail form opens and displays the data. Simultaneously, an **Activity History of type Call** containing all information about that inbound our outbound interaction is automatically created in ServiceNow and made available on the related contact's landing page.

See Activity History to learn more about these records.

Screen pops configuration

In ServiceNow, screen pop configuration is based on the following JavaScript files, which implement the out-of-the-box scenario for different fields:

- **x_sofin_gplus_adap.iwsscriptWWE**: Computer Telephony Integration (CTI) events that can be captured by the Adapter.
- **x_sofin_gplus_adap.iwsutilWWE**: implementation of the events mentioned in the previous point.

For screen pop customization, continue to the next paragraph.

Screen pops customization

To create new screen pop scenarios in ServiceNow, you have to modify the above-mentioned files. Follow this procedure.

- Open the **ServiceNow Studio**.
- Select the **Gplus-Adapter-ServiceNow** application.
- Select **x_sofin_gplus_adap.iwsscriptWWE** or **x_sofin_gplus_adap.iwsutilWWE** in the left-hand panel and modify the code as required.

- Click **Save** to finalize the procedure.

Activity History

Contents

The Gplus Adapter creates Activity History entries in ServiceNow at the end of an inbound or outbound call.

Activity History creation

The screen pop agents receive when they either accept or make a call equally creates a new **Activity History of type Call** for the interaction, and associates it with the ServiceNow record.

The rule the Adapter follows to select the correct record for the activity log creation is the same as for screen pop records. The **Automatic Number Identification (ANI)** is used as the search main criterion.

Activity History fields

The Adapter automatically updates specific ServiceNow activity fields when it saves an Activity History entry. The table below provides an extensive list of ServiceNow fields included in each Activity.

ServiceNow Activity Field	Description
Subject	Interaction ID
Call From	Inbound call: contact from which the call originated Outbound call: agent calling
Call To	Inbound call: agent accepting the call Outbound call: contact receiving the call
Phone Number	Telephone number from which the call originted
Direction	Type of call (inbound, outbound, or internal)
Duration	Length of the call in minutes and seconds (updated when the call ends)
Description	Comments and notes added by one or more involved agents

Click-to-call feature

Contents

Click-to-call makes outbound calls easier.

The click-to-call feature enables to automatically dial a call when clicking a phone number in ServiceNow.

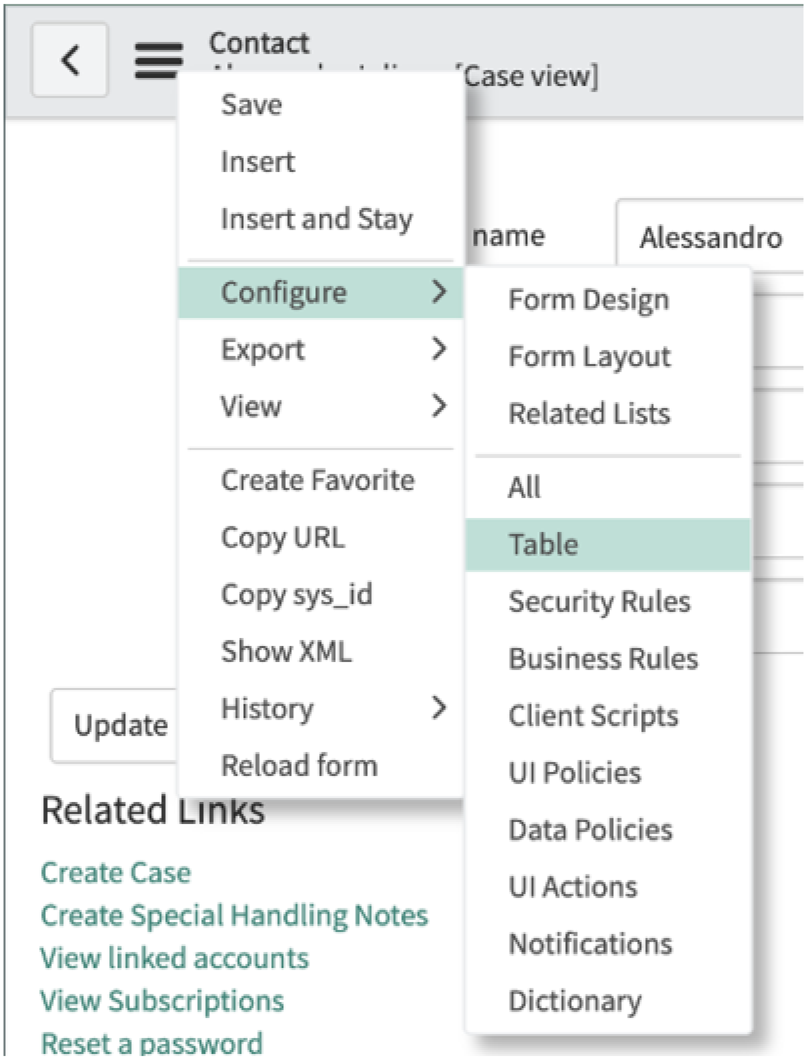
Customize the outbound-call scenario

Unlike screen pop customization, to customize the outbound-call scenario you must handle an additional file:

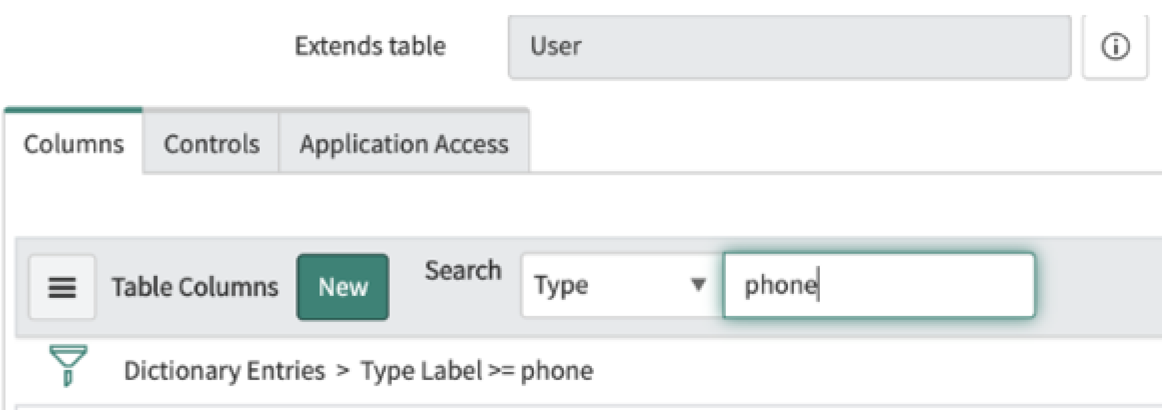
- **x_sofin_gplus_adap_clicktocall**.

Follow this procedure to configure the click-to-call feature inside ServiceNow:

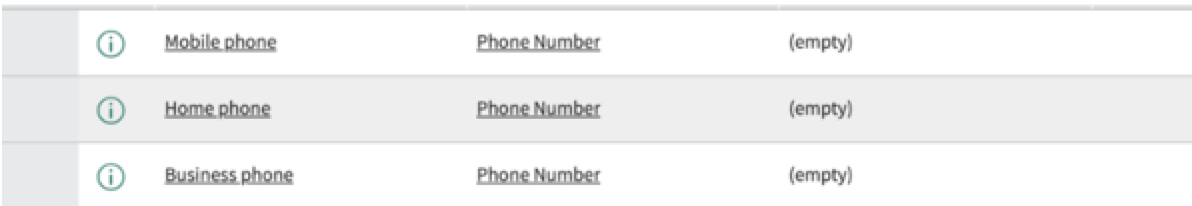
- Open the **Contact form** and then the **Contact menu**.
- Select **Configure** and click **Table**.



- Search for the phone fields as shown in the image below.

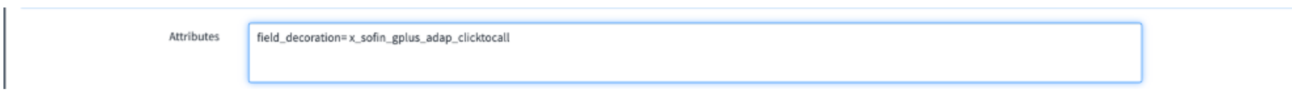


- Select one field among the proposed **phone-number fields**.

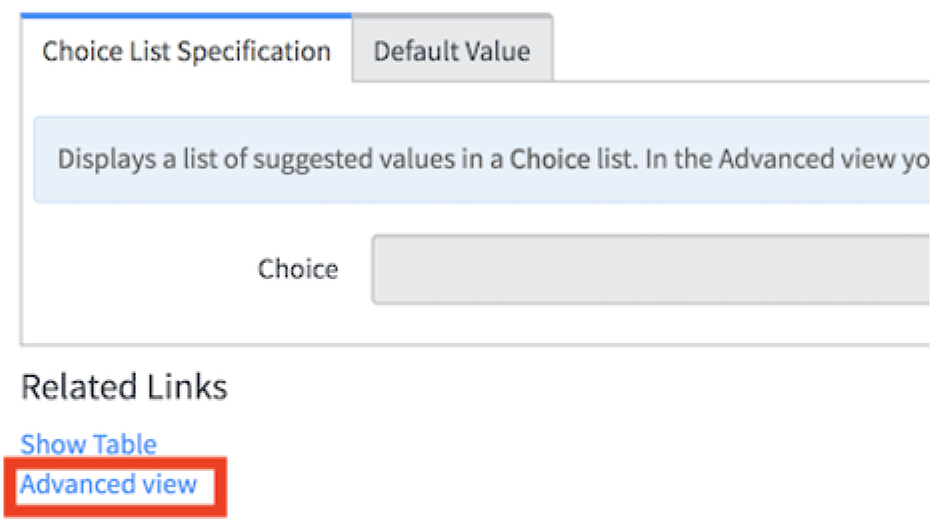


- Go to **Default Value** and add the following attribute in the related box:

```
field_decoration= x_sofin_gplus_adap_clicktocall
```



> **Important**
> If the Attributes box is not visible, select **Advanced view** as shown below.



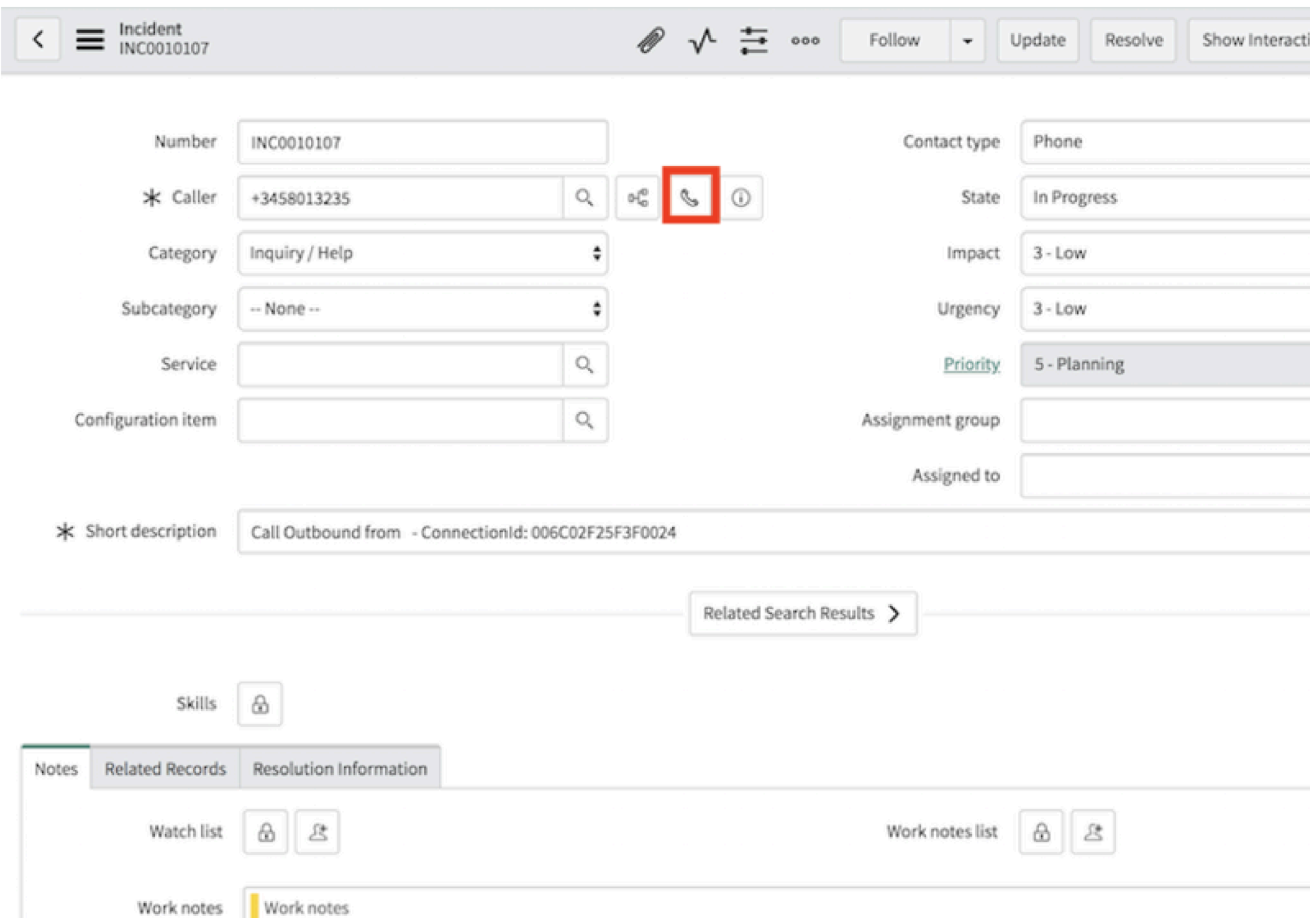
Enable the click-to-call feature on reference fields

You now have to configure the Adapter click-to-call feature inside ServiceNow for the lookup/reference field. In fact, by default, ServiceNow provides some macros to enable the click-to-call feature on reference fields as well.

The following macros are available:

- **show_phone**
    - Requires the OpenFrame plugin activation.
    - Configure the Unique Interface (UI) macro using the **ref_contribution** parameter to display a phone icon next to the **sys_user** reference field. The icon is only shown if the phone field in the sys_user record is populated with a phone number.
- **show_phone_customer_service**
    - Requires Customer Service Management and OpenFrame plugins activation.
    - Configure the Unique Inyerface (UI) macro using the **ref_contribution** parameter to display a phone icon next to the Contact **customer_account** reference field in the case form. The icon is only displayed if the phone field in the Contact customer_account record is populated with a phone number.

It is possible to enable one of these macros on reference fields (such as **Caller** in an **Incident**, or **Contact** in a **Case**). They will display the phone icon next to the field, as shown below, only if the reference field has at least one telephone number.



Important

If you are not able to see che phone icon next to a telephone-number field, make sure you own administrator’s privileges.

Clicking the **phone icon**, a list of the Contact’s available phone numbers is displayed.

To allow these macros to work with the Adapter and start a call with a click, you first need to edit them. Follow these steps:

- Search for the **show_phone** macro and open it.
- Go to the row named **createInteractionData.opened_for=p.attr('data-caller-id')**.
- Remove the **GlideAjax** section as shown below (adding comments).

```
/*
                    var ga = new GlideAjax('global.CTIAjaxUtility');
                    ga.addParam('sysparm_name', 'createInteractionWithPropertyCheck');
                    ga.addParam('context', JSON.stringify(createInteractionData));
                    ga.getXML(function(serverResponse) {
                        var result =
serverResponse.responseXML.getElementsByTagName("result");
                        var output = JSON.parse(result[0].getAttribute("data"));
                        if(output.status == "success"){
                            var interaction = {"entity": "interaction", "query"
:"sys_id="+output.fields.interactionSysId, "value":output.fields.number,
"label":"Interaction", "display":false};
                            payload.data.data.push(interaction);
                        }
                        var context = {"payload": payload, "method" :
"openframe_communication" };
                        jslog("context with interaction : "+ JSON.stringify(context));
                        CustomEvent.fireAll("openframe_request", context);
                    });
    */
```

- Replace the previous section with the following snippet:

```
var payload = {"type": "OUTGOING_CALL", "data" : data, "action":"makecall",
"number":p.attr('data-caller-phone'), "attributes": {"ACTIVITY_ID": p.attr('data-task-id'),
"ENTITY_TYPE": p.attr('data-task-table'), "CONTACT_ID":p.attr('data-caller-id')}};
var context = {"payload": payload, "method" : "openframe_communication" };
CustomEvent.fireAll("openframe_request", context);
```

- Click **Save**.

To conclude and enable this, you must associate the macro to **ref_contributions**: open the Incident table, search for **Caller** and insert **ref_contributions=show_phone** or **ref_contributions=show_phone_customer_service** in the Attribute field.