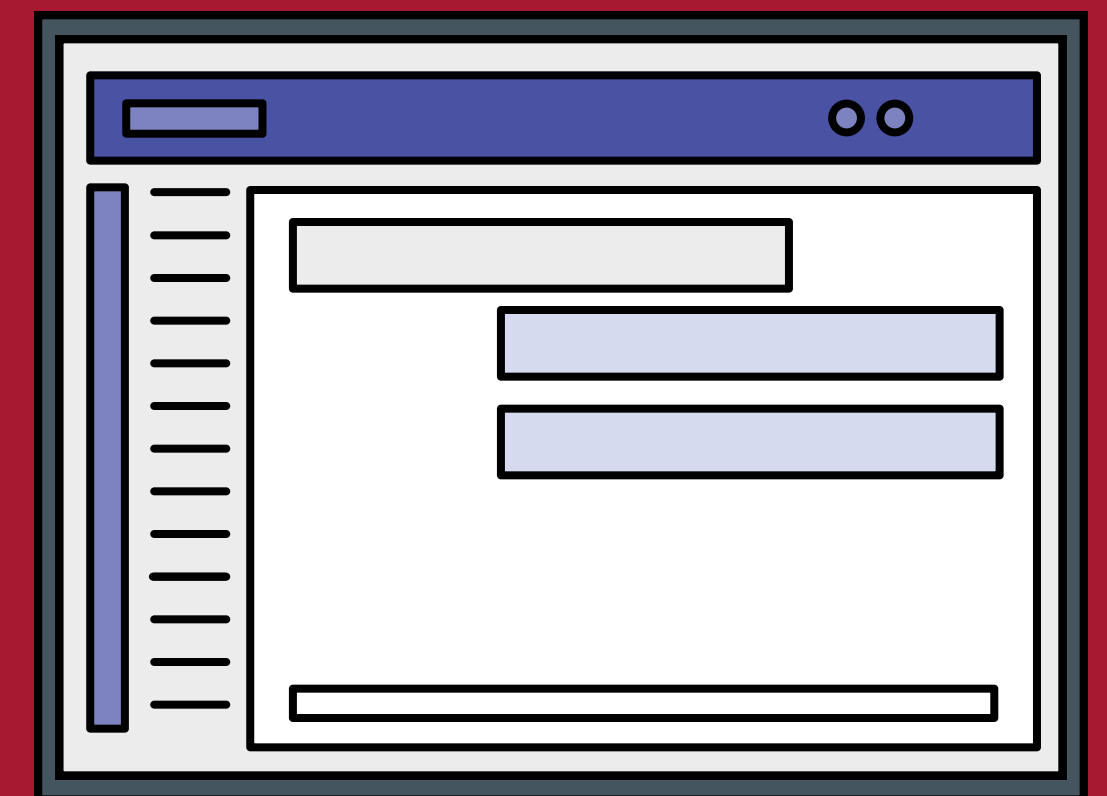




SERVICENOW FOR MICROSOFT TEAMS PLUGIN

Streamlining service communications



Stay up to date

While we feel this guide will be valuable to anyone interested in implementing the collaboration features available in the ServiceNow for Microsoft Teams plugin, we also recommend you familiarize yourself with ServiceNow’s [product documentation page](#). The core features and functionality will undoubtedly evolve, so be sure to bookmark the product documentation page relevant to your family release and register for notifications on updates for the plugin.

The legal stuff

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DATE	VERSION NUMBER
November 29, 2021	1.0

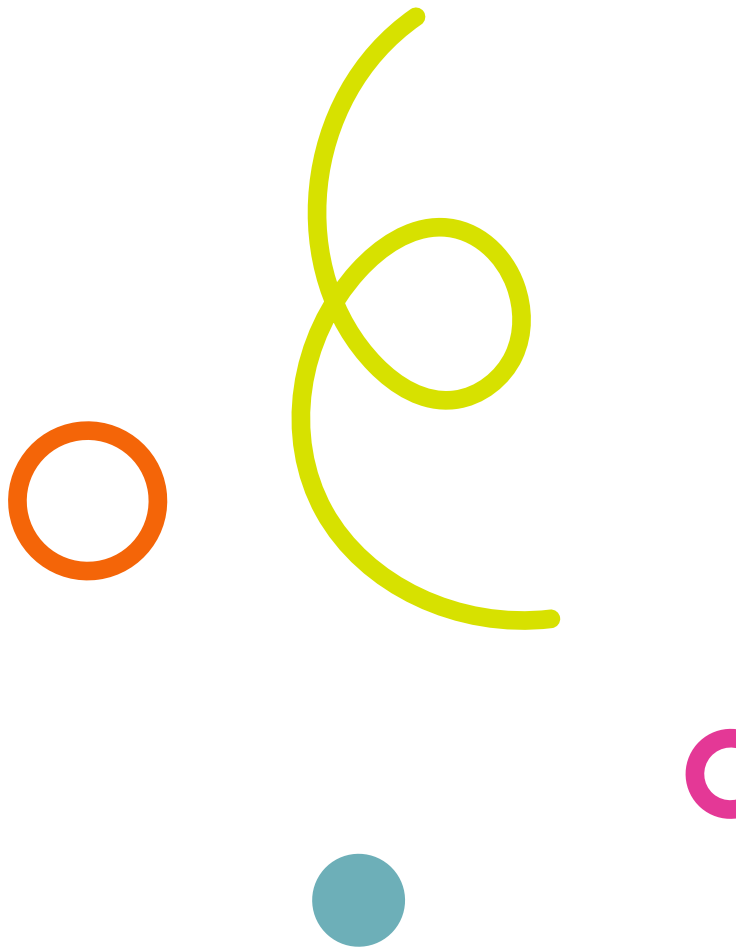


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Streamlining service communications

The ServiceNow for Microsoft Teams plugin helps service desk teams improve their productivity and provide a great employee experience. With collaboration features that reduce the time agents spend switching between platforms, they’re free to focus on higher complexity, higher priority work. The plugin also increases the visibility of activity and communication on ServiceNow records, so providing seamless, efficient service is easier for everyone.

Enabling Microsoft Teams chat: agent to employee/agent to agent

These instructions guide you through a production deployment for a multi-tenant setup of the ServiceNow for Microsoft Teams plugin features in family releases Paris, Quebec and Rome that do NOT have a dependency on the ServiceNow Virtual Agent.

The plugin features activated through this process enable users to:

- Start a Microsoft Teams call or chat from a record, Agent Workspace and/or Major Incident workbench in ServiceNow.
- Auto-import Microsoft Teams chats started from ServiceNow to the history on a record, Agent Workspace and/or Major Incident workbench in ServiceNow.

The UI actions to Start a Microsoft Teams chat can be duplicated and applied to any other table (i.e. task, story or custom table).

Feature	Chat – agent to employee/agent to agent Auto-import – chats started from records
Primary app	ServiceNow for Microsoft Teams
Dependencies	ServiceNow for Teams Core
Licensing requirements	ITSM or HRSD Standard or above

Before you begin

- To connect your ServiceNow instance to your M365 tenant and authorize apps, the external_app_install_admin role and application administrator role in M365 are required.
- A dev or test M365 environment may be required to test features without interruption to production.

STEP ONE

Install ServiceNow for Microsoft Teams plugin

1. Log in to the [ServiceNow Store](#).

2. Search [IT service management integration with Microsoft Teams](#).

3. Select **View dependencies and licensing requirements**.

a) Select each link with an **X** next to it.

b) Select **Get > Continue**.

Note: If you do not have the option available to **Get** the app, select **Other app versions** and navigate to the version related to the release your instances are on.

c) Select **Continue** in the next modal.

d) On the purchase page, select **Make available on all instances** and **Accept** the terms of use.

Note: The plugins must be installed in at least one test instance before production.

e) Select **Get**.

f) Repeat steps a) to e) for all dependent apps.

4. Return to [IT service management integration with Microsoft Teams](#) and refresh page.

5. Select **View dependencies and licensing requirements** and confirm all the apps listed under **App dependency** all have a green checkmark.

6. Exit the modal and select **View products > Select ServiceNow for Microsoft Teams > Select Opt-in**.

7. In one of your ServiceNow dev or test instances, navigate to **System definition > Plugins**.

8. Search for **IT service management integration with Microsoft Teams** and install.

Note: All the dependent plugins will automatically install during this process.

9. In your ServiceNow production instance, navigate to **System definition > Plugins**.

10. Search for **IT service management integration with Microsoft Teams** and install.

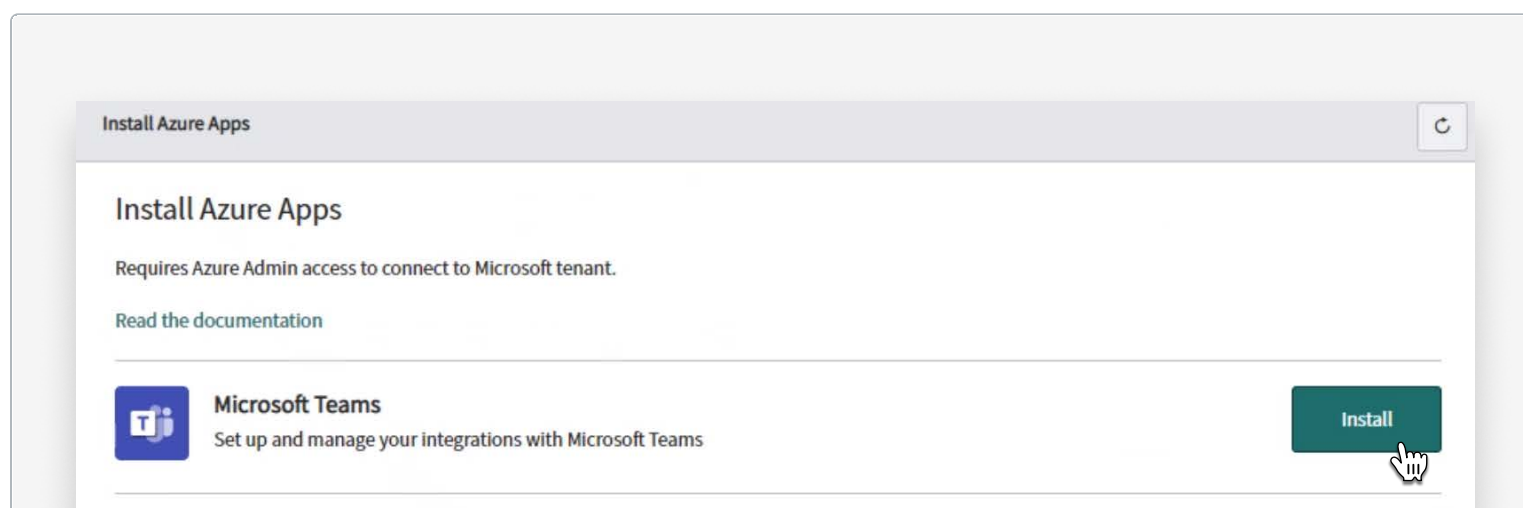
Note: All the dependent plugins will automatically install during this process.

STEP TWO

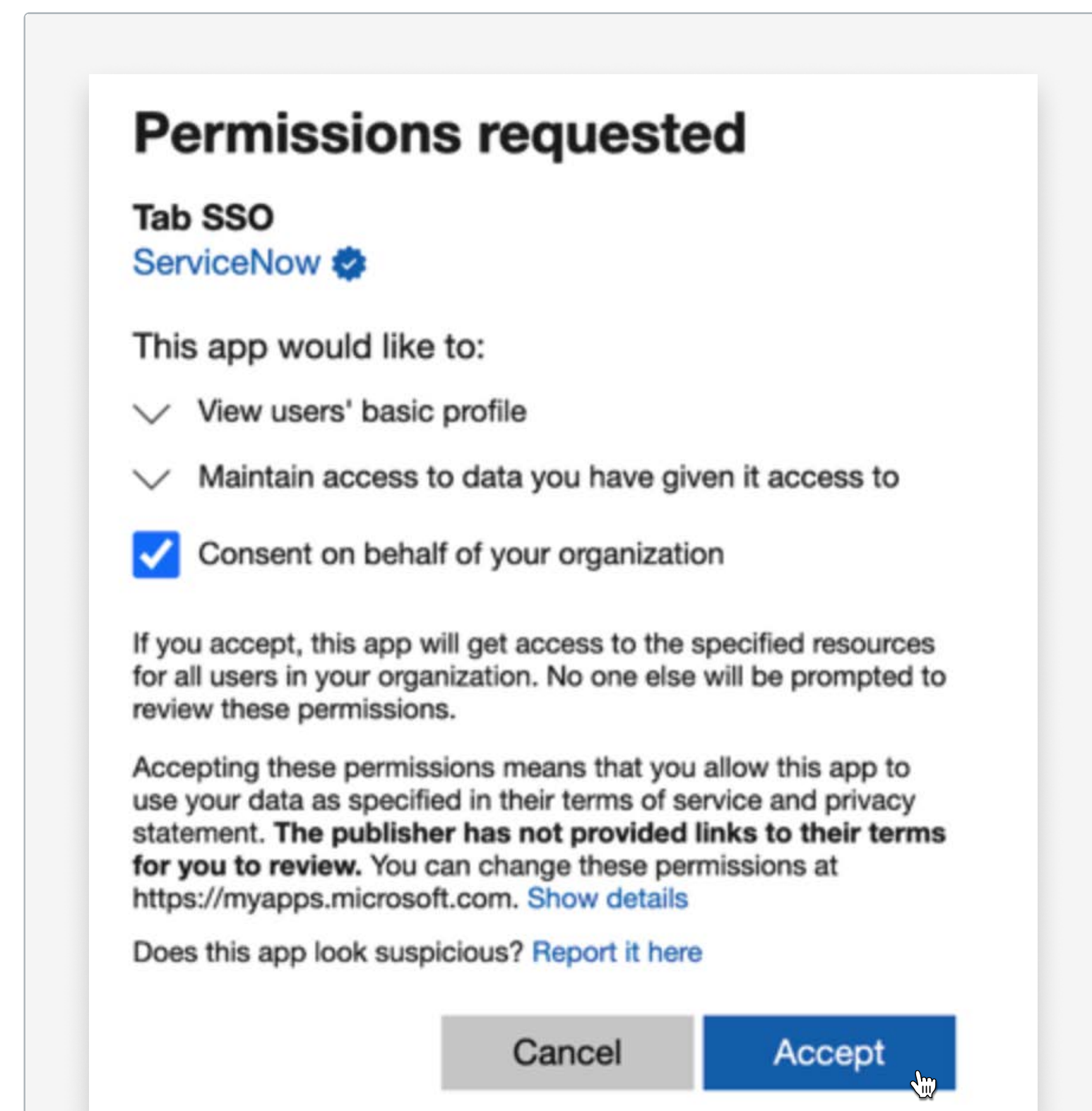
Connect your ServiceNow instance and authorize Azure apps (multi-tenant)

Note: For single tenant configuration, skip to [Step three](#).

1. Navigate to **ServiceNow for Microsoft teams > Install Azure apps**.
2. Click **Install** to install Microsoft Teams in your instance. This connects your tenant to the ServiceNow instance.



3. Select the **Consent on behalf of your organization** option to provide consent for all your users and click **Accept** to provide admin consent.



4. Navigate to **ServiceNow for Microsoft Teams > Install Azure apps**.

5. Authorize the following apps: **Notify Connector**, **Request based Chat**, **TAB SSO**, as required.

Note: If Notify Connector is not shown in your Azure apps, search and install the **Notify Connector for Microsoft Teams** plugin before continuing.

To authorize **Notify Connector**, which allows employees to manage and initiate a Microsoft Teams meeting directly from any task record:

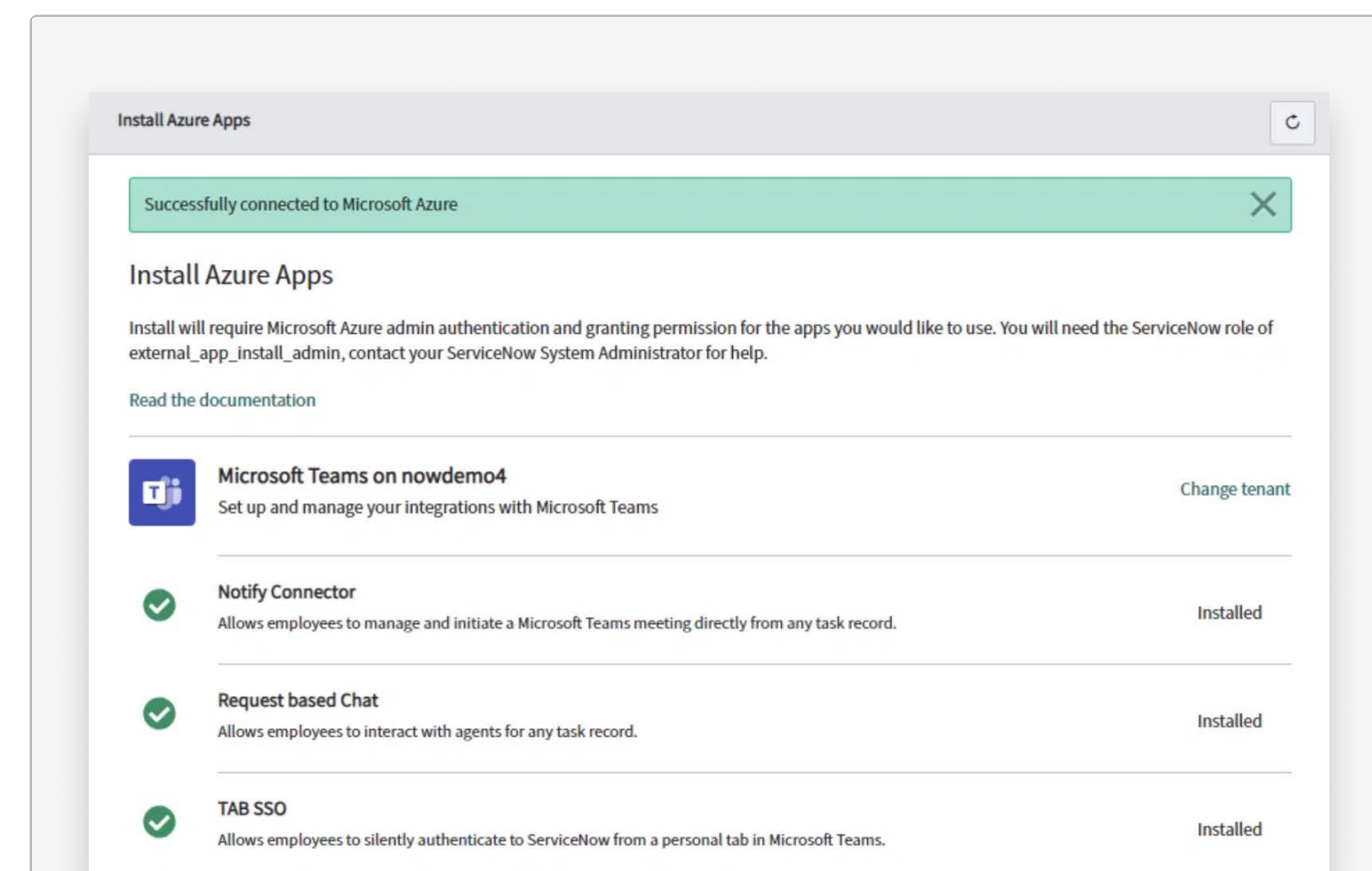
- a) Click **Authorize** for Notify Connector.
- b) Provide the admin consent by clicking on **Accept**. This provides authorization to create a new app for Meeting extensibility app and to create a new tab for a major incident meeting from the major incident workbench in Microsoft Teams.
- c) On successful authorization, the app is shown as **Installed**.

To authorize **Request based chat**, which allows employees to interact with agents for any task record:

- a) Click **Authorize** for Request based chats app.
- b) Provide the admin consent by clicking on **Accept**.
- c) On successful authorization, the app is shown as **Installed**.

To authorize **TAB SSO**, which allows employees to silently authenticate to ServiceNow from a personal tab in Microsoft Teams:

- a) Click **Authorize** for TAB SSO.
- b) Provide the admin consent by clicking on **Accept**.
- c) Upon successful authorization, the app is shown as **Installed**.



6. Skip the steps for single tenant setup and continue with **Step five**.

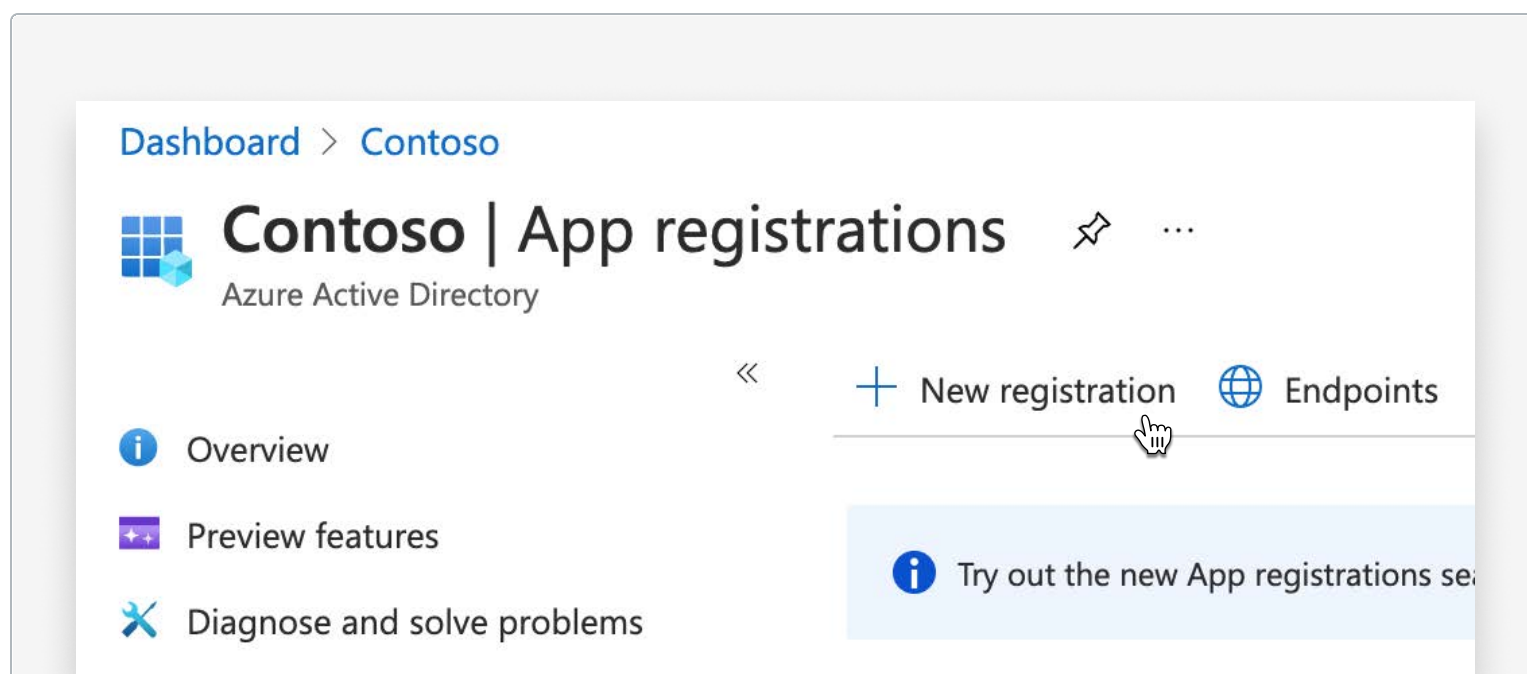
STEP THREE

Connect your ServiceNow instance and authorize Azure apps (single tenant)

Note: If you have completed the multi-tenant setup, skip to [Step five](#).

For single tenant configuration, you will need to create a Microsoft Azure application in the Microsoft Azure portal to enable agents to import the conversations.

1. Log in to **Microsoft Azure** portal.
2. Navigate to **Azure services > Azure Active Directory > Manage > App registrations**.
3. Click **New registration**. The **New registration** page displays.



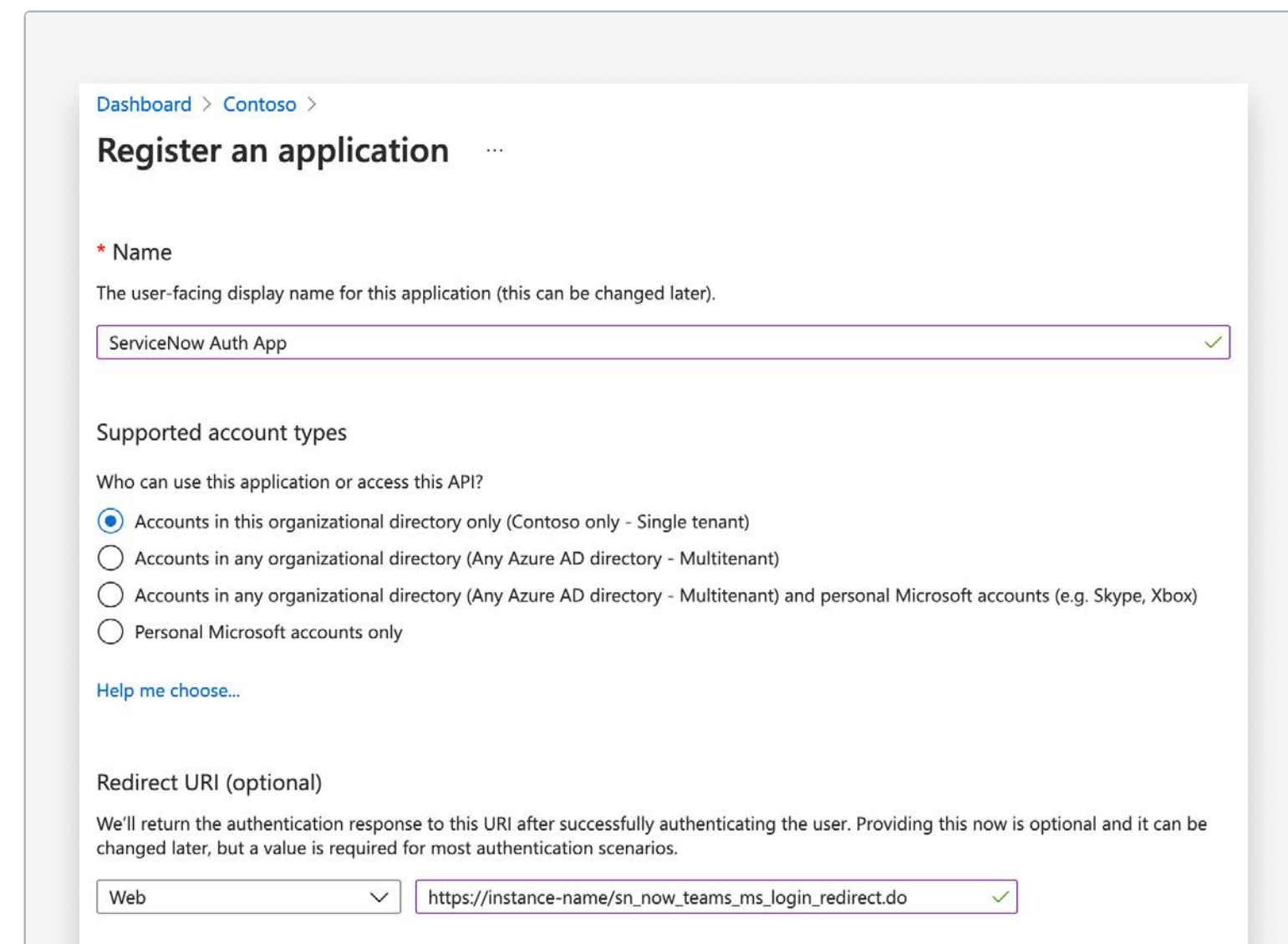
4. Enter the name of your application in the **Name** field. Example: ServiceNow Auth app.

5. In the **Redirect URL (optional)** field, enter

 `https://<instance-name>/sn_now_teams_ms_login_redirect.do`

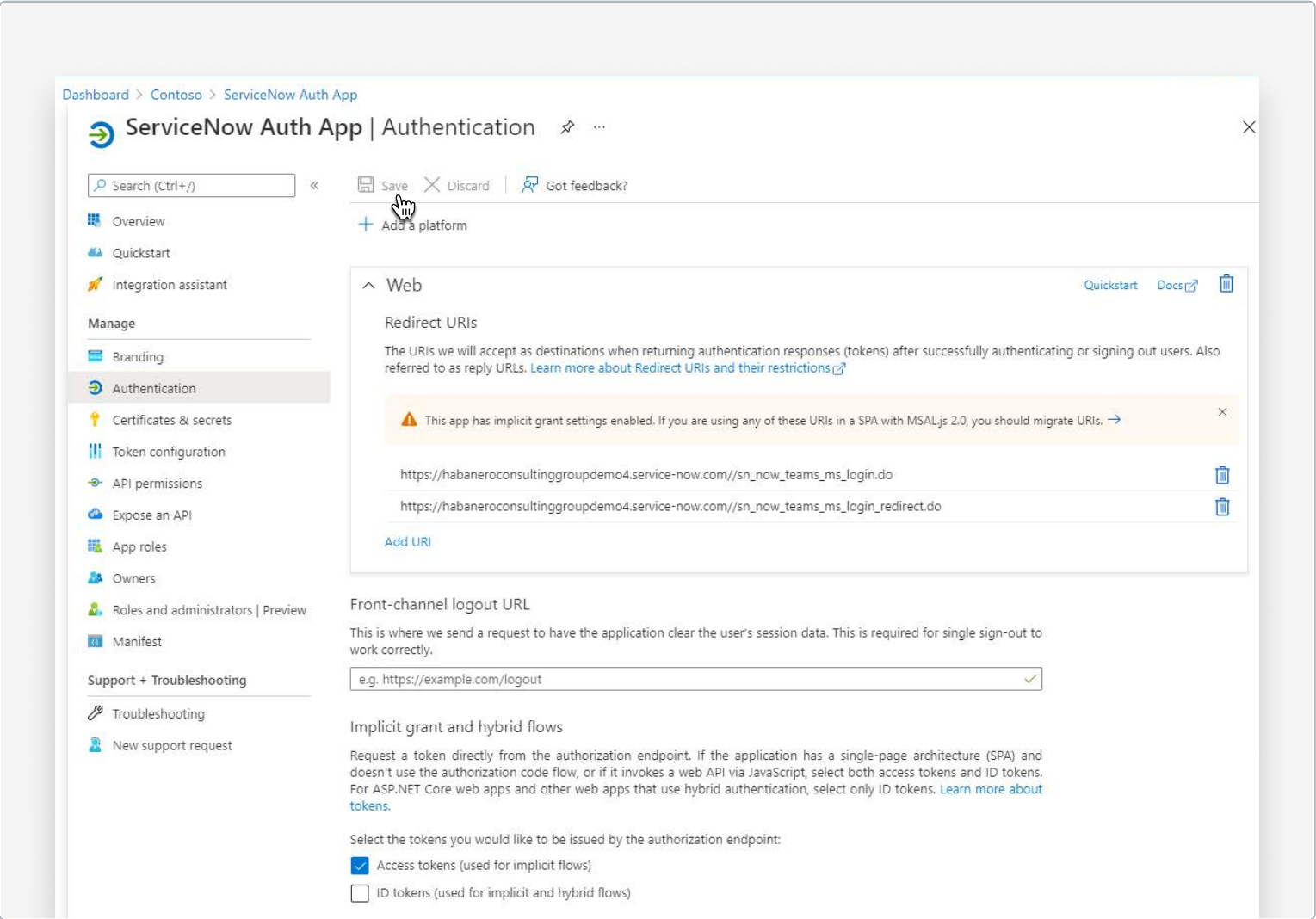
changing **<instance-name>** to the name of your ServiceNow instance.

6. Click **Register**.



7. In your registered application, click **Authentication** from the side menu.

8. Click **Redirect URIs**.
9. Select the **Access tokens** check box.
10. Click **Save**.



11. In ServiceNow, navigate to **System OAuth > Application registry** to verify and update application registry values to authenticate users in Microsoft Teams application.
12. Click **ServiceNow for Microsoft Teams app**.
13. Switch your application to **ServiceNow for Microsoft Teams**.
14. Edit the entry.

15. On the **OAuth OIDC entity – ServiceNow for Microsoft Teams app** form, fill the fields:

- **Client ID:** Verify and update the domain name and application ID

api://<domainName>/<applicationID>

changing <domainName> with your instance URL and the <application ID> from the Azure app created in the previous steps.

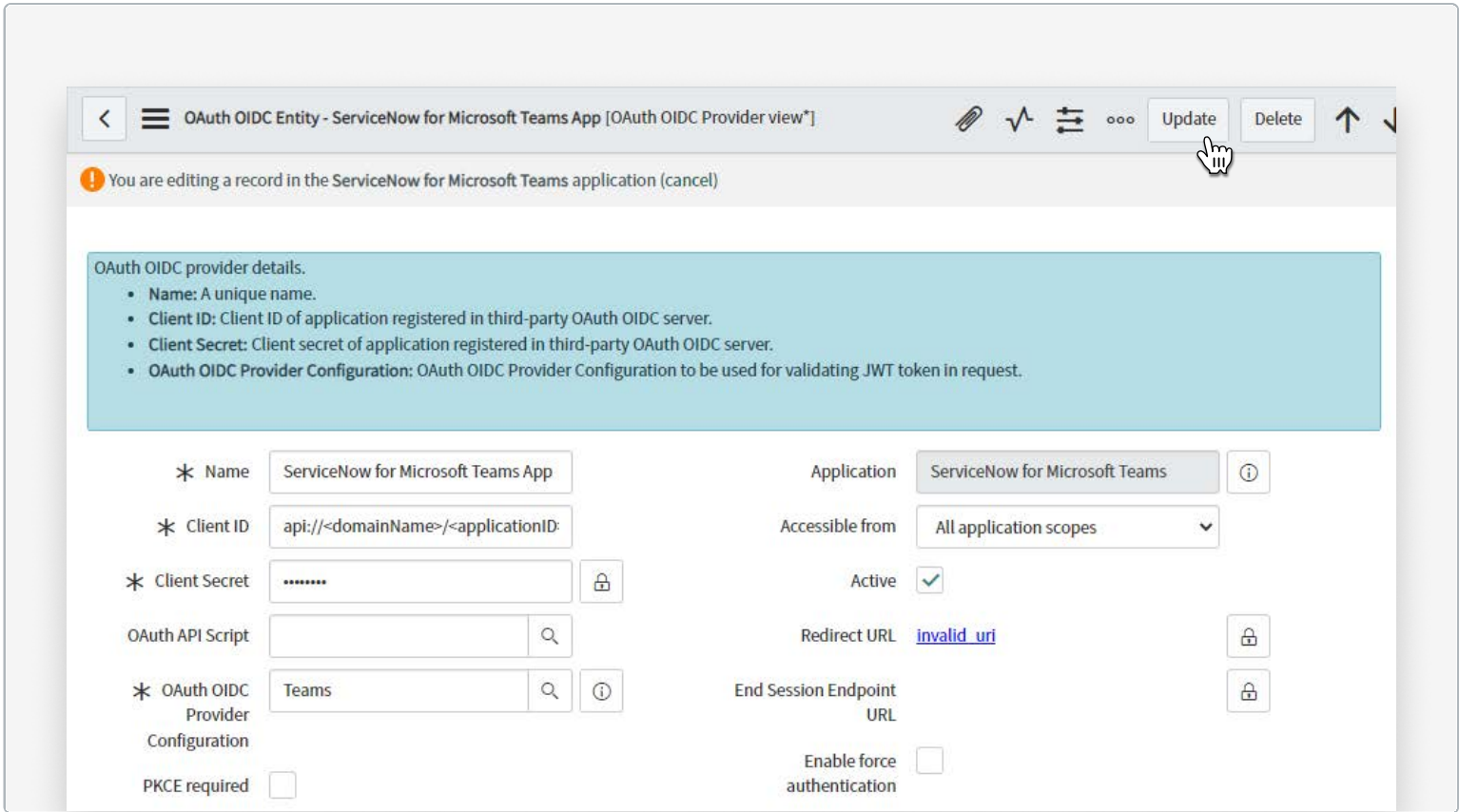
- **OAuth OIDC provider configuration:** Click on the information icon and verify the tenant ID value in the OIDC Metadata URL is correct.

Note: If there is nothing selected, create a **New Record** using the format below for the Metadata URL and an appropriate naming convention.

https://sts.windows.net/<tenantID>/well-known/openid-configuration/

Changing <tenantID> to the tenant ID provided in the app creation.

16. Click **Update**.



STEP FOUR

Register the Request based chat app (single tenant)

Note: If you have completed the multi-tenant setup, skip to [Step five](#).


1. Navigate to **System OAuth > Application registry**.

2. Do one of the following:

- If **Microsoft Teams chat single tenant** application registry is available, click on the application registry for Microsoft Teams.
- If you want to create a new application registry entry, click **New** and select **Connect to a third party OAuth provider**.

3. On the form, fill the fields:

- **Name:** Enter a name to uniquely identify the record. For example, enter: Microsoft Teams chat single tenant.
- **Client secret:** Enter the password you generated when creating the app in Microsoft Teams.
- **Authorization URL:** Enter the Authorization URL

 <https://login.microsoftonline.com/<tenantid>/oauth2/v2.0/authorize>

changing <tenantid> to the tenant ID from the app creation in Microsoft Teams.

- **Token URL:** Enter the Token URL

 <https://login.microsoftonline.com/<tenantid>/oauth2/v2.0/token>

changing the <tenantid> to the tenant ID from the app creation in Microsoft Teams.

- **Redirect URL:** Enter the Redirect URL

 https://<instanceURL>/oauth_redirect.do

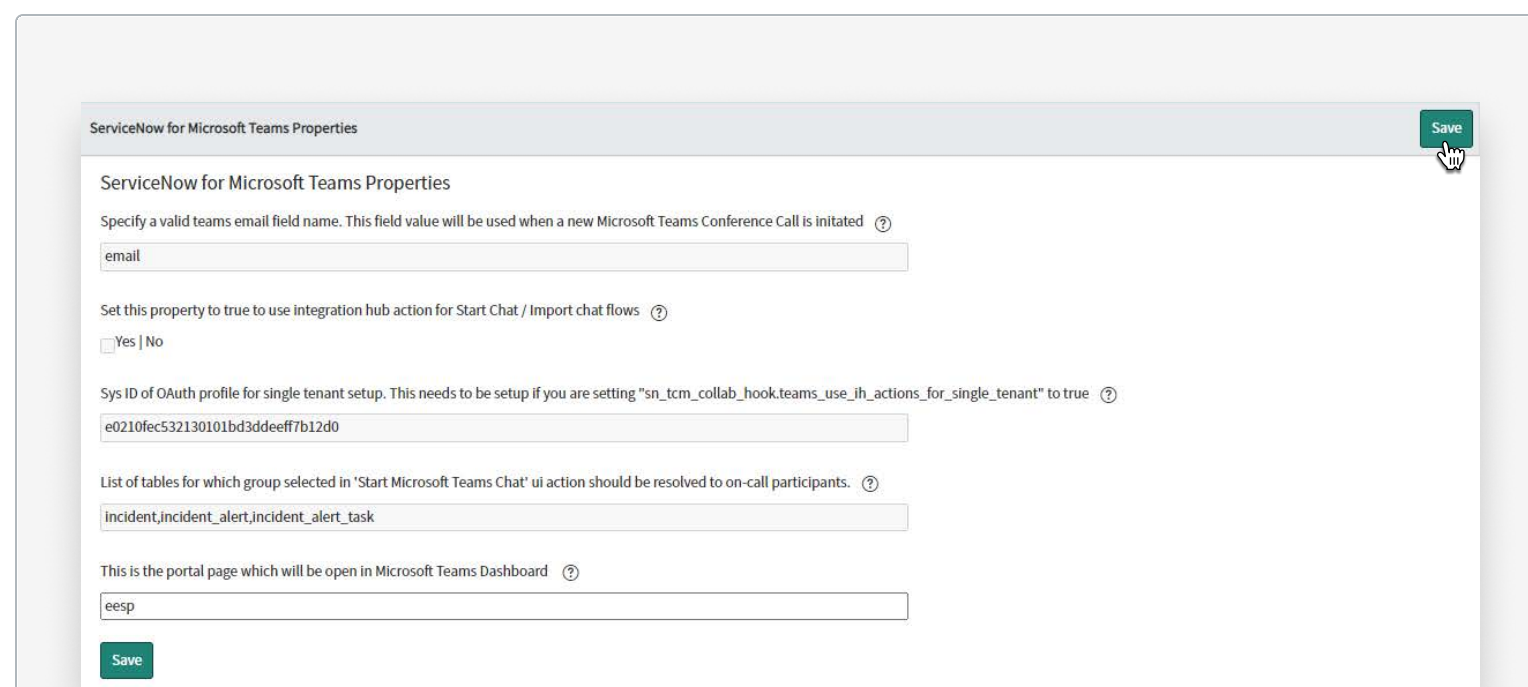
changing the <instanceURL> to the name of your instance.

4. Click **Update**.

5. Navigate to **ServiceNow for Microsoft Teams > Properties**.

6. Enable the option **Set this property to true to use integration hub action for start chat / import chat flows**.

7. Click **Save**.



The screenshot shows the 'ServiceNow for Microsoft Teams Properties' configuration page. The page has a title bar with the text 'ServiceNow for Microsoft Teams Properties' and a 'Save' button in the top right corner. The main content area contains several configuration fields:

- A text input field labeled 'email' with a placeholder text 'Specify a valid teams email field name. This field value will be used when a new Microsoft Teams Conference Call is initiated'.
- A checkbox labeled 'Set this property to true to use integration hub action for Start Chat / Import chat flows'.
- A text input field labeled 'Sys ID of OAuth profile for single tenant setup. This needs to be setup if you are setting "sn_tcm_collab_hook_teams_use_ih_actions_for_single_tenant" to true'.
- A text input field labeled 'List of tables for which group selected in "Start Microsoft Teams Chat" ui action should be resolved to on-call participants'.
- A text input field labeled 'This is the portal page which will be open in Microsoft Teams Dashboard'.

Each field has a small help icon (i) next to its label. A 'Save' button is located at the bottom left of the form.

STEP FIVE

Extend auto-import functionality to additional tables

1. Create a chat configuration by navigating to **ServiceNow for Microsoft Teams** > **Chat administration** > **Chat configuration**.

2. Click **Default** option to view the default OOB configuration.

Note: If you want to auto-import chats for certain conditions, create a new condition.

3. Navigate to **ServiceNow for Microsoft Teams** > **Chat administration** > **Chat configuration**.

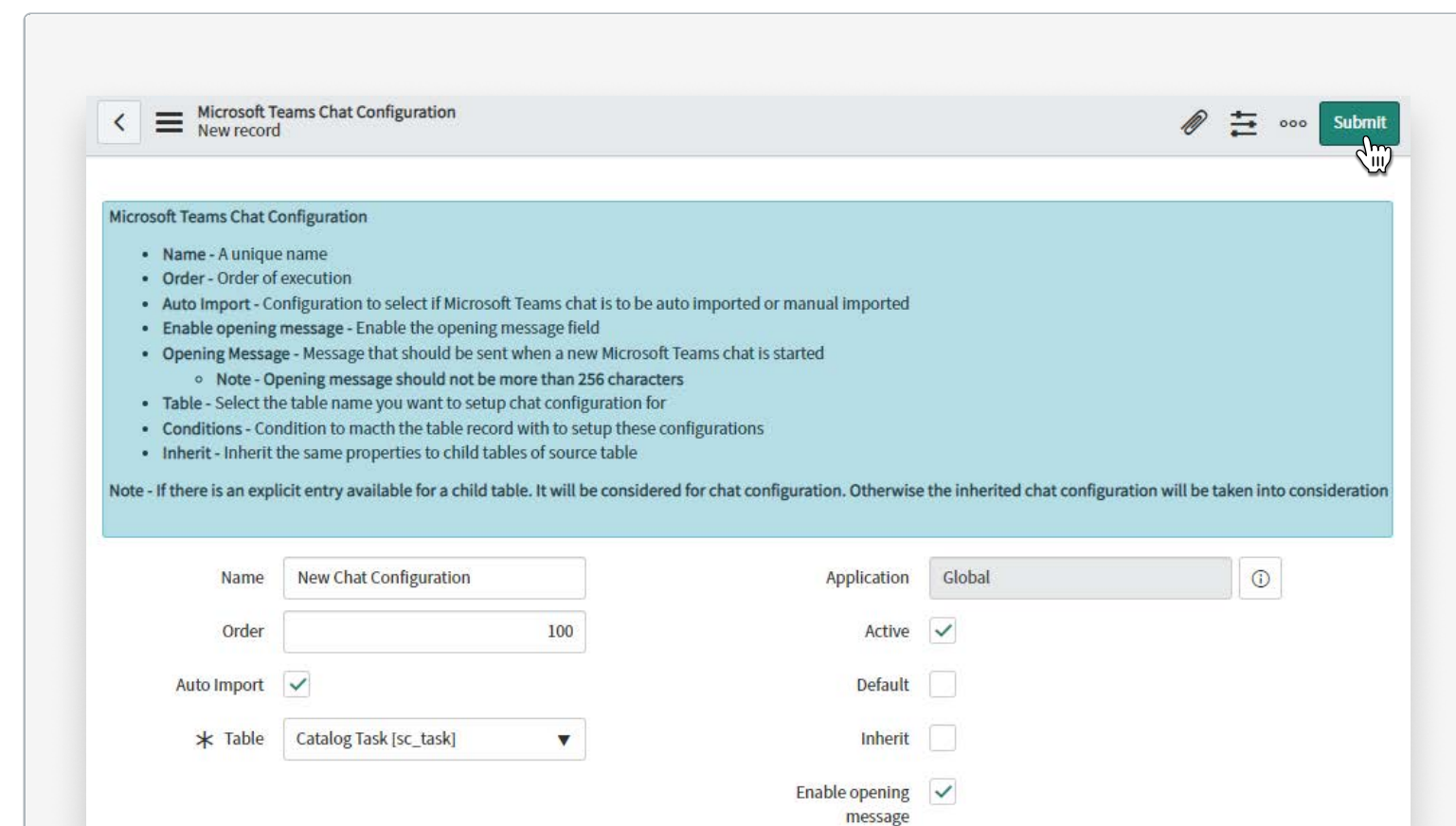
4. Click **New**.

5. On the form, fill in the fields:

- **Name:** Enter the name value for the configuration.
- **Order:** Default order for the configuration. You can change to define multiple chat configurations for a single table. The system executes the query based on the descending order.
- **Active:** Select the check box to activate the configuration.
- **Auto-import:** Select the check box to automatically import the chat.
- **Default:** Select the check box to keep the configuration as default.
Note: You cannot define multiple default values for chat configuration.
- **Table:** Select the table on which to add the auto-import for chat configuration.

- **Inherit:** Select to extend and apply to the child tables.
- **Conditions:** Create a condition to define when a chat is auto-imported.
- **Opening message:** Select to provide a text message that displays to the agent when the agent initiates a chat. This field is enabled only if the Auto Import option is selected.

6. Click **Submit**.



The screenshot shows the 'Microsoft Teams Chat Configuration' form in ServiceNow. The form is titled 'New record' and has a 'Submit' button in the top right corner. The form contains the following fields and options:

- Name:** A text field with the value 'New Chat Configuration'.
- Order:** A numeric field with the value '100'.
- Auto Import:** A checkbox that is checked.
- Table:** A dropdown menu with the value 'Catalog Task [sc_task]'.
- Application:** A dropdown menu with the value 'Global'.
- Active:** A checkbox that is checked.
- Default:** A checkbox that is unchecked.
- Inherit:** A checkbox that is unchecked.
- Enable opening message:** A checkbox that is checked.

A note at the bottom of the form states: 'Note - If there is an explicit entry available for a child table. It will be considered for chat configuration. Otherwise the inherited chat configuration will be taken into consideration'.

7. Create a requestor mapping by navigating to **ServiceNow for Microsoft Teams > Chat administration > Requestor mapping**.

8. Click **New**.

9. On the form, fill in the fields:

- **Table:** Select the table where you would like to add the requester mapping (auto-import feature).
- **Requestor:** Select the field use as the requester for a record.
- **Inherit:** Select to extend and apply the auto-import feature to the child tables of the selected table.
- **Active:** Select to activate the requester-mapping record.

10. Click **Submit**.

11. Configure the condition to exclude the chat conversation from auto importing by navigating to **ServiceNow for Microsoft Teams > Chat administration > Close conditions**.

Note: When a ticket is set to inactive, the system does a final poll for messages in the chat, removes the participants so no further messages can be exchanged in the chat, and then stops polling that chat.

12. Click **New**.

13. On the form, fill in the fields:

- **Table:** Select the table on where you would like to add the close condition for the requestor mapping (auto-import feature).
- **Inherit:** Select to extend and apply the auto-import feature to the child tables of the selected table.
- **Active:** Select to activate the close condition for the requester-mapping record (auto-import feature).
- **Close conditions:** Create close condition(s) to define when a record is closed for auto-import functionality.

14. Click **Submit**.

STEP SIX

Validate and extend UI actions to start chat and import messages

Validate active UI actions

1. In ServiceNow, search for **UI actions** in the left pane.
2. Select ServiceNow for **Microsoft Teams > UI actions**.
3. Validate all desired UI Actions are active. If you do not want to have the feature on one of the default tables, you can do any of the following:
 - Make it inactive.
 - Change the table it is applied to.
 - Delete the UI Action.

Apply UI actions to additional tables

1. In ServiceNow, search for **UI actions** in the left pane.
2. Select **ServiceNow for Microsoft Teams > UI actions**.
3. Change application from **Global** to **IT service management integration with Microsoft Teams**.
4. Open **Start a Microsoft Teams chat** in a new tab (you will be copying from here).
5. Select **Insert and stay**.
6. Update the **Table** field to apply to your required ServiceNow table.
7. Repeat Steps 3–7 for the **Import messages** and **Import messages from Microsoft Teams UI actions**.


STEP SEVEN

Extend on-call users for start Microsoft Teams chat

Note: The users associated with On-Call Scheduling will be displayed on the Selected column in **Start Microsoft Teams chat** modal.

1. In the Navigation filter, enter **sys_properties.list**. The entire list of properties in the System Properties [sys_properties] table appears.

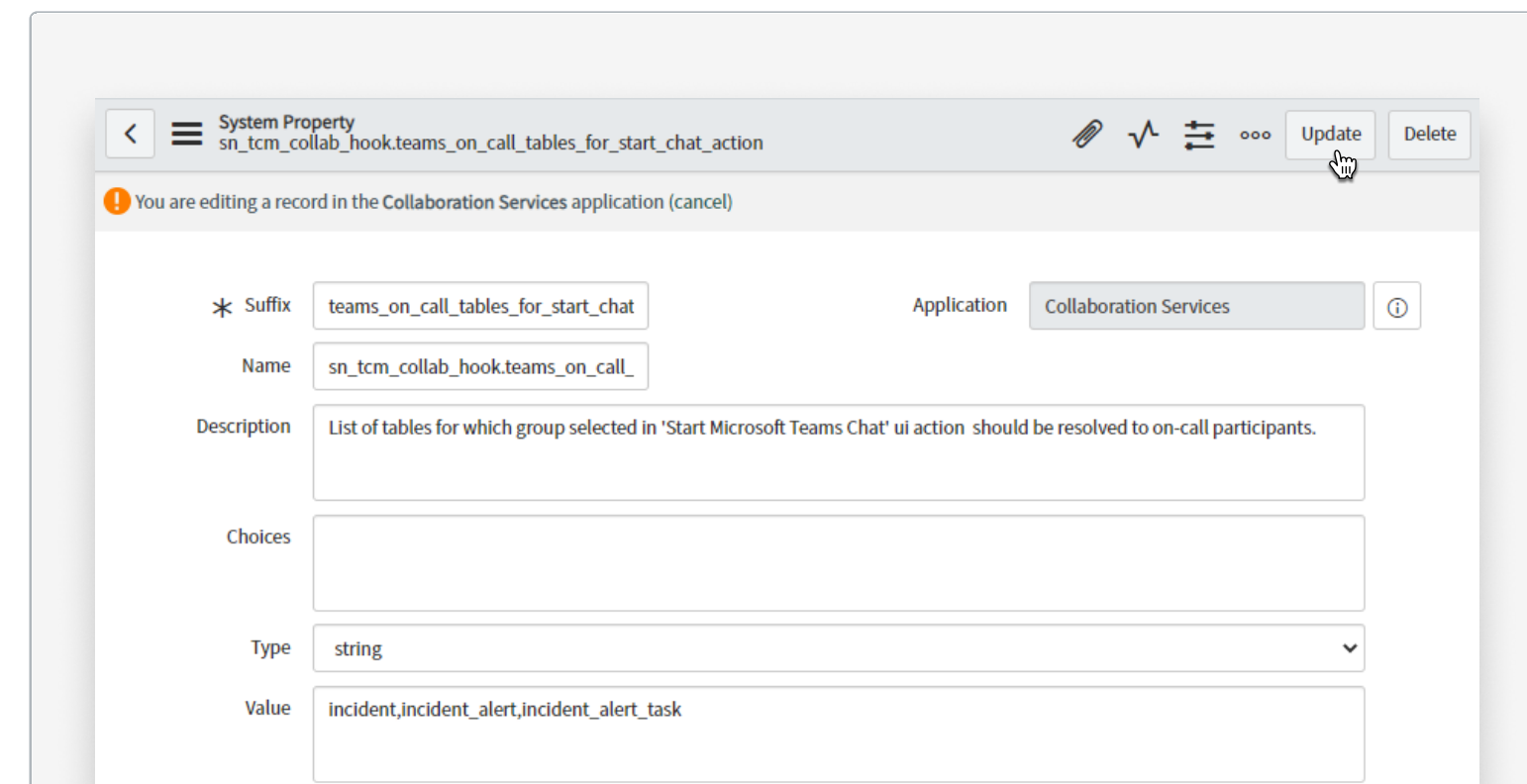
2. In the Name search field, enter

 **sn_tcm_collab_hook.on_call_tables_for_start_chat_action**

3. Click on **sn_tcm_collab_hook.on_call_tables_for_start_chat_action** system property.

4. In the **Value** field, provide the tables to which you need to extend the functionality. Example: change, request.

5. Click **Update**.



The screenshot shows the 'System Property' edit form for the property `sn_tcm_collab_hook.teams_on_call_tables_for_start_chat_action`. The form is titled 'System Property' and includes a breadcrumb trail. The 'Suffix' field is set to `teams_on_call_tables_for_start_chat` and the 'Application' is 'Collaboration Services'. The 'Name' field is `sn_tcm_collab_hook.teams_on_call_`. The 'Description' field contains the text: 'List of tables for which group selected in 'Start Microsoft Teams Chat' ui action should be resolved to on-call participants.' The 'Choices' field is empty. The 'Type' is set to 'string'. The 'Value' field contains the text: 'incident,incident_alert,incident_alert_task'. The form has 'Update' and 'Delete' buttons at the top right.

Advanced Features

Ready to take it a step further? Learn how you can make the most of the ServiceNow plugin for Microsoft Teams to automate common requests. With the ServiceNow virtual agent, you can route issues to a chatbot, reducing call volumes and increasing efficiency. If you have questions or want to learn more about how to get ServiceNow working better for you, let us know. We'd love to talk.

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