



Altorra PowerClick Toolkit Essentials User Guide

December 2024 – v1.3

altorra.com

Table of Contents

1. Introduction	4
2. Installation	4
3. Upgrading	4
4. Application Menu	5
4.1 Getting Started	5
4.2 Configuration	6
4.3 Messages	9
4.4 Support	10
5. How it works	11
5.1 Overview	11
5.2 Tools & Features of Toolkit	12
5.2.1 Manage Access Controls for UI pages	12
5.2.2 "Add Data to Table" Tool	14
5.2.3 "Add or Remove Role" Tool (Modules)	16
5.2.4 "All" Mailbox Modules	21
5.2.5 Grab sys_id from Selected Records	22
5.2.6 Reorder Variables	23
5.2.7 "Show Choice List Items" Tool	26
5.2.8 "Switch to List View" Tool	28
5.2.9 Enhanced "Try it" for Catalog items	29
6.0 Support	30

1. Introduction

The Altorra PowerClick line of tools has been developed over many years of ServiceNow implementations and provides practitioners powerful functionality that is over and above what is offered in the standard ServiceNow platform. Altorra offers both free and paid versions of the product line.

The PowerClick Toolkit Essentials is a grouping of tools that is offered FREE to the ServiceNow community.

ServiceNow provides users a vast amount of flexibility and options when developing, administering and using the platform. There are, however, some actions and functions that can slow practitioners down, especially when they are used repeatedly.

When the Altorra PowerClick Toolkit Essentials, a set of powerful capabilities and tools, is added to your platform, your work becomes much easier, reducing clicks, reducing the risk of errors and ultimately making work more efficient.

2. Installation

The Altorra PowerClick Essentials toolkit is distributed as an Update Set. Please follow the standard ServiceNow installation steps to install an Update Set.

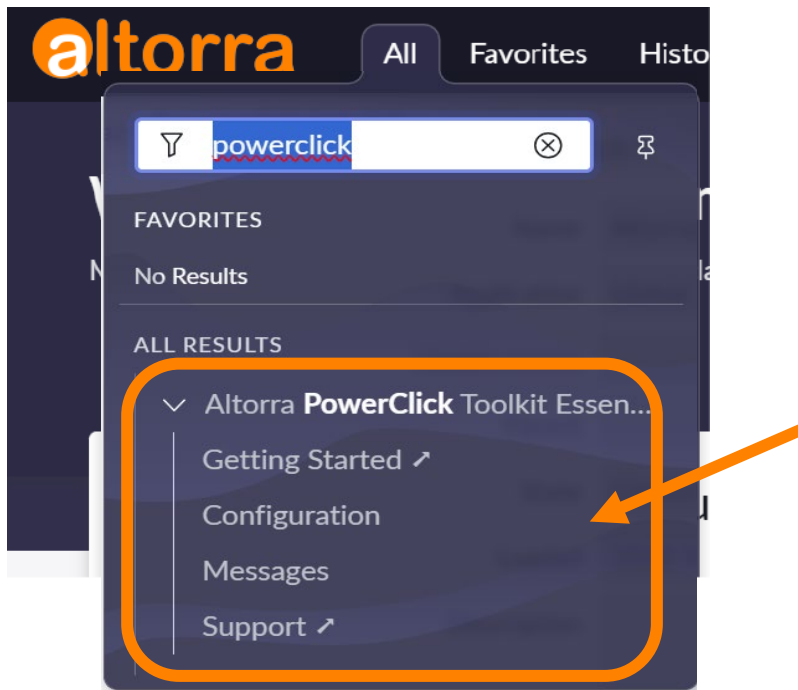
The toolkit can be installed on any instance you manage.

3. Upgrading

Altorra will release updates to the toolkit as required. We will notify users via email and on our website, when updates are available. To remain current, please ensure you are set up to receive email notifications from Altorra, by visiting altorra.com/support.

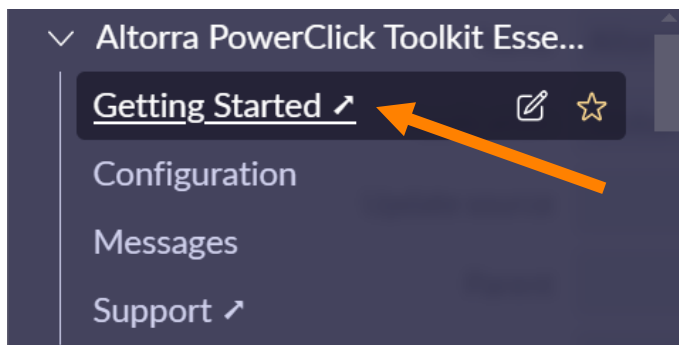
4. Application Menu

Once installed, the Altorra PowerClick Toolkit Essentials menu can be found in the “All” menu.



It contains the following Modules:

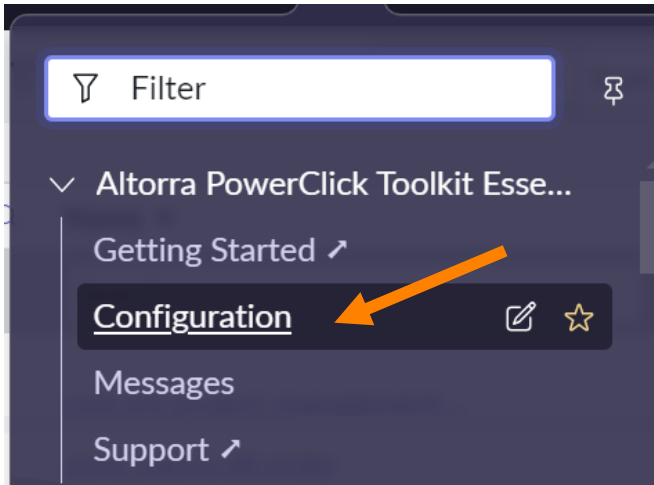
4.1 Getting Started



This Module will open the Altorra **PowerClick Toolkit Essentials** product page in a new browser tab/window.

4.2 Configuration

This menu item will allow the user to set up some parameters of how the tools will work.



Ensure you click on the Save button for any changes to the configuration page to take effect.

Altorra PowerClick Toolkit Essentials Configuration

Enable PowerClick Toolkit Essentials

When checked, the tools will be available to users.

NOTE: Does NOT affect the "All" Mailbox Modules, nor the "Access Controls" Relationship. (?)

☒ Yes | No

"Add Data to Table" Roles

Comma-separated list of Roles that can see the "Add Data to Table" Context Menu.

Leave empty to allow users with the appropriate permissions on the table to see it.

Default value is "admin". (?)

admin

"Grab sys_id from Selected Record(s)" Roles

Comma-separated list of Roles that can see the "Grab sys_id from Selected Record(s)" Context Menu.

Leave empty to allow all users to see it.

Default value is "admin". (?)

admin

"Reorder Variables" Roles

Comma-separated list of Roles that can see the "Reorder Variables" UI Action.

Only users with the "admin" Role will see it if the field is left empty.

Default value is "catalog_admin, catalog_builder_editor, catalog_editor, catalog_manager". (?)

catalog_admin, catalog_builder_editor, catalog_editor, catalog_manager

"Switch to List View" Roles

Comma-separated list of Roles that can see the "Switch to List View" UI Action.

Leave empty to allow all users to see it.

Default value is "admin". (?)

admin

"Try It" for Catalog Items Roles

Comma-separated list of Roles that can see the "Try It" UI Action.

Only users with the "admin" Role will see it if the field is left empty.

Default value is "catalog_admin, catalog_builder_editor, catalog_editor, catalog_manager". (?)

catalog_admin, catalog_builder_editor, catalog_editor, catalog_manager

Save

The following configuration settings are possible.

Enable PowerClick Toolkit Essentials

This will enable the suite of tools. When selected (Yes), the tools will appear and be available for use. When unselected (No), all PowerClick Toolkit Essential tools will be disabled, except: The **“All” Mailboxes** (see section 5.2.4) and the **“Manage Access Controls for UI pages”** Relationship (See section 5.2.1), which will remain available for use.

Default setting is enabled/checked.

"Add Data to Table" Roles

This setting allows you to restrict the roles that can see the "Add Data to Table" item in the Context Menu. If you have more than one role, list them in a comma-separated format.

If no roles are specified, only the **users with the appropriate permissions** on the table will be able to see it.

Default value is "admin".

"Grab sys_id from Selected Record(s)" Roles

This setting allows you to restrict the roles that are able to see the "Grab sys_id from Selected Record(s)" item in the Context Menu. If you have more than one role, list them in a comma-separated format.

If no roles are specified, **all users** will be able to see it.

Default value is "admin".

"Reorder Variables" Roles

This setting allows you to restrict the roles that are able to see the "Reorder Variables" UI Action. If you have more than one role, list them in a comma-separated format.

If no roles are specified, only users with the **"admin"** Role will see it.

Default value is "catalog_admin, catalog_builder_editor, catalog_editor, catalog_manager"

"Switch to List View" Roles

This setting allows you to restrict the roles that are able to see the "Switch to List View" UI Action. If you have more than one role, list them in a comma-separated format.

If no roles are specified, **all users** will be able to see it.

Default value is "admin"

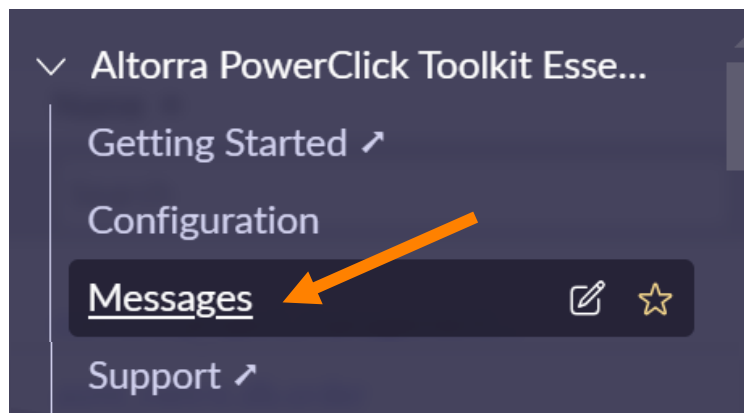
“Try It” for Catalog Items Roles

This setting allows you to restrict the roles that are able to see the "Try It" UI Action. If you have more than one role, list them in a comma-separated format.

If no roles are specified, only users with the "**admin**" Role will see it.

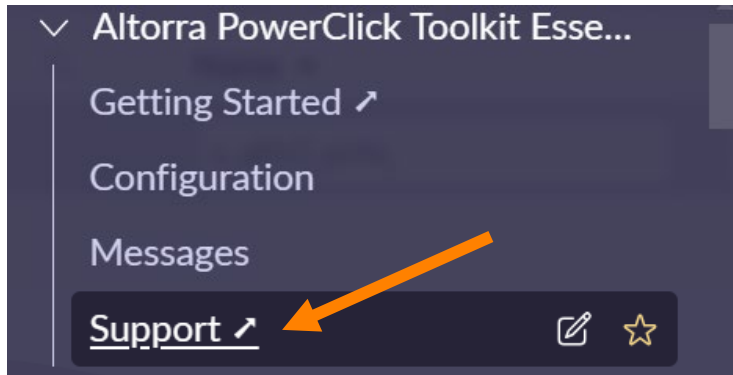
Default value is "catalog_admin, catalog_builder_editor, catalog_editor, catalog_manager".

4.3 Messages



This Module displays the on-screen messages visible to users. This can be used for translation purposes.

4.4 Support



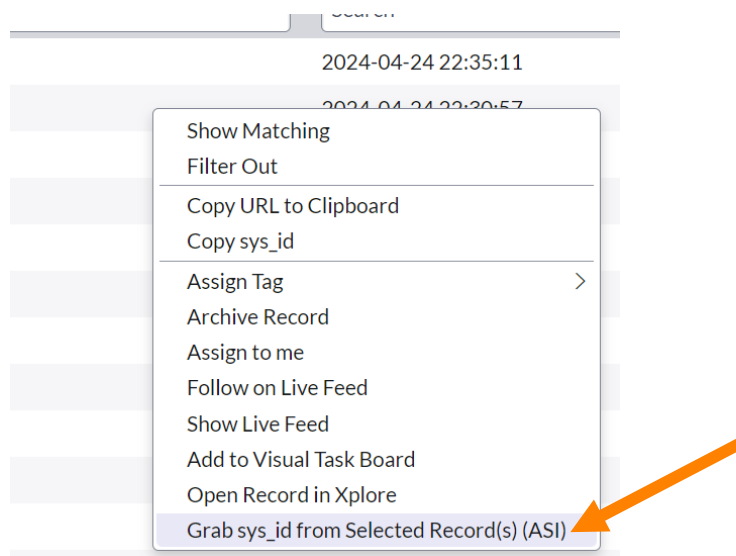
Should you ever require assistance, have a comment or want to request a feature enhancement, this menu item will open the **PowerClick Toolkit Essentials** Support page, where you can get answers and also reach out to us.

5. How it works

5.1 Overview

The PowerClick Toolkit Essentials installs 9 tools to any of your instances. These tools will be integrated into the native ServiceNow menus and context windows. They can easily be identified, having **(ASI)** appended to the end of the tool name.

For example:



The tools are:

- ***Manage Access Controls for UI pages***
- ***"Add Data to Table" Tool***
- ***"Switch to List View" Tool***
- ***"All" Mailbox Modules***
- ***Show Choice List Items Tool***
- ***Reorder Variables***
- ***Get sys_id for Selected Records***
- ***Add/Remove Module Roles***
- ***Enhanced "Try it" for Catalog items***

NOTE: We take pride in thoroughly testing our tools, applications & utilities. As with all new tools, we recommend starting to use the Altorra PowerClick Toolkit Essentials in a sub-production or your

personal development instance (PDI) initially, to understand how the tools function and to familiarize yourself with the various options.

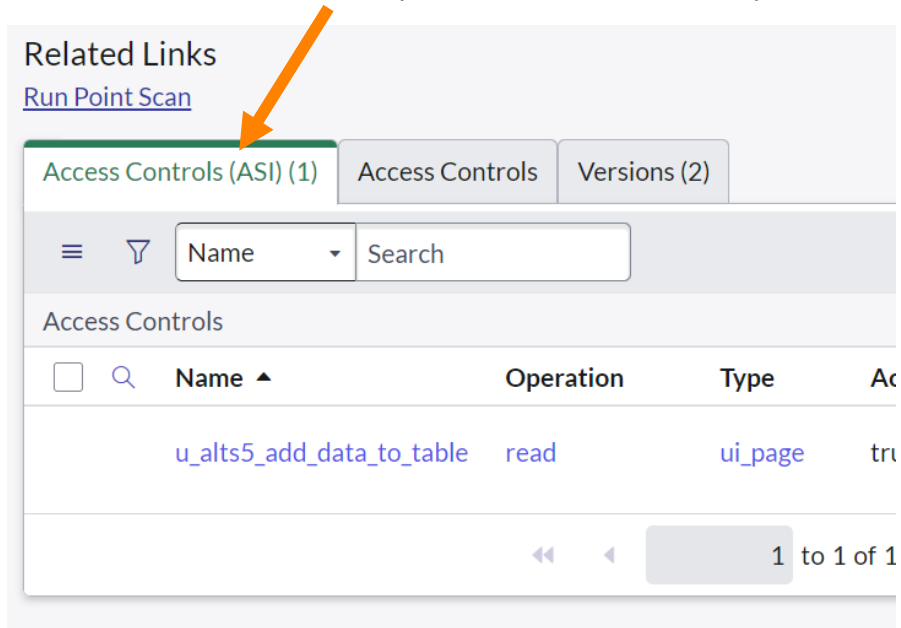
5.2 Tools & Features of Toolkit

5.2.1 Manage Access Controls for UI pages

This is a tool that provides you with a Relationship allowing you to add a Related List of Action Controls to a UI page form. Makes it easy to see if you have Access Controls defined for the UI Page or not.

ServiceNow offers an Access Controls view, but the functionality is not reliable in all situations. With Altorra's **Access Controls (ASI)**, you can rely on it for the correct access controls associated to the particular UI page.

With this view, it is also a helpful reminder for users to protect their UI Page with an Access Control.



Related Links

[Run Point Scan](#)

Access Controls (ASI) (1) | Access Controls | Versions (2)

≡ | 🔍 | Name ▾ | Search

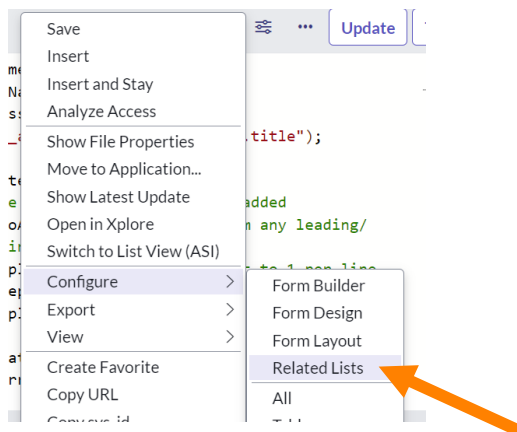
Access Controls

☐	🔍	Name ▲	Operation	Type	Access
☐		u_alts5_add_data_to_table	read	ui_page	true

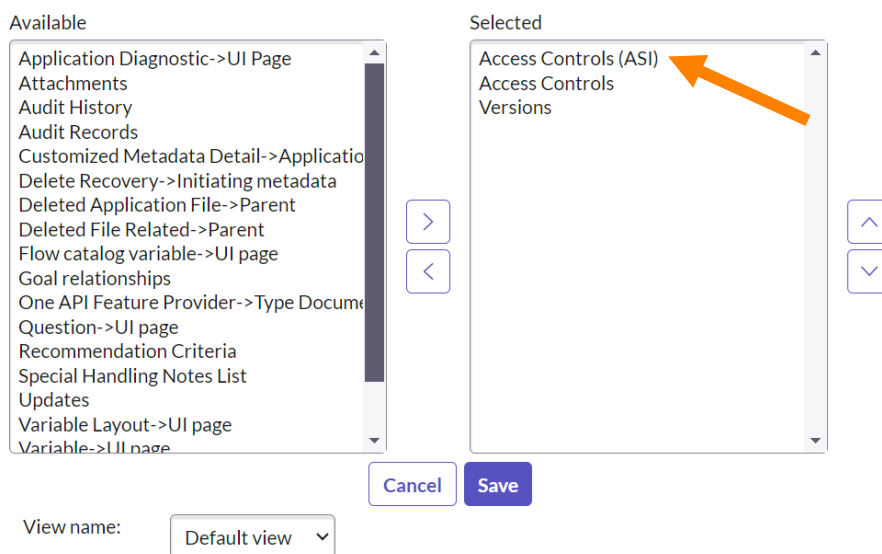
1 to 1 of 1

Adding the **Access Controls (ASI)** view is quick and easy, simply follow these simple steps:

1. Open record page.
2. Right click on the form header and select **Configure -> Related Lists**



3. Add the **Access Controls (ASI)** item from the “Available” box to the “Selected” box and click Save.



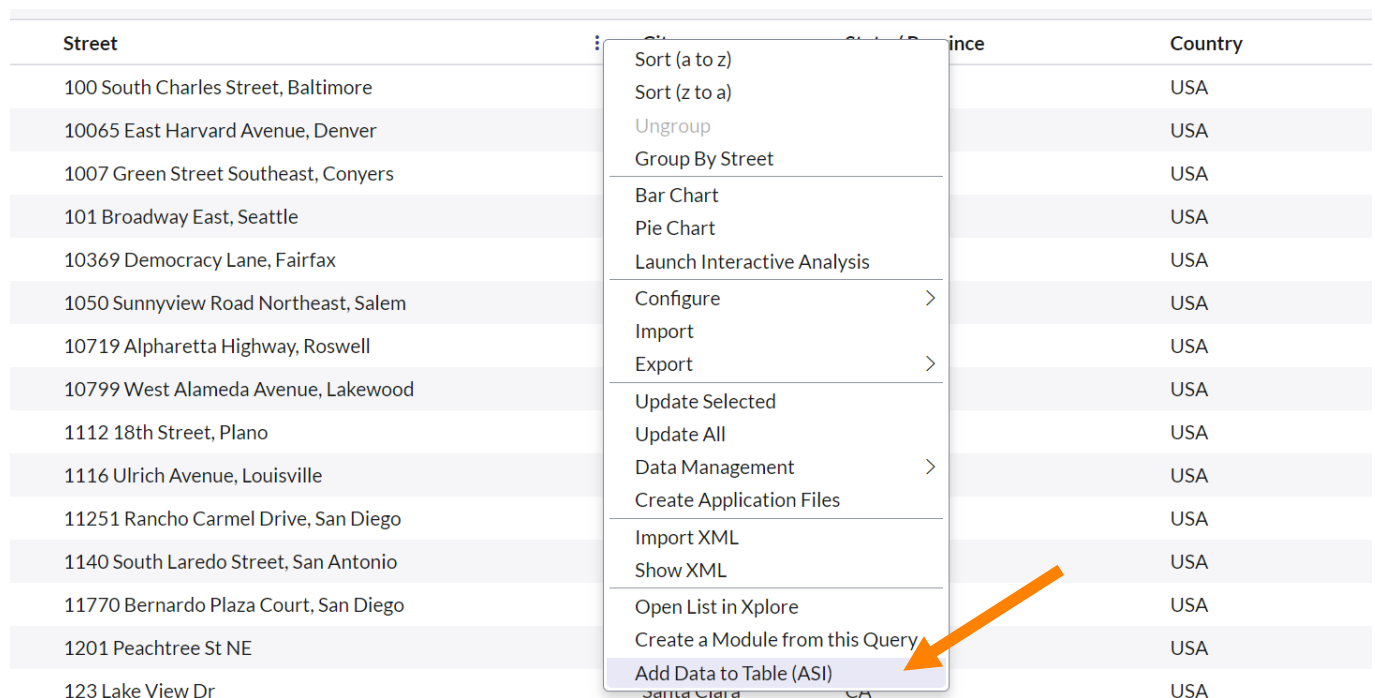
4. The **Access Controls (ASI)** tab will now appear under the Related Links section.

5.2.2 “Add Data to Table” Tool

There are times when you need to add a few simple records into a table. Adding them manually can be slow and cumbersome, especially if you have a few to add. Using an import set is another option, but by the time that process is done, it is sometimes even longer than the manual approach.

That’s where the **Quick Record to Table** tool comes in handy.

You access the tool by selecting the **Add Data to Table (ASI)** Context Menu by right-clicking the list header, or clicking the vertical ellipsis (:).



Street	State	City	Zip	Country
100 South Charles Street, Baltimore	MD	Baltimore	21201	USA
10065 East Harvard Avenue, Denver	CO	Denver	80231	USA
1007 Green Street Southeast, Conyers	MI	Conyers	48801	USA
101 Broadway East, Seattle	WA	Seattle	98101	USA
10369 Democracy Lane, Fairfax	VA	Fairfax	22033	USA
1050 Sunnyview Road Northeast, Salem	OR	Salem	97305	USA
10719 Alpharetta Highway, Roswell	GA	Roswell	30076	USA
10799 West Alameda Avenue, Lakewood	CO	Lakewood	80401	USA
1112 18th Street, Plano	TX	Plano	75075	USA
1116 Ulrich Avenue, Louisville	KY	Louisville	40203	USA
11251 Rancho Carmel Drive, San Diego	CA	San Diego	92121	USA
1140 South Laredo Street, San Antonio	TX	San Antonio	78205	USA
11770 Bernardo Plaza Court, San Diego	CA	San Diego	92128	USA
1201 Peachtree St NE	GA	Atlanta	30309	USA
123 Lake View Dr	CA	San Jose	95128	USA

A popup window appears with 4 sections: **Table name**, **Column name**, **How is the data separated** and **Data**. The table and field names should be auto populated for you, based on the list view you were looking at and that table's *display* value column.

Fill in the values as needed and click on the Add button. The records will be added to the table.

NOTE: Leading and trailing spaces are stripped before inserting the data.

Add Data to Table

Select the table and column name you wish to add the data to. The fields should be auto-populated with the appropriate data, based on the list view you are currently viewing.

* Table name Location

* Column name name

* How is the data separated One entry per line

* Data

87 Coram
345 Buena Vista Way
900 Tamiami Trail
1455 Main Street

Cancel Add

The tool has some built-in checks and data validation before committing any changes to your table. Some informational or error messages may appear on screen to update you on what actions the tool undertook.

⊗ Record already exist for 'name = 1455 Main Street' - insert skipped

ⓘ Add Data to Table
Attempting to add the following data into the 'name' column in the 'cmn_location' table:
87 Coram
345 Buena Vista Way
900 Tamiami Trail
1455 Main Street

ⓘ 3 records inserted

In this example, 3 records were successfully inserted into the table, but one (1455 Main Street) was skipped because the tool deemed that it already existed and prevented a duplicate from being created.

The tool will also create an entry in the System Logs:

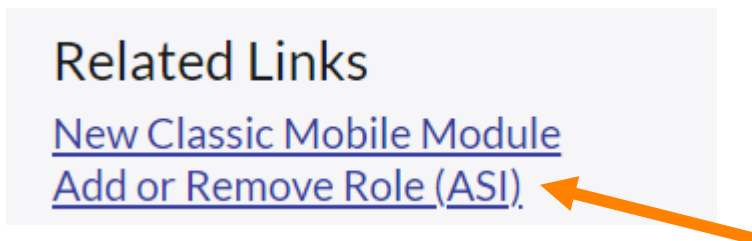
2024-06-30 18:40:15	Information	Add Data to Table
		Attempting to add the following data into the 'name' column in the 'cmn_location' table:
		87 Coram
		345 Buena Vista Way
		900 Tamiami Trail
		1455 Main Street
		Record already exist for 'name = 1455 Main Street' - insert skipped
		3 records inserted

The tool uses UI Messages now for any message visible to users, to make it easier to localize the tools.

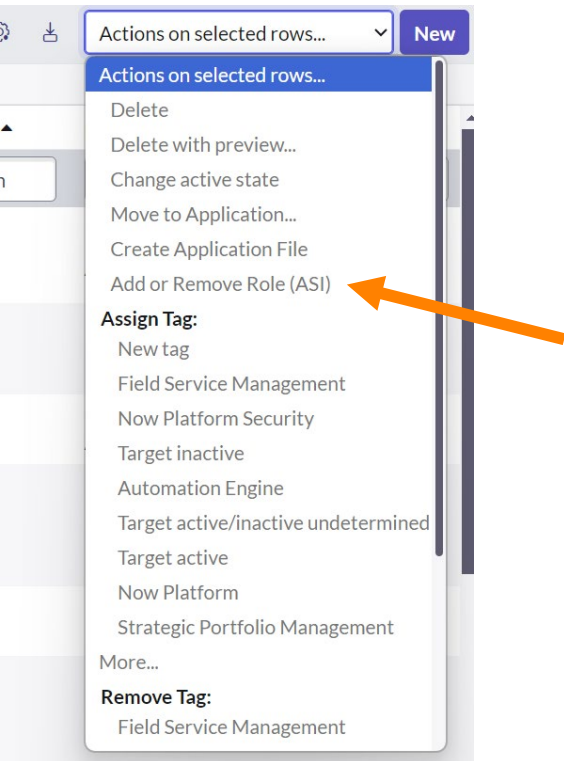
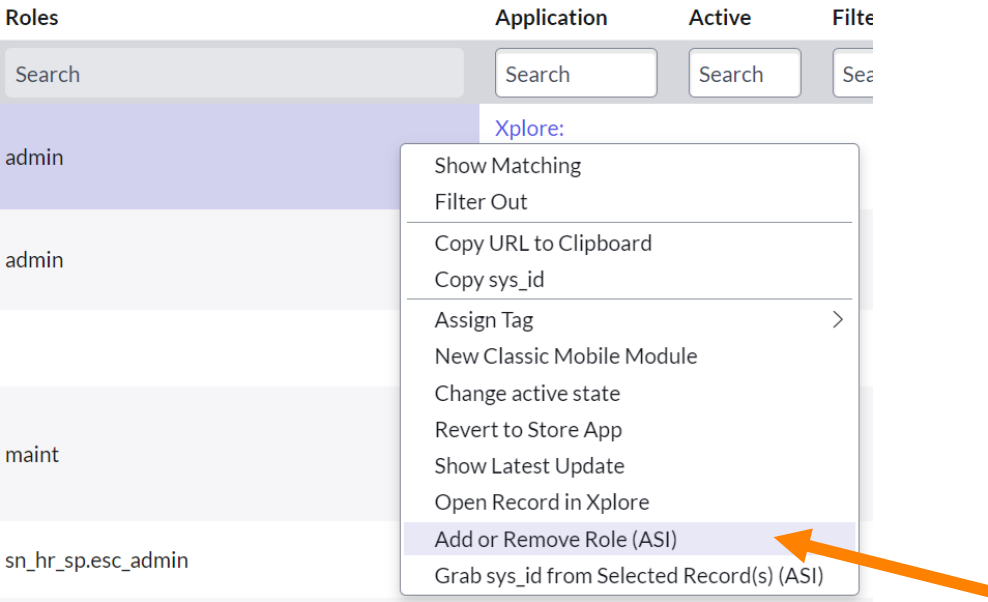
5.2.3 "Add or Remove Role" Tool (Modules)

The **Add or Remove Role** tool makes it easy to add or remove a single Role to one or more Application Modules at once. You also have the option to remove all the Roles from the selected Modules.

Form view:

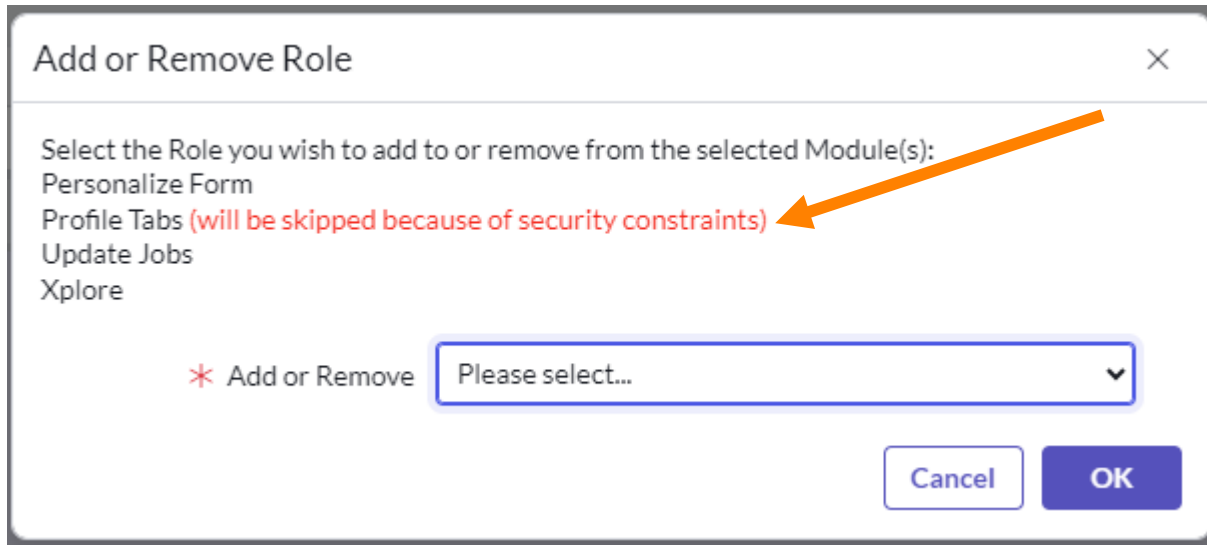


List view:

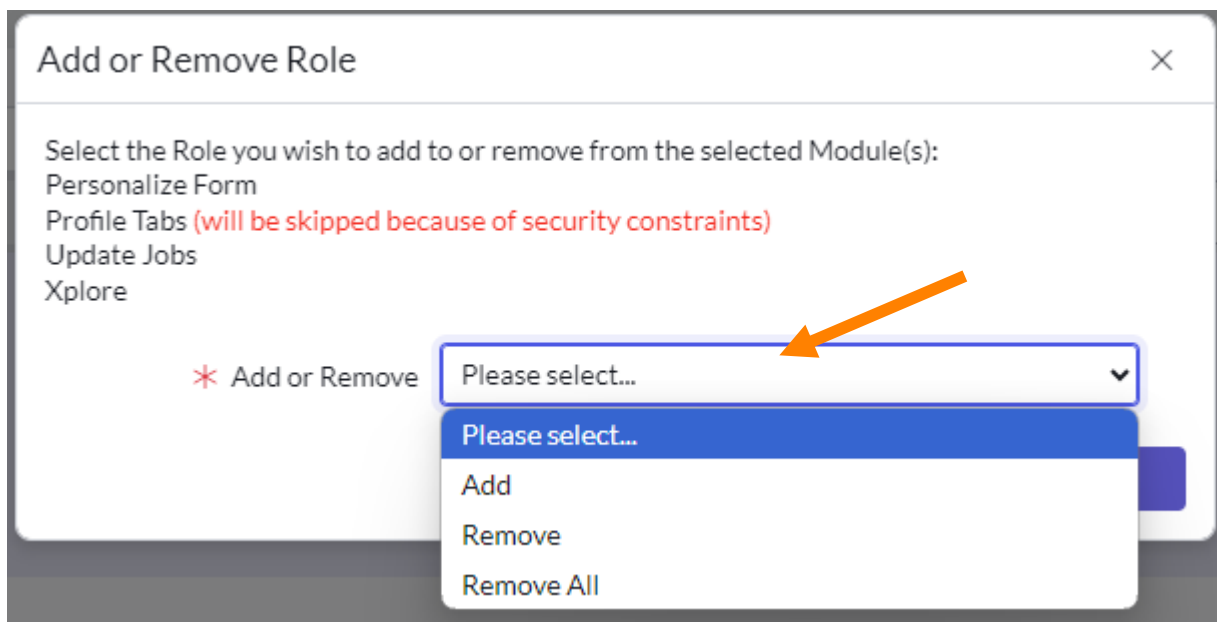


Select one or more records and click on Add or Remove Role (ASI) from one of the ways shown above.

A modal window will appear, showing the list of module(s) you will be modifying.



If any of the modules cannot be modified due to security constraint (i.e part of a different scope), it will be noted, as seen in the red colored warning.



From the drop-down menu, select which action you wish to perform on the modules.

- **Add** – allows you to add a role to all selected module(s)
- **Remove** – will remove a role from the selected module(s)
- **Remove all** - will remove ALL roles from the selected module(s)

Add or Remove Role

Select the Role you wish to add to or remove from the selected Module(s):

Personalize Form

Profile Tabs (will be skipped because of security constraints)

Update Jobs

Xplore

* Add or Remove Add

* Role

Cancel OK

If you select **Add** or **Remove**, a second entry box will appear to specify the role you wish to add or remove from the selected module(s). Press OK to continue.

Add or Remove Role

Select the Role you wish to add to or remove from the selected Module(s):

Personalize Form

Profile Tabs (will be skipped because of security constraints)

Update Jobs

Xplore

* Add or Remove Add

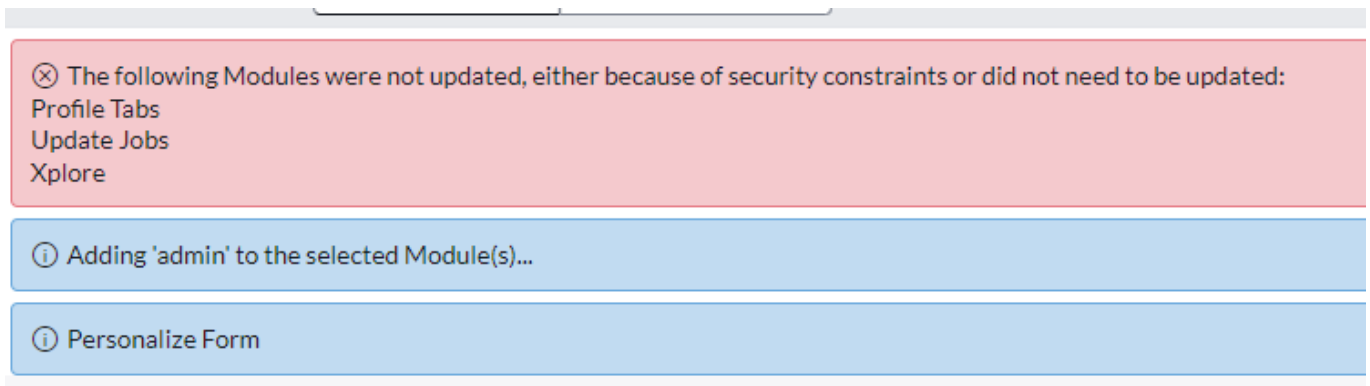
* Role admin

Showing 1 through 1 of 1

admin

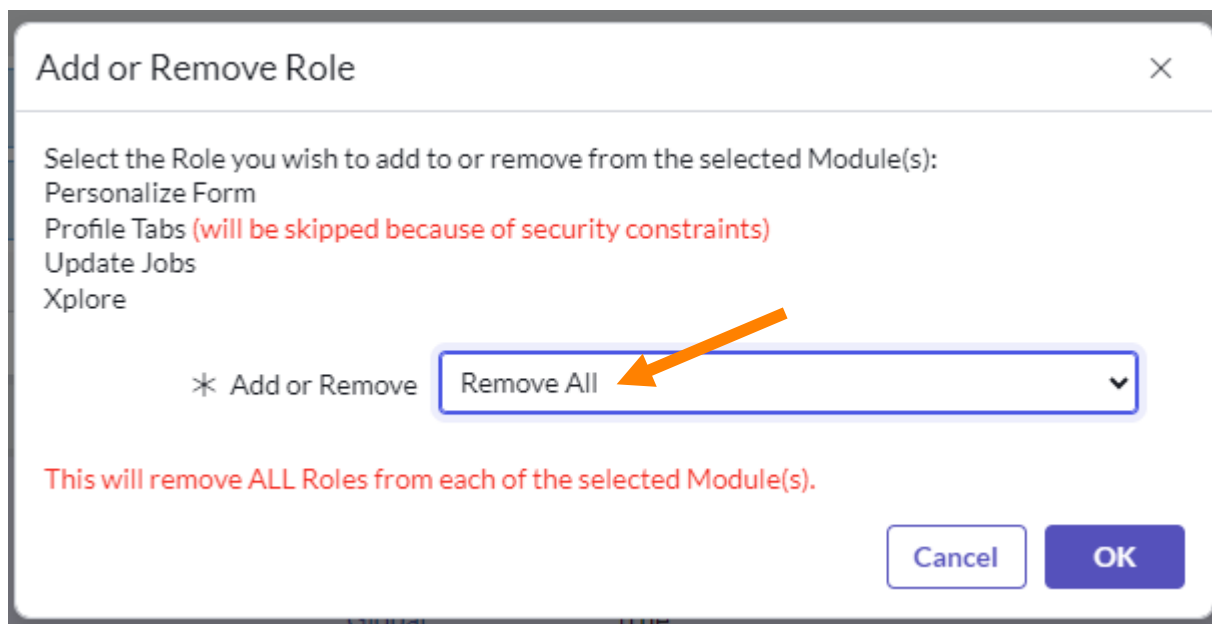
OK

Select the role you wish to add or remove. Click OK.



Informational messages will be presented to describe which actions the tool took. In this example, the admin role was already assigned to the **Update Jobs & Xplore** modules, so the records were skipped. The **Profile Tabs** module was skipped because of security constraints. The new role was added to only the **Personalize Form** module.

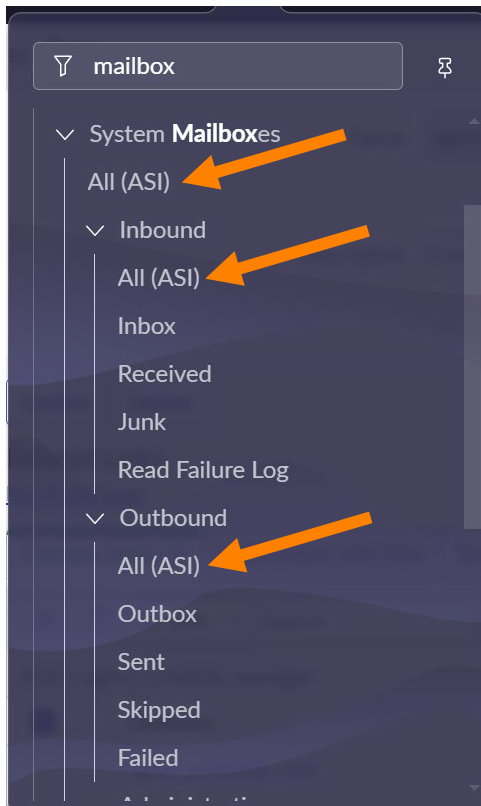
The **Remove** functionality behaves in the same way, except it will remove the identified role from the selected module(s).



If the **Remove All** action will remove **ALL** roles from the selected modules, leaving the roles list empty.

5.2.4 "All" Mailbox Modules

Here's a pretty simple and useful addition to the "System Mailboxes" Application - three "All" Modules:



Each of the new modules will display **all** the emails from today, from each respective Category. The Modules' Type field is set to "List of Records" on the Email [sys_email] table and will show the following emails:

- in all mailboxes (Combination of all system mailboxes)
 - Emails in all system mailboxes
- in all the **Inbound** mailboxes
 - Emails in the Inbound Inbox, Received or Junk mailboxes.
- in all the **Outbound** mailboxes
 - Emails in the Sent, Skipped or Failed mailboxes.

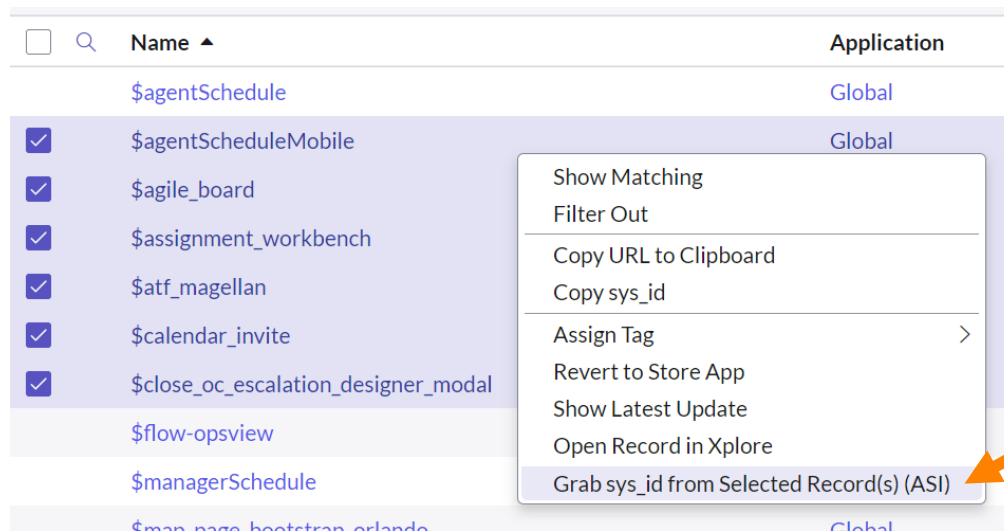
5.2.5 Grab sys_id from Selected Records

ServiceNow has a built-in capability, "Copy sys_id" Context Menu, allowing users to easily view and copy the sys_id from a single record in a List view. If you have multiple records, you need the sys_id for, you would be required to perform the action for each.

That's where the PowerClicks Toolkit Essentials – **Grab sys_id for Selected Records** comes in handy. This tool allows users to display and copy the sys_id for multiple records at the same time.

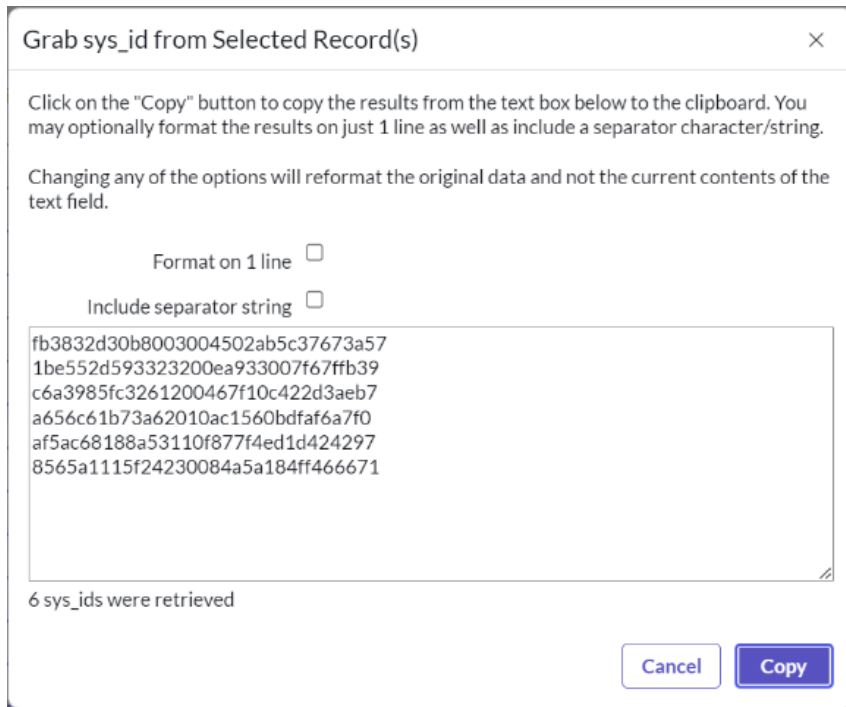
This tool can be found as a Context Menu in your List View.

Select multiple records and right-click on the selected section. Click on the **Grab sys_id for Selected Records (ASI)** tool.



A custom UI Page that displaying the sys_ids will appear.

You may change the way the sys_ids are presented using these formatting options:



- Format on 1 line – Will reformat the sys_ids in sequential order, one after the other.
- Include separator on string – This will allow you to select a separator between the sys_ids. (for example: comma, space, colon, etc)

Once formatted the way you desire, select the text you want and click the Copy button (standard ctrl-c/command-c, or system OS copying functions also work).

NOTE: If you do not have any records selected, clicking the Copy button will grab the sys_id from the record you right-clicked over to open the menu.

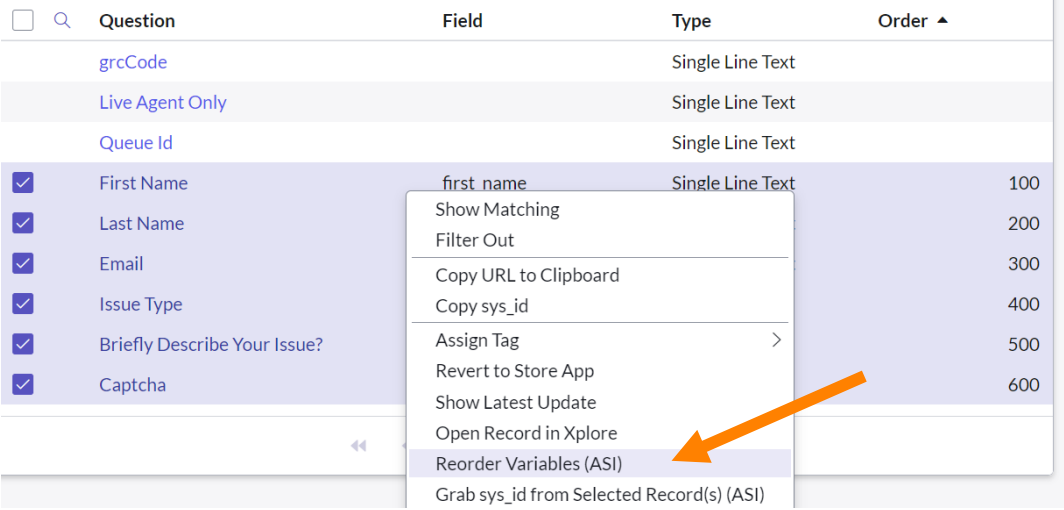
5.2.6 Reorder Variables

When creating or modifying Catalog items or Variable Set Variables, an *Order* number is assigned to each item. If there is a need to insert additional, or re-order them, users must individually and manually change each number, making the task tedious and lengthy.

With the PowerClicks Toolkit Essentials **Reorder Variables** tool, you can re-number any selected number of items in a single action (i.e. assigning new order numbers).

This tool appears in the platform as a List context menu, List choice UI Action and UI Page, allowing a user to quickly gain access to it.

Select multiple records/Variables and right-click on the selected section. Click on the **Reorder Variables (ASI)** tool.

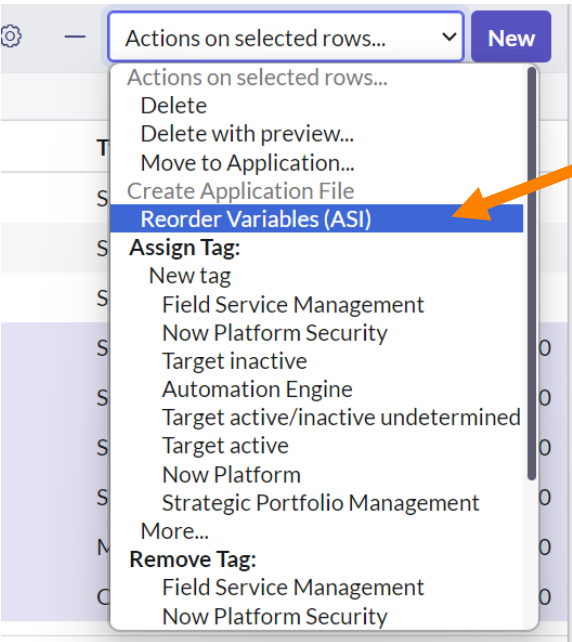


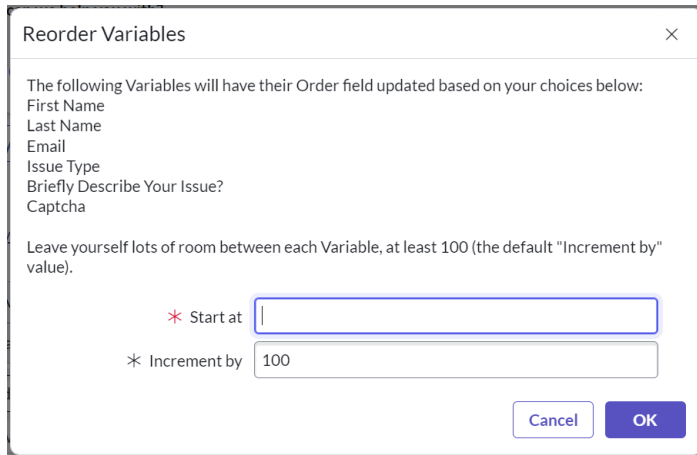
	Question	Field	Type	Order ▲
	grcCode		Single Line Text	
	Live Agent Only		Single Line Text	
	Queue Id		Single Line Text	
✓	First Name	first_name	Single Line Text	100
✓	Last Name			200
✓	Email			300
✓	Issue Type			400
✓	Briefly Describe Your Issue?			500
✓	Captcha			600

- Show Matching
- Filter Out
- Copy URL to Clipboard
- Copy sys_id
- Assign Tag >
- Revert to Store App
- Show Latest Update
- Open Record in Xplore
- Reorder Variables (ASI)**
- Grab sys_id from Selected Record(s) (ASI)

Alternatively, select multiple records/Variables and select **Reorder Variables (ASI)** from the List Choice.

The Reorder Variables UI Page will be displayed.



A dialog box titled "Reorder Variables" with a close button (X) in the top right corner. The text inside reads: "The following Variables will have their Order field updated based on your choices below:" followed by a list of variables: "First Name", "Last Name", "Email", "Issue Type", "Briefly Describe Your Issue?", and "Captcha". Below this list, it says: "Leave yourself lots of room between each Variable, at least 100 (the default 'Increment by' value).". There are two input fields: "Start at" with a red asterisk icon and "Increment by" with a grey asterisk icon. The "Increment by" field has the value "100" entered. At the bottom right are "Cancel" and "OK" buttons.

Reorder Variables

The following Variables will have their Order field updated based on your choices below:

- First Name
- Last Name
- Email
- Issue Type
- Briefly Describe Your Issue?
- Captcha

Leave yourself lots of room between each Variable, at least 100 (the default "Increment by" value).

* Start at

* Increment by

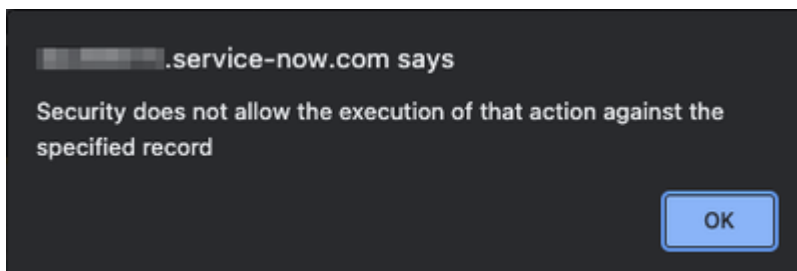
Cancel OK

Select a new "Start at" number as well as the "Increment by" value, which is, by default, set to 100. It is best practice to allow some room between each Variable, to provide the ability to add additional in-between existing ones.

Click on the *OK* button to make the changes. It may take a moment for the change to complete and for the screen to reload. Depending on the variables selected, the Start number and increment values, you may have unselected variables fall in-between re-ordered ones.

Pay close attention to the re-ordered variable list to ensure the desired outcome was achieved.

NOTE: When selecting the **Reorder Variables (ASI)** tool, you may receive a message similar to the following:



This will occur if any of the selected items is not currently editable. This typically occurs because it is in a different Application Scope. When clicking OK, the Reorder Variables UI Page will also indicate which of the Variables will not be changed.

Any issues will be shown at the top of the form when it reloads. For example, you may receive a message similar to this one, if variables were not changed.:

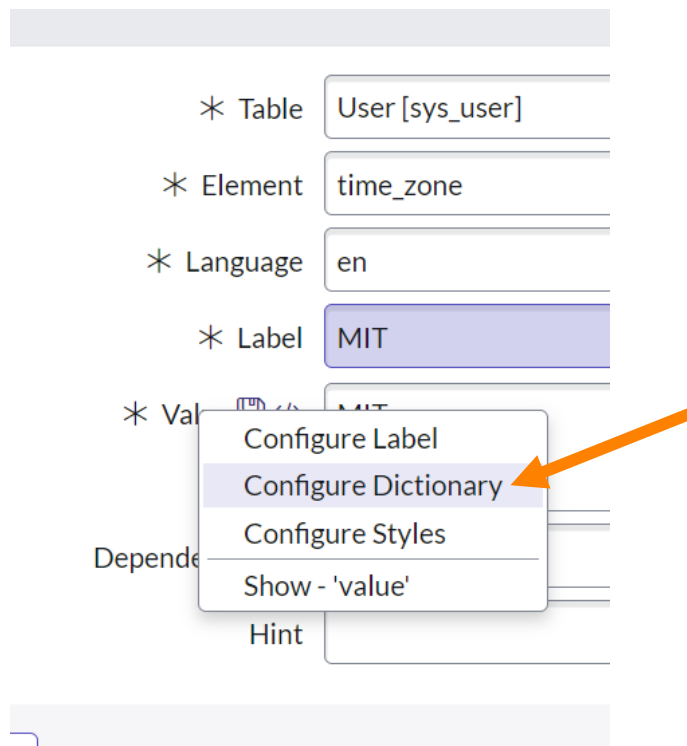


5.2.7 "Show Choice List Items" Tool

When you are configuring a drop-down choice list, there are a couple of ways to accomplish the items shown in the list. You can specify each of the items in the Choices Tab in the Dictionary Entry, or you may re-use an exiting base table that already has the list you want to use.

When re-using a base table, the **Show Choice List Items** tool makes it easy to see what Choice table entries are in the chosen base table. Clicking on the **Show Choice List Items (ASI)** will open a new tab/window with the Choice table entries for the selected "Choice table" and "Choice field" fields. It will appear when the "Choice" field is NOT "-- None --":

Here is an example of how to use the tool.



Choice List Specification Dependent Field Calculated Value Default Value

Displays a list of suggested values in a **Choice** list. In the Advanced view you can see

Choice	Dropdown with -- None --
Choice table	User [sys_user]
Choice field	Time zone

[Update](#)

Related Links

[Show Table](#)
[Run Point Scan](#)
[Default view](#)
[Show Choice List Items \(ASI\)](#)

Navigate to the choice record. Right click on a label and select Configure Dictionary.

Select your desired settings for the **Choice**, **Choice table** and **Choice field**. Click on the **Show Choice List items (ASI)** tool, which is located in the Related Links.

Choices
Table

All > Table = sys_user > Element = time_zone

Table	Element	Language
=sys_user	=time_zone	Se
sys_user	time_zone	en
sys_user	time_zone	en

A new browser tab/window will be opened, displaying the appropriate Choice table entries for your selection.

Choice Dropdown with -- None --

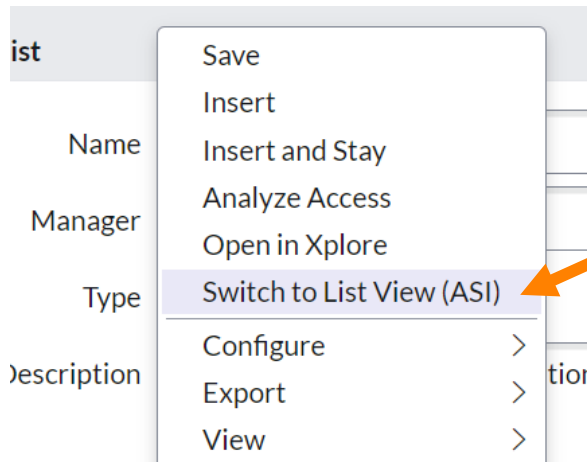
Both the "Choice table" and "Choice field" fields must be populated for the "Show Choice List Items" UI Action to work. You might have to switch to the "Advanced" View to see them.

You may receive this error when clicking on the **Show Choice List items (ASI)** tool. Change your view to Advanced to ensure proper functionality.

5.2.8 "Switch to List View" Tool

Here is "Switch to List View". It's a "Form context menu" UI Action that simply switches to the list view for the table, and filters the list to only display the current record.

It's useful, for instance, when you need to see or modify a field that is not, for whatever reason, displayed on the form view. You can personalize your list view, add the appropriate fields and update the record if you need to.



Users

New

Go to

User ID

▼

Search

All > Sys ID = 67fa7bec4f3032007af9be218110c7aa

User ID ▲

Active

Do not delete

Hide record

Preserve during clone

Name

Search

Search

Search

Search

Search

Search

\$jcoyne

true

false

false

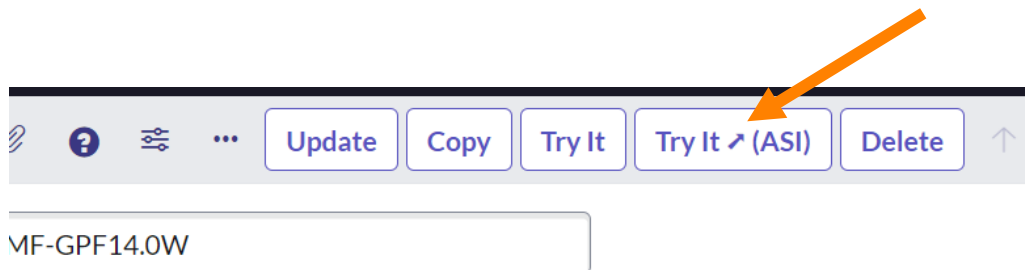
false

Jim Coyne

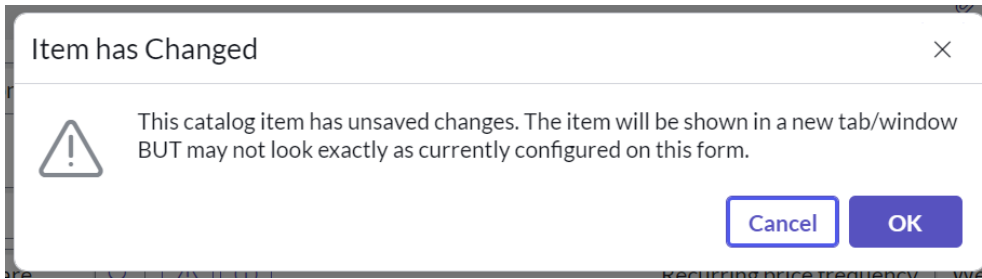
5.2.9 Enhanced “Try it” for Catalog items

This tool gives users the ability to quickly see the changes to a Catalog item, in a separate browser window, keeping it within the regular user interface (NOT a Portal).

ServiceNow provides an Out-of-Box **Try it** UI Action, but with less restrictive conditions (must be active and user must have "catalog_admin" Role) and will render the item in the current page.



The **Enhanced “Try it” for Catalog items** UI Action opens it in a new tab/window, allowing you to work on the item and simply refresh the new tab/window to see the results, making your work quicker and much easier.



If there are any unsaved changes, a warning will appear. Clicking on OK will open the new tab/window without the unsaved changes. Once the changes have been saved/updated, refresh the new tab/window to see the updated Catalog item.

6.0 Support

If you require further support, have comments or even have a feature request, please contact us by visiting us at <https://www.altorra.com/support> or by emailing us at support@altorra.com.

Thank you for your interest in Altorra Solutions products and services.