Altorra PowerClick Toolkit Essentials User Guide

December 2024 – v1.3

altorra.com

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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, administrating 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.

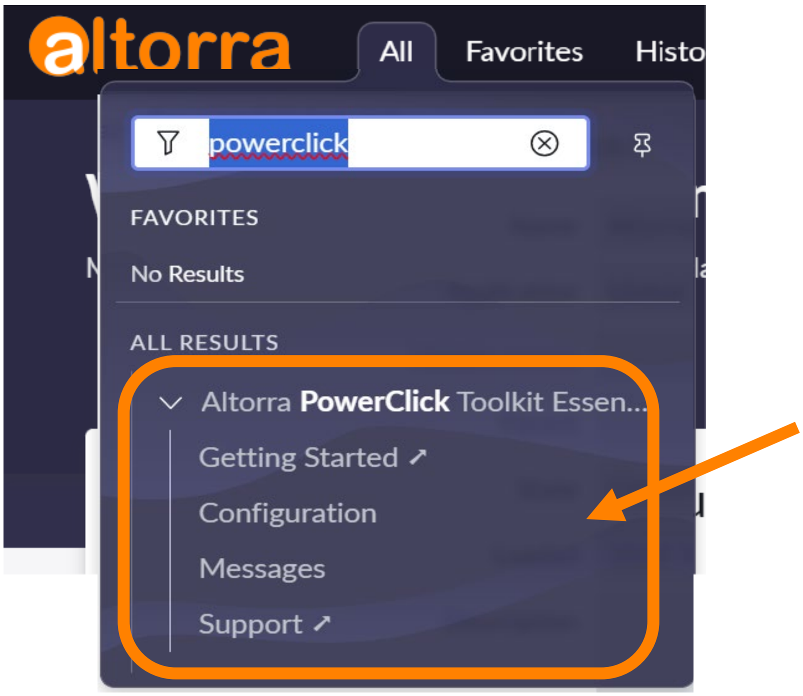
The toolkit can be installed on any instance you manage.

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.

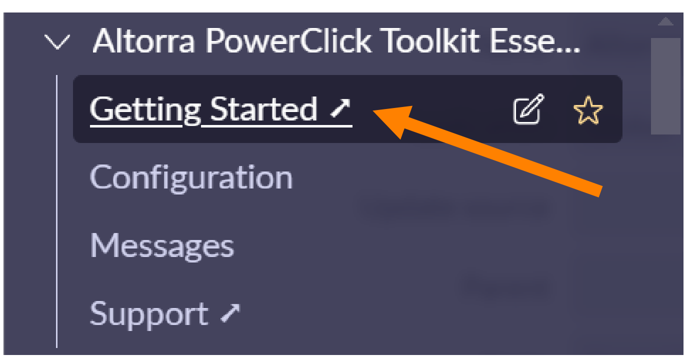
4. Application Menu

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



It contains the following Modules:

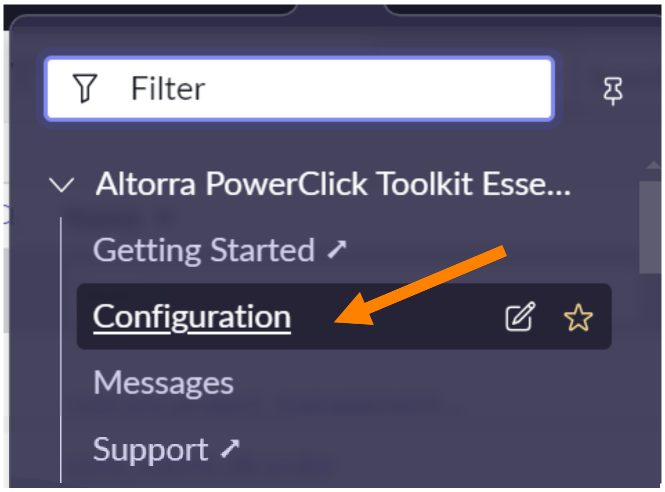
4.1 Getting Started



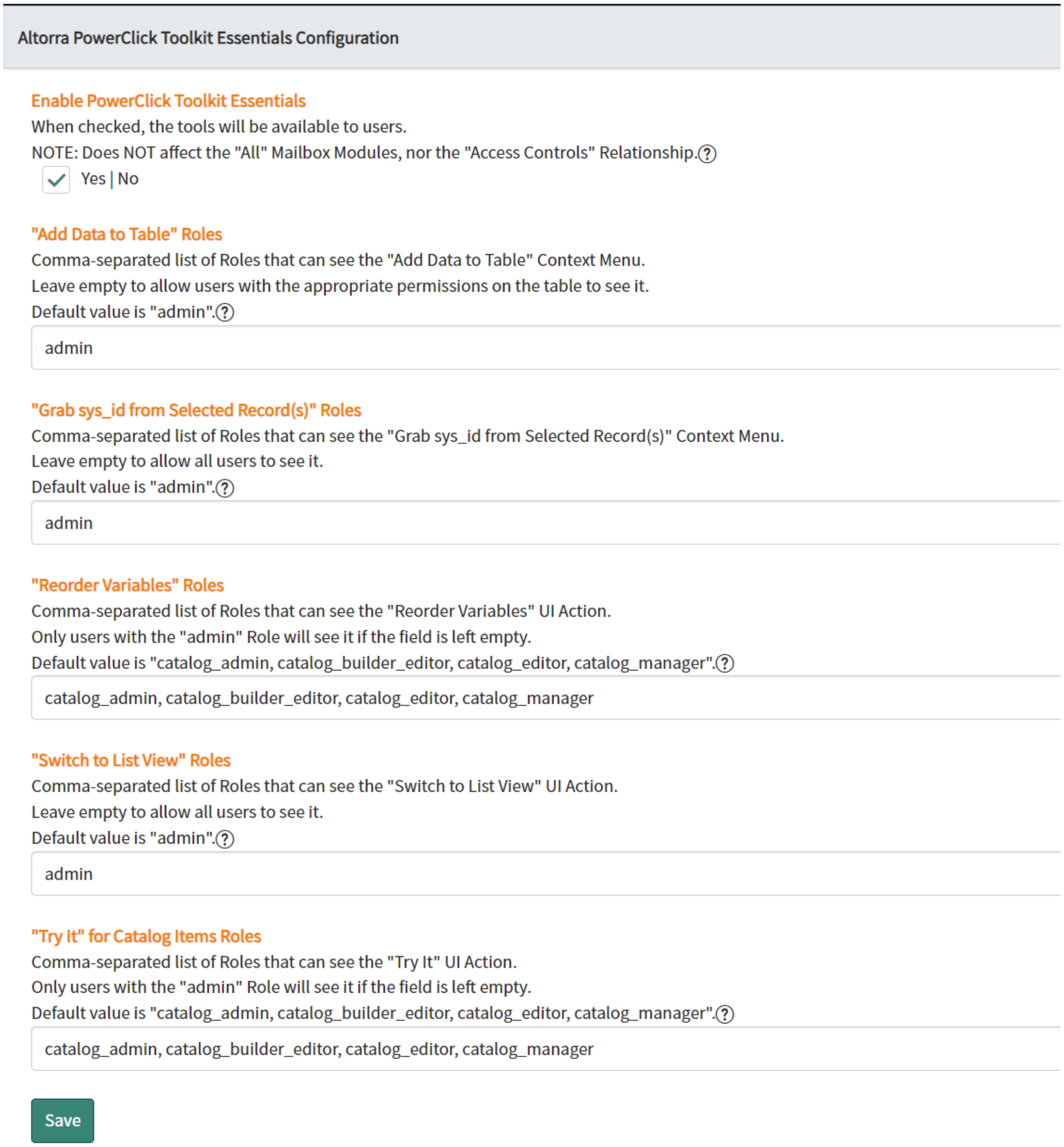
This Module will open the Altorra **PowerClick Toolkit Essentials** product page in a new browser tab/window.

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.



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"

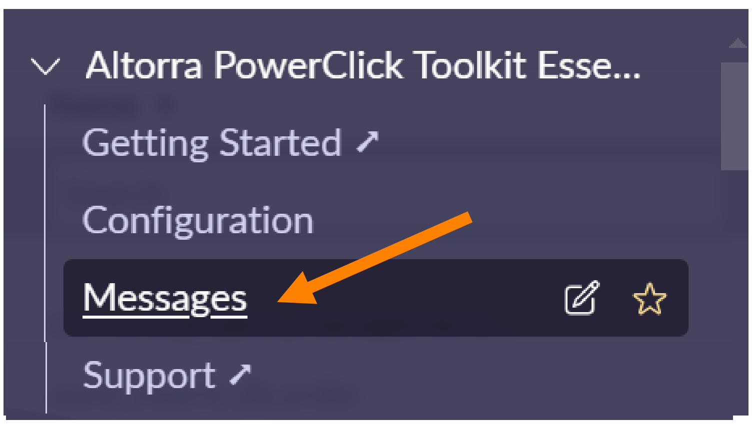
"Try It" for Catalog Items Roles

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.

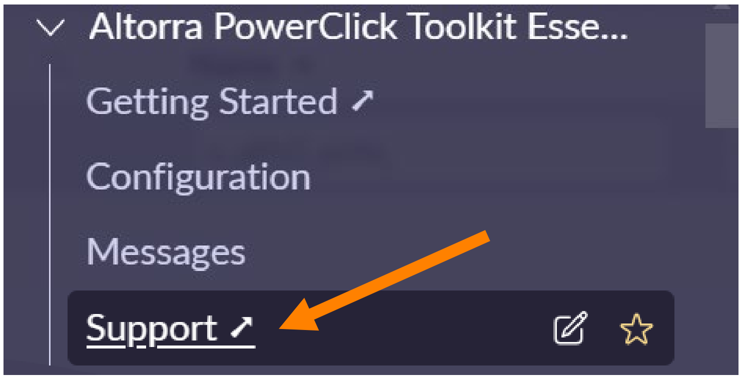
Default value is "catalog_admin, catalog_builder_editor, catalog_editor, catalog_manager".

4.3 Messages



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

4.4 Support



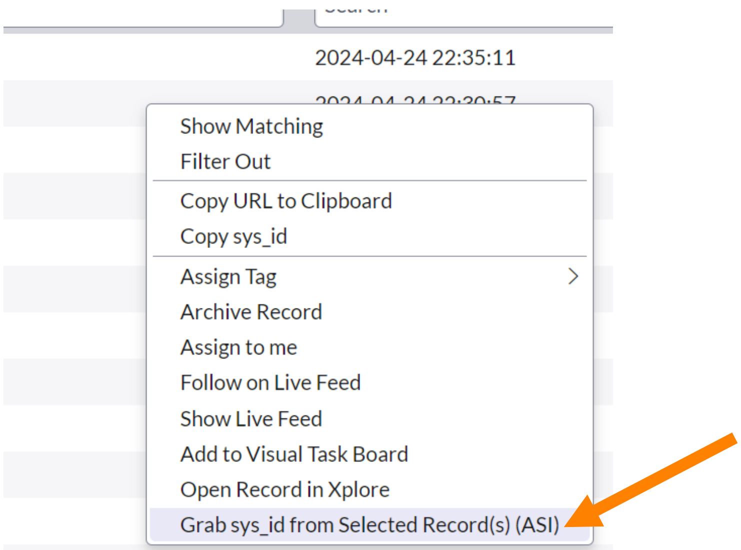
Should you ever require assistance, have a comment or want to request a feature enhancement, this menu item will open the **PowerClick Toolkit Essentials** Support page, where you can get answers and also reach out to us.

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.

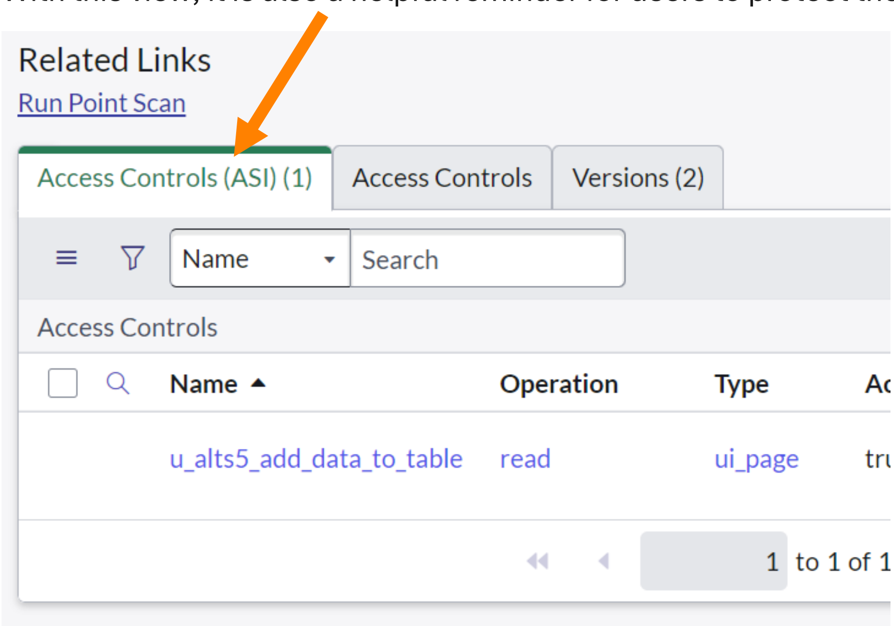
5.2 Tools & Features of Toolkit

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.

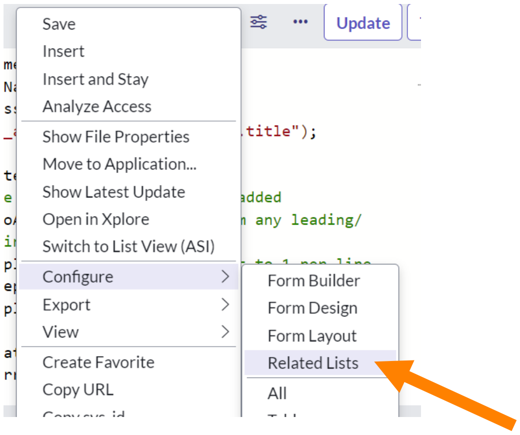
ServiceNow offers an Access Controls view, but the functionality is not reliable in all situations. With Altorra's **Access Controls (ASI)**, you can rely on it for the correct access controls associated to the particular UI page.

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

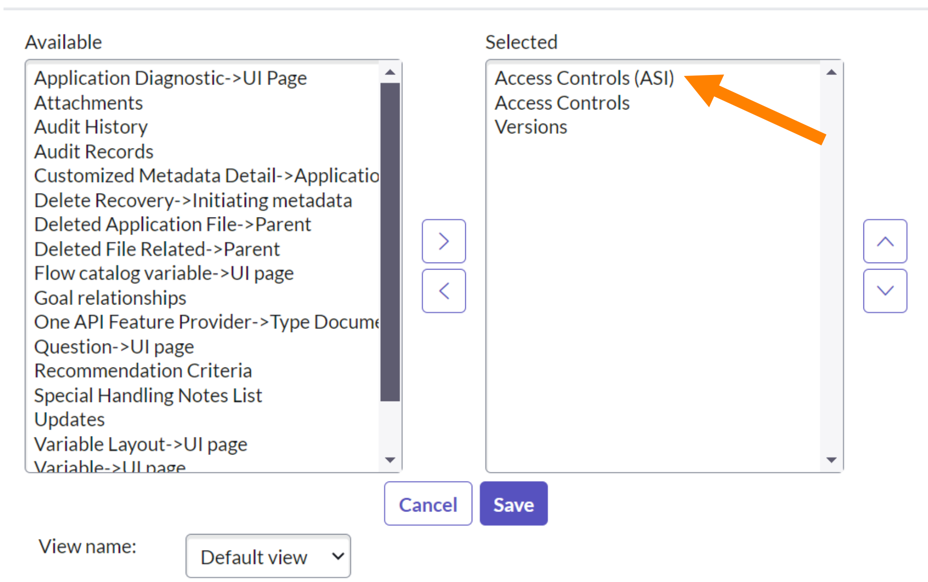


Adding the **Access Controls (ASI)** view is quick and easy, simply follow these simple steps:

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.



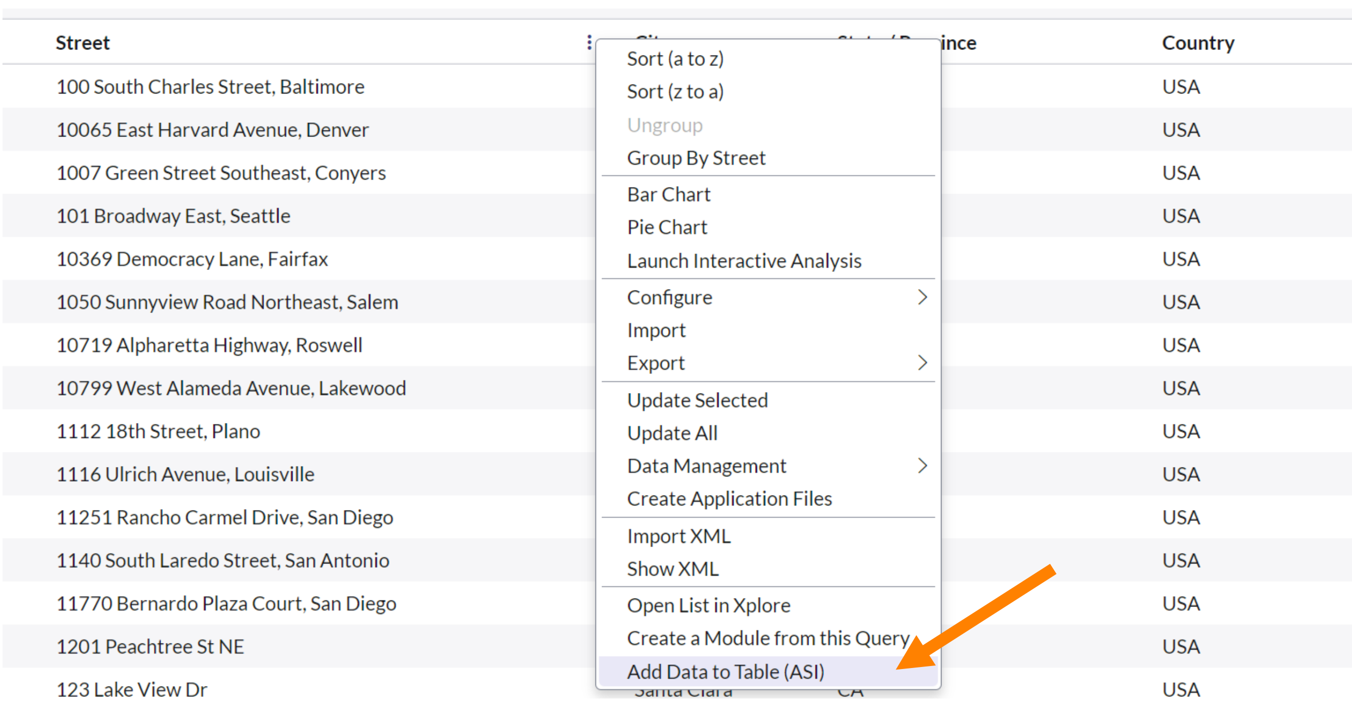
4. The **Access Controls (ASI)** tab will now appear under the Related Links section.

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.

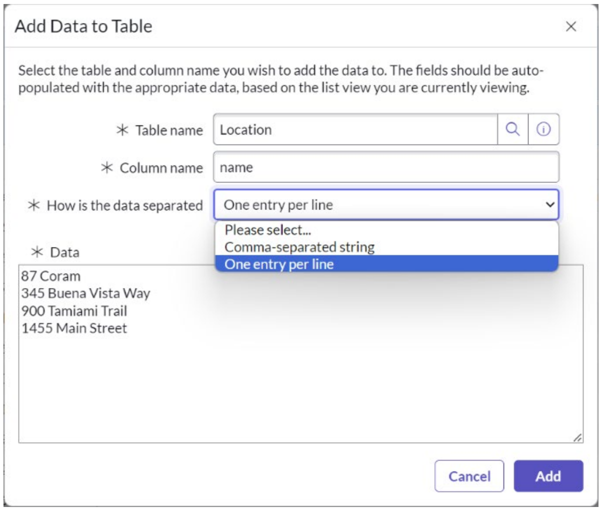
You access the tool by selecting the ***Add Data to Table (ASI)*** Context Menu by right-clicking the list header, or clicking the vertical ellipsis (⋮).



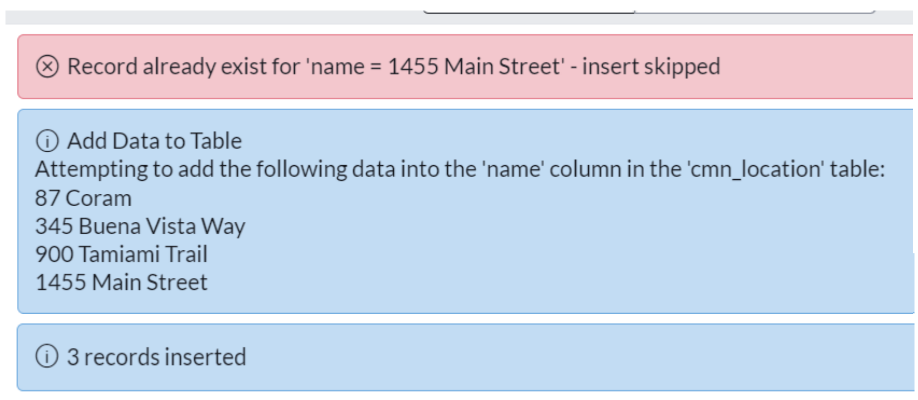
A popup window appears with 4 sections: ***Table name***, ***Column name***, ***How is the data separated*** and ***Data***. The table and field names should be auto populated for you, based on the list view you were looking at and that table's *display* value column.

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.



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.



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:

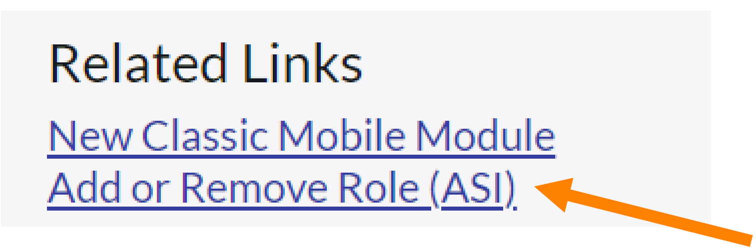
2024-06-30 18:40:15	Information	Add Data to Table Attempting to add the following data into the 'name' column in the 'cmn_location' table: 87 Coram 345 Buena Vista Way 900 Tamiami Trail 1455 Main Street Record already exist for 'name = 1455 Main Street' - insert skipped 3 records inserted

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

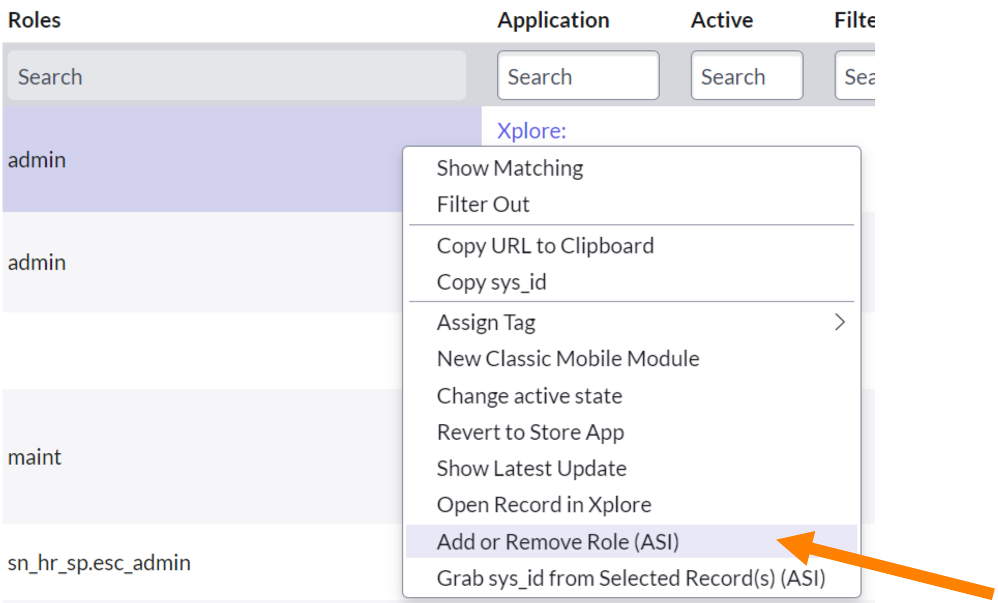
5.2.3 "Add or Remove Role" Tool (Modules)

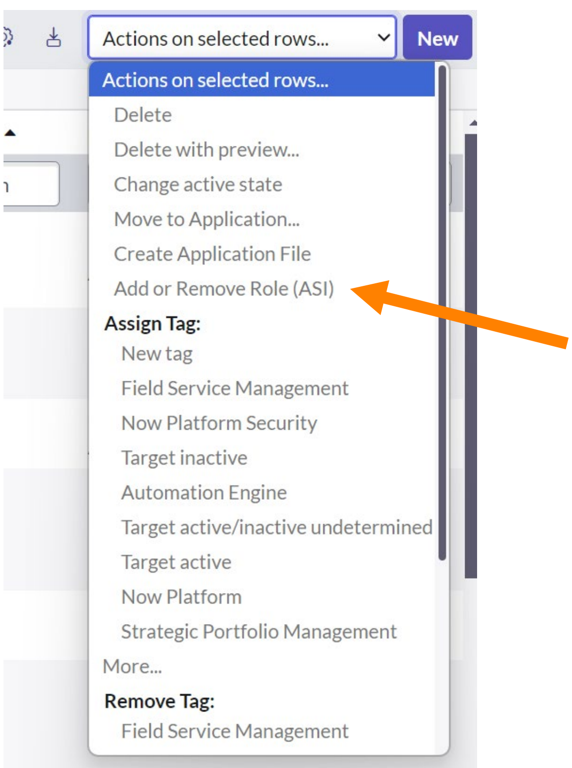
The ***Add or Remove Role*** tool makes it easy to add or remove a single Role to one or more Application Modules at once. You also have the option to remove all the Roles from the selected Modules.

Form view:



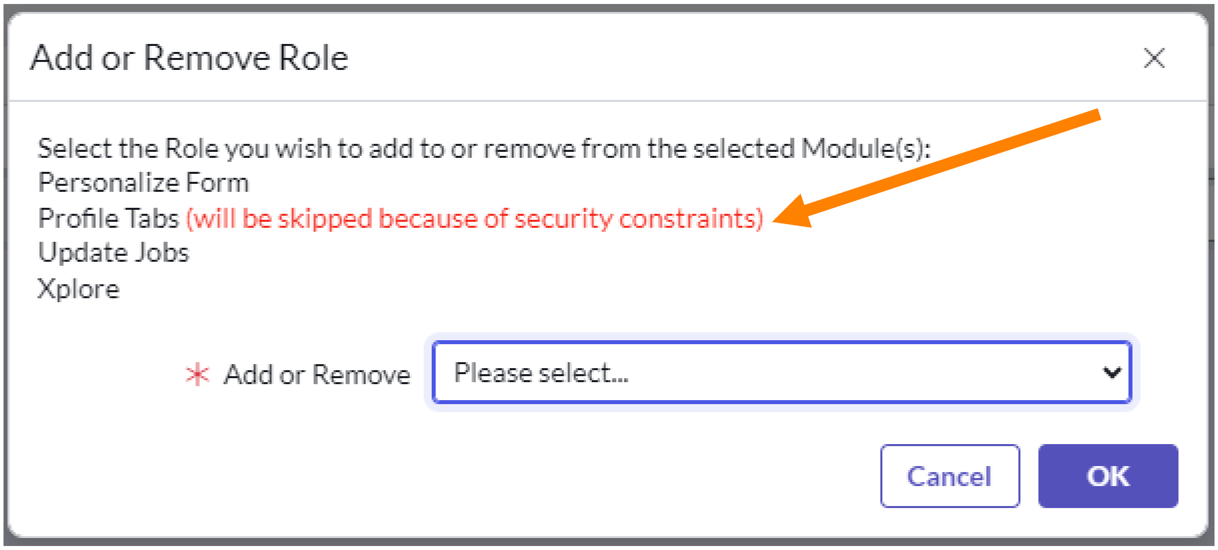
List view:



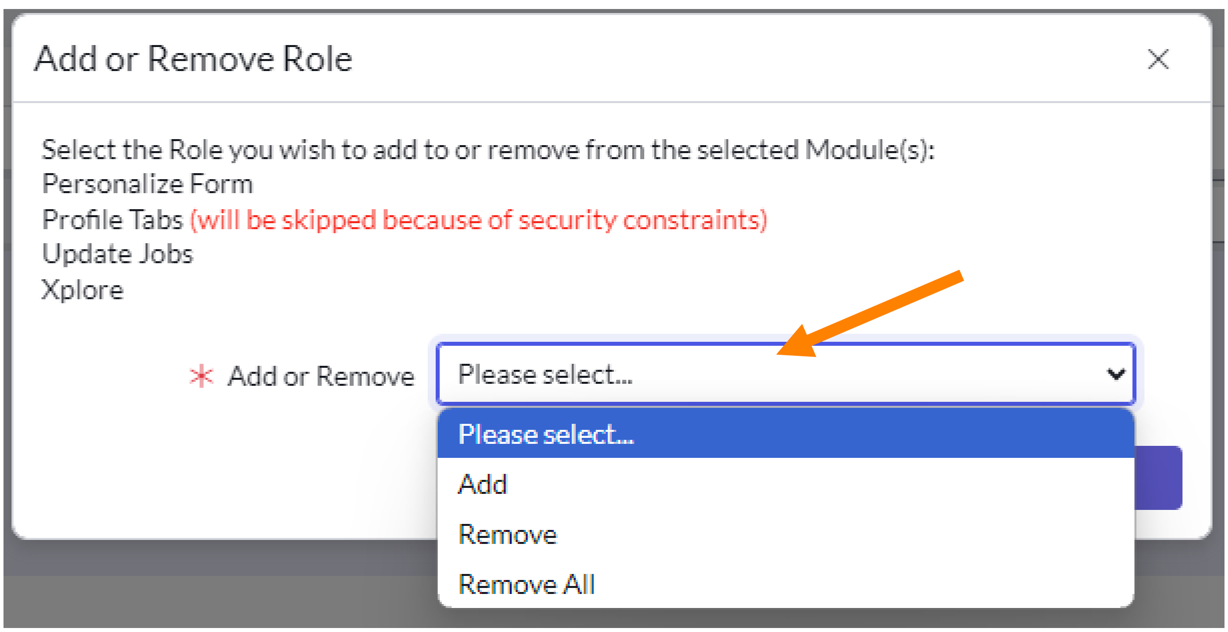


Select one or more records and click on Add or Remove Role (ASI) from one of the ways shown above.

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

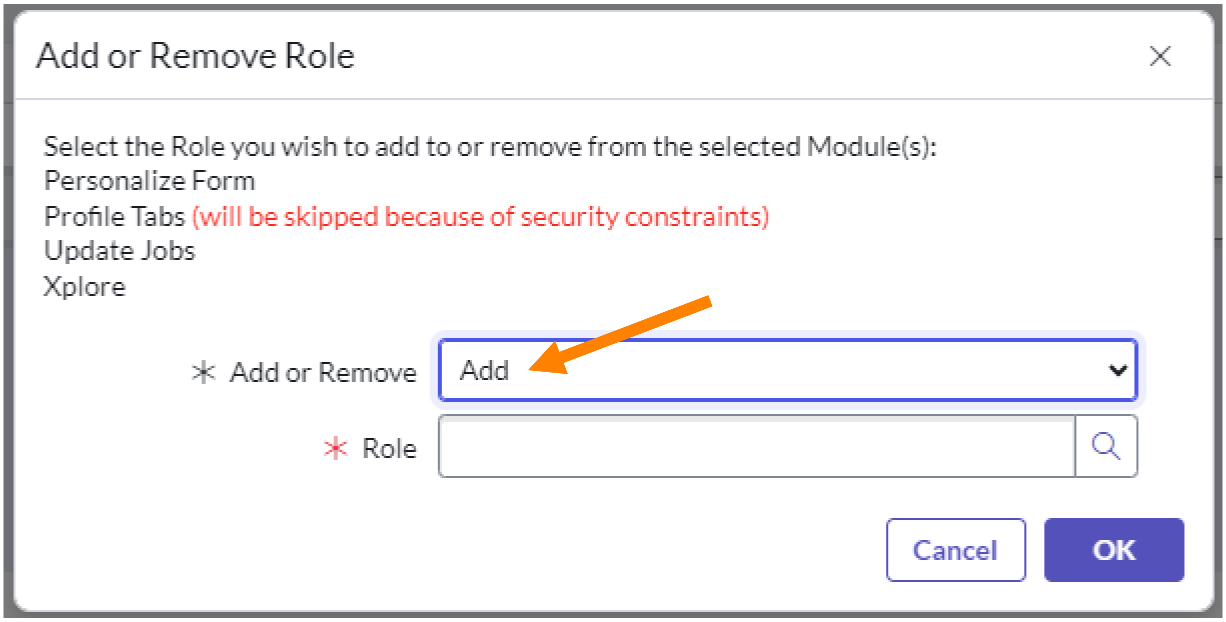


If any of the modules cannot be modified due to security constraint (i.e part of a different scope), it will be noted, as seen in the red colored warning.

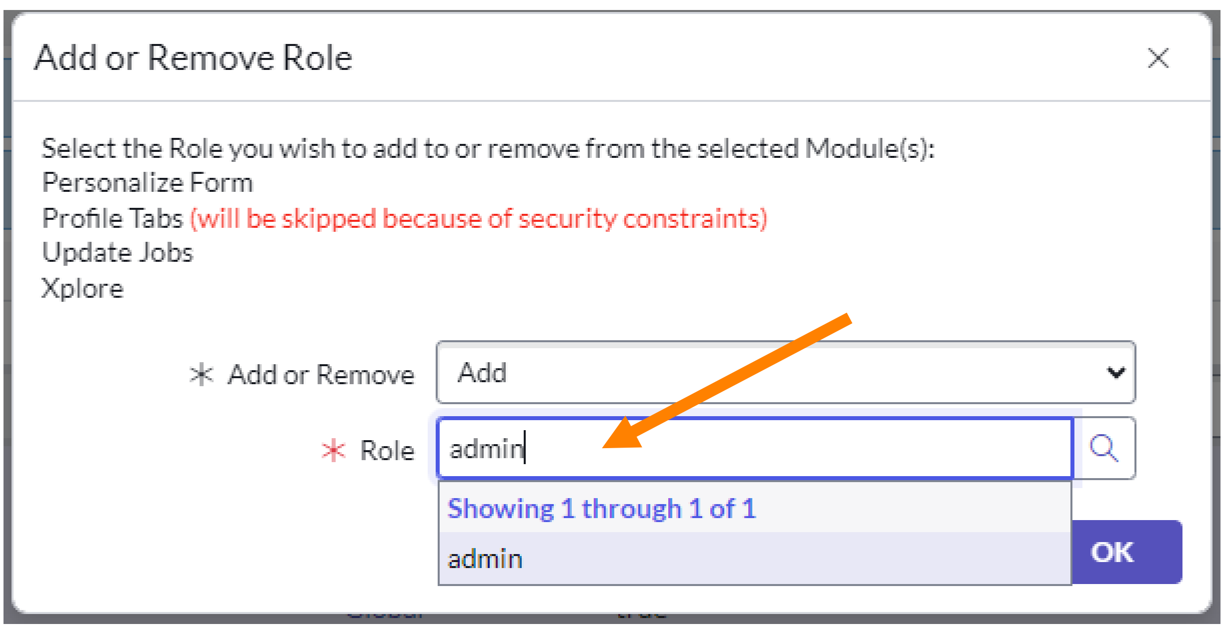


From the drop-down menu, select which action you wish to perform on the modules.

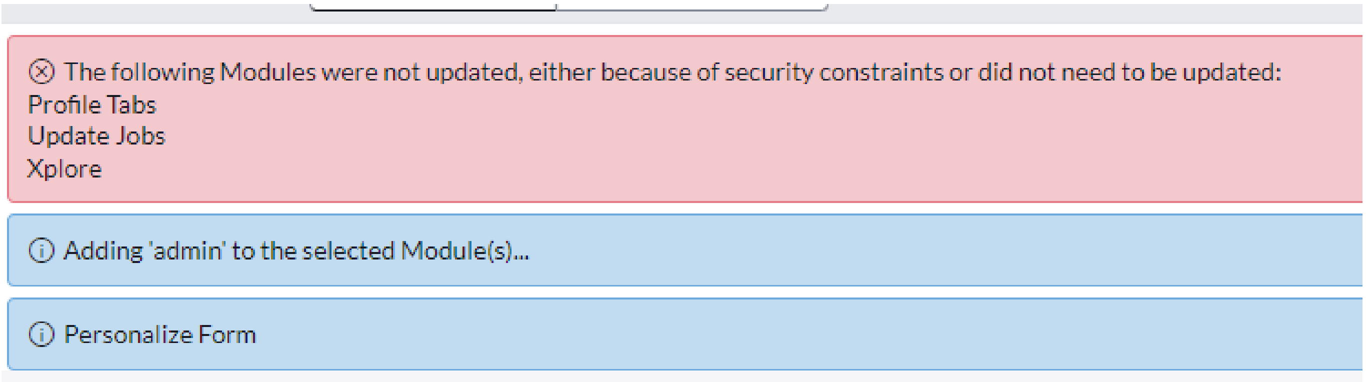
- **Add** – allows you to add a role to all selected module(s)
- **Remove** – will remove a role from the selected module(s)
- **Remove all** - will remove ALL roles from the selected module(s)



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.

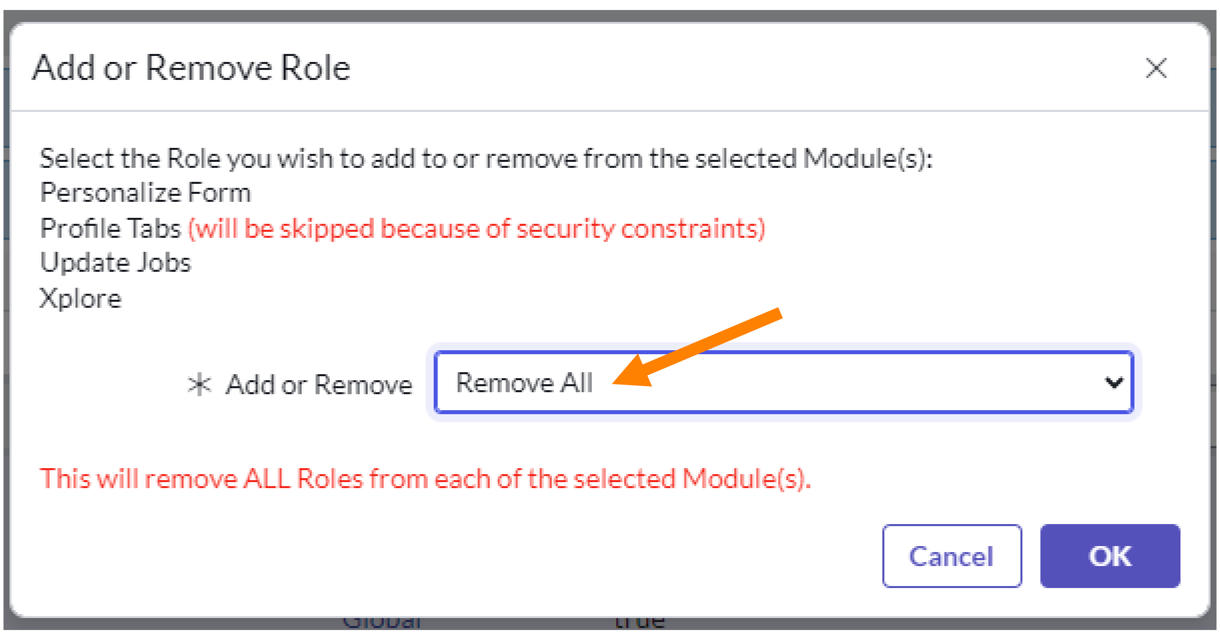


Select the role you wish to add or remove. Click OK.



Informational messages will be presented to describe which actions to 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.

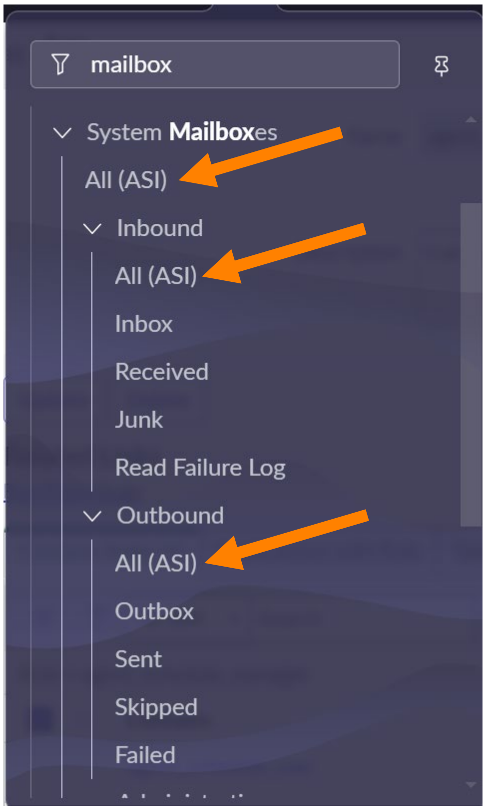
The **Remove** functionality behaves in the same way, except it will remove the identified role from the selected module(s) .



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 <u>today</u>, 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.

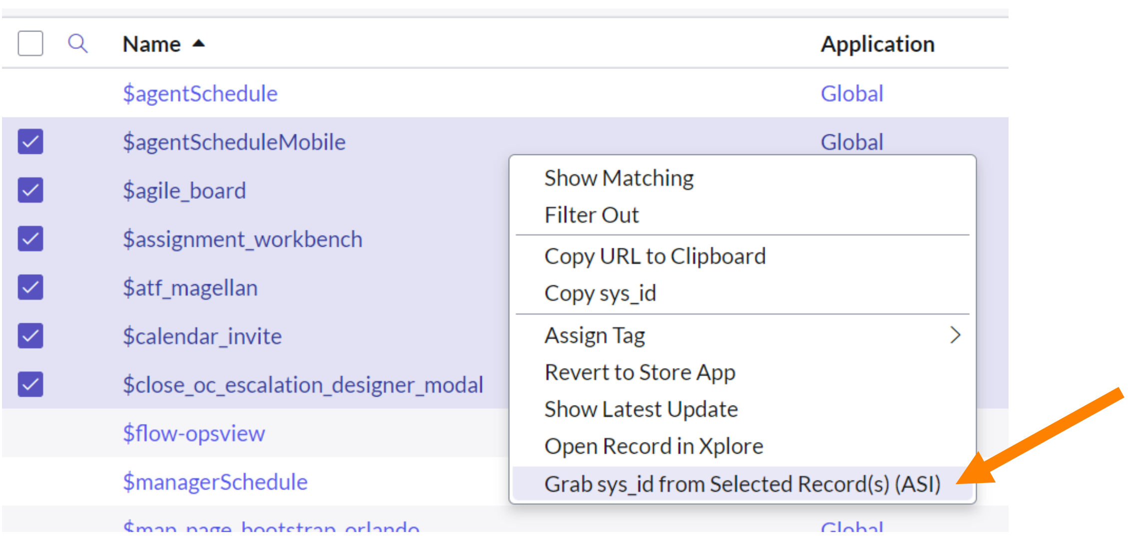
5.2.5 Grab sys_id from Selected Records

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 tools allows users to display and copy the sys_id for multiple records at the same time.

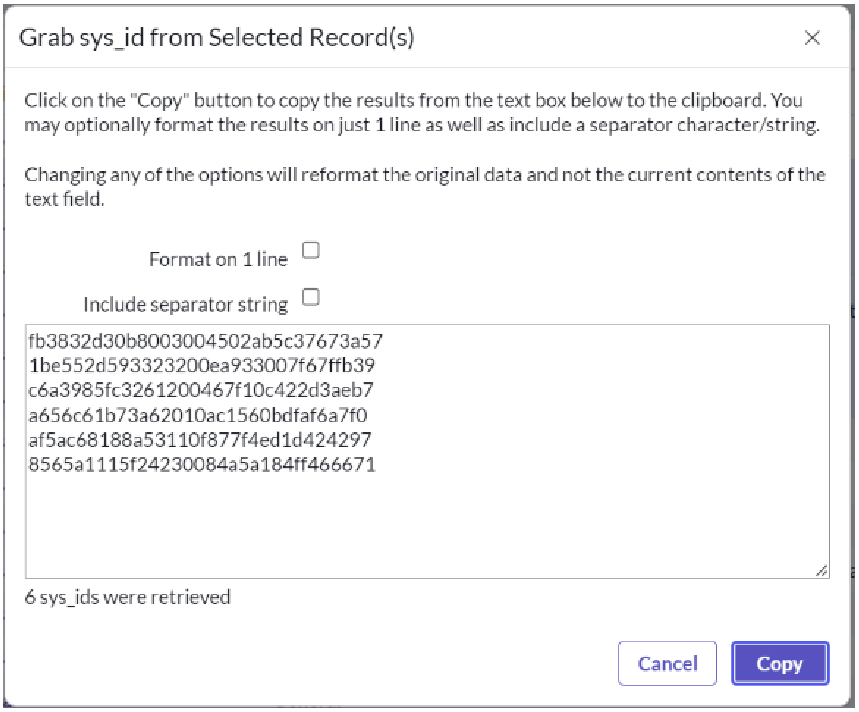
This tool can be found as a Context Menu in your List View.

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.

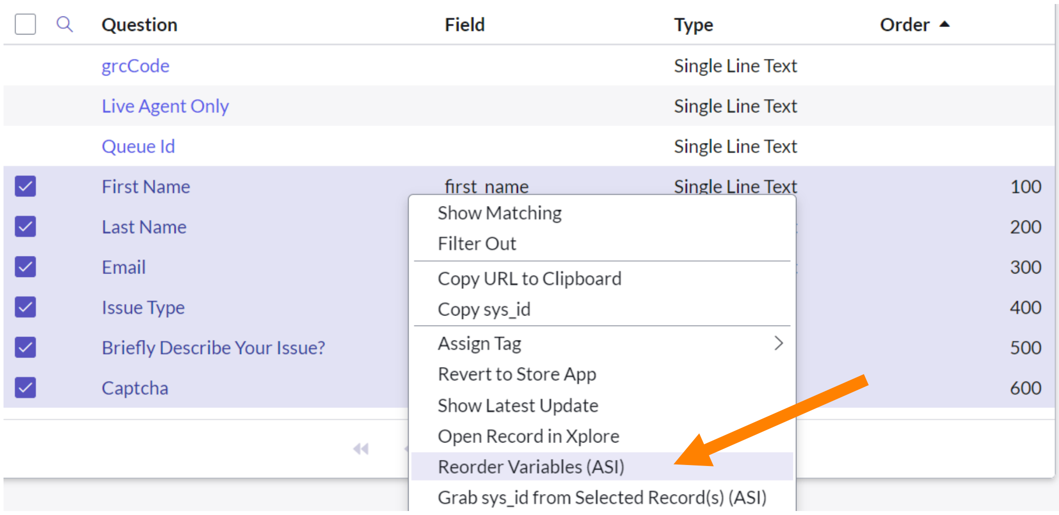
5.2.6 Reorder Variables

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).

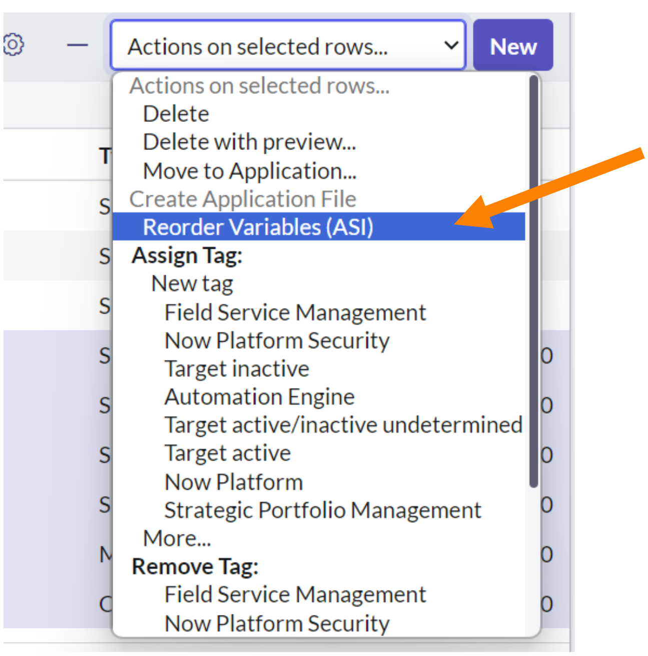
This tool appears in the platform as a List context menu, List choice UI Action and UI Page, allowing a user to quickly gain access to it.

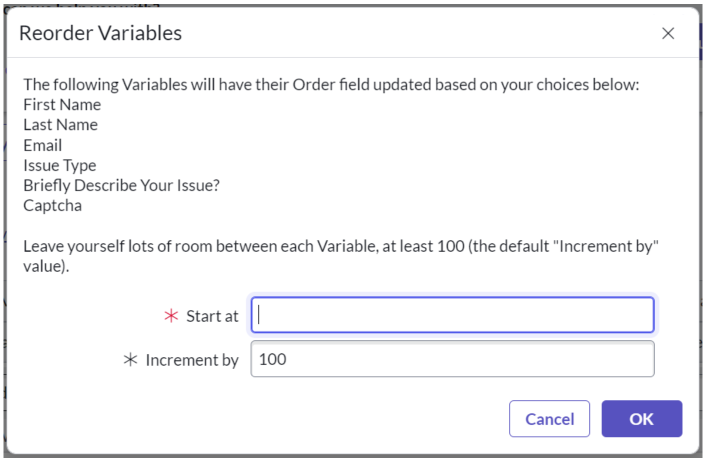
Select multiple records/Variables and right-click on the selected section. Click on the ***Reorder Variables (ASI)*** tool.



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

The Reorder Variables UI Page will be displayed.



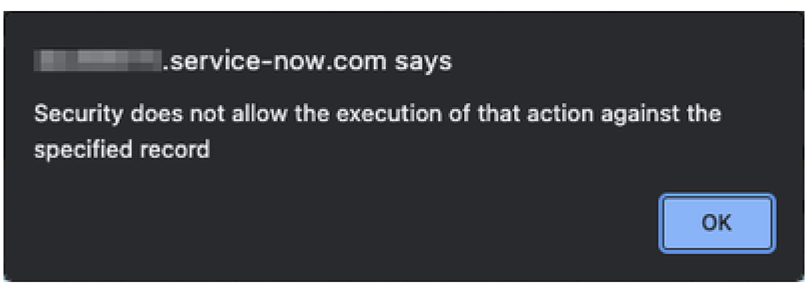


Select a new "Start at" number as well as the "Increment by" value, which is, by default, set to 100. It is best practice to allow some room between each Variable, to provide the ability to add additional in-between existing ones.

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.

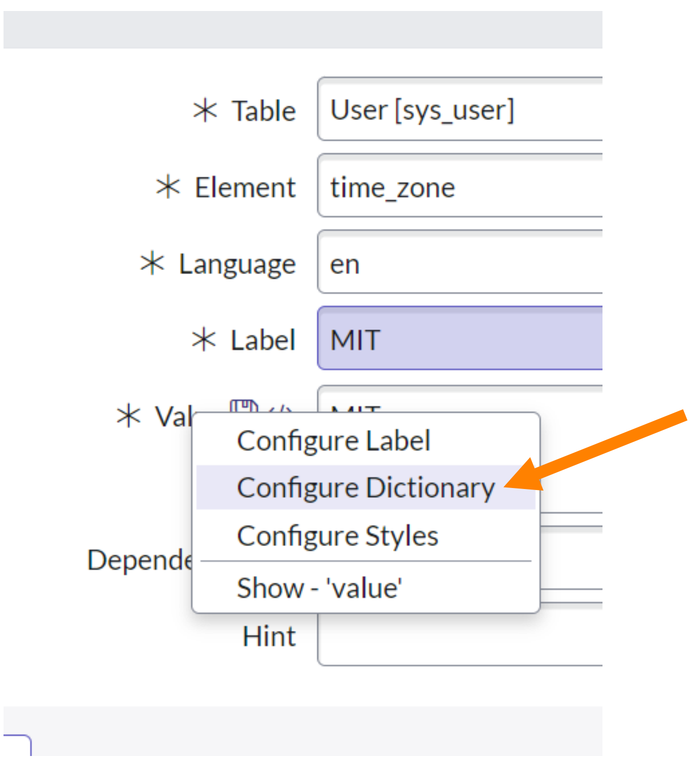
Any issues will be shown at the top of the form when it reloads. For example, you may receive a message similar to this one, if variables were not changed.:

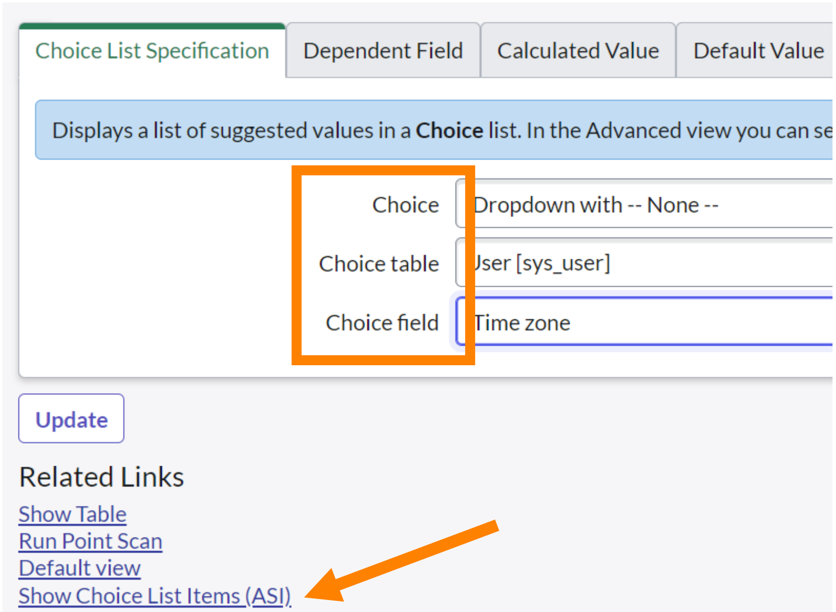
5.2.7 "Show Choice List Items" Tool

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 --":

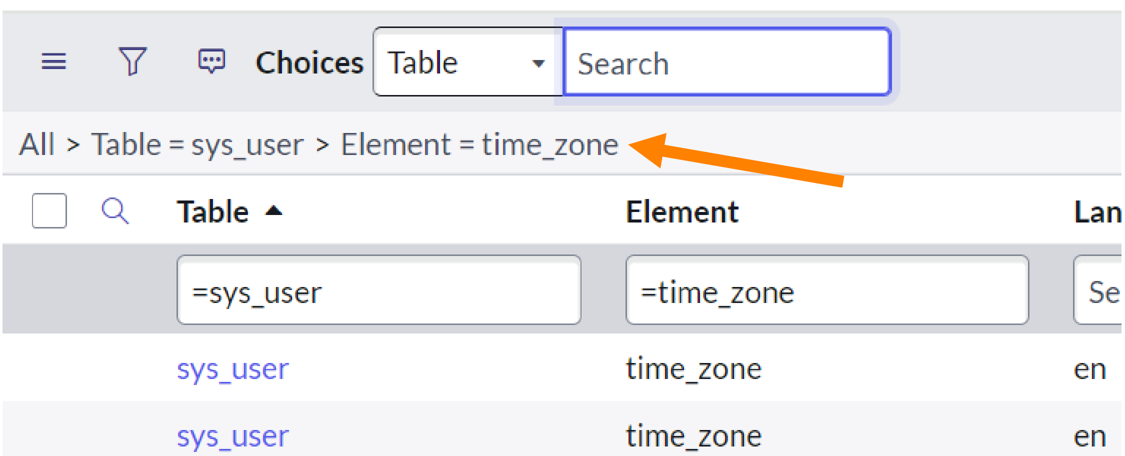
Here is an example of how to use the tool.



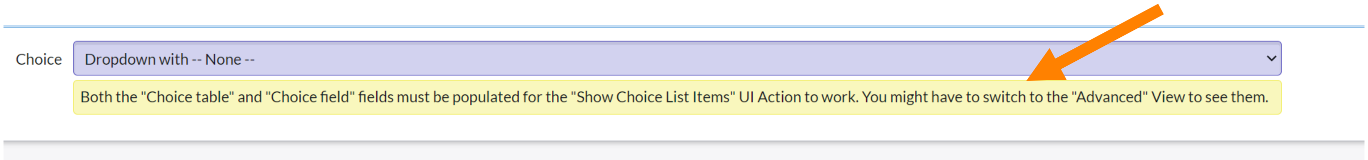


Navigate to the choice record.   Right click on a label and select Configure Dictionary.

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.



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

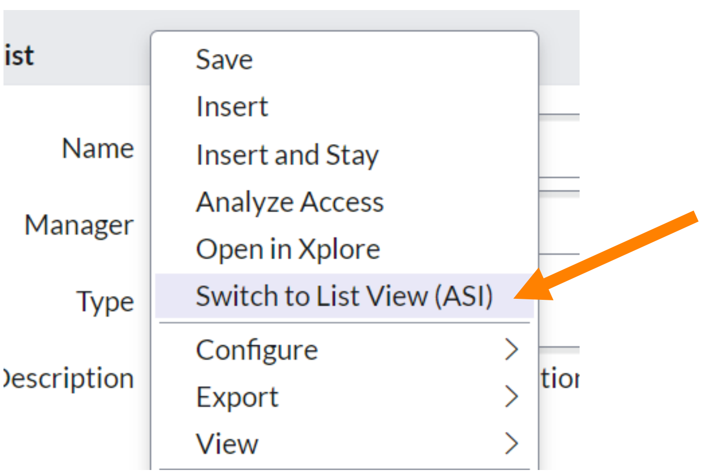


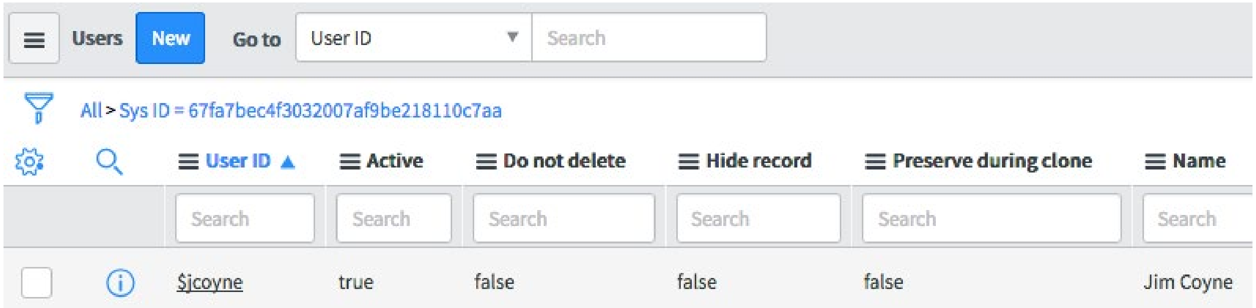
You may receive this error when clicking on the **Show Choice List items (ASI)** tool. Change your view to Advanced to ensure proper functionality.

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.

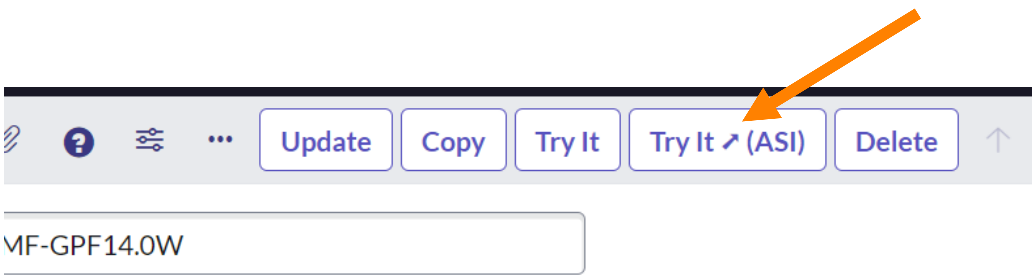




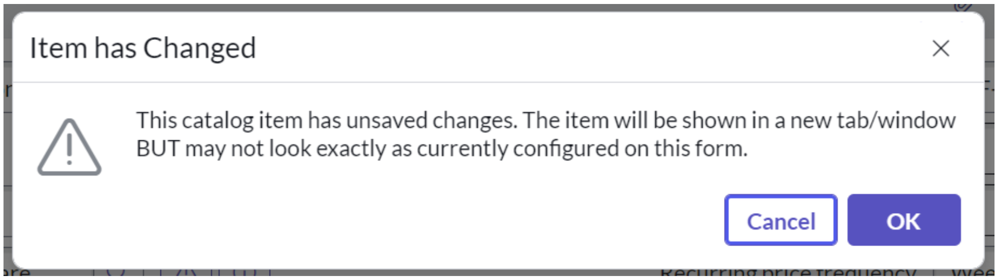
5.2.9 Enhanced “Try it” for Catalog items

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.