

How to Install Exalate for ServiceNow on Exalate Cloud

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Introduction

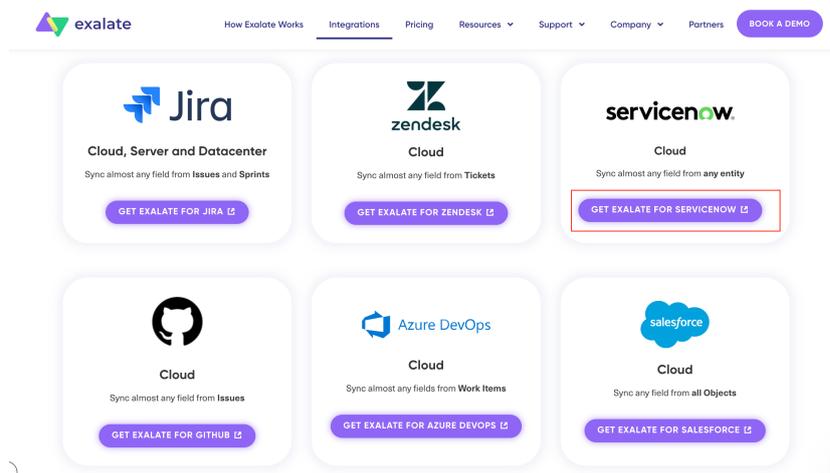
- Install Exalate for ServiceNow on Exalate cloud
 - Request an evaluation instance of Exalate for ServiceNow
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 - Set up Exalate in your ServiceNow instance using an update set
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Install Exalate for ServiceNow on Exalate Cloud

This section describes how to request a ServiceNow integration for Exalate.

Request an Evaluation Instance of Exalate for ServiceNow

1. Go to the Exalate Integrations page: <https://exalate.com/integrations/>
2. Select ServiceNow



3. Enter your info

Reserve an Exalate for ServiceNow evaluation instance ✕

The Exalate for ServiceNow instance will allow you to setup a fully functional integration between your ServiceNow environment and any other supported tracking platform.

Enter Organisation*

Enter First name

Enter Last name*

Enter Phone number*

Enter Email address*

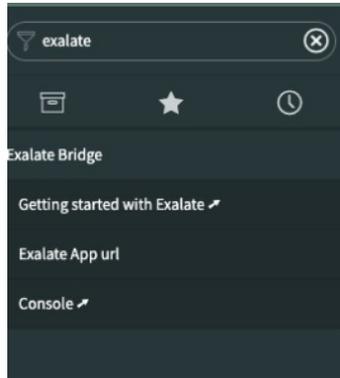
SUBMIT

We respect your privacy - more details [here](#)

4. Press **Submit**

After you submit a request you will get the following email:

- Create 2 Roles
 - x_idnv_exa_bridge.admin
 - x_idnv_exa_bridge.integration
- Creates 3 ACL on the sync_journal_field table
 - read, create, write
- Add a link to the console in the exalate bridge application menu



To know more about the further steps visit the [Deploy Exalate for ServiceNow guide](#).

Configure Exalate for ServiceNow

Once you've configured the Exalate app in the ServiceNow instance, you can proceed with the app configuration.

Step 1: Set up a proxy user on ServiceNow

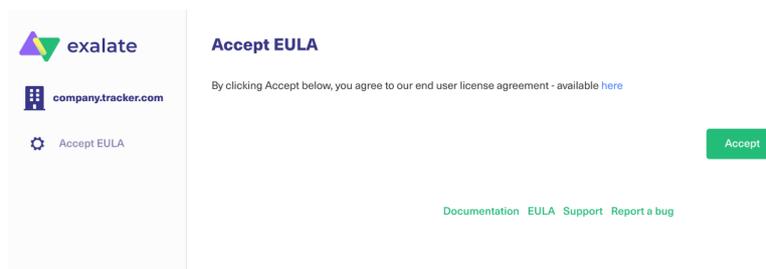
A proxy user is a ServiceNow service account that is responsible for accessing the information stored on your instance and applying any incoming changes.

Create a service account on your ServiceNow environment. This service account will require a number of permissions as documented [here](#)

To simplify this step, you can also use an update package which will automatically configure the necessary settings. Details of deploying this updated package are available [here](#)

Step 2: Accept the EULA

By using this product we require an explicit approval of the end user license agreement, which can be found [here](#)



Step 3: Connect the Exalate for ServiceNow to your instance

In the second step, you will need to connect the Exalate for ServiceNow with your instance.

You will need

- The URL of your ServiceNow instance. This URL must be accessible from this application.
- The details of the proxy user: The username and either the password, or an OAuth token. (More information on retrieving the OAuth token are documented [here](#))
- The license The evaluation or production license which unlocks the functionality of the application.

You will get notified if something fails

Step 4: Access the Exalate Console

The Exalate console is where integrations are configured. To access the console you will need a ServiceNow account with administration permissions.

Prepare your admin username and either the password or an OAuth token

Step 5: Configure General Settings

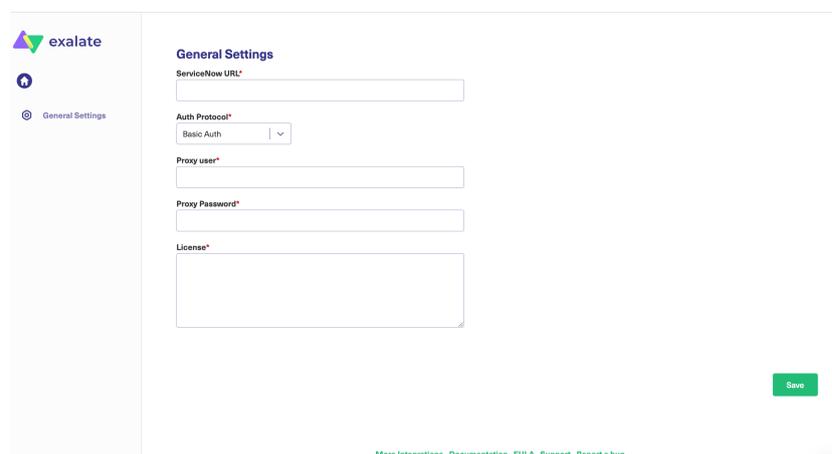
You need to specify your ServiceNow instance URL, the proxy user access details, and the evaluation license key.

The **proxy user** is a dedicated user in your ServiceNow instance. The proxy user must have permission to **Create/Read/Update** entities on ServiceNow. If you want to Create/Read/Update Incidents, Cases, Problems, or Change Requests in ServiceNow, the user needs to have roles for that.

In ServiceNow, proxy users can sync tables or attributes based on the access from their user role. Check [Exalate for ServiceNow: Proxy user permissions](#) for more information.

Note: In ServiceNow, proxy users can sync tables or attributes based on the access from their user role. Please see [Exalate for ServiceNow: Proxy user permissions](#) for more information.

You can find the license key in the email along with your Exalate app URL.



The screenshot shows the 'General Settings' page in the Exalate application. The page has a sidebar on the left with the Exalate logo and a 'General Settings' link. The main content area is titled 'General Settings' and contains the following fields:

- ServiceNow URL***: A text input field.
- Auth Protocol***: A dropdown menu currently set to 'Basic Auth'.
- Proxy user***: A text input field.
- Proxy Password***: A text input field.
- License***: A large text area for entering the license key.

A green 'Save' button is located at the bottom right of the form. At the bottom of the page, there is a footer with links: 'More Integrations', 'Documentation', 'EULA', 'Support', and 'Report a bug'.

6. Save the Configuration

You will be redirected to the log-in screen.

7. Log in to the Exalate Admin Console

Log in

Use the credentials from an administrator account in the issue tracker.

Auth Protocol*
Basic Auth ▾
OAuth token
Password
Log in ⓘ

Basic Auth

Use your ServiceNow instance admin access credentials.

Log in

Use the credentials from an administrator account

Auth Protocol*
Basic Auth ▾
Username
Password
Log in ⓘ

We do not store ServiceNow instance access credentials. Exalate only checks if the admin user is valid.

OAuth Token

You need to have a ServiceNow endpoint to log in with an OAuth token.

Log in

Use the credentials from an administrator account in `dev53142.service-now.com`.

[To get more information, check out how to generate an OAuth2 token for ServiceNow](#)

Auth Protocol*

Token

Token

.....

Log in

Set Up OAuth Tokens in Exalate for ServiceNow

Here is the detailed procedure to [set up the login with OAuth tokens in Exalate for ServiceNow](#).

Install Exalate for ServiceNow on Your Own Server

You can host Exalate for ServiceNow on your own server. To do so, you need to install Exalate on Docker.

Check out [Docker documentation](#) for details on how to install Docker.

Here is a glimpse of the steps to do that.

- How to install Exalate for ServiceNow
 - Preview
 - 1. Create or download the docker-compose.yml
 - 2. Ensure that a correct database is a setup using a createdb.sh
 - 3. Set environment variables if necessary
 - 4. Start the application
- Troubleshooting

Check the detailed procedure in our [Install Exalate for ServiceNow on your own server](#) guide.

Configuring Proxy User Permissions

To change the proxy user in Exalate for ServiceNow:

1. Log in to the Exalate admin console.
2. Navigate to **General Settings**.
3. Input details:
 - ServiceNow instance URL.
 - Proxy user name.
 - Proxy user password.

General Settings

Issue Tracker URL *
https://dev83903.service-now.com

Proxy user *
Exalate_proxy

Proxy Password *

Cancel Save

Users and permissions

Note: For security reasons, it is better to create a separate role with specific permissions for a proxy user instead of giving him an administrator role.

To integrate Exalate with ServiceNow you need 2 ServiceNow user accounts:

Proxy User

The ServiceNow user account that fetches information from the ServiceNow instance and updates the ServiceNow entities with incoming changes.

The proxy user can integrate various tables or attributes depending on the permissions defined by his user role in ServiceNow.

Exalate Console User

The ServiceNow user is authorized to configure the Exalate app for ServiceNow. The Exalate console user must be an admin in your ServiceNow instance or the proxy user.

Exalate uses REST API to communicate with the ServiceNow issue tracker. By default, ServiceNow REST APIs use basic authentication or OAuth to authorize user access to REST APIs/endpoints. Therefore, the Exalate console users must have access to the ServiceNow instance admin configuration.

IMPORTANT: Role Management V2 REST API plugin must be installed and activated on your ServiceNow instance.

Starting from the New York version this plugin is included by default. But if you've recently updated your ServiceNow instance to the latest version you need to **activate Role Management V2 REST API plugin manually**. [ServiceNow contextual security](#).

Configuring access on ServiceNow

You can access the ServiceNow instance in one of these ways:

Basic Login

In order to log in you use a Username and a Password. Exalate will not store the password in the database, but use the rest connection to attempt to log in to the ServiceNow node.

OAuth Token

Authentication with a Username and an OAuth token. Exalate will store the token and use it to access it. The token is refreshed every time the lifespan ends.

Note: OAuth token can be used as long as the refresh token is valid. Read more about setting up the refresh token in the article [Access the Exalate app in ServiceNow](#).

You need to generate a new refresh token after the old one is expired. We suggest setting a longer lifespan for the refresh token.

Video Tutorial

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