Citrix ITSM Adapter service

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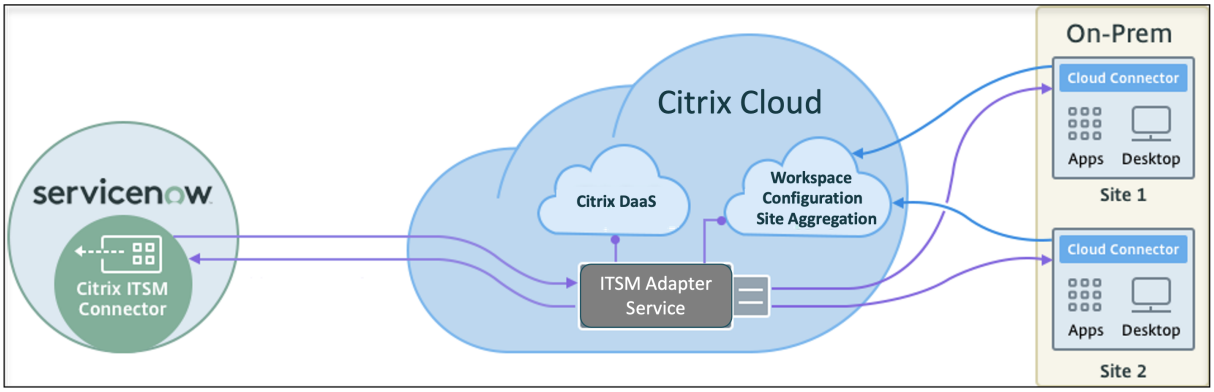
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Overview

November 18, 2025

IT Service Management (ITSM) Adapter is a Citrix Cloud service that is available with the Citrix Universal or Platform License. It lets you extend the ServiceNow capabilities into your Citrix environments. With the service, IT teams and end users can deliver and manage Citrix virtual apps and desktops directly from ServiceNow.

This document shows you how to deliver, manage, and monitor Citrix virtual apps and desktops™ by using workflows in ServiceNow, also known as ITSM workflows.



As shown in the graphic, the service connects Citrix DaaS and Citrix Virtual Apps and Desktop™ on-premises sites to ServiceNow. It requires you to install the *Citrix ITSM Connector* plug-in in ServiceNow.

The plug-in adds the following Citrix apps and desktops specific components to ServiceNow:

- **Default ITSM workflows.** IT help desks and end users use them to request and manage Citrix apps and desktops.
- **Custom Activities and tables.** Developers use them to create ITSM workflows for Citrix apps and desktops. For more information, see Citrix ITSM developer documentation.

What's new

May 14, 2026

A goal of Citrix is to deliver new features and product updates to Citrix ITSM Adapter service customers when they are available. New releases provide more value, so there's no reason to delay updates. Rolling updates to the Citrix ITSM Adapter service release approximately every 3 months.

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Updating Citrix ITSM Adapter service includes two parts:

- Updating the service on Citrix Cloud. This process is transparent to you. Initial updates are applied to Citrix internal sites only and are then applied to customer environments gradually. Delivering updates incrementally in waves helps ensure product quality and maximize availability.
- Upgrading the Citrix ITSM Connector plug-in on your ServiceNow instance to the latest version. For more information, see Upgrade.

May 2026

Support for ServiceNow Australia. The Citrix ITSM Adapter service now supports the ServiceNow Australia release, expanding compatibility for enterprise environments.

Bug fixes and performance improvements. This release includes various bug fixes and performance improvements to enhance system reliability, scalability, and response times.

March 2026

Least-privilege access for on-premises site management. When adding an on-premises site to the ITSM Adapter service for management, you can now use a dedicated account with the **Help Desk Administrator** role instead of the **Full Administrator** role. This enhancement follows the principle of least privilege and is suitable when only limited permissions (such as resetting user sessions) are needed.

This capability requires Citrix Cloud Connector version `6.148.*` or later. For more information, see Step 4: (Optional) Add on-premises sites to Citrix Cloud for management.

January 2026

Sync alerts to ServiceNow from Citrix Monitor. Previously, you could control which Citrix DaaS alert policy-generated alerts were synced to ServiceNow only from ServiceNow. You can now configure this directly from Citrix Monitor. For more information, see Customize alert policies.

October 2025

Support for ServiceNow Zurich. The Citrix ITSM Adapter service now supports the ServiceNow Zurich release, expanding compatibility for enterprise environments.

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Auto-renewal for Citrix Principal Secret. You can now check the validation status of the Citrix Principal Secret and enable auto-renewal. This feature prevents service disruptions caused by expired credentials.

Delivery group maintenance status in Studio dashboard. The **Delivery Groups** tab in the ServiceNow Studio dashboard now displays synchronized maintenance status, giving you clearer visibility into group availability.

Enhanced Get Machines action. A new `isAssigned` filter is now available in the **Get Machines** action, allowing you to quickly identify and retrieve unassigned (free) machines.

April 2025

Support for Yokohama platform. The Citrix ITSM Adapter service now supports the Yokohama version of ServiceNow.

Integration with ServiceNow Event Management. You can now configure policies to forward Citrix alerts and notifications to the ServiceNow Event Management platform. This integration enables automated incident response through ServiceNow.

> **Note:**
>
> Make sure to manually configure event rules in ServiceNow to process forwarded events.

Improved error handling. The service now provides more detailed error codes to help you troubleshoot issues more efficiently.

Bug fixes and performance improvements. This release includes various bug fixes and performance enhancements to improve system reliability, scalability, and response times.

January 2025

Citrix ITSM Adapter for ServiceNow service now available in Citrix Cloud Japan. The Citrix ITSM Adapter for ServiceNow service is now available in Citrix Cloud Japan. This availability allows users in Japan to integrate ServiceNow with Citrix DaaS and Citrix Virtual Apps and Desktops, automating IT services and monitoring Citrix environments from ServiceNow. For more information, see Get started.

Enhanced Citrix Cloud authentication with service principals. The ITSM connector plug-in now supports using service principals for Citrix Cloud authentication, providing stronger security for automation scenarios. Both secure client and service principal options are available in the UI during the transition period, allowing for flexibility while moving to the more secure service principal method. For more information, see Configure the Citrix ITSM Connector plug-in.

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Support for enabling AD operations through the Citrix Cloud Identity service. Resource managers can assign applications or desktops to users by adding them to Active Directory (AD) groups with permission to use the applications or desktops. Previously, enabling AD operations required activating the **Active Directory Automation** solution in ServiceNow.

Now, as an ITSM administrator, you can simplify this process by enabling AD operations through the Citrix Cloud Identity service. This method requires configuring only a pair of AD user credentials with the necessary permissions, eliminating the need for complex configurations in ServiceNow.

For more information, see Enable AD operations through ITSM.

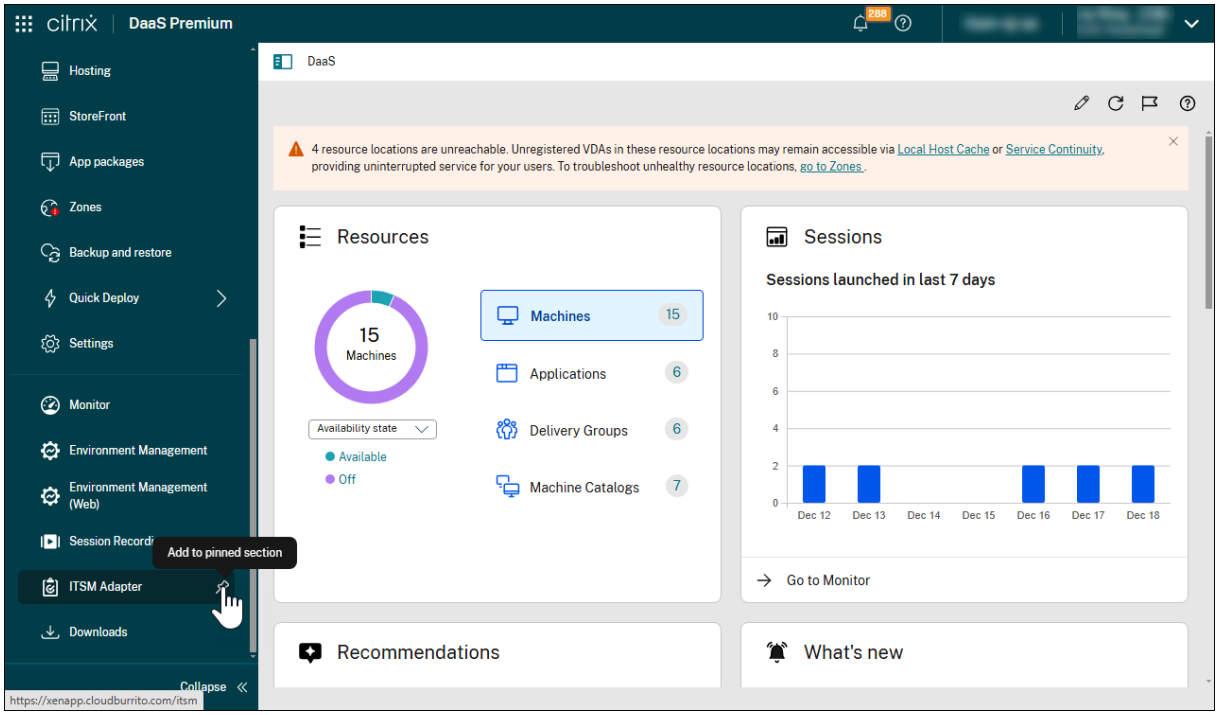
Workflow for desktop scaling. With a new workflow, **Scaling Citrix Virtual Desktops**, IT help desks and end users can now request desktop scaling based on workload needs. After resource managers approve the requests, the VMs hosting those desktops are resized to the specified VM sizes at the specified time periods. Desktop resizing is available only for MCS-provisioned VMs with VM resizing enabled. For more information, see Enable VM resizing, Request desktop scaling for users, Request desktop scaling, and Approve requests for desktop scaling.

Unified platform experience for the ITSM Adapter service. As part of our move to a unified navigation experience across the Citrix Cloud platform, the ITSM Adapter service is now integrated into the DaaS service package.

To access the ITSM Adapter service, enter the **DaaS** management console, scroll down in the navigation pane, and then select **ITSM Adapter**.

> **Tip:**
>
> For quick access, hover over the menu and pin it to the top PINNED section at the top of the navigation pane.

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August 2024

Refactored ITSM Adapter service UI for Web Studio integration. We've refactored the Citrix ITSM Adapter service UI to prepare for future integration with Web Studio. The top bar menus are now relocated to the left navigation pane.

Removal of dependency on ServiceNow Orchestration plug-in. The Citrix ITSM Adapter service plug-in now utilizes the ServiceNow Flow Designer for workflow automation, eliminating the need for the paid ServiceNow Orchestration plug-in. This update reduces costs and simplifies service setup for a more efficient user experience.

May 2024

Simplified on-premises site aggregation. Previously, to add your on-premises sites to the ITSM Adapter service for management, you had to add them to Citrix Cloud through Citrix Workspace. You can now do it directly from the **Manage** page of the ITSM Adapter service, using a new action, **Add Site**. This feature eliminates the need to switch between different platforms, making on-premises site aggregation more efficient. For more information, see Step 4: (Optional) Add on-premises sites to Citrix Cloud for management.

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March 2024

Introducing Citrix maintenance window settings. With a setting menu, **Citrix Maintenance Windows**, you can now configure maintenance windows for Citrix services. Before creating incidents for alerts and notifications, the ITSM Adapter service now checks whether a customer is within an active maintenance window. This feature ensures that incidents aren't generated during scheduled maintenance, reducing unnecessary disruptions and keeping operations running smoothly. For more information, see Configure Citrix maintenance windows.

Dedicated section for alerts and notifications configuration. We've refined our configuration structure by introducing a dedicated **Alerts and Notifications Configuration** section in the left navigation menu. In this section, you can centrally manage Citrix alerts and notifications-related policies:

- CVAD Alert Policies
- Citrix Cloud Notification Policies
- Citrix Cloud Health Incident Policies
- ADM Event Policies
- Citrix Maintenance Windows

Improved organization for CVAD alert policies. We've introduced a significant enhancement to the **CVAD Alert Policies** user interface. Those policies are now grouped by **Target Kind** for easier management and enhanced visibility.

Support for the ServiceNow Washington DC version. Starting with this version, the Citrix ITSM Connector plug-in can now run on the ServiceNow Washington DC version.

October 2023

Register Citrix Cloud with your ServiceNow instance using a ServiceNow service account. With a new option, you can now register Citrix Cloud with your ServiceNow instance using a ServiceNow service account instead of a ServiceNow user account. For more information, see Step 3: Register Citrix Cloud with your ServiceNow instance.

Streamlined ServiceNow OAuth reauthentication. Previously, updating ServiceNow OAuth Endpoint credentials required you to unregister Citrix Cloud from your ServiceNow instance and then register it again. With the introduction of a new action, **Re-authenticate**, you can now accomplish this task in a single step. To do so, click the ellipsis in the ServiceNow instance record, select **Re-authenticate**, and then enter the new credentials.

Support for naming ServiceNow instances. When registering with or managing ServiceNow instances in the ITSM Adapter Service console, you can now assign them more meaningful and

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descriptive names. This improvement enhances the overall administration experience. For more information, see Step 3: Register Citrix Cloud with your ServiceNow instance.

ServiceNow Flow Designer support. To support ServiceNow's low-code workflow design tool, **Flow Designer**, we've provided a series of custom Actions for Citrix applications and desktops. With those Actions, you can now create workflows for Citrix apps and desktops using Flow Designer. For more information, see the developer guide.

July 2023

Improved ServiceNow instance registration process. The **IT Service Management Adapter > Manage** page now provides a comprehensive view of all ServiceNow instances that have access to Citrix Cloud. You can easily select or switch between instances, ensuring a seamless registration experience. For more information, see Step 3: Register Citrix Cloud with your ServiceNow instance.

With the instance list, you can also monitor the registration status of Citrix Cloud and track the latest processing time of API calls from each instance. This information provides insights into the overall health of the connections between Citrix and ServiceNow.

Parameters support for *Run PowerShell on a Machine* Custom Activity. With this enhancement, you can now use parameters in your PowerShell scripts and pass parameter values using the JSON strings, therefore, enhancing flexibility in your script execution. For more information, see Get started using the sample workflow.

March 2023

Retention policy for Citrix alerts and notifications. With a new setting, **Enable Data Auto-Deletion**, you can now have Citrix alerts and notifications automatically deleted from ServiceNow after a retention period. For more information, see Enable data auto-deletion for Citrix alerts and notifications.

Integration with status.cloud.com. With a new policy, **Citrix Cloud Health Incident Policies**, you can now sync Citrix Cloud health incidents from https://www.status.cloud.com to ServiceNow for monitoring and tracking. For more information, see Create Citrix Cloud health incident policies.

All-in-one self-service for troubleshooting and reporting failures. A new service, **Troubleshoot and report app and desktop failures**, is now available in the ServiceNow self-service portal. With this service, end users can trigger different troubleshooting actions and report the issues to IT help for further assistance. For more information, see Troubleshoot and report app and desktop failures.

Ability to manually refresh all VDA records. Data Import Policies now have a new setting, **Refresh All Data Immediately**. With it selected, all VDA data in your ServiceNow instance is refreshed with the

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latest data from Citrix Cloud once you create or update a data import policy. For more information, see Import VDA information.

Custom activity for retrieving license usage data. With a new custom activity, **Get license usage data**, you can now get usage data of your Citrix DaaS licenses. For more information, see Custom activities and tables.

New input variable for VDA-related custom activities. VDA-related custom activities now have a new input variable: **MachineName**. With it, you can use machine names to identify VDAs when invoking VDA-related activities. For more information, see Custom activities and tables.

December 2022

Support for delegated session reset. A service, **Reset a session for other users**, is now available in the ServiceNow self-service portal. With this service, authorized users can reset desktop or app sessions for users who can't access the ServiceNow portal. A new role, **assistant**, is provided to control who can use this service. For more information, see Reset sessions for other users.

Ability to provide troubleshooting insights to help desks based on user-reported session failures (preview). A ServiceNow service, **Report Citrix session failures**, is now available for end users to report desktop and app session issues. With this new feature, the ITSM Adapter service can now call APIs from Citrix DaaS components to provide troubleshooting information to help desks through the **User Requests** page. Those components include the Delivery Controller, Citrix Health Check service (if applicable), and more. For more information, see Report Citrix session failures and View details of user requests.

Sample workflow for the *Run PowerShell scripts on a machine* Custom Activity.
A sample workflow is now available to help you visualize the use of the **Run PowerShell scripts on a machine** Custom Activity. For more information, see Run PowerShell scripts on a machine

Custom Activity to assign persistent desktops to users. With a new Custom Activity, **VDI assignment**, you can now assign end users with dedicated desktops in a ServiceNow workflow rather than relying on Assignment Rules. For more information, see VDI assignment.

Enhancements to the Citrix alert and notification policies. More options are now available for the Citrix alert and notification policies, such as filters, actions, and incident details. With them, you can sync and monitor Citrix alerts and notifications in a more flexible way. For more information, see Manage Citrix alerts and notifications.

September 2022

Workflow for handling employee separation. With a new workflow, **Process employee separation**, you can now log outgoing employees off from launched sessions and take back their apps and

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desktops. For more information, see Process employee separation.

Automatic deprovisioning of idle static desktops. Static desktops can now be automatically deprovisioned after they have been idle for a preset number of days. As the Citrix ITSM administrator, you can enable this feature and set the number of idle days that triggers automatic deprovisioning. For more information, see Enable deprovisioning of idle static desktops.

Automatic approval of app and desktop requests. After users request apps and desktops, the Citrix ITSM Adapter service can now automatically approve the requests and add users to the corresponding resource groups. As the Citrix ITSM administrator, you can enable this feature and set rules that automate the resource assignment process. For more information, see Enable automatic approval for applications and Enable automatic approval for desktops.

Ability to import license information to ServiceNow. With a new data import policy, **Import License Info**, you can now import license information from Citrix DaaS to your ServiceNow instance. For more information, see Import license information.

Enhanced policy settings for Citrix Cloud notifications. More options are now available to filter and process notifications when you create policies for Citrix Cloud notifications. For more information, see Customize notification policies.

More roles available for access control. More roles are now available to reflect various IT job duties in an organization. With these roles, you can set up more secure and flexible access control for workflows in the Citrix ITSM Adapter service. For more information, see Citrix ITSM Roles and permissions

Deprovisioning types renamed for better understanding. Deprovisioning types that appear when you deprovision desktops or enable deprovisioning of idle desktops have been renamed:

- **Deprovision Desktop** renamed to **Remove the desktop**
- **Deprovision User Access** renamed to **Keep the desktop but remove the user assignment**

June 2022

Ability to import VDA machine information to ServiceNow. With a new policy, **Import VDA Info**, you can now import VDA machine information from Citrix DaaS to your ServiceNow instance. The imported data appears in the **Studio Dashboard** menu. For more information, see Import more deployment data from Citrix DaaS.

In addition, a ServiceNow table is now available with the Citrix ITSM connector to accommodate VDA information. Developers can now invoke information from the table when creating custom ITSM workflows or updating your asset information in ServiceNow Configuration Management Database. For more information, see ServiceNow tables in the Citrix ITSM developer documentation.

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Support for running PowerShell scripts remotely from ServiceNow. With a new Custom Activity, **Run PowerShell scripts on a machine**, you can now remotely manage machines using PowerShell scripts. For more information, see Custom Activities and tables.

Ability to process Citrix ADM events using policies. By setting ADM event policies, you can now control how ServiceNow processes Citrix ADM events, such as **Ignore**, **Display in Dashboard**, or **Create Incidents**. For more information, see Customize ADM event policies.

March 2022

- **Ability to support multiple Citrix Cloud accounts from a single ServiceNow instance.** You can now manage multiple Citrix Cloud accounts in your organization from a single ServiceNow instance. For more information, see Configure the ITSM Connector plug-in and Add your ServiceNow instance to the ITSM Adapter service.

  > **Note:**
  >
  > When upgrading your plug-in to version 22.3.0, you must reauthenticate it with the secure client credentials from Citrix Cloud.

- **Support for multiple-AD-domain Citrix Cloud accounts.** With a new setting in the Citrix ITSM Connector plug-in, the Citrix ITSM adapter service can now adapt to multiple-AD-domain environments. For more information, see Enable support for multiple-AD-domain Citrix Cloud accounts.
- **Dashboard for monitoring events from Citrix Application Delivery Management.** A new dashboard, **ADM Events**, is available on the **Alerts and Notifications** menu. With the dashboard, IT help desks can now monitor events from Citrix Application Delivery Management. For more information, see Monitor alerts and notifications from Citrix Cloud.
- **Service for IT help desks to reset sessions.** Previously, Citrix virtual apps and desktops could be reset only by their current users. IT help desks can now reset those sessions for users. For more information, see Reset sessions for users.
- **Service Overview page restructured.** Citrix administrators can now see more concise information when they access the ITSM Adapter service from the Citrix Cloud console.

December 2021

- **New version of Citrix ITSM Connector now available: 21.12.0**. You can download it from the ServiceNow Store. Note: version 2110.1.0 was renamed to version 21.10.0.

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- **Support for role-based access control.** Administrators can now assign IT members with different roles for access control over the Citrix ITSM Adapter service. For more information, see Citrix ITSM roles and permissions.
- **Support for two new services for managing Citrix virtual apps and desktops.** For more information, see the following sections:
  - Deprovision a static desktop
  - Reset user profiles
- **Support for adding users to AD groups when processing `Request a desktop` tickets.** For more information, see Assign a user with the requested desktop.
- **Support for assigning incidents triggered by Citrix alerts or notifications to Assignment Groups.** When you assign an incident triggered by a Citrix alert or notification, you can now assign it to an Assignment Group in addition to an IT member. For more information, see Manage Citrix alerts and notifications.
- **Orchestration enhanced.** More Custom Activities are provided, including `Create MCS task`, `Retrieve MCS task status`, `Send message to session`, and `Update maintenance mode`.
- **Table information published.** Tables used in the Citrix ITSM plug-in are described in the developer documentation, enabling more customization.

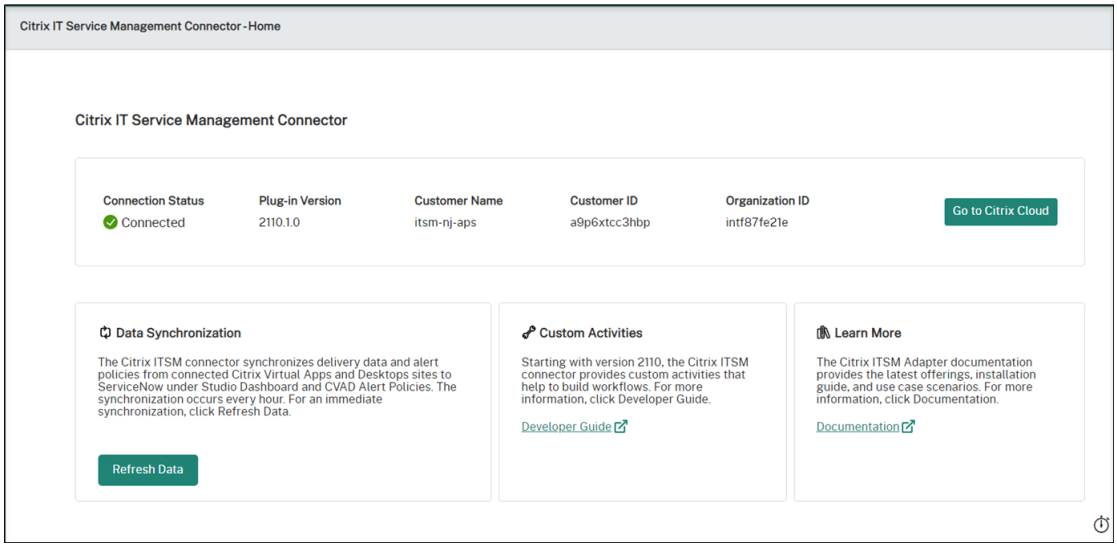
October 2021

- We have updated the ITSM connector version from 2108.1.0 to 2110.1.0.
- As an experimental feature, the Citrix ITSM connector plug-in now includes Custom Activities that you can use to create or customize workflows. For more information, see the developer documentation.
- ServiceNow administrators and end users can now apply the following power actions on a Virtual Desktop Infrastructure (VDI) desktop:
  - **Start**
  - **Shut down**
  - **Force shutdown**
  - **Reboot**
  - **Force reboot**

  For more information, see that the Power manage VDI desktops](/en-us/citrix-itsm-adapter-service/deliver-and-manage/it-help-desks.html#power-manage-vdi-desktops).

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- Starting with Version 2108.1.0, you can remove a VDI desktop from your cloud deployment when its idle time exceeds the configured deprovisioning threshold. This release enhances the VDI desktop deprovisioning feature by offering an extra option to retain such a VDI desktop but remove the current user's access rights. For more information, see Studio Dashboard.
- You can now configure which desktops are available for user requests. If you want to hide a desktop from the request list, find the application on the **Published Desktops** tab of **Studio Dashboard**, select it, and then choose the **Disable availability for requests** action. To unhide the application on the request list, select it and choose **Enable availability for requests**.
- We have added the following pieces of information to the home menu of the Citrix ITSM connector in ServiceNow:
  - Version of the Citrix ITSM connector plug-in
  - Synchronization of Citrix Virtual Apps and Desktops delivery data and alert policies to ServiceNow
  - Custom Activities that help to build workflows
  - A learn more link to this document from within ServiceNow



August 2021

- We have updated the ITSM connector version from 2106.1.1 to 2108.1.0.
- The ITSM Adapter service supports ServiceNow Rome.
- We have restructured the global navigation of the Citrix ITSM connector in ServiceNow. For example, we have aggregated your Citrix Virtual Apps and Desktops delivery on a single **Studio Dashboard** and renamed some of the former navigation menus. The former **Requests**, **Reporting**, **Alerts**, **Settings**, and **Alert Policies** menus are now called **User Requests**, **Statistics**

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Report, **Alerts and Notifications**, **Configurations**, and **CVAD Alert Policies**, respectively. We have also added a navigation menu - **Citrix Cloud Notification Policies**.

- We have simplified the process of adding a ServiceNow instance in Citrix Cloud. For more information, see Step 4: Add a ServiceNow instance in Citrix Cloud.
- You can now set which applications are available for user requests. If you want to hide an application from the request list, find the application on the **Published Applications** tab of **Studio Dashboard**, select it, and then choose the **Disable availability for requests** action. To show back the application on the request list, select it and choose **Enable availability for requests**. For more information, see Studio Dashboard.
- You can now subscribe to Citrix Cloud notifications of your interest. For more information, see Access Citrix Cloud notifications from within ServiceNow.
- You can now reclaim idle resources from VDI desktops that are hosted on the Citrix Virtual Apps and Desktops service. For more information, see Studio Dashboard.

June 2021

- We have updated the ITSM connector version from 1.8.0 to 2106.1.1.
- We have extended our service options to let you add MCS-created machines when a requested machine catalog is short on machines. The machine catalog that you are scaling out must be hosted on the Citrix Virtual Apps and Desktops service. For more information, see Add MCS-created machines.

April 2021

- The ITSM Adapter service supports ServiceNow Quebec.
- We have made an enhancement to automatically generate a refresh token and an access token when you add a ServiceNow instance in Citrix Cloud. This enhancement frees you from using a separate tool to generate the tokens. For more information, see Step 3: Add a ServiceNow instance in Citrix Cloud.
- We have synced the Citrix alert policies that you set in the Citrix Virtual Apps and Desktops service to ServiceNow under **Citrix IT Service Management Connector > Settings > Alert Policies**. With the webhook monitor enabled for an alert policy, alerts meeting the policy are listed in ServiceNow under **Citrix IT Service Management Connector > Alerts**. You can also create incidents and assign them to specific assignees. To disable an alert policy in ServiceNow, click **Disable Monitor**. For more information, see Access Citrix alerts from within ServiceNow.

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November 2020

- We have simplified the deployment of the ITSM Adapter service.
- The ITSM Adapter service adds the **Reporting** dashboard for presenting request statistics.
- The ITSM Adapter service adds the **Add users to Application Group(s)** tab for ServiceNow administrators to select when processing application access requests.
- Access to a specific application can be limited to certain users in an Active Directory group. To facilitate the need, the ITSM Adapter service lists all Active Directory groups that can access a specific application on the **Add users to Active Directory Group(s)** tab. ServiceNow administrators can add a user to such an Active Directory group when processing application access requests.

June 2020

- The ITSM Adapter service supports ServiceNow New York.
- The ITSM Adapter service implements the User Principal Name (UPN) to give Active Directory (AD) users an email address-like format to sign on with.

Get started

July 28, 2026

This article walks you through the process of setting up the Citrix ITSM Adapter service.

Preparations

To set up the ITSM Adapter service, make sure you have the following things ready:

- An account with system administrator permission to your ServiceNow instance

  After the service is set up, you can implement role-based access control on it. For more information, see Access management.

- An active subscription to Citrix DaaS™

  You can also sign up for a free trial. For more information, see Verify you've subscribed to Citrix DaaS.

- A Citrix Cloud™ administrator account with Full access

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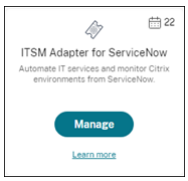
- Connectivity between your ServiceNow instance and the IP address of the region where your Citrix Cloud account is located

Citrix Cloud region	IP address
US	52.158.218.132/30
EU	20.54.214.12/30
Asia Pacific	20.195.2.68/30
Japan	20.46.176.104/30
US Government	52.245.250.248/30

Verify you've subscribed to Citrix DaaS

Sign in to Citrix Cloud or sign up for a new account.

If you have an active subscription to Citrix DaaS or signed up for a free trial, the ITSM Adapter service appears in the **My Services** list. Otherwise, check with your Citrix representatives.



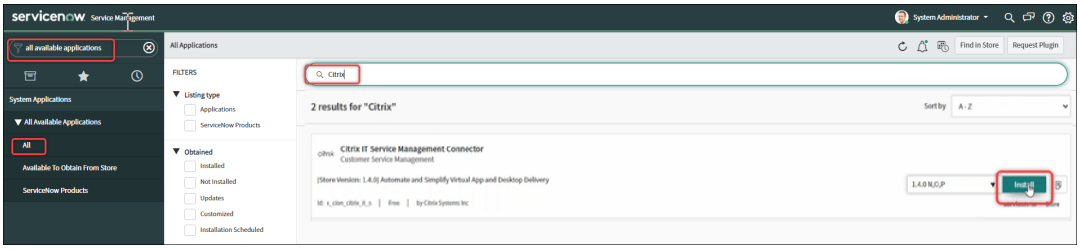
> **Tip:**
>
> The **Manage** button is available only when your organization has the valid subscription to Citrix DaaS Premium Edition. Before that, **Request Demo** is displayed.

Step 1: Install the Citrix ITSM Connector plug-in in ServiceNow

Install the Citrix ITSM Connector plug-in on your ServiceNow instance.

1. Sign in to your ServiceNow Service Management Portal using an account assigned with the `system administrator` role.
2. Install the **Citrix IT Service Management Connector** plug-in for your ServiceNow instance:
    a) In the left pane, select **All Available Applications > All**. To quickly locate the menu, type **Applications** in the **Filter navigator** field.
    b) On the **All applications** page that appears, search for **Citrix** in the search bar.

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c) In the search results, locate **Citrix IT Service Management Connector**, and then click **Install**.

d) Follow the onscreen instructions to complete the installation.

> **Note:**
>
> To verify you download the latest version of the Citrix ITSM connector plug-in, click **Other App Versions**.

Step 2: Configure the Citrix ITSM Connector plug-in

Configure the plug-in to set up its connection with Citrix Cloud.

Steps:

1. Create the authentication credentials in Citrix Cloud.
2. Add the authentication credentials to the plug-in.

Starting with the ITSM Adapter service version 22.3.0, a single ServiceNow instance can manage apps and desktops in multiple Citrix Cloud accounts.

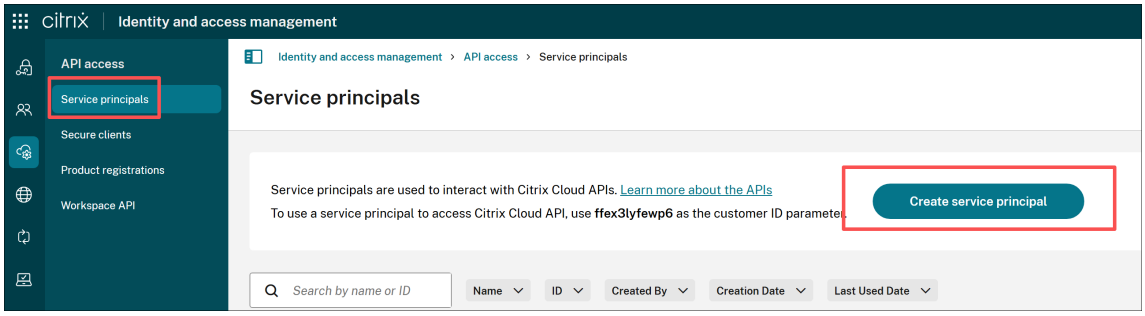
Create the authentication credentials in Citrix Cloud

To communicate with Citrix Cloud, the Citrix ITSM connector plug-in must have the authentication credentials that the Citrix Cloud generates. In each Citrix Cloud account that you want to manage, create the service principal credentials for the plug-in authentication.

The detailed steps are as follows:

1. Sign in to Citrix Cloud, and then select the Citrix Cloud account you want to manage.
2. Create a a Service principal for the Citrix ITSM connector plug-in. For more information, see Get started with Citrix Cloud APIs.

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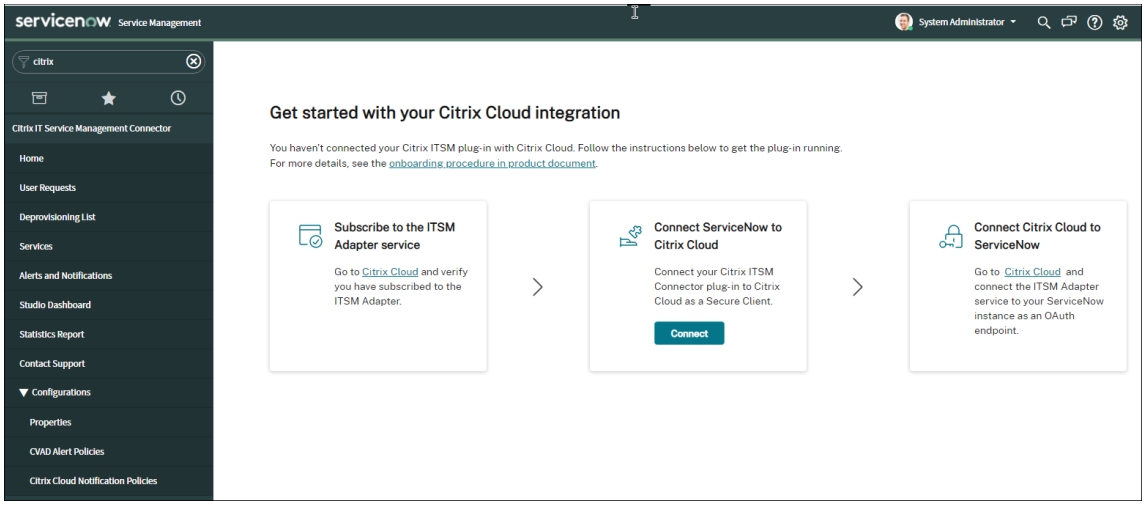


3. Store the ID and Secret in a safe place.
4. If you have more Citrix Cloud accounts to manage, repeat steps 1–3 for each.

Add the authentication credentials to the plug-in

After you create the Service Principal in your Citrix Cloud account, add them to the ITSM Connector plug-in. The plug-in uses the credentials to set up the connection with Citrix Cloud.

1. Sign in to your ServiceNow Service Management Portal.
2. In the left pane, select **Citrix IT Service Management Connector > Home**.
3. On the **Get started with your Citrix Cloud integration** page that appears, click **Connect**.

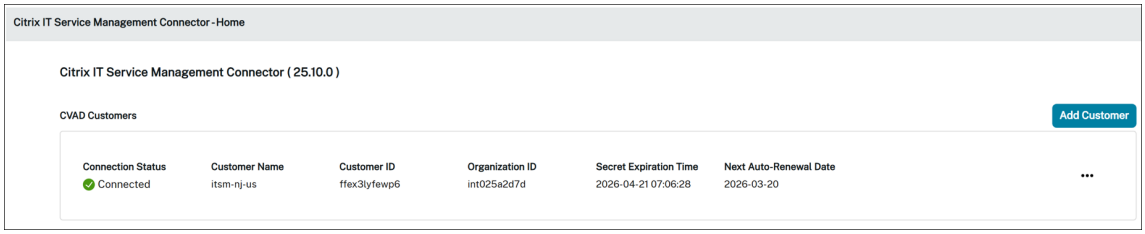


4. In the **Citrix Cloud Authentication** dialog that appears, specify the following information:
   - **Citrix Deployment**: For regions other than Citrix Cloud Japan, select **Citrix Cloud**.
   - **Customer ID**: Type the **CCID** of your Citrix Cloud account.
   - **Service Principal ID / Secure Client ID** and **Service Principal Secret / Secure Client Secret**: Type the pair of ID and Secret that you created in your Citrix Cloud account. For more information, see Create the authentication credentials in Citrix Cloud.

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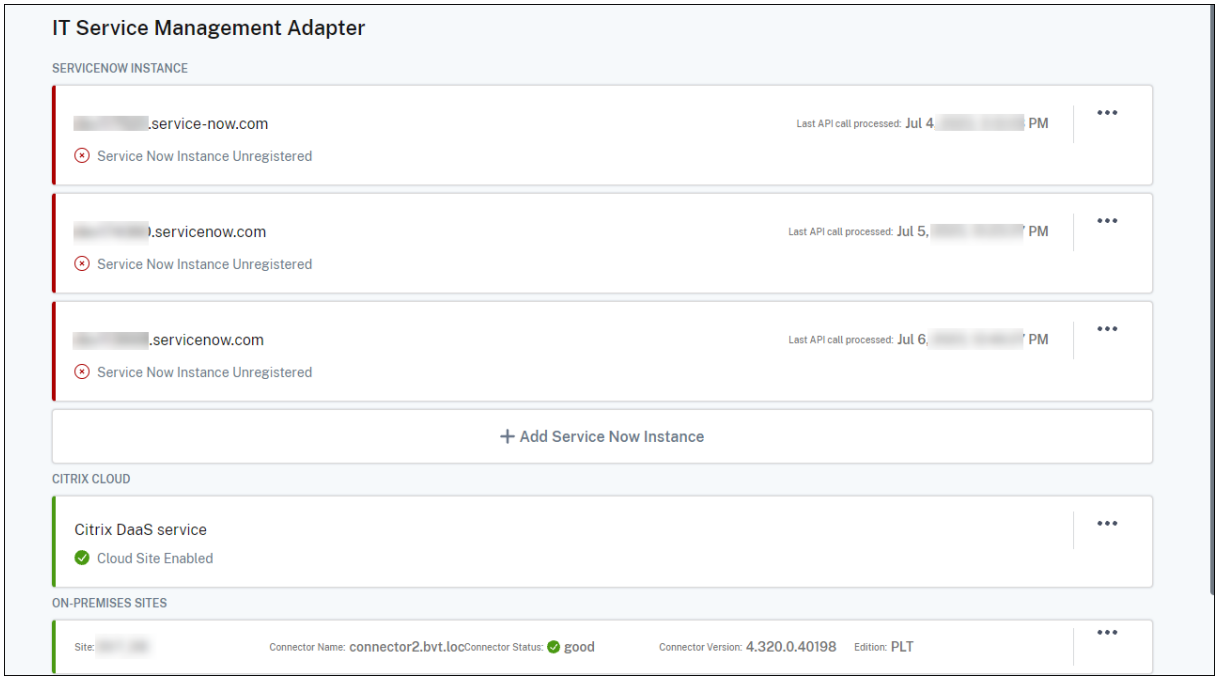
5. Click **Test** to test the connection to your Citrix Cloud account. If the credentials are valid, the following information and option appear:
   - **Secret expiration time** –Displays the date and time when the service principal secret expires.
   - **Auto Renew Token** –Select this option to automatically renew the secret 31 days before it expires.
6. Save the configuration.

   An acknowledgment from ServiceNow appears, indicating that the connection is up and running.



7. If you have more Citrix Cloud accounts to manage, follow these steps for each:
   a) Click **Add customer**.
   b) Repeat steps 4–6.

After the configuration completes, the ServiceNow instance automatically connects to Citrix Cloud using the provided authentication credentials. When you sign in to Citrix Cloud and go to the **ITSM Adapter for ServiceNow > Manage** page, you can see all instances that have set up connections with Citrix Cloud.



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Those instances are in *Unregistered* status, indicating that Citrix Cloud hasn't registered with them.

Decommission a Citrix account

To decommission a Citrix Cloud account from your ServiceNow instance, sign in to your ServiceNow Service Management Portal, on the **Citrix IT Service Management Connector > Home** page, click the ellipsis, and then click **Decommission**.

> **Note:**
>
> To completely remove Citrix ITSM data for a Citrix Cloud account, decommission the account. Manually deleting or editing an account might leave residual data in your environment.

Step 3: Register Citrix Cloud with your ServiceNow instance

To enable Citrix Cloud to send alerts and notifications to your ServiceNow instance, register Citrix Cloud with your ServiceNow instance by providing the following details:

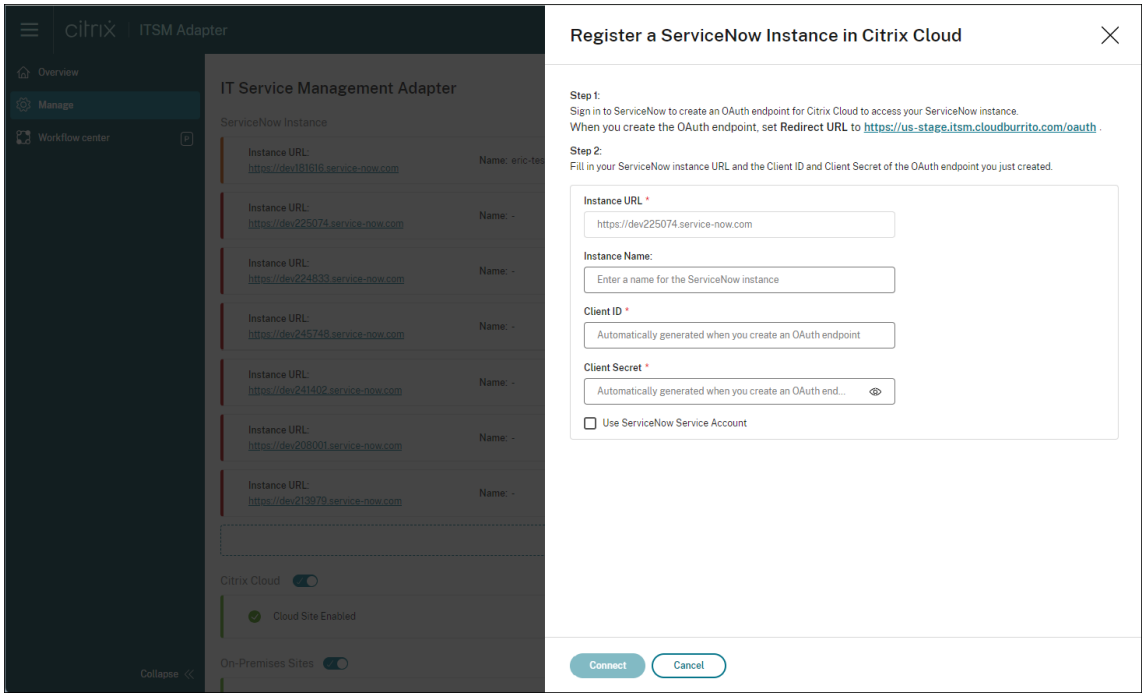
- URL of your ServiceNow instance
- Authentication credentials that your ServiceNow instance generates

Starting with the ITSM Adapter service version 22.3.0, a single ServiceNow instance can manage multiple Citrix Cloud accounts. If you have multiple Citrix Cloud accounts to manage, add your ServiceNow information to each.

Steps:

1. Sign in to Citrix Cloud, and then select the Citrix Cloud account you want to manage.
2. Click the **DaaS** button on the top right. The DaaS home page appears.
3. In the left pane, scroll down and select **ITSM Adapter**. The ITSM Adapter home page appears.
4. In the left pane, select **Manage**. All instances that have established connections with Citrix Cloud appear.
5. Locate the ServiceNow instance that you want to register with, and then select **Register** from the ellipsis menu. The following page appears with the URL of the ServiceNow instance automatically filled.

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Alternatively, you can click **Add ServiceNow Instance** to start the registration.

6. Follow the onscreen instructions to have ServiceNow generate an OAuth endpoint for the Citrix Cloud account:

   a) Copy the Redirect URL provided in the instructions.
   b) Open a new tab in your browser to access your ServiceNow Service Management Portal.
   c) In the Portal, create an OAuth endpoint for the Citrix Cloud account. You must enter the Redirect URL copied in step a when creating the endpoint. For more information, see Create an OAuth Endpoint for a Citrix Cloud account.

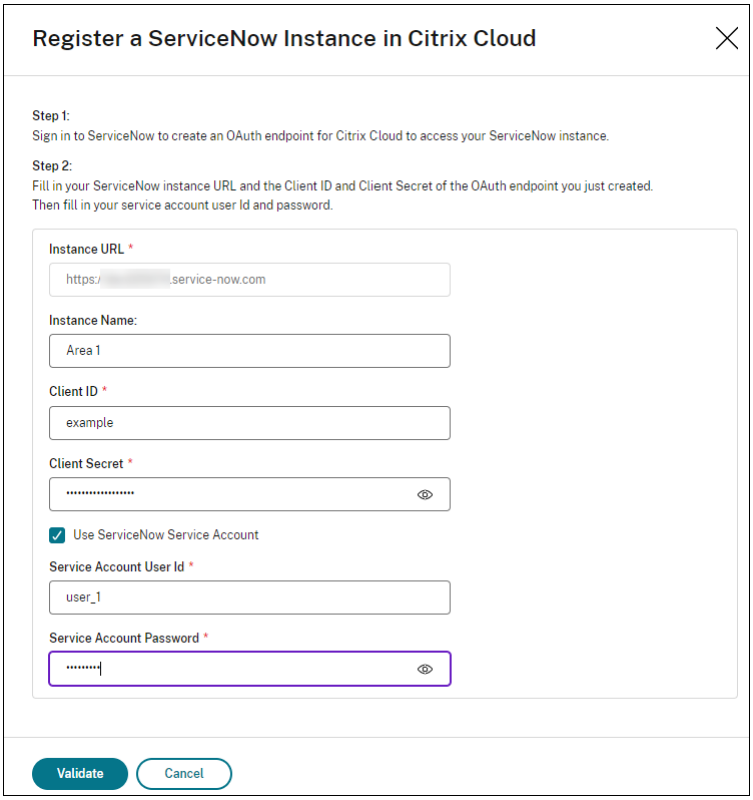
7. Return to the tab that has the **Register a ServiceNow Instance in Citrix Cloud** dialog open and enter the required OAuth credentials:

   - (Optional) Enter a descriptive name for the ServiceNow instance.
   - Enter the OAuth endpoint details (Client ID and Client Secret) generated in step 5.
   - To use a ServiceNow *service* account for ServiceNow login and registration authorization, select **Use ServiceNow Service Account**, enter the service account's user ID and password, and then click **Validate** to verify the service account credentials.

     > **Note:**
     >
     > You can use a ServiceNow *service* account assigned with the `x_cion_citrix_it_s.ctx_itsm_admin` role to complete the validation. To enable ServiceNow to generate incidents for alerts and notifications from Citrix Cloud, make sure that this

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> service account is also assigned the necessary `incident_manager` role.



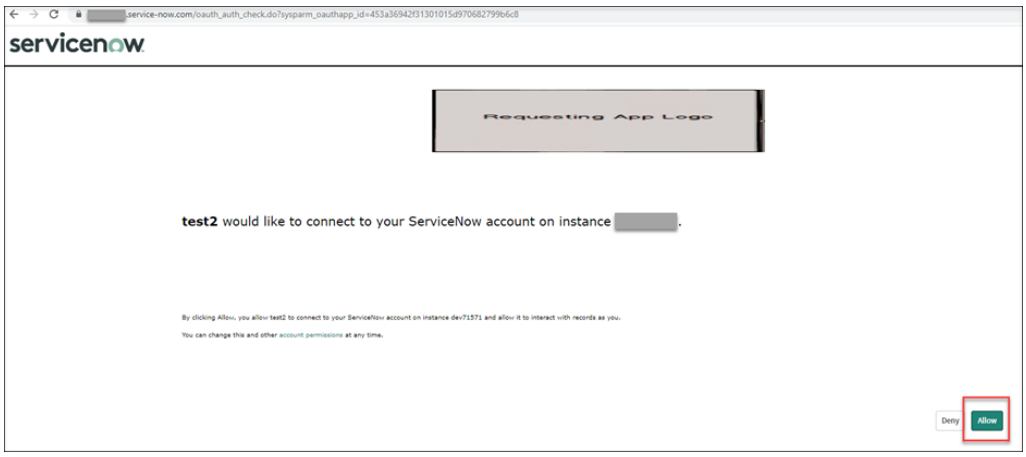
- To use a ServiceNow *user* account for ServiceNow login and registration authorization, keep **Use ServiceNow Service Account** cleared and complete the following steps:

  > **Note:**
  >
  > To complete this task, you can use a ServiceNow *user* account assigned with the `x_cion_citrix_it_s.ctx_itsm_admin` role. To enable ServiceNow to generate incidents for alerts and notifications from Citrix Cloud, make sure that this user account is also assigned the necessary `incident_manager` role.

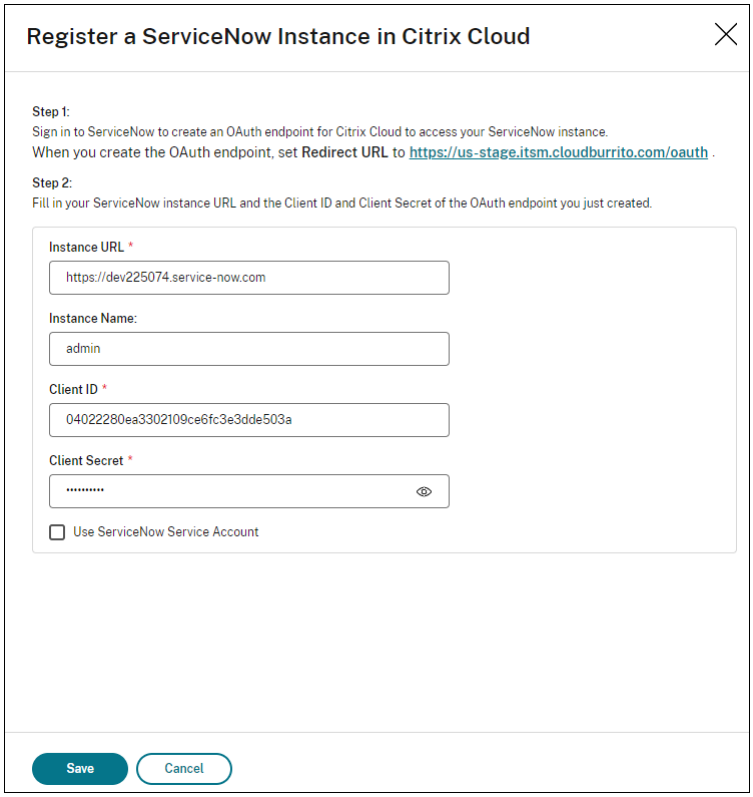
  a) Click **Connect**. Your ServiceNow instance login page appears.

  b) Type the user name and password of the ServiceNow user account, and then click **Log in**. A page appears, requesting your permission for the ITSM Adapter service to connect to this ServiceNow account in your ServiceNow instance.

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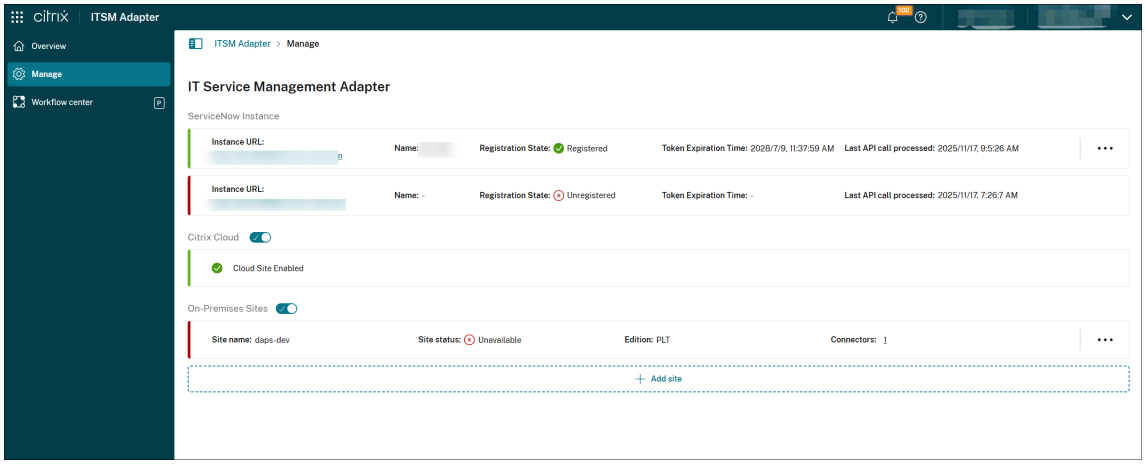
c) Click **Allow**. You're taken back to the **Register a ServiceNow Instance in Citrix Cloud** dialog.



> **Note:**
>
> Data sent from Citrix DaaS to ServiceNow through the OAuth endpoint-authenticated channel is stored in the ServiceNow database. The corresponding database records clearly indicate that they were created by the account that you used for ServiceNow login and registration authorization.

8. Click **Save**. The ITSM Adapter service starts testing the connections with the Citrix ITSM connector. If the test completes successfully, the status of the instance changes to **Registered**.

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> **Tip:**
>
> If the instance status appears as **ServiceNow Instance Unauthorized**, check for expired OAuth credentials and reauthenticate if needed by selecting **Reauthenticate** from the ellipsis menu.

9. If you have more Citrix Cloud accounts to manage, repeat steps 1–7 for each.

After you complete the preceding steps successfully, IT help desks and end users can now access the Citrix ITSM services.

Register with a different ServiceNow instance

A Citrix Cloud account can be registered only with one ServiceNow instance. To register it with a different ServiceNow instance, first unregister the existing one.

1. On the **Manage** page of the ITSM Adapter service, click the ellipsis next to the existing ServiceNow instance.
2. Select **Unregister**.
3. To register Citrix Cloud with a different ServiceNow service instance, locate the instance record and then select **Register** from the ellipsis.
4. Follow the onscreen instructions to complete the procedure.

Create an OAuth Endpoint for a Citrix Cloud account

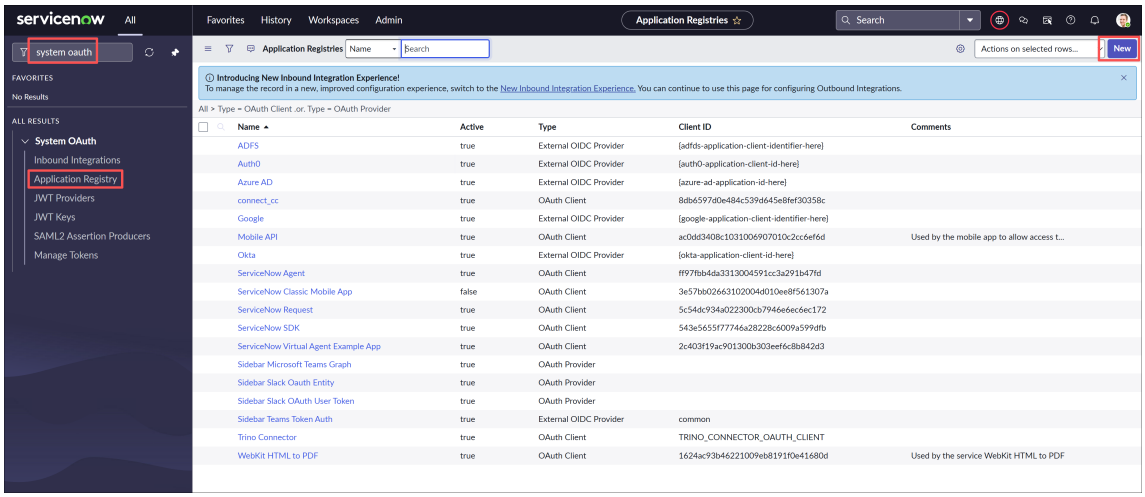
In your ServiceNow instance, create an OAuth Endpoint (including a Client ID and a Client Secret) for a Citrix Cloud account.

Steps:

1. Sign in to your ServiceNow Service Management Portal.

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2. In the left pane, select **System OAuth > Application Registry**. To quickly locate the menu, type **oauth** in the **Filter navigator** field.
3. On the **Application Registries** page, click **New** next to **Application Registries**.



4. On the **OAuth application** page that appears, click **New Inbound Integration Experience**.

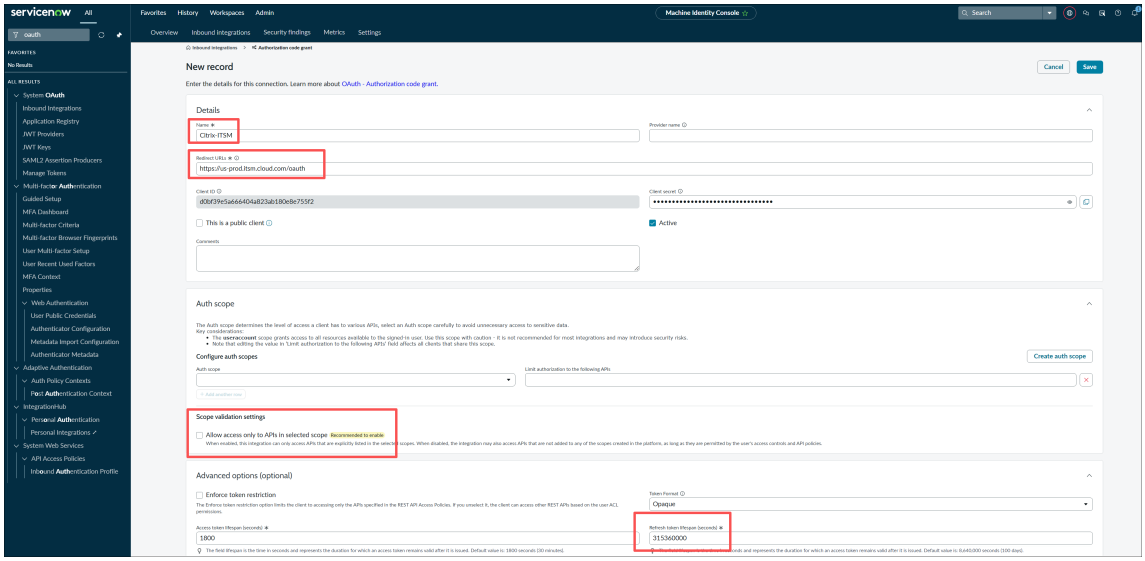
   If your ServiceNow version is Yokohama or earlier, select **Create an OAuth API endpoint for external clients**.

5. On the **Select your application connection type** page, select **OAuth - Authorization code grant**:

   a) Type a name for the OAuth endpoint.
   b) Click the lock icon next to the **Redirect URL** field, and then type the Redirect URL that was prompted in the **Add a ServiceNow Instance in Citrix Cloud** dialog.
   c) If the **Scope Restriction** field is present, set it to **Broadly scoped**.
   d) Open **Auth scope**. Under **Scope validation settings**, clear **Allow access only to APIs in selected scope**.
   e) Open **Advanced Options (Optional)** and set **Refresh Token Lifespan (seconds)** to a larger value, such as **315,360,000** seconds (10 years), instead of using the default 8,640,000 seconds (100 days).
   f) Click **Submit**.

6. On the **Application Registries** page that appears, locate the OAuth endpoint that you created.
7. Click the OAuth endpoint name to open its detail page.

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8. Store the Client ID and Client Secret.
9. Return to the Citrix Cloud console to continue the remaining steps.

Step 4: (Optional) Add on-premises sites to Citrix Cloud for management

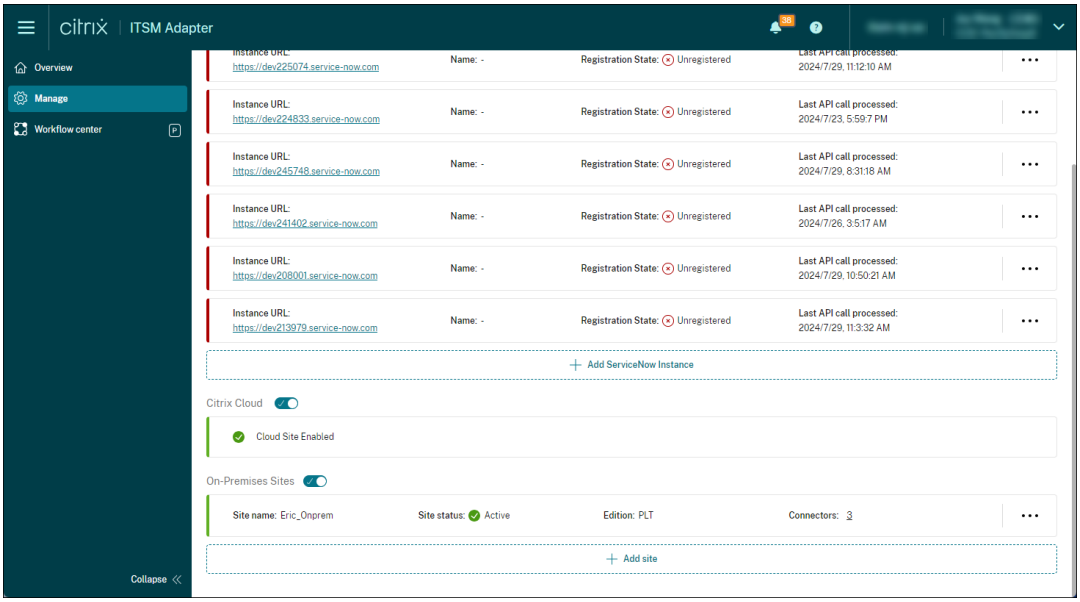
If you have on-premises sites and want to manage their resources (such as sessions and machines) using ServiceNow ITSM workflows, follow these steps:

1. Sign in to Citrix Cloud and select your Citrix Cloud account.
2. Create resource locations for your on-premises sites and install Cloud Connectors on each location following the onscreen instructions.

   For more information, see Cloud Connector Installation.
3. Add those on-premises sites to the ITSM Adapter service by completing the following steps:

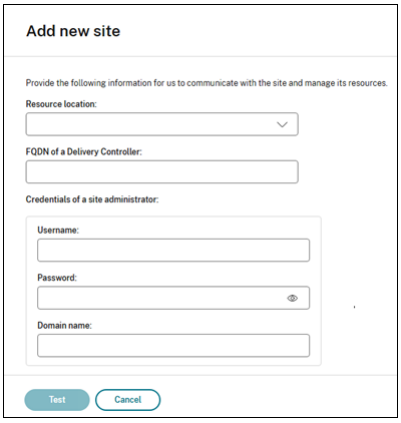
   a) On the **ITSM Adapter for ServiceNow** tile, click **Manage**. The **ITSM Adapter** page appears.

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b) On the **Manage** menu, turn the **Enable on-premises sites** option on.

c) Click **Add site**. The **Add site** page appears.



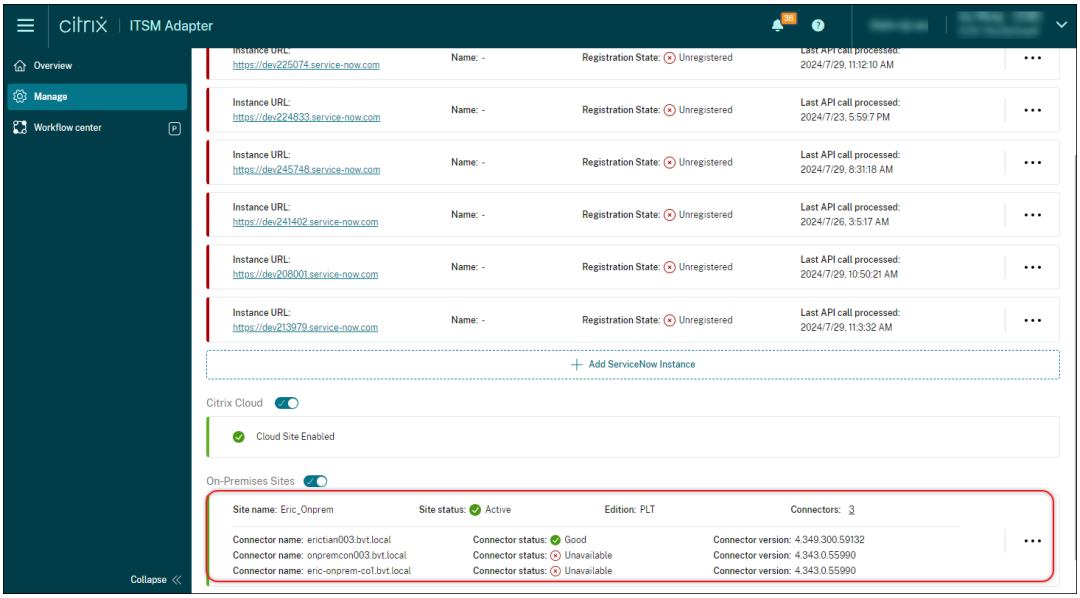
d) Enter the following information for a site that you want to manage:

- Select the resource location where this site resides.
- Type the FQDN of a Delivery Controller™ in this site.
- Type the credentials of a site administrator with either the Full Administrator or Help Desk Administrator role, including the user name, password, and domain name.

  For an example setup, see Set up a Help Desk Administrator for site management.

e) Click **Test**. The connectivity test begins. When it completes successfully, the Cloud Connectors in the selected resource location appear, as shown in the following screenshot.

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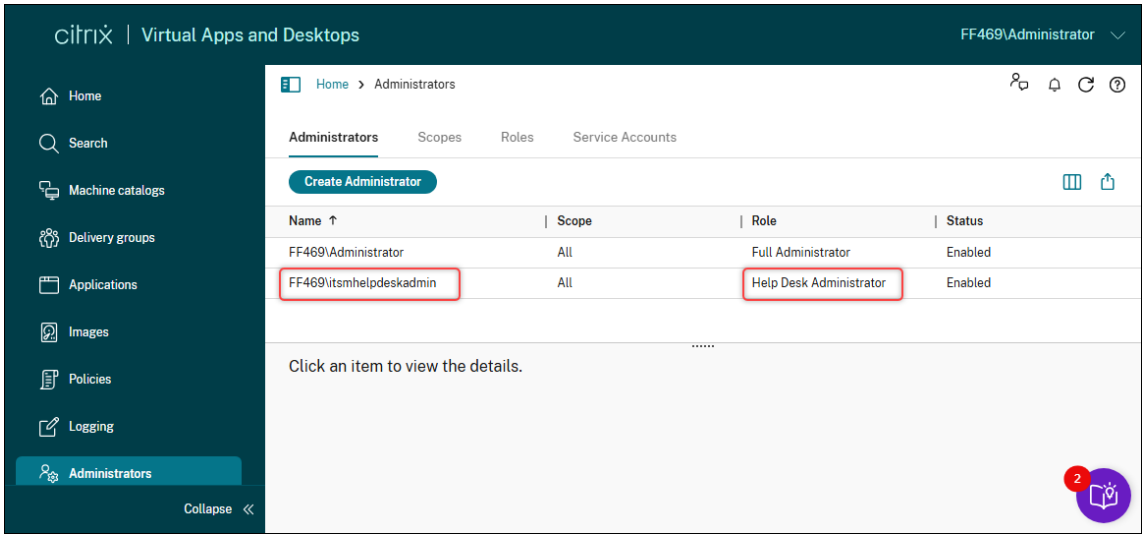
f) Repeat steps c–e to add the remaining on-premises sites.

Example: Set up a Help Desk Administrator for site management

To follow the principle of least privilege, you can use a dedicated domain account with the **Help Desk Administrator** role instead of the **Full Administrator** role. This approach is suitable if you need only limited permissions, such as resetting user sessions.

> **Note:**
>
> This capability is supported starting with Citrix Cloud Connector version `6.148.*` or later.

1. Create a domain user account named `itsmhelpdeskadmin`.
2. In **Studio**, assign the **Help Desk Administrator** role to this account.

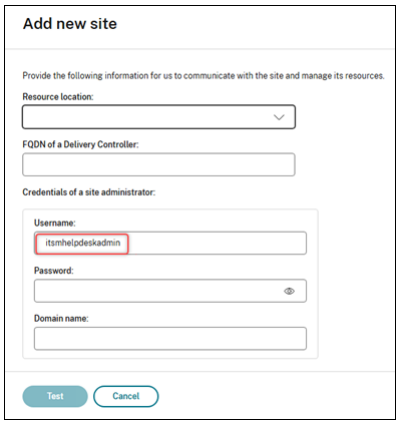


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3. On the Delivery Controller machine, open an elevated PowerShell console and run the following command to grant remote management permissions to this account:

   ```
   net localgroup "Remote Management Users"/add <DOMAIN>\itsmhelpdeskadmin
   ```

4. Use the `itsmhelpdeskadmin` account credentials when adding the on-premises site to ITSM, as described in the preceding step.



Access management

September 6, 2025

After your organization sets up the Citrix ITSM Adapter service, Citrix ITSM services appear in your ServiceNow portals.

User interfaces

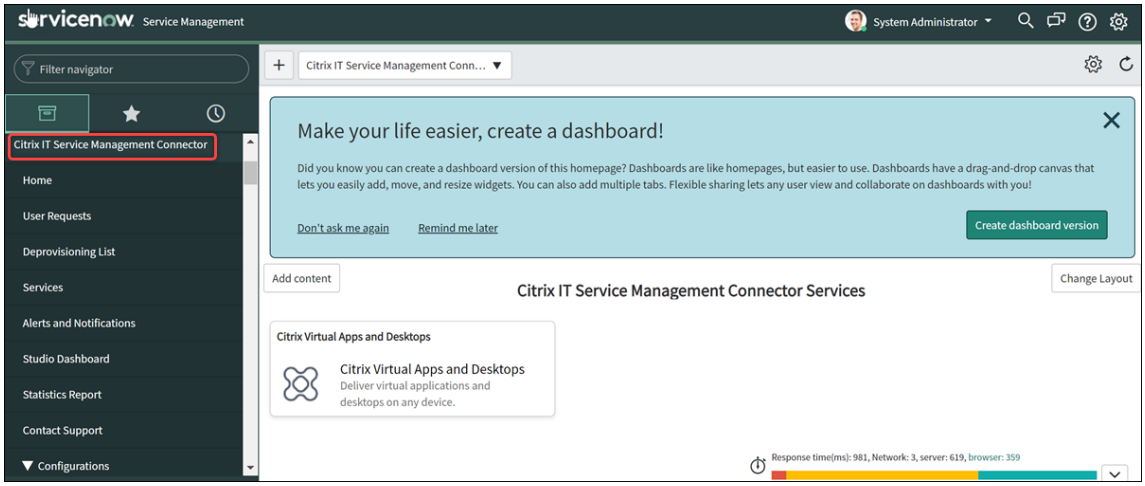
The following section shows you the ServiceNow user interfaces associated with the Citrix ITSM services:

- **ServiceNow Service Management Portal**. Portal for IT members.

  The **Citrix IT Service Management Connector** menu appears in the left navigation pane for authorized IT members to:

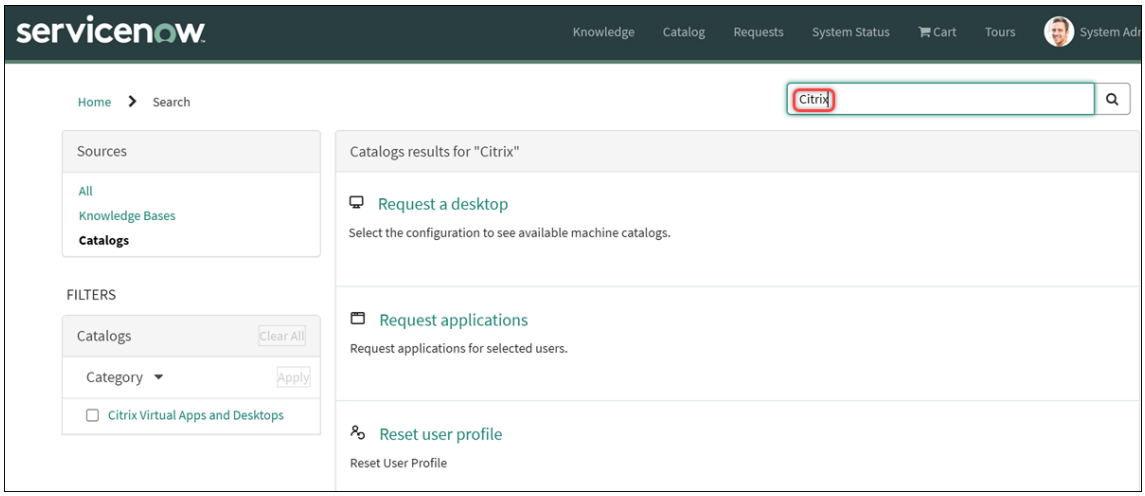
  - Deliver and manage Citrix apps and desktops
  - Manage Citrix alerts and notifications
  - Configure Citrix ITSM global settings

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- **ServiceNow Service Portal**. Portal for end users.

  With Citrix ITSM self-service items, end users can request and manage apps and desktops on their own.



> **Note:**
>
> - We recommend that you associate your ServiceNow Service Portal with the **Citrix IT Service Management Connector Services** catalog. As a result, end users can locate Citrix-specific items by searching for **Citrix** in the **Search** field. For more information, see this ServiceNow article.
> - If you access the portal using a user account assigned a Citrix ITSM role, services available to that role appear. To test end-user self-service items, sign in to the portal with an end-user account.

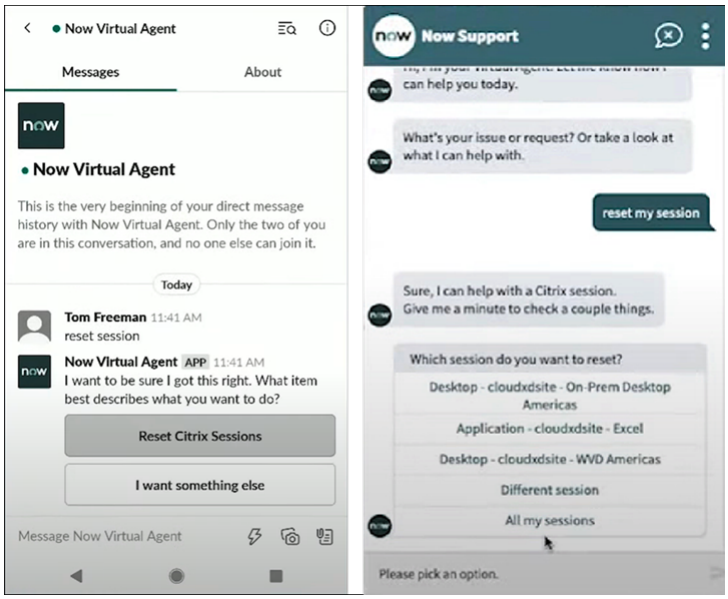
- **ServiceNow Virtual Agent integration**.

  Citrix ITSM Adapter service is integrated with the ServiceNow Virtual Agent. The automated, AI-enabled Virtual Agent interacts with end users through predefined topic conversations, helping

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end users accomplish specific goals such as resetting desktop or app sessions. End-user services can be available in web chatbot, NowMobile, and collaboration tools such as Microsoft Teams and Slack.

For more information, see this ServiceNow article.



Citrix ITSM roles and permissions

Citrix ITSM Adapter service provides the following roles to control user access to various types of Citrix ITSM services:

- `x_cion_citrix_it_s.ctx_itsm_admin`: administrators
- `x_cion_citrix_it_s.ctx_itsm_operator`: operators
- `x_cion_citrix_it_s.ctx_itsm_event_manager`: event managers
- `x_cion_citrix_it_s.ctx_itsm_resource_manager`: resource managers
- `x_cion_citrix_it_s.ctx_itsm_helpdesk`: help desks
- `x_cion_citrix_it_s.ctx_itsm_assis`: assistants

The following table lists Citrix ITSM services and their required Citrix ITSM roles.

As a ServiceNow system administrator, you can assign these roles to users. For more information, see this ServiceNow article.

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Service	Administrator	Operator	Help desk	Resource manager	Event manager	Assistant
Reset sessions for other users	Yes	Yes	Yes	No	No	Yes
Request MCS-created machines	Yes	Yes	Yes	Yes	No	No
Deprovision VDI desktops	Yes	Yes	No	Yes	No	No
Process employee separation	Yes	Yes	No	Yes	No	No
Approve application requests	Yes	Yes	No	Yes	No	No
Approve desktop requests	Yes	Yes	No	Yes	No	No
Approve MCS-created machine requests	Yes	Yes	No	Yes	No	No
View user requests	Yes	Yes	No	Yes	No	No
View studio dashboard	Yes	Yes	No	Yes	No	No
View Citrix alerts and notifica-tions	Yes	Yes	No	No	Yes	No
Manage alert and notification policies	Yes	Yes	No	No	Yes	No

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Service	Administrator	Operator	Help desk	Resource manager	Event manager	Assistant
Onboard and decommission customers	Yes	No	No	No	No	No
Update customer properties	Yes	No	No	No	No	No
View data import policy	Yes	No	No	No	No	No
Manage app and desktop policies	Yes	No	No	No	No	No
View statistic reports	Yes	No	No	No	No	No

Note:

- The operator role is a combination of the help desk, resource manager, and event manager roles.
- The following services are available to all users:
  - Request applications
  - Reset sessions
  - Request desktops
  - Request MCS-created machines
  - Power manage VDI desktops

Deliver and manage apps and desktops

September 6, 2025

By default, the Citrix ITSM Adapter service provides a range of ITSM services in ServiceNow. This article shows how to request, deliver, and manage apps and desktops using these services:

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- End users - Self-service through portal
- End users - Self-service through Virtual Agent
- Help desks - Request and manage
- Resource managers - Approve and manage

End users - Self-service through portal

September 6, 2025

As an end user, you can request and manage apps and desktops for yourself and your colleagues through the ServiceNow Service Portal.

> **Note:**
>
> If you access the self-service portal using an account assigned a Citrix ITSM role, ITSM services available to that role appear.

Troubleshoot and report app and desktop failures

The **Troubleshoot and report app and desktop failures** service provides a central place for end users to troubleshoot, resolve, and report issues with Citrix virtual apps and desktops. With this service, end users can trigger different troubleshooting actions and report the issues to IT help for further assistance.

To use this service, follow these steps:

1. Sign in to the ServiceNow Service Portal.
2. Click **Troubleshoot and report app and desktop failures**. All desktops and apps assigned to you appear.
3. Select the desktop or app where you experienced issues.
4. From the **Action** field, select an action to perform. The options include: Reset sessions, Power manage VDA machines, and Report issues.
5. Click **Submit**.

Reset sessions

As an end user, you can reset your desktop or app sessions on your own.

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1. Sign in to the ServiceNow Service Portal.
2. Click **Reset a session**. The **Reset a session** page displays all your desktop and application sessions.



3. Select a desktop or app session, and then click **Request**.

   The target desktop or app session resets immediately, and you're logged out of the session.

Reset sessions for other users

As an end-user assigned the ServiceNow assistant role, you can reset desktop or app sessions for other users in your organization. For example, if you're a manager and have team members who don't have ServiceNow licenses. You can reset sessions for them.

> **Note:**
>
> - Reset operations are logged in ServiceNow for auditing purposes.
> - For more information about the ServiceNow assistant role, see Citrix ITSM roles and permissions.

1. Sign in to the ServiceNow Service Portal.
2. Click **Reset a session for other users**.
3. In the **User** field, enter the user's ID (email address format), and then click **Search**. All active sessions of that user appear.
4. Select the target session.
5. Click **Submit**.

Power manage VDI desktops

As an end user, you can power manage your VDI desktops.

1. Sign in to the ServiceNow Service Portal.
2. Click **Power manage VDI desktops**.
3. On the page that appears, select the target VDI desktop, and then select a power action to apply on the target VDI desktop.

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> **Tip:**
>
> Only VDI desktops are available for selection.

4. Click **Submit**.

   The selected power action is applied to the target desktop immediately.

Reset user profiles

> **Note:**
>
> This feature applies only to Citrix Profile Management deployments. For more information, see this Citrix DaaS article.

As an end user, you can reset your user profile.

1. Sign in to the ServiceNow Service Portal.
2. Click **Reset User Profiles**.
3. On the page that appears, click **Request**.

   The user's profile resets immediately.

Request desktops

As an end user, you can request a desktop for yourself.

1. Sign in to the ServiceNow Service Portal.
2. Click **Request a desktop**. The **Request a desktop** page appears.
3. From the **Configuration** list, select a published desktop group as needed.



4. Click **Request**.

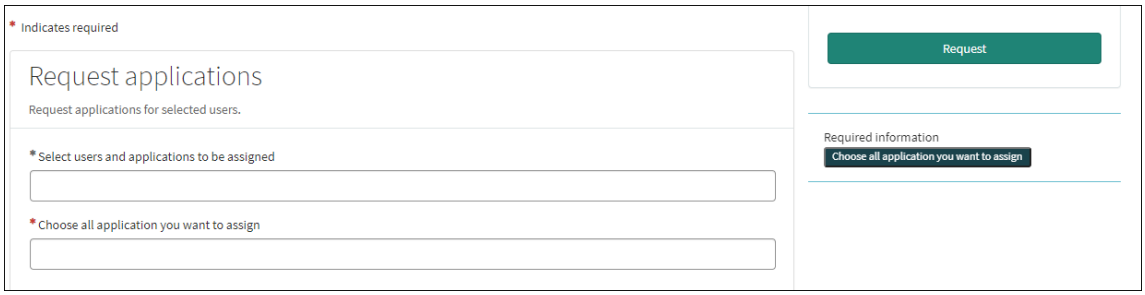
   The request appears in the **User Requests** menu for approval.

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Request applications

As an end user, you can request applications for yourself and for your colleagues.

1. Sign in to the ServiceNow Service Portal.
2. Click **Request applications**. The **Request applications** page appears.



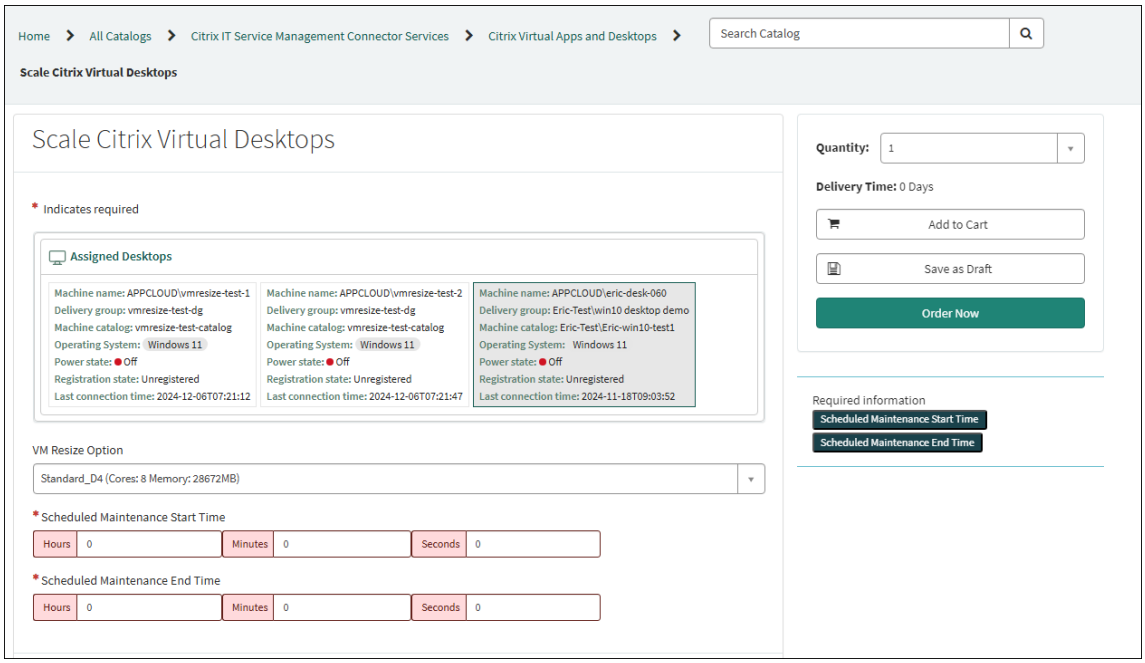
3. Click the blank space of each field to select or type one or more users and applications.
4. Click **Request**.

   The request appears in the **User Requests** menu for approval.

Request desktop scaling

As an end user, you can request to scale your desktops up or down to meet workload needs.

1. Sign in to the ServiceNow Service Portal.
2. Click **Scaling Citrix Virtual Desktops™**.



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3. On the page that appears, select a desktop from the list of desktops assigned to you, then specify the start and end times for resizing.
4. Click **Submit**.

   The request appears in the **User Requests** menu for approval.

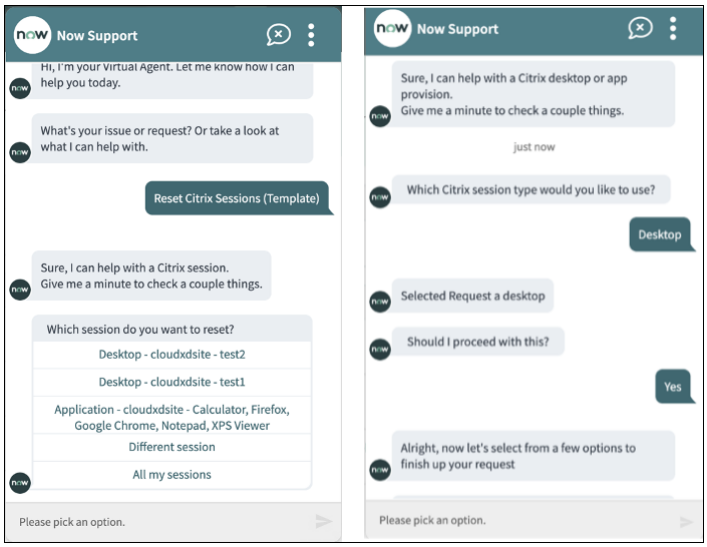
   > **Note:**
   >
   > Desktop scaling occurs at the scheduled time period after a resource manager approves your request.

End users - Self-service through Virtual Agent

September 6, 2025

The Citrix ITSM Adapter service is integrated with the ServiceNow Virtual Agent. The automated, AI-enabled Virtual Agent interacts with end users through predefined topic conversations. The agent identifies and triggers the actions that users want to do, such as reset desktop sessions.

Virtual Agent can be available in web chatbot, NowMobile, and collaboration tools such as Microsoft Teams and Slack. For more information, see this ServiceNow article.



Help desks - Request and manage

March 4, 2026

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As a Citrix ITSM IT help desk, you can request and manage apps and desktops for end users.

Required roles

You must have one of the following Citrix ITSM roles:

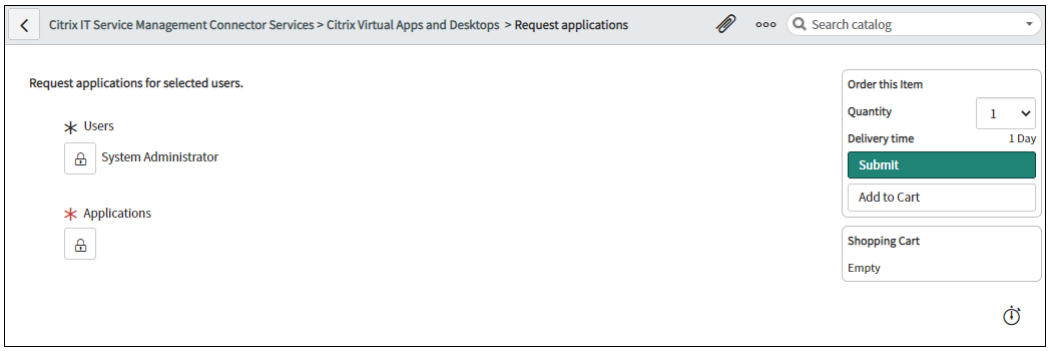
- Help desk (`x_cion_citrix_it_s.ctx_itsm_helpdesk`)
- Operator (`x_cion_citrix_it_s.ctx_itsm_operator`)
- Administrator (`x_cion_citrix_it_s.ctx_itsm_admin`)

Request applications for users

You can request applications for users in your organization.

> **Note:**
>
> By default, all published applications and desktops are unavailable for requests. Before a published resource can be requested, you must enable its availability. For more information, see Set application and desktop availability for user requests.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Services > Citrix Virtual Apps and Desktops™**.
3. Click **Request applications**. The **Request applications** page appears.



4. Select one or more users:
   a) Click the lock icon to unlock the field.
   b) In the blank space of the field, type a user name, and then click the target user. The user appears in the user list.
   c) To remove a user from the user list, click the delete icon.
   d) Click the lock icon to confirm the selection.
5. Select one or more applications in the same way as you select users.

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6. Click **Submit**.

   The request appears in the **User Requests** menu for approval. Requests for an application can be automatically approved if a Citrix ITSM administrator enables automatic approval for that application.

Reset sessions for users

You can reset a desktop or app session based on user requests or business needs.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Services > Citrix Virtual Apps and Desktops**.
3. Click **Reset a session**.
4. Use the filters to target the sessions.

   For example, after you select a user from the drop-down menu, all sessions of the user are listed. You can also select all users by setting the **User** field to **All**, and then set the other fields to filter sessions.
5. Select a session.
6. Click **Submit**.

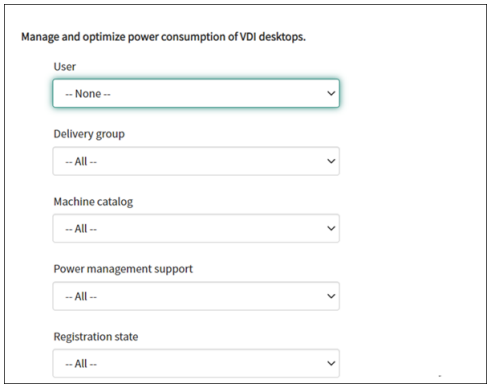
   The target session resets immediately and its current user is logged out of the session.

Power manage VDI desktops

You can power manage a VDI desktop in your deployment.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Services > Citrix Virtual Apps and Desktops**.
3. Click **Power manage VDI desktops**.
4. Set the filters to target the VDI desktops.

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For example, after you select a user from the drop-down menu, all machines of the user are listed. You can also select all users by setting the **User** field to **All**, and then set the other fields to filter VDI desktops.

5. Select a target VDI desktop, and then select a power action to apply on the target VDI desktop.
6. Click **Submit**.

   The selected power action is applied to the target desktop immediately.

Reset user profiles

> **Note:**
>
> This feature applies only to Citrix Profile Management deployments. For more information, see this Citrix DaaS article.

You can reset profiles for users in your organization.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Services > Citrix Virtual Apps and Desktops**.
3. Click **Reset user profiles**.
4. In the **Users** field, click the lock icon to unlock the field.
5. Search for a user by the user name, and then click the **Add** icon to add the user to the **Users** list. If needed, repeat this step to add more users.
6. To delete a user from the **Users** list, select the user and click the delete icon.
7. Click the lock icon to confirm your selection.
8. Click **Submit**.

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Request desktops for users

You can request desktops for users in your organization.

> **Note:**
>
> By default, all published applications and desktops are unavailable for requests. Before a published resource can be requested, you must enable its availability. For more information, see Set application and desktop availability for user requests.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Services > Citrix Virtual Apps and Desktops**.
3. Click **Request a desktop**. The **Request a desktop** page appears.
4. From the **Configuration** list, select a published desktop group as needed.



5. Click **Submit**.

   The request appears in the **User Requests** menu for approval. Requests for a desktop can be automatically approved if a Citrix ITSM administrator enables automatic approval for that desktop.

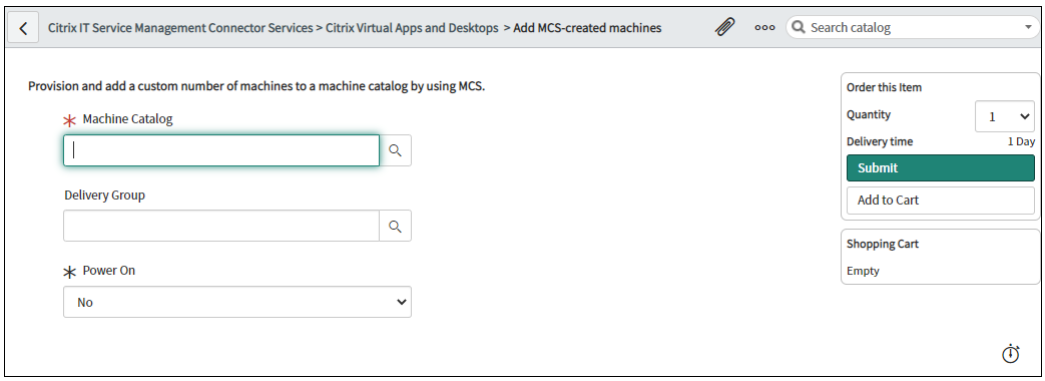
Request MCS-created machines

If a machine catalog is short on machines, you can submit a request to provision MCS-created machines for this catalog.

> **Note:**
>
> This service item applies only to adding machines to machine catalogs created in Citrix DaaS.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Services > Citrix Virtual Apps and Desktops**.
3. Click **Add MCS-created machines**.

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4. Select where you want to add the machines:
   - In the **Machine Catalog** field, type the name of the machine catalog you want to add the machines to. Next, click the search icon to search and select it.
   - (Optional) In the **Delivery Group** field, type the name of the delivery group you want to add the machines to. Next, click the search icon to search and select the group.
5. (Optional) From the **Power On** list, select the power status of the new machines. By default, the newly created machines are in a power-off state.
6. In the **Quantity** field, type the number of machines you want to add, and then click **Submit**.

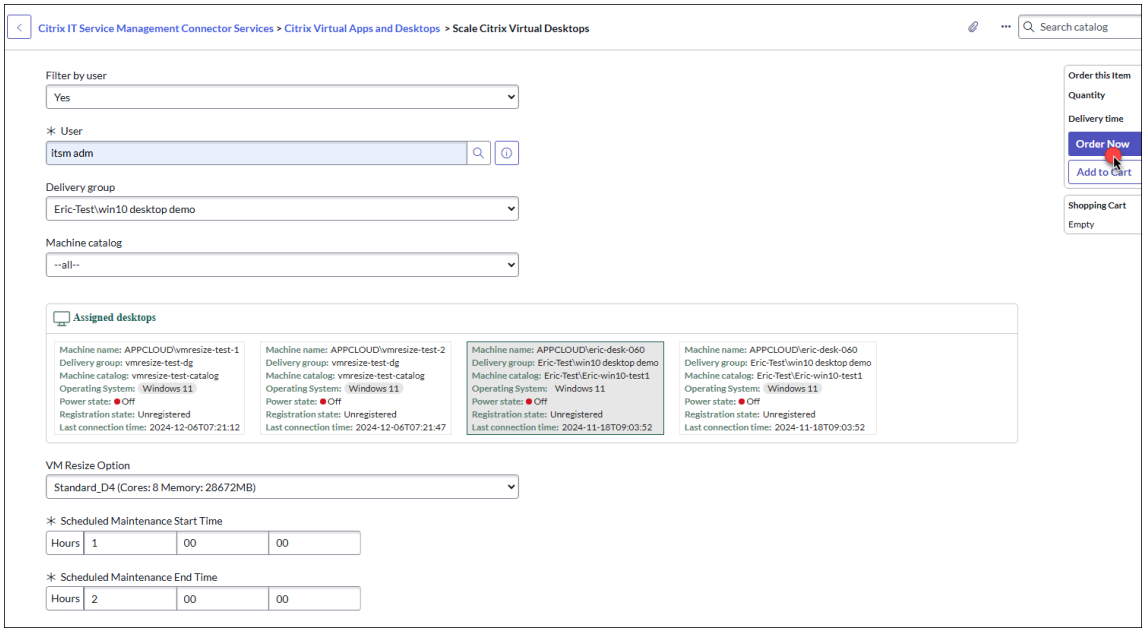
   The request appears in the **User Requests** menu for approval.

Request desktop scaling for users

As an IT help desk, you can request desktop scaling to adjust resources based on users'workload needs.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Services > Citrix Virtual Apps and Desktops**.
3. Click **Scale Citrix Virtual Desktops™**.

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4. Use one or more filters to locate the assigned desktops you want to scale:

   - **User** (optional): Select **Yes** for **Filter by user**, then click the **Magnifier** icon to select a user.
   - **Delivery group**: Select a group from the drop-down list. *All* groups are selected by default.
   - **Machine catalog**: Select a catalog from the drop-down list. *All* catalogs are selected by default.

5. In the filtered list of assigned desktops, select the desktop to scale.

   > **Note:**
   >
   > If the machine catalog isn't enabled for VM resizing enabled, an error message prompts you to contact ITSM service administrators.

6. From the **VM Resize Option** drop-down list, select the desired size.
7. Specify the start and end times for a scheduled resizing.
8. Click **Order** now at the top-right corner.

   The request appears in the **User Requests** menu for approval.

   > **Note:**
   >
   > Desktop scaling occurs at the scheduled time period after a resource manager approves your request.

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Resource managers - Approve and manage

September 13, 2025

As a Citrix ITSM resource manager, you can approve app and desktop requests and reclaim apps and desktops.

Required roles

You must have one of the following Citrix ITSM roles:

- Resource manager (`x_cion_citrix_it_s.ctx_itsm_resource_manager`)
- Operator (`x_cion_citrix_it_s.ctx_itsm_operator`)
- Administrator (`x_cion_citrix_it_s.ctx_itsm_admin`)

Process employee separation

When employees leave your organization, start the Process employee separation service to log them out of sessions and to reclaim their apps and desktops.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Services > Citrix Virtual Apps and Desktops™**.
3. Click **Process employee separation**.
4. In the **User** field, enter the universal principal name of an outgoing employee and then click **Search**.

   Resources associated with the user appear:

   - Sessions: Displays active and disconnected sessions launched by this user.
   - Assigned Desktops: Displays desktops assigned to this user.
   - Available Desktops: Displays desktops that this user has permission to launch.
   - Available Applications: Displays applications that this user has permission to launch.

5. From the **Deprovisioning Type** list, select an option:

   - Remove the desktop
   - Keep the desktop but remove the user assignment

6. Click **Submit**.

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Deprovision static VDI desktops

You can deprovision static VDI desktops to take back resources in the following ways:

- Deprovision a static desktop depending on your needs
- Deprovision an idle static desktop

For more information about static VDI desktops, see VDI desktops.

> **Note:**
>
> You can deprovision only static desktops deployed in Citrix DaaS.

Deprovision a static desktop depending on your needs

You can deprovision static desktops to take back resources when needed. For example, when an employee leaves your organization.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Services > Citrix Virtual Apps and Desktops**.
3. Click **Deprovision a static desktop**.
4. Use the following filters to locate the target desktop:

   - **User**: select the user who is using the desktop. To ignore this filter, select **All**.
   - **Delivery Group**: (optional) select the delivery group where the desktop belongs.
   - **Machine Catalog**: (optional) select the machine catalog where the desktop belongs.

   The Search Results field shows the static desktops that meet the search criteria you selected.
5. In the **Search Results** field, select the target desktop.
6. From the **Deprovisioning Type** list, select the type you want:

   - Remove the desktop
   - Keep the desktop but remove the user assignment
7. Click **Update**.

   The deprovisioning task starts to run in the background. To see the task progress, go to the User Requests menu. When the task completes, the State field of this request shows Closed Complete.

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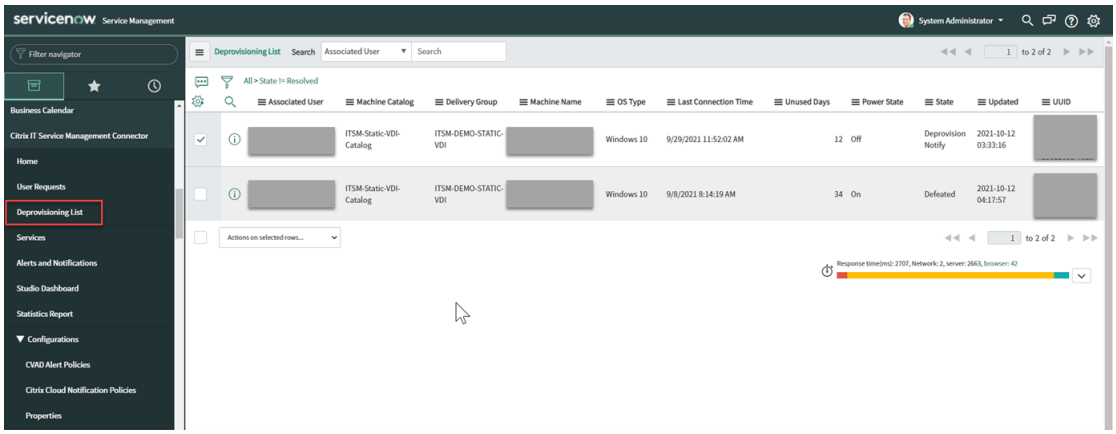
Deprovision an idle static desktop

The **Deprovisioning List** menu provides a central place for you to view and deprovision idle static desktops. If your Citrix ITSM administrator has enabled automatic deprovisioning for a delivery group, idle desktops in this group are deprovisioned automatically.

> **Note:**
>
> Citrix ITSM administrators can enable deprovisioning of idle static desktops based on delivery groups. For more information, see Enable deprovisioning of idle desktops.

To deprovision an idle desktop, follow these steps:

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Deprovisioning List**. The Deprovisioning List page appears.



   Desktops in this list can have the following states:

   - **Flagged for Deprovisioning**. Identifies that the desktop will soon be ready for deprovisioning.
   - **Ready for Deprovisioning**. Identifies that the desktop is ready for deprovisioning.
   - **Completed Deprovisioning**. Identifies that the desktop is deprovisioned successfully.

3. Select an idle desktop record that has the **State** field shown **Ready for Deprovisioning**.
4. From the **Actions on selected rows** list in the lower left of the list, select a deprovisioning type as needed:

   - Remove the desktop
   - Keep the desktop but remove the user assignment

   Alternatively, you can click the **Associated User** field to open the desktop details page, and then click **Remove the desktop** or **Keep the desktop but remove the user assignment** at the bottom of that page.

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5. Click **Update**.

   The deprovisioning task starts to run in the background. When the task completes, the State field of this record shows Completed Deprovisioning.

Approve user requests

As a resource manager, you can review and approve requests submitted by end users or IT help desks. Use the following tasks to manage and process these requests:

- View details of user requests
- Approve desktop requests
- Approve application requests
- Approve requests for MCS-created machines
- Approve requests for desktop scaling

View details of user requests

After end users or IT help desks submit requests, you can view the request details in the **User Requests** menu. For example, you can view the processing state of a user request. For the `Report Citrix session failures` requests, you can view session logs from Citrix DaaS components for troubleshooting. Those components include the Delivery Controller™, Citrix Health Check service (if applicable), and more.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > User requests**.
3. On the **User Requests** page that appears, view the **State** field of each request:

   - **Pending**. Indicates that the request is pending approval.
   - **Work in progress**. Indicates that the request has been approved but the resources have not yet been assigned.
   - **Closed Complete**. Indicates that the request has been completed successfully and closed.
   - **Closed Incomplete**. Indicates that the request has been closed but not completed successfully.

Approve desktop requests

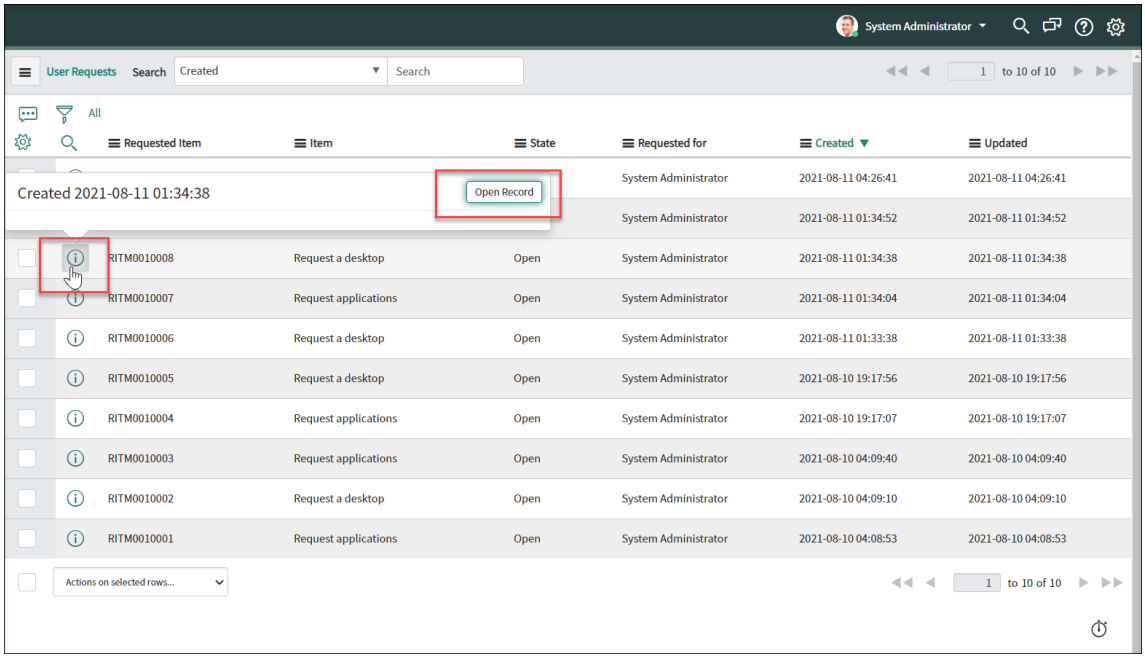
Through the **User Requests** menu, you can view and approve desktop requests.

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> **Note:**
>
> By default, when you approve a desktop request, the user is added to the delivery group containing this desktop. However, if your organization manages user assignments using AD groups, you can choose to add users to those AD groups. To support adding users to AD groups, enable AD operations by using one of the following methods:
>
> - **Use ServiceNow for AD operations**: Activate the **Active Directory Automation** solution in ServiceNow. For more information, see this ServiceNow article.
> - **Use ITSM for AD operations**: Enable the **Enable AD Operation via ITSM** property. This configuration uses the Citrix Identity service to connect to your AD server. For more information, see Enable AD operations through ITSM.

Steps:

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > User Requests**.
3. On the **User Requests** page that appears, locate a **Request a desktop** record whose **State** is **Open**.



4. Click the information icon next to the request ID, and then click **Open Record**. The request page appears.

   If you are prompted the machine catalog is short on machines, you can click the hyperlink provided in the message to create a machine creation request immediately. Or you can start a machine creation request later after completing the current desktop request. For more information about detailed steps, see Request MCS-created machines.

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5. To approve this request and add the user to the displayed delivery group, click **Update**.
6. To approve this request and add the user to an AD group that has permission to use the desktop, follow these steps:

    a) From the **Add user to AD group instead** list, select an AD group. The drop-down list displays AD groups that have permission to use the desktop.

    > **Note:**
    >
    > The ITSM connector periodically syncs configurations (including the AD group information) from Citrix Cloud. Currently, the synchronization cycle is four hours.

    a) Click **Update**.

After the task completes, you can see the result (succeed or fail) in the **Comments** field.

Approve application requests

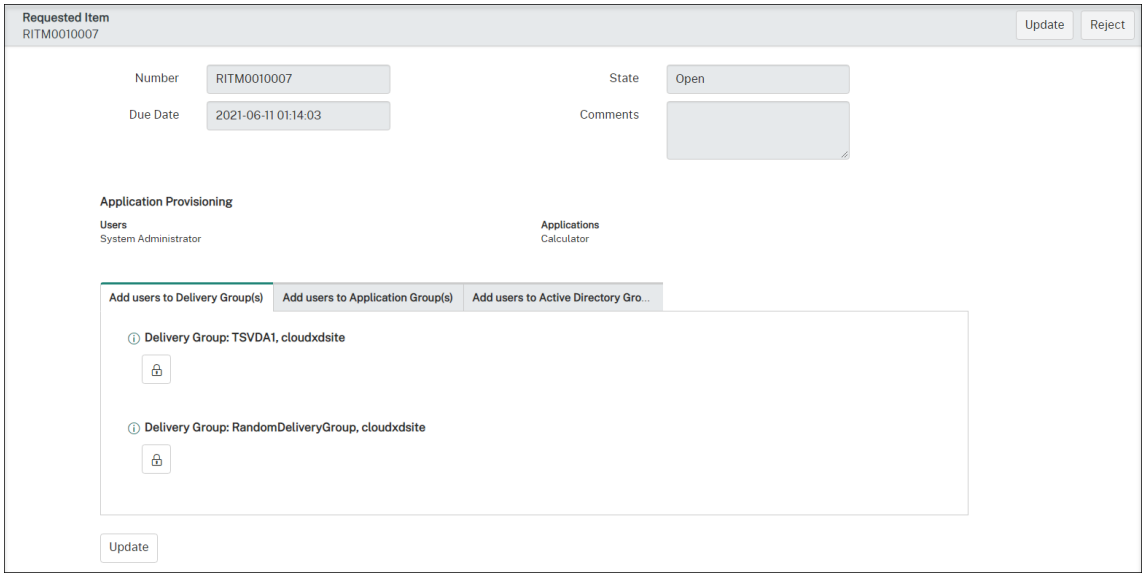
Through the **User Requests** menu, you can view and approve application requests. When approving requests, you must assign applications to users by adding them to delivery groups, application groups, or AD groups.

> **Note:**
>
> To support adding users to AD groups, configure one of the following options to authorize AD operations:
>
> - **Use ServiceNow for AD operations**: Activate the **Active Directory Automation** solution in ServiceNow. For more information, see this ServiceNow article.
> - **Use ITSM for AD operations**: Enable the **Enable AD Operation via ITSM** property. This configuration uses the Citrix Identity service to connect to your AD server. For more information, see Enable AD operations through ITSM.

Steps:

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > User Requests**.
3. On the **User Requests** page that appears, locate a Request Applications record whose **State** is **Open**.
4. Click the information icon next to the application request ID, and then click **Open Record**. The request details appear.

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5. Assign the applications to the users by adding them to the following groups:

   - **Add users to Active Directory Group(s)**. Click the tab. Active Directory groups that have permission to use the requested applications appear. To add the users to one of the groups, click the lock icon under the group name.
   - **Add users to Delivery Group(s)**. Click the tab. Delivery groups containing the requested applications appear. To add the users to one of the groups, click the lock icon under the group name.
   - **Add users to Application Group(s)**. Click the tab. Application groups containing the requested applications appear. To add the users to one of the groups, click the lock icon under the group name.

   > **Note:**
   >
   > - By default, the ITSM connector periodically syncs Citrix DaaS data to ServiceNow every four hours.
   > - If you add users to two or more types of groups, AD groups have higher priority than Delivery groups and Application groups. The latter two have the same priority.
   > - When you add users to a group, all resources (not only applications) associated with this group are assigned to the users. To avoid assigning unnecessary applications to them, create more fine-grained groups.

6. Click **Update**.

   After the task completes, you can see the result (succeed or fail) in the Comments field.

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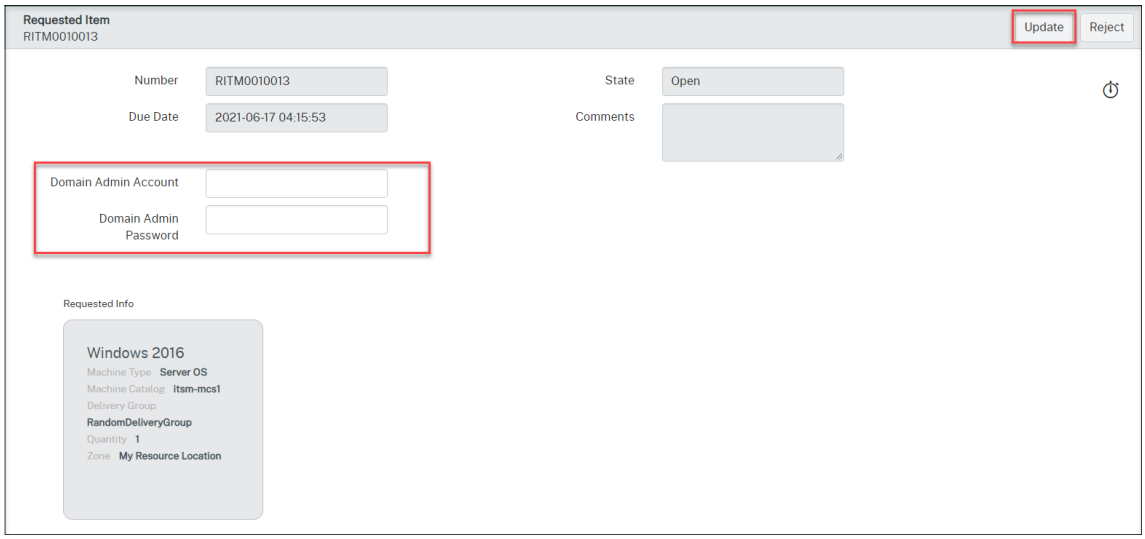
Approve requests for MCS-created machines

Through the **User Requests** menu, you can approve requests for MCS-created machines.

> **Note:**
>
> You also have permission to request MCS-created machines. For more information, see Request MCS-created machines.

Steps:

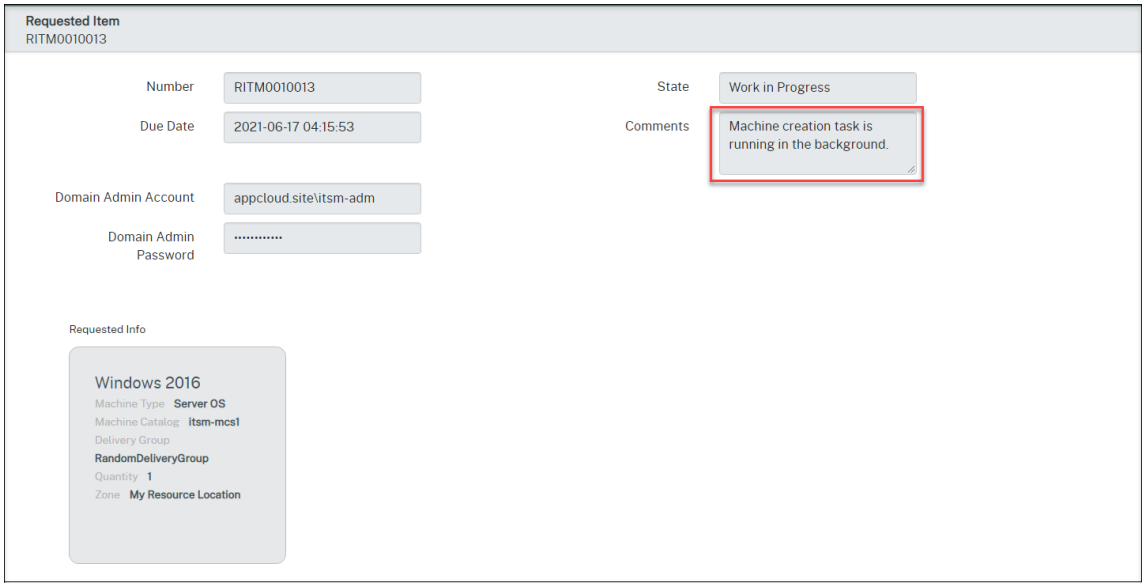
1. Before approving a request, get the credentials of the domain where the requested machines belong.
2. Sign in to your ServiceNow Service Management Portal.
3. Go to **Citrix IT Service Management Connector > User Requests**.
4. Open the record of a machine creation request. The **Requested Item** page appears.



5. Type your domain credentials, and then click **Update** in the upper-right corner.

   Machine creation starts to run in the background. After it completes, you can see the result (succeed or fail) in the Comments field.

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> **Note:**
>
> The domain credentials that you provide are for one-time use only. Your ServiceNow instance doesn't store or cache them.

Approve requests for desktop scaling

Through the **User Requests** menu, you can view and approve requests for desktop scaling.

> **Note:**
>
> Desktop scaling occurs at the scheduled time period after you approve the request.

Steps:

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > User Requests**.
3. On the **User Requests** page that appears, locate a **Scale Citrix Virtual Desktops™ record** with a **State** of **Open**.
4. Click the information icon before the request ID, and then click **Open Record** to view the request details.
5. Review the request details and either approve or reject the request.

   The **State** field indicates the status and progress of the request:

   - **Closed Skipped:** The request was rejected.
   - **Work in Progress:** The request was approved, but the desktop scaling hasn't yet completed.

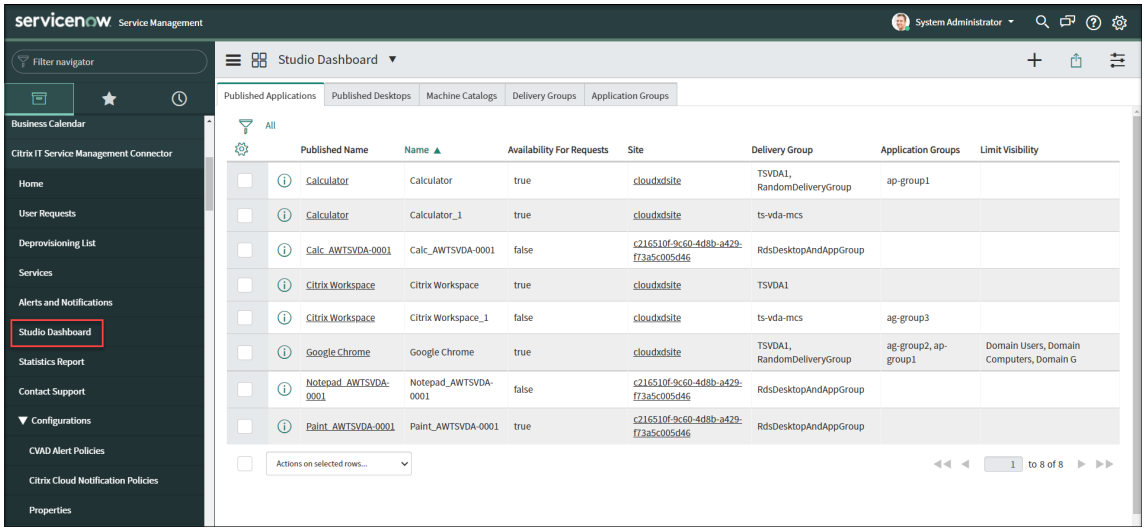
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- **Closed Complete:** The request was approved, and desktop scaling completes.

View Citrix DaaS deployment information

Studio Dashboard provides a central place for you to view data from your Citrix DaaS deployment.

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Studio Dashboard**. The Studio Dashboard page appears with tabs. Each tab displays a type of delivery information of your apps and desktops.



3. Click one of the following tabs to view details:

   - Published Applications
   - Published Desktops
   - Machine Catalogs
   - Delivery Groups
   - Application Groups

> **Note:**
>
> If you have the Citrix ITSM connector 22.6 or later installed on your ServiceNow instance, more tabs might appear on this dashboard, such as VDA Info. Those tabs appear only after your ITSM administrators set up the corresponding data import policies. For more information, see Import Citrix data to ServiceNow.

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Event managers - Manage Citrix alerts and notifications

February 4, 2026

As a Citrix event manager, you can manage and monitor the following Citrix alerts and notifications through the ServiceNow Service Portal:

- Alerts from Citrix DaaS and Citrix Virtual Apps and Desktops™
- Notifications from Citrix Cloud™
- Events from Citrix Application Delivery Management (ADM)
- Alerts and notifications from status.cloud.com

This article provides guidance on how to:

- Customize alert and notification policies
- Monitor Citrix alerts and notifications

Required roles

You must have one of the following Citrix ITSM roles:

- Event manager (`x_cion_citrix_it_s.ctx_itsm_event_manager`)
- Operator (`x_cion_citrix_it_s.ctx_itsm_operator`)
- Administrator (`x_cion_citrix_it_s.ctx_itsm_admin`)

Customize alert and notification policies

You can customize policies to control:

- Which alerts and notifications are synced to your ServiceNow instance. For more information, see:
  - Customize alert policies
  - Customize notification policies
- Whether to suppress alert and notification creation by defining maintenance windows. For more information, see Configure Citrix maintenance windows
- How ServiceNow processes the Citrix ADM events that it receives. For more information, see Customize ADM event policies
- Which Citrix Cloud health incidents are synced from status.cloud.com to your ServiceNow instance. For more information, see Create Citrix Cloud health incident policies.

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Customize alert policies

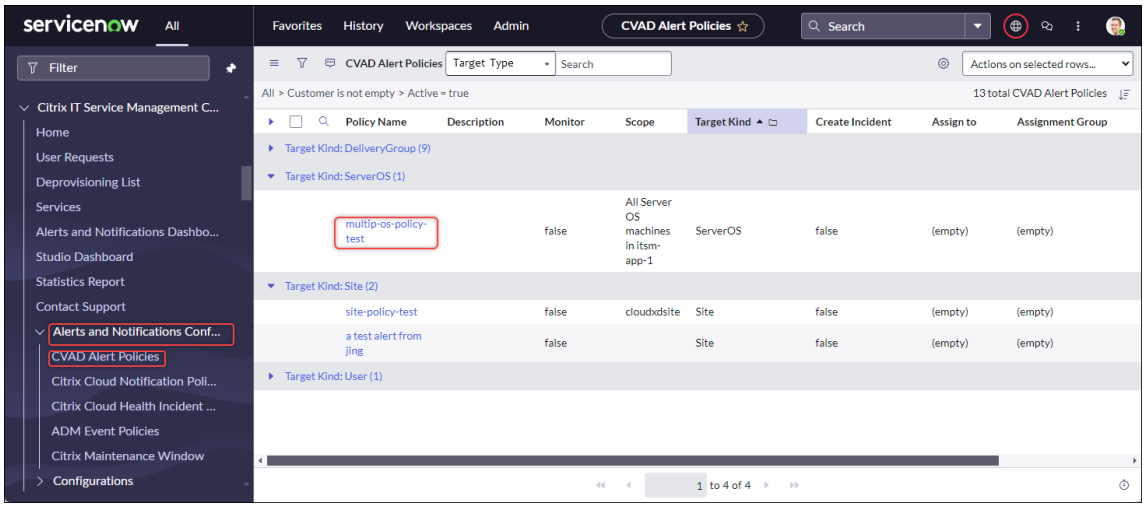
On the Citrix DaaS™ portal, alerts are generated based on the alert policies administrators create. The Citrix ITSM Adapter service automatically syncs all alert policies from the Citrix DaaS portal to your ServiceNow instance every 12 hours. As the Citrix ITSM event manager, you can choose which alerts are synced based on alert policies.

For more information about alert policies, see the Citrix Virtual Apps and Desktops documentation – Director and the Citrix DaaS documentation –Monitor articles.

To sync alerts corresponding to an alert policy to ServiceNow and display them on the Alerts and Notifications dashboard, configure the integration from either ServiceNow or Citrix Monitor:

- From Citrix Monitor, see Alerts and notifications in the Monitor documentation.
- From ServiceNow, follow these steps:

1. Sign in to your ServiceNow Service Management Portal.
2. In the left pane, select **Citrix IT Service Management Connector > Alerts and Notifications Configuration > CVAD Alert Policies**. The **CVAD Alert Policies** page appears, where policies are grouped by **Target Kind**.



3. To refresh alert policies from Citrix DaaS immediately, click **Refresh**.
4. Click a policy name link as needed. The target alert policy window appears.
5. Click **Enable Monitor** at the bottom of the page.

> **Note:**
>
> Enabling monitoring automatically creates a webhook on Citrix Director. If you manually created a Citrix Director webhook, it is overwritten.

6. To create incidents for alerts associated with the policy, follow these steps:

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a) Select **Create Incident**.

b) From the **Create Incidents for** list, select the alerts for which you want to create incidents. The options include **Critical Alerts** and **All Alerts**.

c) Select **Category**, **Impact**, and **Urgency** for the incidents to create.

d) (Optional) In the **Assignment group** field, type the name of the assignment group you want to assign the incident to. Next, click the search icon to search and select the group.

e) (Optional) In the **Assign to** field, type the name of the IT member you want to assign the incident to. Next, click the search icon to search and select the member.

7. Click **Update**.

   Alerts corresponding to the selected policy are synced to your ServiceNow instance. Citrix ITSM operators can see them on the **Citrix IT Service Management Connector > Alerts and Notifications** page.

To stop monitoring alerts corresponding to an alert policy, open the policy and then click **Disable Monitor**.

Customize notification policies

Citrix Cloud notifications provide information about issues or events that need administrators' attention, such as new Citrix Cloud features or problems with a machine. Citrix Cloud notifications can come from any service within Citrix Cloud. As the Citrix ITSM event manager, you can define policies to control how ServiceNow processes Citrix Cloud notifications based on their attributes. The processing actions include ignore, enable monitoring, and create incidents.

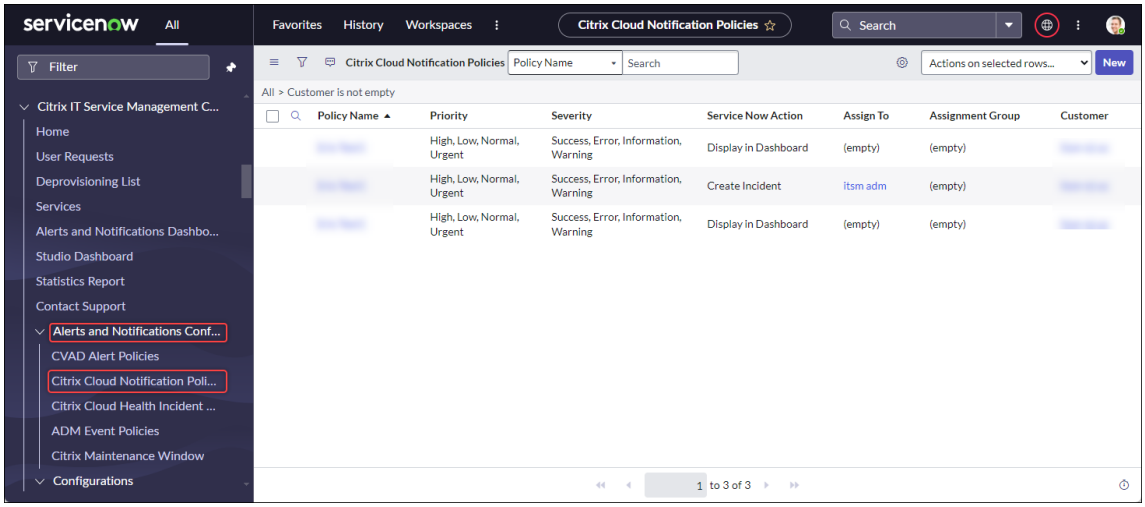
> **Note:**
>
> If no policies apply to a received notification, ServiceNow automatically ignores it.

For more information about Citrix Cloud notifications, see this Citrix Cloud documentation - Notifications article.

To create a policy for Citrix Cloud notifications, follow these steps:

1. Sign in to your ServiceNow Service Management Portal.
2. In the left pane, select **Citrix IT Service Management Connector > Alerts and Notifications Configuration > Citrix Cloud Notification Policies**.

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3. On the **Citrix Cloud Notification Policies** page that appears, click **New**. A new policy page appears.
4. Define the general information about the policy as follows:
   - From the **Customer** list, select a Citrix Cloud account you want to manage.
   - In the **Policy Name** field, type a descriptive name for the policy.
   - In the **Policy Priority** field, enter a number to indicate the policy priority. The smaller the number, the higher the priority. When two policies apply to the same notification, the one with the higher priority (smaller number) takes precedence.
5. On the **Notification Attributes** tab, specify attribute values to match notifications. For attributes other than **Severity** and **Priority**, enter a keyword or a regular expression.
6. On the **ServiceNow Action** tab, select the action that you want ServiceNow to perform for the target notifications:
   - **Ignore**. Ignores the target notifications.
   - **Display in Dashboard**. Displays the target notifications on the Alerts and Notifications dashboard.
   - **Create Incidents**. Creates a ServiceNow incident for each notification event.
7. If you select **Create Incidents** as the action, define the incident as needed:
   - Select **Category**, **Impact**, and **Urgency** for the incident.
   - To assign the incident to an assignment group, in the **Assignment group** field, click the search icon and then select the group.
   - To assign the incident to a person, in the **Assign to** field, click the search icon and then select the person.
8. Click **Create**. The policy appears on the **Citrix Cloud Notification Policies** page.

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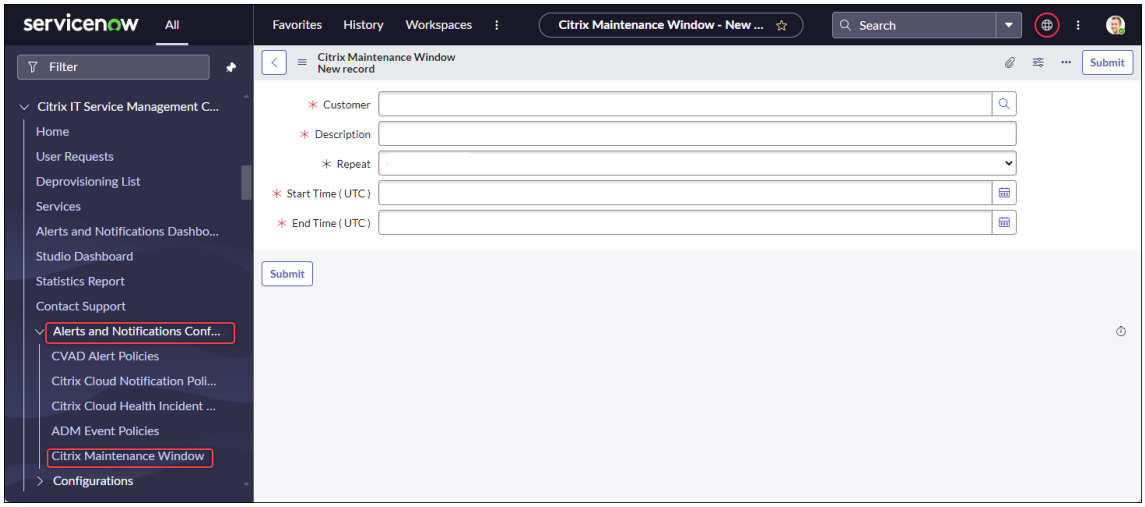
> **Note:**
>
> Creating a policy automatically creates a webhook on Citrix Cloud notifications. If you manually created a webhook on Citrix Cloud notifications, it is overwritten.

Configure Citrix maintenance windows

By default, the Citrix ITSM connector plug-in generates an incident for every Citrix alert or notification. To avoid disruption during maintenance, configure Citrix maintenance windows. During those periods, the plug-in halts generating incidents for alerts and notifications.

To create a maintenance window, follow these steps:

1. Sign in to your ServiceNow Service Management Portal.
2. In the left pane, select **Citrix IT Service Management Connector > Alerts and Notifications Configuration > Citrix Maintenance Windows**.
3. On the **Citrix Maintenance Windows** page that appears, click **New**. A configuration page appears.



4. Define the general information about the window as follows:
   - From the **Customer** list, select a Citrix Cloud account you want to manage.
   - In the **Description** field, type a descriptive name for this maintenance window.
   - In the **Repeat** field, select how often the maintenance event is repeated, such as **Daily (at the same time each day)**, **Weekly (on the same day each week)**, **Monthly (on the same day of each month)**, or **Never**.
   - In the **Start Time (UTC)**and **End Time (UTC)** fields, select the start and end times for the maintenance window.

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5. Click **Submit**.

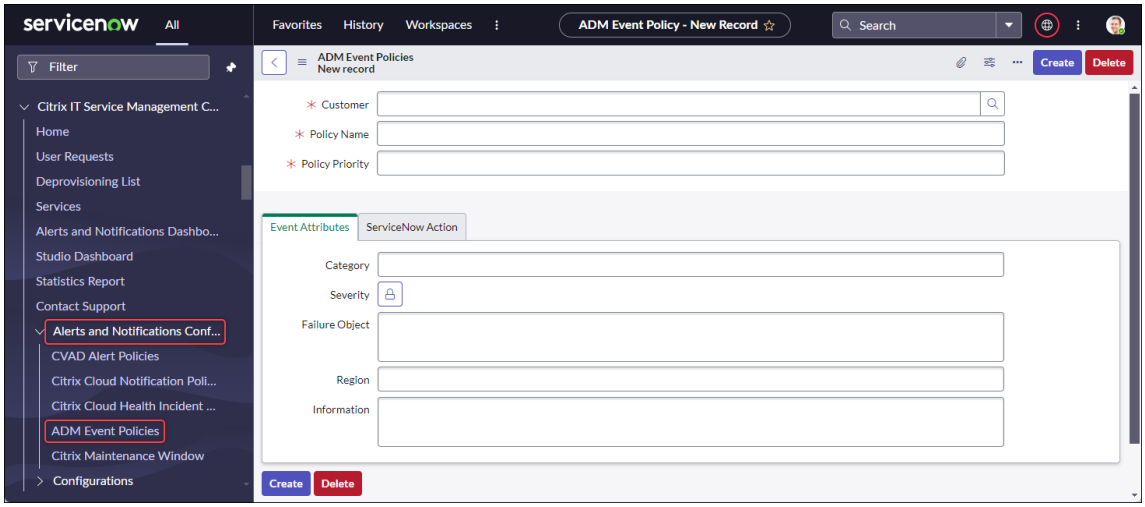
Customize ADM event policies

By default, the Citrix ITSM connector plug-in creates a predefined ServiceNow incident for each ADM event it receives. Starting with the ITSM Adapter service 22.6, you can define policies to control how ServiceNow processes ADM events based on event attributes. The processing actions include ignore, enable monitoring, and create incidents.

> **Note:**
>
> - If no policies apply to a received event, ServiceNow automatically creates a predefined incident for it: Incident Category: None, Impact: 2 - Medium, and Urgency: 2 - Medium.
> - Citrix Cloud administrators control which types of Citrix ADM events are synced to ServiceNow. For more information, see Integration with the ServiceNow instance in the Citrix Application Delivery Management document.

To create an ADM event policy, follow these steps:

1. Sign in to your ServiceNow Service Management Portal.
2. In the left pane, select **Citrix IT Service Management Connector > Alerts and Notifications Configuration > Citrix ADM Event Policies**.
3. On the **Citrix ADM Event Policies** page that appears, click **New**. A new policy page appears.



4. Define the general information about the policy as follows:
   - From the **Customer** list, select a Citrix Cloud account you want to manage.
   - In the **Policy Name** field, type a descriptive name for the policy.

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- In the **Policy Priority** field, enter a number to indicate the policy priority. The smaller the number, the higher the priority. When two policies apply to the same event, the one with the higher priority (lower number) takes precedence.

5. On the **Event Attributes** tab, specify values for event attributes to match events. For attributes other than **Severity**, enter a keyword or a regular expression.

   For more information about the ADM event attributes, see Create event rules in the Citrix Application Delivery Management document.

6. On the **ServiceNow Action** tab, select the action that you want ServiceNow to perform for the target events:

   - **Ignore**: Ignores the target events.
   - **Display in Dashboard:** Displays the target events on the Alerts and Notifications page.
   - **Create Incidents:** Creates a ServiceNow incident for each target event.

7. If you select **Create Incidents** as the action, define the incident as needed:

   - Select **Category**, **Impact**, and **Urgency** for the incident.
   - To assign the incident to an assignment group, in the **Assignment group** field, click the search icon and then select the group.
   - To assign the incident to a person, in the **Assign to** field, click the search icon and then select the person.

8. Click **Create**. The policy appears on the **Citrix ADM Event Policies** page.

Create Citrix health incident policies

https://status.cloud.com generates health incidents for outages and issues with Citrix Cloud services. By creating policies, you can sync those incidents to your ServiceNow Service Management Portal for monitoring and tracking.

To create a Citrix Cloud health incident policy, follow these steps:

1. Sign in to your ServiceNow Service Management Portal.
2. In the left pane, select **Citrix IT Service Management Connector > Alerts and Notifications Configuration > Citrix Cloud Health Incident Policies**.
3. On the page that appears, click **New**. A new policy page appears.
4. Enter the general information for the policy as follows:

   - From the **Customer** list, select a Citrix Cloud account you want to manage.
   - In the **Name** field, type a descriptive name for the policy.

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- In the **Policy Priority** field, enter a number to indicate the policy priority. The smaller the number, the higher the priority. When two policies apply to the same incident, the one with the higher priority (lower number) takes precedence.

5. On the **Event Attributes** tab, specify the Citrix Cloud health incidents that you want to sync by selecting their attributes:

   - **Service Name**: Click the unlock icon, select the services from which the incidents originate, and then click the lock icon.
   - **Region**: Click the unlock icon, select the regions to which the incidents belong, and then click the lock icon.
   - **Event Type**: Click the unlock icon, select the types of the incidents, and then click the lock icon.

6. On the **ServiceNow Action** tab, select how ServiceNow processes the Citrix Cloud health incidents specified in step 5:

   a) In the **ServiceNow Action** field, select a ServiceNow action as needed:

      - **Display in Dashboard.** Displays the incidents on the Alerts and Notifications dashboard.
      - **Create Incidents.** Creates a ServiceNow incident for each target Citrix Cloud health incident.

   b) If you select **Create Incidents** as the action, define the ServiceNow incident as needed:

      - Select the **Category**, **Impact**, and **Urgency** values for the incident.
      - To assign the incident to an assignment group, in the **Assignment group** field, click the search icon and then select the group.
      - To assign the incident to a person, in the **Assign to** field, click the search icon and then select the person.

   > **Note:**
   >
   > If any update occurs on a Citrix Cloud health incident, the latest data automatically appears in the Comment field of the corresponding ServiceNow incident. When the Citrix Cloud health incident is resolved, the ServiceNow incident is automatically marked as Closed.

7. Click **Create**. The policy appears on the **Citrix Cloud Health Incident Policies** page.

Monitor Citrix alerts and notifications

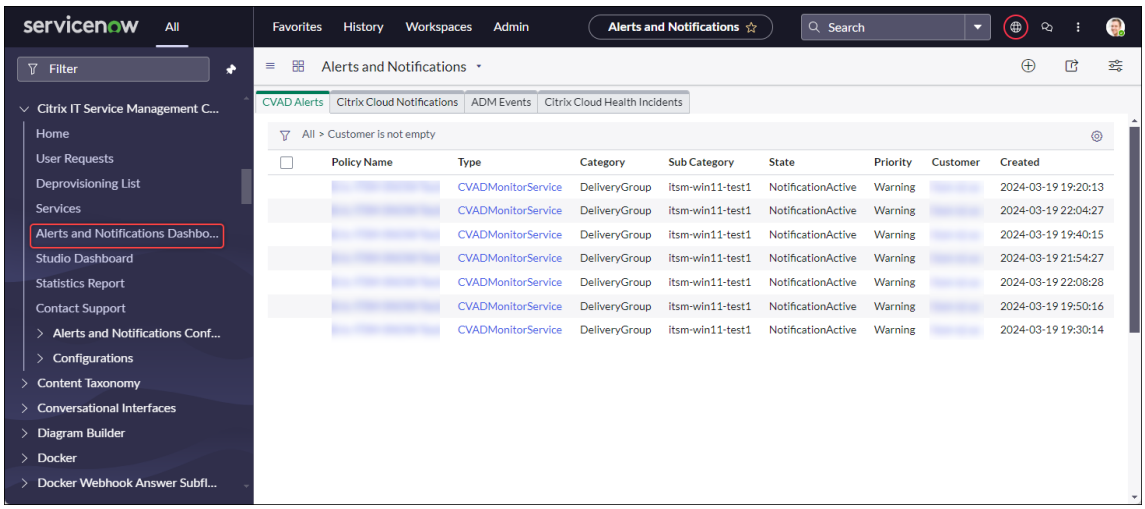
With the ITSM Adapter service, your ServiceNow instance provides a central place for IT help desks to monitor alerts, notifications, and ADM events from Citrix Cloud.

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> **Note:**
>
> Citrix ITSM event managers control which alerts and notifications are shown in the **Alerts & Notifications** menu. For more information, see Customize alert and notification policies.

Steps:

1. Sign in to your ServiceNow Service Management Portal.
2. In the left pane, select **Citrix IT Service Management Connector > Alerts and Notifications Dashboard**. The Alerts and Notifications page appears with three tabs. Each tab displays a type of message from Citrix Cloud.



3. Click one of the following tabs to view details:
   - **CVAD Alerts**: Alerts from Citrix DaaS and Citrix Virtual Apps and Desktops.
   - **Citrix Cloud Notifications**: Notifications from Citrix Cloud.
   - **ADM Events**: Events from Citrix ADM.
   - **Citrix Cloud Service Events**: Events from https://status.cloud.com.
4. To change settings for the incidents created for Citrix ADM events, follow these steps:
   a) Click the **ADM Events** tab.
   b) On the **ADM Events** page that appears, locate an event, and then click its **Incident** field.
   c) On the **Incident** page that appears, change settings for the incident as needed. For example, assign the incident to an assignment group or assignee.
   d) Click **Update**.

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Administrators - Configure Citrix ITSM settings

September 13, 2025

This article provides guidance on how to complete the following administrator tasks:

- Manually sync Citrix DaaS™ data
- Import Citrix data to ServiceNow
- Manage IT services for Citrix Virtual Apps and Desktops™
- Manage ITSM connector advanced settings

Required roles

Citrix ITSM administrator role (x_cion_citrix_it_s.ctx_itsm_admin)

Manually sync Citrix DaaS data

The Citrix ITSM connector syncs delivery data from the connected Citrix Cloud™ accounts to the **Studio Dashboard** menu. The synchronization occurs every four hours. Citrix ITSM administrators can sync the data immediately by using the following steps:

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Home**.
3. On the **Data Synchronization** tile, click **Refresh Data**.

Import Citrix data to ServiceNow

By default, the Citrix ITSM connector imports five types of deployment data from Citrix DaaS to your ServiceNow instance. See View Citrix DaaS deployment information for details. Starting with the Citrix ITSM connector 22.6, you can import more deployment data by configuring Data import policies.

For example, by configuring the policies, you can import VDA and license information from Citrix DaaS to your ServiceNow instance:

- Import VDA information
- Import license information

> **Note:**
>
> The Citrix ITSM connector provides two ServiceNow tables to store VDA and license information respectively. Developers can invoke those tables when creating custom ITSM workflows or up-

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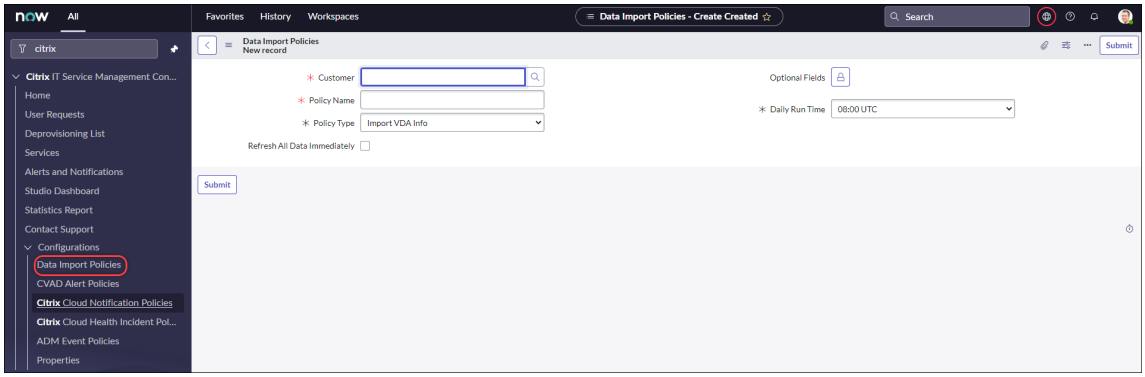
> dating your asset information in the Configuration Management Database. For more information, see ServiceNow tables in the Citrix ITSM developer documentation.

Import VDA information

With **Data Import Policies**, you can import VDA information from your Citrix Cloud accounts to your ServiceNow instance on a daily basis.

To create a data import policy, follow these steps:

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Configurations > Data Import Policies**. The Data Import Policies page appears.
3. Click **New** in the upper-right corner. The following page appears.



4. In the **Customer** field, select a Citrix Cloud account you want to manage.
5. In the **Policy Name** field, enter a descriptive name for the policy.
6. From the **Policy Type** list, select **Import VDA Info**.
7. In the **Optional Fields** field, select any additional fields you want to import as follows:
   a) Click the lock icon.
   b) From the list that appears, select the fields to import.
   c) Click the Unlock icon to save the changes.

> **Note:**
>
> - By default, the policy automatically imports several VDA fields, such as machine name, desktop group name.
> - For the policy to take effect if the Citrix ITSM connector plug-in installed is version 22.6, you must add at least one optional field. To remove this limitation, upgrade the plug-in to version 22.9 or later.
> - Importing more fields consumes more resources on your ServiceNow instance, such

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> as storage capacity, processing power, and network bandwidth.

8. From the **Daily Run Time** drop-down list, select the time of day you want the import task to run.
9. To import VDA to ServiceNow immediately after you create the policy, select **Refresh All Data Immediately**.
10. Click **Submit**.

    A new tab, **Published VDI List**, appears on the Studio Dashboard page, where IT help desks can view the VDA machine information. The imported VDA data are also stored in the `x_cion_citrix_it_s_citrix_vdis` database table. For more information, see the Citrix ITSM developer documentation.

After you create a data import policy, the first import loads all the VDA records from the Citrix Cloud account into your ServiceNow instance. Subsequent imports load only the VDA records that have been added since the previous import. If needed, you can refresh existing VDA data in ServiceNow with the latest data from Citrix Cloud.

To refresh VDA data in ServiceNow with the latest data from Citrix Cloud, follow these steps:

1. Go to **Citrix IT Service Management Connector > Configurations > Data Import Policies**. The Data Import Policies page appears.
2. Open a policy as needed.
3. Select **Refresh All Data Immediately**.
4. Click **Update**.

Import license information

To import daily usage data for Citrix app and desktop licenses, follow these steps:

1. Go to **Citrix IT Service Management Connector > Configurations > Data Import Policies**. The Data Import Policies page appears.
2. Click **New** in the upper-right corner. The New Record page appears.
3. In the **Customer** field, select a Citrix Cloud account you want to manage.
4. In the **Policy Name** field, enter a descriptive name for the policy.
5. From the **Policy Type** list, select **Import License Info**.
6. From the **License Type** list, select the license type you want to import.

   For more information, see License types in the Citrix Licensing documentation.

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7. Click **Submit**.

   The imported license usage data is stored in the `x_cion_citrix_it_s_cvad_active_use` database table. For more information about this table, see the Citrix ITSM developer documentation. For more information about license usage data, see Monitor licenses and active usage for cloud services in the Citrix Cloud documentation.

Manage IT services for Citrix Virtual Apps and Desktops

Use **Studio Dashboard** to manage IT services for Citrix Virtual Apps and Desktops, including:

- Set application and desktop availability for user requests
- Enable automatic approval for applications
- Enable automatic approval for desktops
- Enable deprovisioning of idle desktops
- Enable VM resizing

Set application and desktop availability for user requests

By default, all published applications and desktops are unavailable for user requests. You can enable their availability as needed. Detailed steps are as follows:

1. Sign in to your ServiceNow Service Management Portal.
2. Go to **Citrix IT Service Management Connector > Studio Dashboard**.
3. Click the **Published Applications** or the **Published Desktops** tab as needed.
4. Locate an application or desktop, and then click the **Published Name** field. The application or desktop information page appears.
5. To make the applications or desktops available for user requests, select **Availablility for requests**.
6. To hide the application or desktop from the request list, clear **Available for requests**.
7. Click **Update**.

Enable automatic approval for applications

By default, application requests require manual approval. To save the approval process for an application, you can enable automatic approval for it. Detailed steps are as follows:

1. Go to **Citrix IT Service Management Connector > Studio Dashboard**.

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2. Click the **Published Applications** tab.
3. Locate an application and click the **Published Name** field. The application information page appears.
4. Select **Enable Automatic Approval**.
5. Set the rule for adding users to a resource group:
    - **AD Group for Automatic Approval**. Click the lock icon and then the **Add/Move Multiple** icon. Active Directory groups that have permission to use this application appear. Follow the onscreen instructions to add groups as needed.
    - **Delivery Group for Automatic Approval**. Click the lock icon and then the **Add/Move Multiple** icon. Delivery groups that have permission to use this application appear. Follow the onscreen instructions to add groups as needed.
    - **Application Group for Automatic Approval**. Click the lock icon and then the **Add/Move Multiple** icon. Application groups that have permission to use this application appear. Follow the onscreen instructions to add groups as needed.
6. Click **Update**.

Enable automatic approval for desktops

By default, desktop requests require manual approval. To speed up the approval process for a desktop, you can enable automatic approval for it. Detailed steps are as follows:

1. Go to **Citrix IT Service Management Connector > Studio Dashboard**.
2. Click the **Published Desktops** tab.
3. Locate a desktop and click the **Published Name** field. The desktop information page appears.
4. Select **Enable Automatic Approval**.
5. To add users to the displayed delivery group, click **Update**.
6. To add users to an AD group that has permission to use the desktop, follow these steps:
    a) Select **Add AD Group Instead**.
    b) From the **AD Group for Automatic Approval** list, select an AD group as needed. The list displays AD groups that have permission to use the desktop.
    c) Click **Update**.

Enable deprovisioning of idle desktops

Deprovisioning idle desktops lets resource managers take back idle resources, thus increasing resource utilization. You can enable deprovisioning of idle desktops based on delivery groups. If

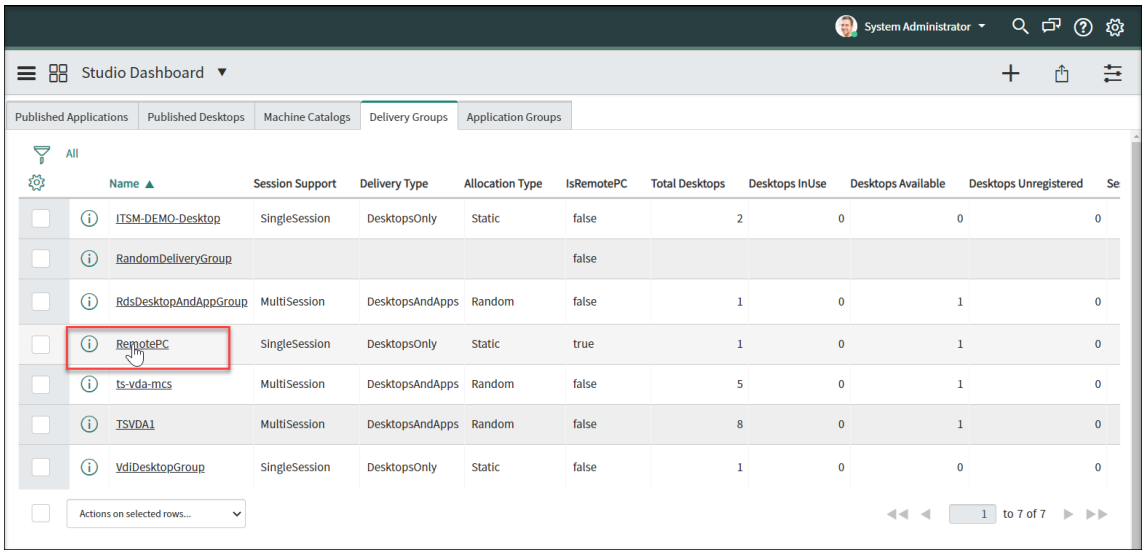
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needed, you can also enable automatic deprovisioning.

> **Note:**
>
> Deprovisioning idle desktops is supported only for static VDI desktops.

Detailed steps are as follows:

1. Go to **Citrix IT Service Management Connector > Studio Dashboard**.
2. Click the **Delivery Groups** tab.
3. Locate a delivery group whose **Allocation Type** field shows **Static**, and then click the **Name** field. The information page of the delivery group appears.



4. Select **Enable Deprovisioning**.
5. In the **Days of Idling Before Alerts** field that appears, change the default value if needed.

   When a desktop in the delivery group has been idle for more than the specified days, the desktop appears in the Deprovisioning List menu. Its *State* field shows *Flagged for Deprovisioning*, notifying the desktop will soon be ready for deprovisioning. To avoid generating such notifications, set **Days of Idling before Alerts** to **0**.
6. In the **Days of Idling Before Deprovisioning** field that appears, change the default value if needed.

   When a desktop in the delivery group has been idle for more than the specified days, the desktop appears in the Deprovisioning List menu. Its *State* field shows *Ready for Deprovisioning*.
7. To enable automatic deprovisioning, select **Automatic Deprovisioning**, and then select a deprovisioning type:

   - Remove the desktop

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- Keep the desktop but remove the user assignment

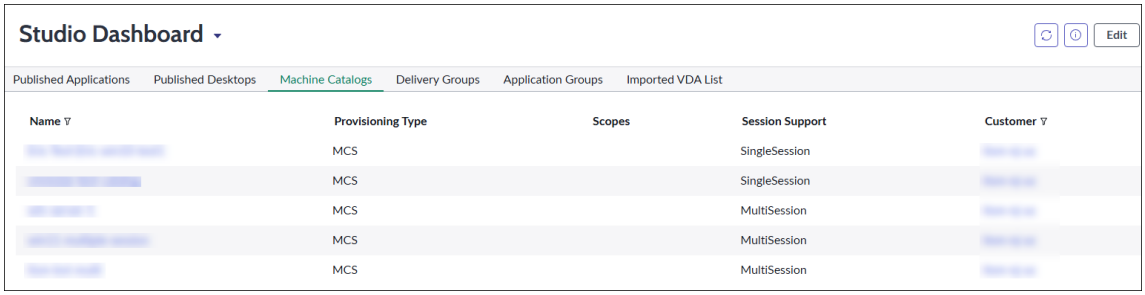
8. Click **Update**.

Enable VM resizing

As an ITSM administrator, you can enable VM resizing for an MCS-provisioned machine catalog. After you enable this capability, machines in this catalog can be resized to the VM sizes you specify. This capability allows help desks and end users to request desktops scaling to match workload needs.

To enable VM resizing, follow these steps:

1. Go to **Citrix IT Service Management Connector > Studio Dashboard**.
2. Click the **Machine Catalogs** tab.
3. Locate a machine catalog where the **Provisioning Type** field shows **MCS**, and click its **Name**. The machine catalog details page appears.



4. Select **Enable VM Resize**.
5. In the **Resize Type** field that appears, specify the VM sizes available for resizing:
   a) Click the lock icon to unlock the field.
   b) Click the magnifier icon next to **Select targe record** to view available options.
   c) Select a VM size option from the list.
   d) If needed, repeat steps b–c to add more VM size options.

   > **Note:**
   >
   > The selected sizes determine the VM resizing options available for help desks and end uses to request. Choose sizes based on workload requirements.

6. Click **Update**.

   After you complete these steps, resizing is enabled for the selected machine catalog.

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Manage ITSM connector advanced settings

Use **Configurations > Properties** to manage advanced settings for the ITSM connector, including:

- Enable remote PowerShell
- Enable auto-deletion for Citrix alerts and notifications
- Enable support for multiple-AD-domain Citrix Cloud accounts
- Enable AD operations through ITSM

Enable remote PowerShell

To support the **Run PowerShell scripts on a machine** Custom Activity, enable the remote PowerShell feature in the Citrix ITSM connector as follows:

1. Sign in to your ServiceNow Service Management Portal.
2. In the left pane, select **Citrix IT Service Management Connector > Configurations > Properties**. The **Citrix Customers** page appears, listing Citrix Cloud accounts that you added to the plug-in.
3. Locate a customer, and then click **Display Name**. The customer information page appears.
4. Select **Enable Remote PowerShell**.
5. Click **Update**.

   For more information about this Custom Activity, see Custom Activities and tables.

> **Note:**
>
> Your setting takes effect in 24 hours. For it to take effect immediately, restart Cloud Connectors.

Enable auto-deletion for Citrix alerts and notifications

The Citrix ITSM connector keeps syncing the following data from Citrix Cloud to your ServiceNow instance. To save storage space, you can enable automatic deletion for the data and specify a retention period for it.

- Alerts from Citrix DaaS and Citrix Virtual Apps and Desktops
- Notifications from Citrix Cloud
- Events from Citrix Application Delivery Management (ADM)
- License usage data from Citrix DaaS

To enable auto-deletion for Citrix data, follow these steps:

1. Sign in to your ServiceNow Service Management Portal.

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2. In the left pane, select **Citrix IT Service Management Connector > Configurations > Properties**. The **Citrix Customers** page appears, listing Citrix Cloud accounts that you added to the plug-in.
3. Locate a customer, and then click **Display Name**. The customer information page appears.
4. Select **Enable Data Auto-Deletion**.
5. In the **Days of Retention** field that appears, enter a retention period, in days.
6. Click **Update**.

Enable support for multiple-AD-domain Citrix Cloud accounts

In multiple-AD-domain Citrix Cloud accounts, users are identified by user names and domain names. To enable the ITSM connector plug-in to retrieve user session data from those accounts, select the **SAM Account Name** or **User Principal Name (UPN)** as the user-unique identity.

Follow these steps to enable the support:

1. Sign in to your ServiceNow Service Management Portal.
2. In the left pane, select **Citrix IT Service Management Connector > Configurations > Properties**. The **Citrix Customers** page appears, listing Citrix Cloud accounts that you added to the plug-in.
3. Locate a customer that has more than one AD domain, and then click **Display Name**. The customer information page appears.
4. From the **User Unique Identity** list, select the field that stores the sAMAccountName or UPN. The options come from the field names in the **Organization > Users** table.
5. Click **Update** to save the change.
6. For the other multiple-AD-domain customers in the list, repeat steps 3–5 for each.

Enable AD operations through ITSM

When approving user requests for applications and desktops, resource managers can assign applications and desktops to users by adding them to Active Directory (AD) groups with permission to use the applications or desktops. To enable this functionality, you must enable AD operations using one of the following methods:

- **Use ServiceNow for AD operations**: Activate the **Active Directory Automation** solution in ServiceNow. For more information, see this ServiceNow article.
- **Use ITSM for AD operations**: Enable the **Enable AD Operation via ITSM** property. This configuration uses the Citrix Identity service to connect to your AD server.

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To enable the **Enable AD Operation via ITSM** property, follow these steps:

1. Sign in to your ServiceNow Service Management Portal.
2. In the left pane, select **Citrix IT Service Management Connector > Configurations > Properties**. The **Citrix Customers** page appears, listing Citrix Cloud accounts that you added to the plug-in.
3. Locate an account, and then click the **Display Name** field. The customer information page appears.
4. Select **AD Operation via ITSM**.
5. In the **AD Account** and **AD Password** fields that appear, enter the credentials with permission to add users to AD groups.
6. Click **Update**.

Upgrade

November 18, 2025

To upgrade Citrix ITSM Adapter service to a new version, install and configure the corresponding Citrix ITSM Connector plug-in on your ServiceNow instance.

Steps:

1. From the ServiceNow Store, search for **Citrix** to locate the plug-in, and then download the required version.
2. Install the plug-in on your ServiceNow instance.

   For more information, see Install the Citrix ITSM Connector plug-in.
3. Get the Citrix Cloud Service principal credentials that you initially generated for the service, and then add it to the plug-in.

   For more information, see Add the authentication credentials to the plug-in.

The upgrade completes.

Custom activities, actions, and tables

September 6, 2025

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The ITSM Adapter service provides a set of Custom Activities, Actions, and tables through the Citrix ITSM connector plug-in. With them, developers can create Citrix ITSM workflows that best suit your needs:

- With the Activities, developers can create workflows for Citrix apps and desktops by using the ServiceNow Workflow Editor.

  Activities are building blocks of ServiceNow workflows. The Citrix ITSM connector plug-in provides Custom Activities for Citrix apps and desktops. Take the Get Sessions Activity as an example. It retrieves information about Citrix app and desktop sessions based on variable values.
- With the Actions, developers can create workflows for Citrix apps and desktops by using the ServiceNow Flow Designer.
- With the tables, you can retrieve data from Citrix environments.

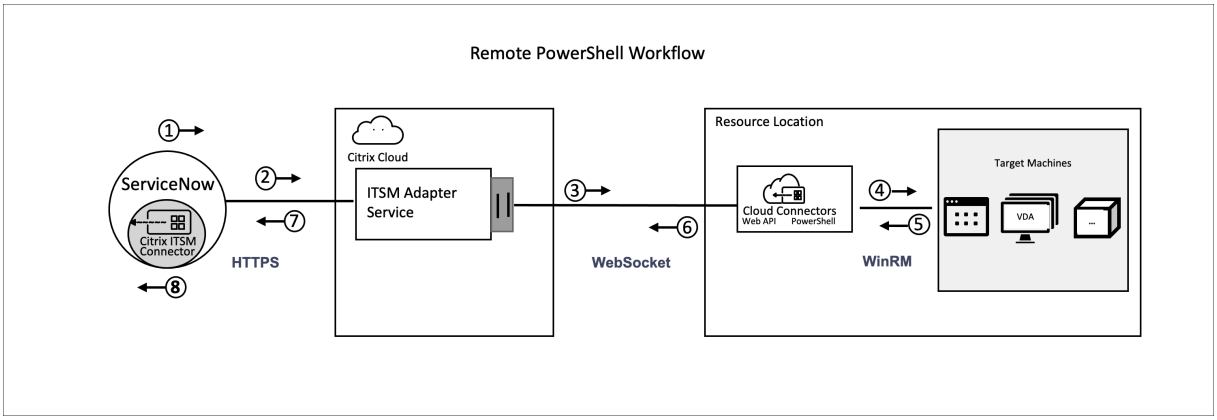
For more information, see the Citrix ITSM developer documentation.

Activity: Run PowerShell scripts on a machine

With the **Run PowerShell scripts on a machine** Custom Activity, you can remotely run PowerShell scripts on a target machine.

Overview

The following diagram illustrates the processing flow of this Custom Activity.



The detailed process is as follows:

- 1 and 2: The Citrix ITSM connector plug-in collects data from the activity and sends it to the Citrix ITSM Adapter service.
- 3: The Citrix ITSM Adapter service parses the received data and sends it to the target Cloud Connectors.

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- 4: The Cloud Connectors parse the received data and deliver the script to the target machine for execution.
- 5, 6, and 7: The target machine runs the script and returns the result to ServiceNow. In the process, HTTPS, WebSocket, and WinRM protocols are used.

This activity contains the following data:

- Customer ID and resource location ID. Identify the Cloud Connectors for script delivery.
- Machine Name. Identifies the target machine to run the script.
- User name and password. Identify the credentials to run PowerShell on the machine.
- Script. Identifies the PowerShell script.

For more information, see Run PowerShell scripts on a machine in the Citrix ITSM developer documentation.

Prerequisites

Before you use this Activity, you must:

- Enable remote PowerShell in the Citrix ITSM connector. For more information, see Enable remote PowerShell.
- Enable VDA machines to receive remote commands. For more information, see this Microsoft article.

Get started using the sample workflow

The ServiceNow Service Management Portal provides a sample workflow to help you understand how to use this Custom Activity.

To experience this sample workflow as a user, follow these steps:

1. In the ServiceNow Service Management Portal, go to **Citrix IT Service Management Connector > Services > Citrix Virtual Apps and Desktops™**.
2. Click **Run PowerShell scripts on a machine (sample workflow)**.
3. Search for a target machine using the user name, delivery group, or machine catalog (any or all), and then select a machine from the search results.
4. In the **User Name** and **Password** fields, enter the credentials for running the PowerShell script on the machine.
5. In the **Script Content** field, enter the PowerShell script to run on the machine. Starting with the ITSM Adapter service version 23.7.0, you can use parameters in the script. Parameters are represented as `${ ScriptParameters.<key> }`. Each key name corresponds to a different parameter, such as `${ ScriptParameters.ExampleParam1 }` and `${ ScriptParameters.ExampleParam2 }`.

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6. If you're using parameters in the script, in the **Script Parameters** field, enter key-value pairs using the JSON format to assign values to the keys in the script. Example, `{ "ExampleParam1":"Value1","ExampleParam2":"Value2"}`
7. Click **Submit**.

Example Script Content:

```
$processes = Get-Process -Name " ${
 ScriptParameters.appname }
 "
foreach ($process in $processes){

    Stop-Process -id $process.Id
 }
```

Script Parameters:

```
{ "appname":"chrome"}
```

Final script:

```
$processes = Get-Process -Name " chrome "
foreach ($process in $processes){

    Stop-Process -id $process.Id
 }
```

To view design details of this workflow, follow these steps:

1. On the ServiceNow Service Management Portal, select **Workflow Editor** in the left navigation menu.
2. On the **Workflows** tab, select the **CTX Remote PowerShell** workflow. Its design details appear.

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