knowledge16
May 15–20, 2016 • Mandalay Bay • Las Vegas, NV

Lab Guide

ServiceNow Connect:

Working in Real-Time

Katia Suchkova and Scott Marshall

Default Login / Password:

admin / Knowledge16

itil / Knowledge16

employee / Knowledge16

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Lab Goal

Lab 1.0 Connect Overview: Administration

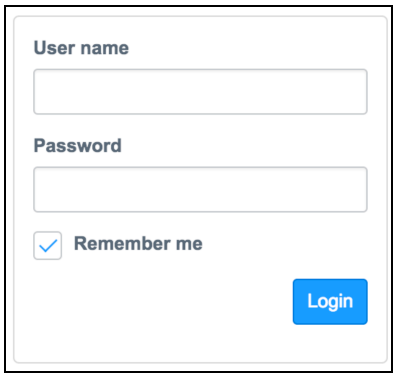
This lab reviews Connect content from an administrative perspective. Subject areas include the following:

- Enable Connect Chat
- Create Peer-to-peer conversation
- Create Group conversation
- Understand Connect Actions

The goal of this lab is to review Connect and its structure from the administrative view. It is important to know that Connect was launched in Geneva as a new way of doing work on the platform. This is achieved by combining presence, delightful chat experience and collaborative incident editing into a powerful tool that helps reduce resolution times from hours to mere minutes.

Log on to the Training Instance

1. Navigate to the unique instance URL provided.

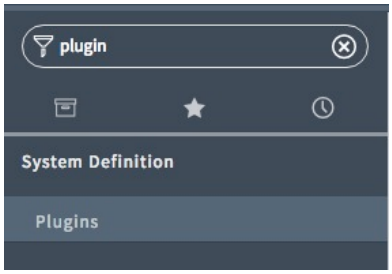


2. Log in with the provided administrator credentials.

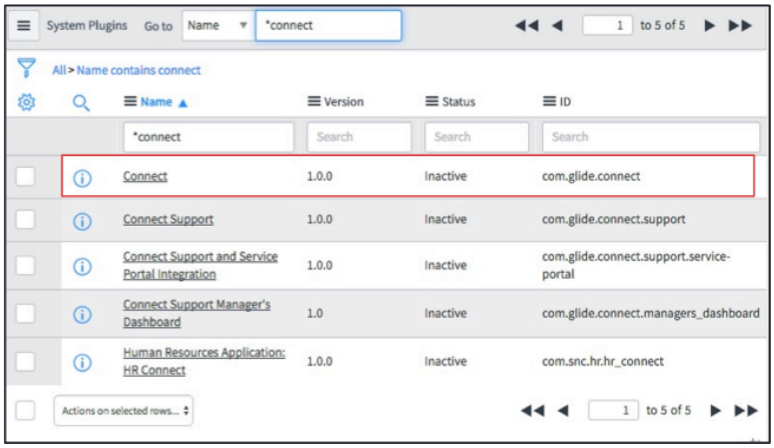
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Enable Connect Plugin

1. Using the filter in the upper-left corner, navigate to **Plugins (System Definitions > Plugins)**.

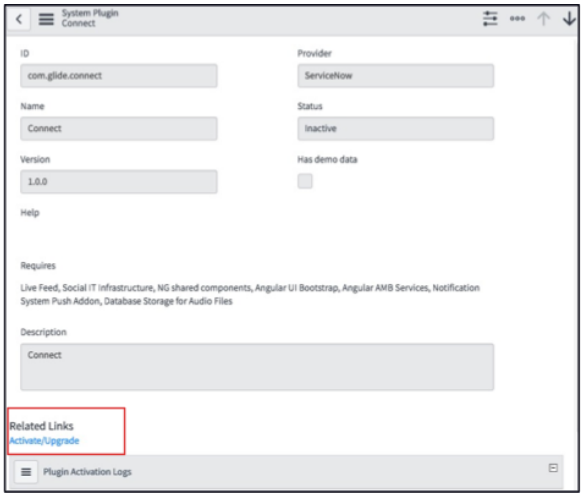


2. Using Search, type ***Connect** in the System Plugins search field and navigate to ***com.glide.connect*** plugin.

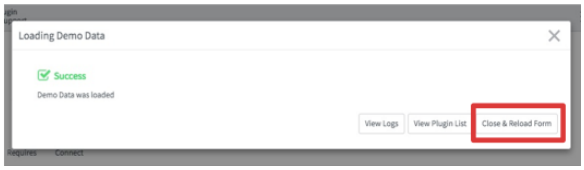


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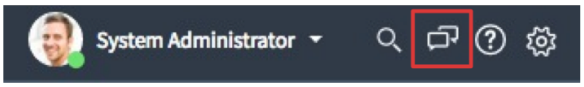
3. In the Connect plugin form, click **Enable/Upgrade** and check the box **Load Demo Data**.



4. Click **Close & Reload Form**.



5. After Connect is installed, notice a new Chat icon in the upper-right corner next to a magnifying glass icon.



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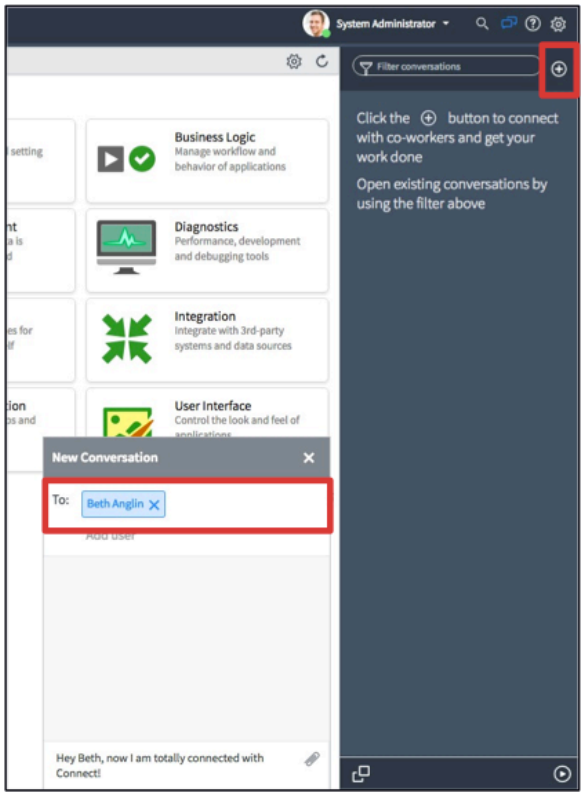
6. Use this **Chat** icon as a toggle to open and close Connect Sidebar. You can also use the icon in the lower-right corner inside Connect Sidebar to close it.



Note: As long as you are in a Frameset view (the view where you can see a navigation menu on the right and your user avatar) the Chat icon persists, and you can work collectively in real-time using Connect no matter where you are on the platform.

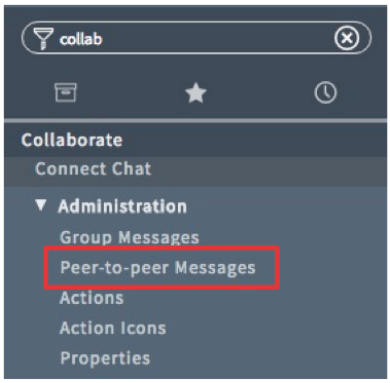
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7. Send a direct message to Beth Anglin by clicking on the (**+**) next to the Filter Conversations field and tell her that you are totally connected with Connect now.



Peer-to-Peer Messages

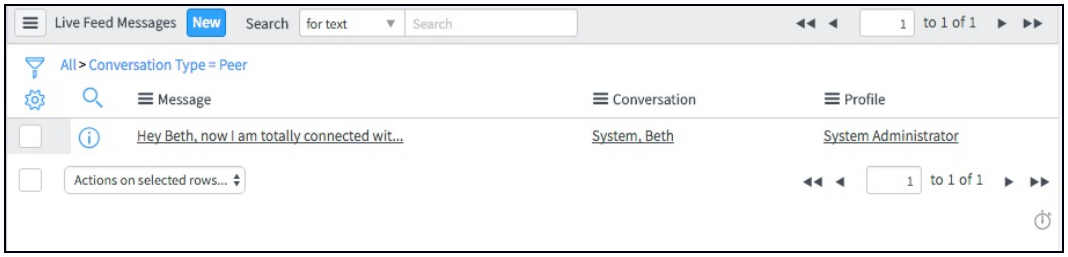
1. Using the filter in a navigation menu on the right, start typing "**collab**" to invoke the **Collaborate** module where Connect lives. **Collaborate > Connect Chat**.



2. Navigate to **Connect Chat > Administration.** This is where all the administration options live.

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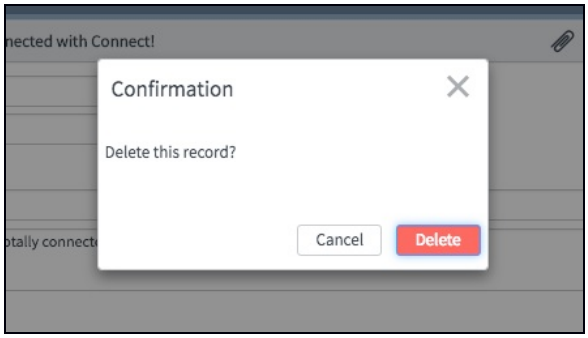
3. Click on **Peer-to-peer Messages** under **Administration** to navigate to the *Live Feed Messages (live_feed_messages* table) record list view. Here all direct messages are saved as records. Notice there is currently only one record – a message you've just sent to Beth.



4. Drill down to a message record.

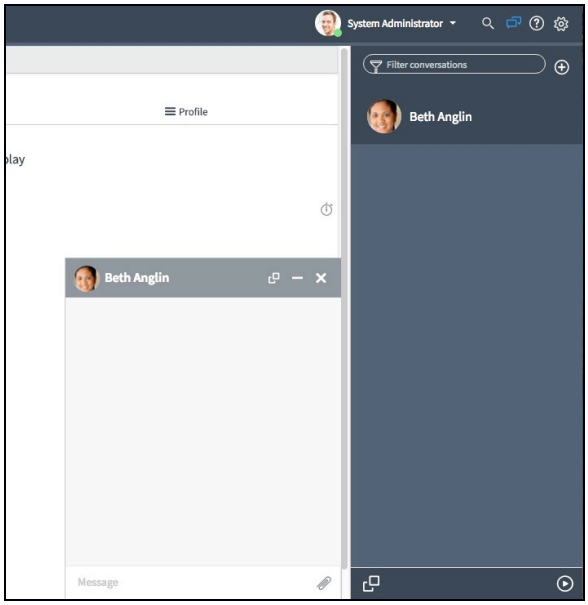


5. Click **Delete** to delete this message from your conversation with Beth permanently and refresh the page.



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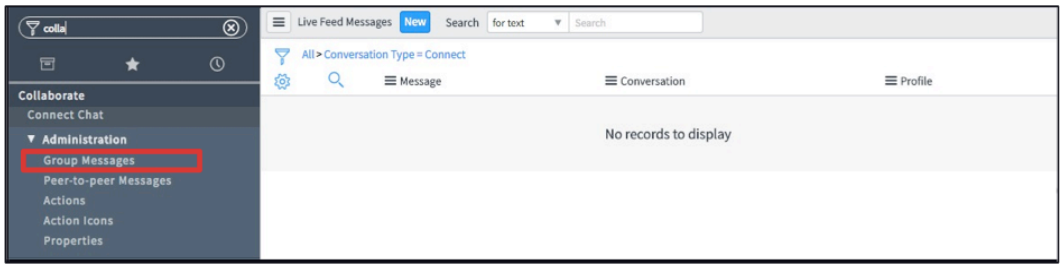
6. After the page refreshes, notice the message you sent to Beth no longer exists.



Note: OOB deleting messages using this view, permanently removes them from the table. You can configure the platform so that deleting messages/conversations from here does not remove them from the table.

Group Messages

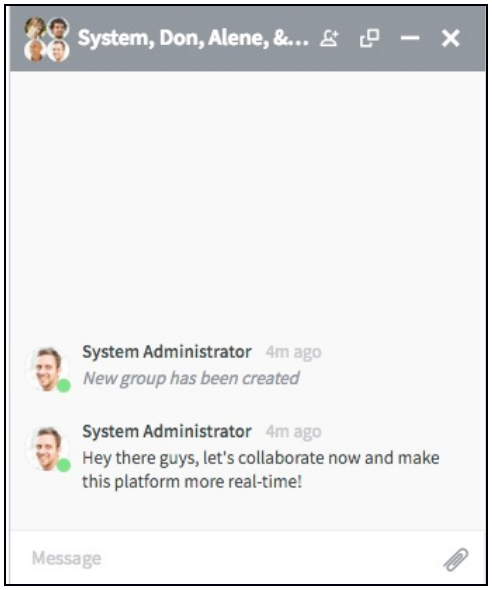
1. From the navigation menu on the left, navigate to **Administration > Group messages**. This is where all the group conversations records live.



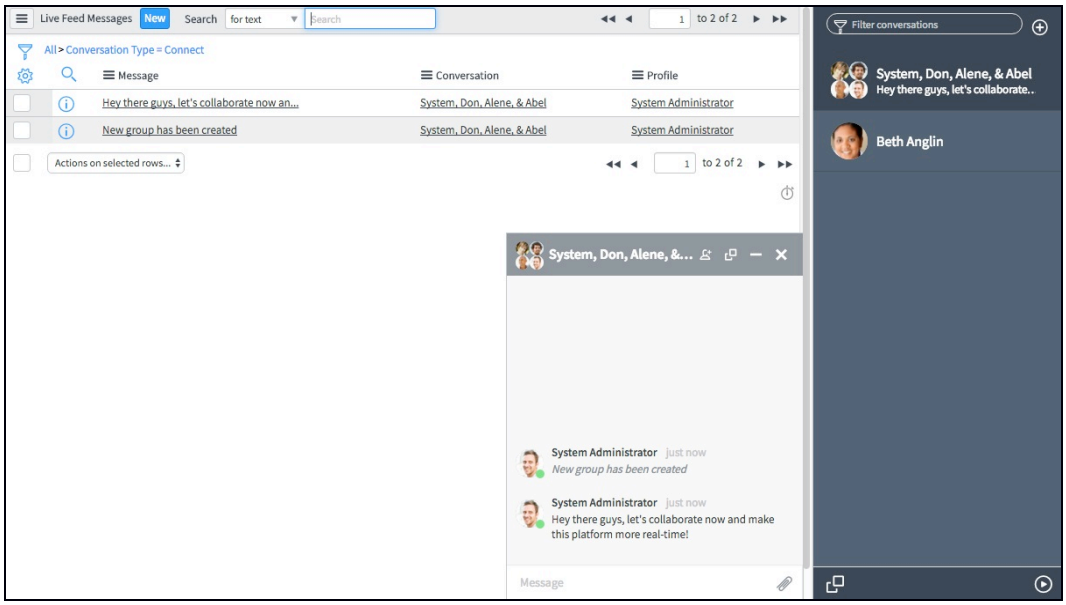
Since you don't have any group conversations, there are no records. Let's create one!

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2. Navigate to the (**+**) next to the Filter Conversations field and start a new group conversation with your colleagues Don Goodliffe, Alene Rabeck and Abel Tuter. Send them a short message.



3. Notice 2 new records were just created under **Administration > Group Messages**. From here you can manage these records the same way you do any other record on the platform.



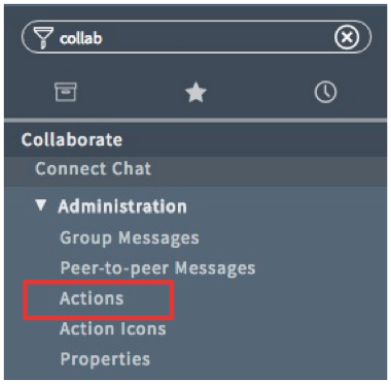
Note: "**New group has been created**" is a message generated by the system.

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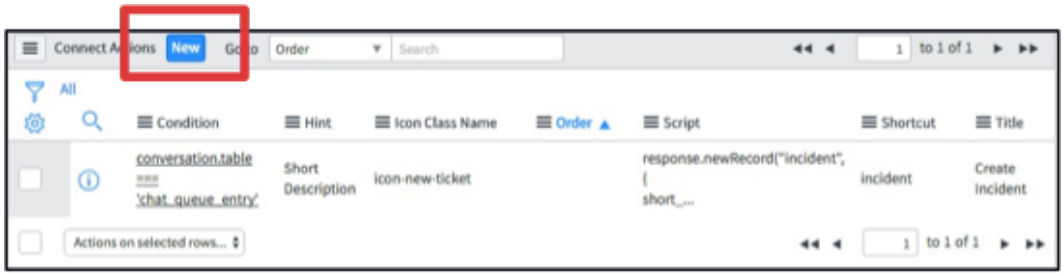
Understand Connect Actions

Connect Actions are intelligent scoops of code you can create or modify to provide custom functionality in conversations. Let's create one!

1. Navigate to **Collaboration > Administration > Actions**.



2. Click **New** to start creating a new Action.



3. Complete the form with the following information:

   Condition: ***Leave it empty***
   Hint: **gyphy (text)**
   Icon Class Name: **icon-image**
   Order: ***Leave it empty***
   Shortcut: **gyphy**
   Title: **Gyphy**
   Script (copy and paste following):

```
var text = text ? text.replace(/ /g, '+') : "";

var url =
'https://api.giphy.com/v1/gifs/random?rating=g&api_key=dc6zaTOxFJmzC&tag=' + text;

var sm = new sn_ws.RESTMessageV2();
sm.setEndpoint(url);
```

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```
sm.setHttpMethod('get');
sm.setHttpTimeout(10000);
var response = sm.execute();

var responseBody = response.haveError() ? response.getErrorMessage() :
response.getBody();
var parser = new JSONParser();
var parsed = parser.parse(responseBody);

var gifURL = parsed.data.image_url;

if(gifURL) {

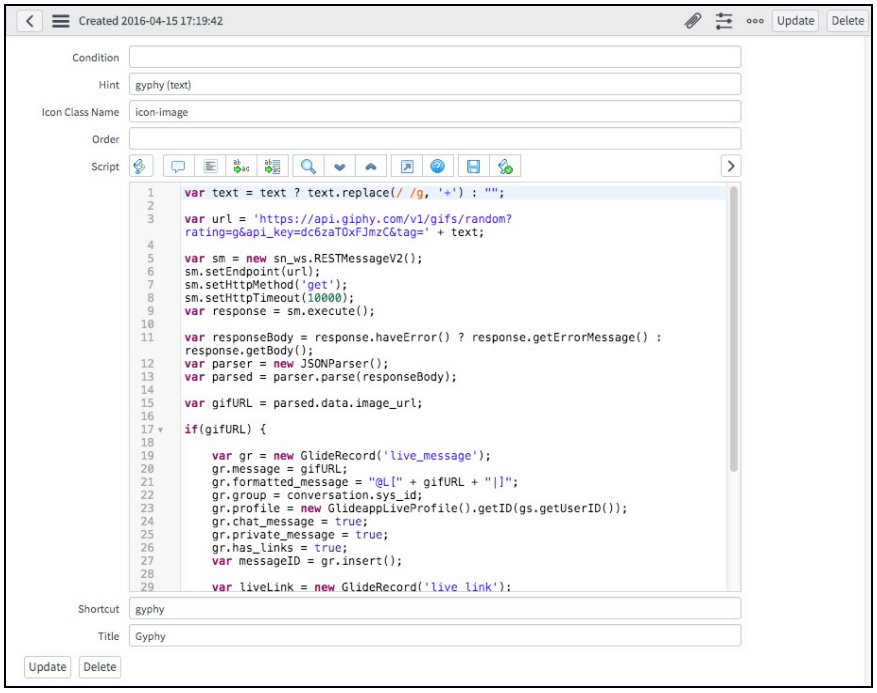
    var gr = new GlideRecord('live_message');
    gr.message = gifURL;
    gr.formatted_message = "@L[" + gifURL + "|]";
    gr.group = conversation.sys_id;
    gr.profile = new GlideappLiveProfile().getID(gs.getUserID());
    gr.chat_message = true;
    gr.private_message = true;
    gr.has_links = true;
    var messageID = gr.insert();

    var liveLink = new GlideRecord('live_link');
    liveLink.url = gifURL;
    liveLink.title = text;
    liveLink.site_name = text.replace(/\+/g,' ');
    liveLink.attached_to_table = 'live_message';
    liveLink.attached_to_id = messageID;
    liveLink.type = 'image';
    liveLink.external = true;
    liveLink.title = text;
    liveLink.insert();

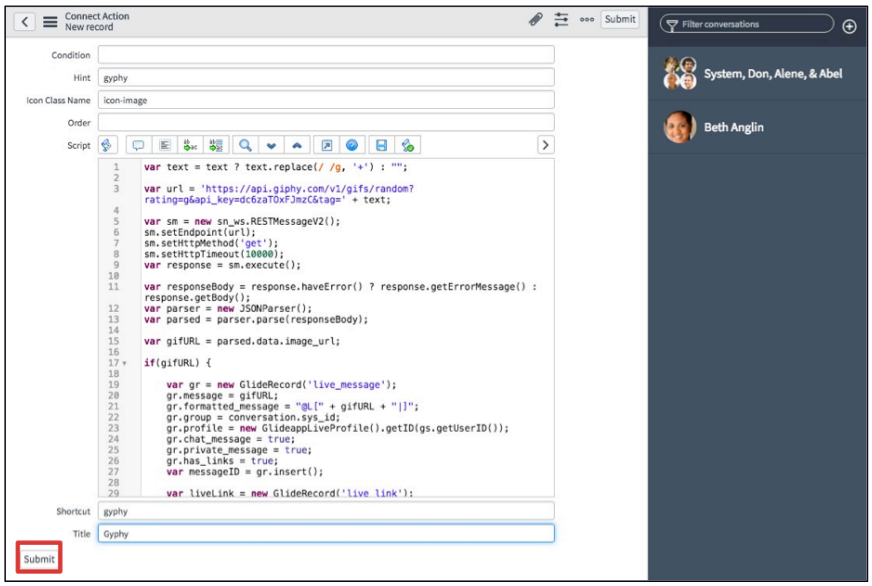
    new GlideLiveMessageBroadcaster().broadcastFromRecord(gr);
}
```

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Desktop Image:



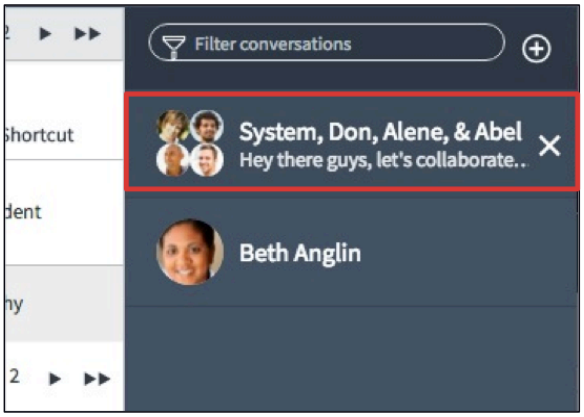
4. Click **Submit**.



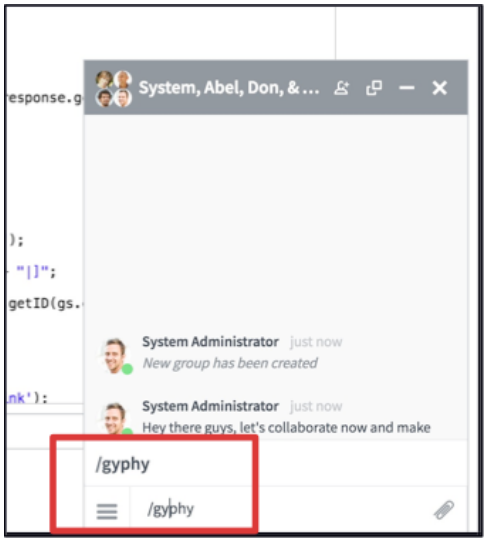
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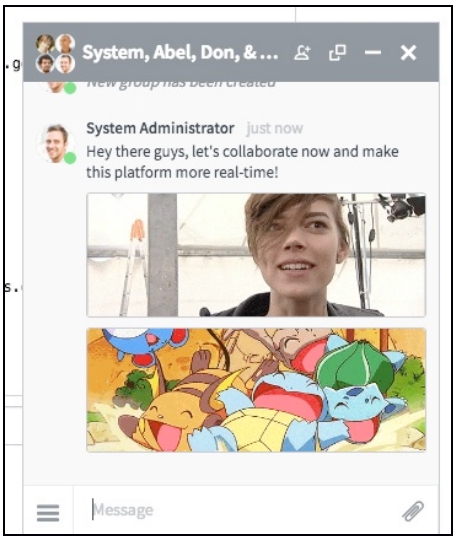
Let's see what you've just created!

1. Click on a group chat in Connect Sidebar (conversation list).



2. By clicking on the conversation, you invoke the Connect Mini window. In the input field, enter (**/**) and start typing "**gy**". Notice how system suggests "**gyphy**". Select the suggestion, press **Enter** on your keyboard and after "/**gyphy**" type "**cats**".





Note: You just created and tried a Gyphy action that allows you with a click of a button to send a GIF to everyone in your group. Try it a couple more times – have fun!

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Lab Goal

Lab 2.0 Getting Around Connect

This lab reviews Connect from an employee perspective. Subject areas include the following:

- Notification preferences
- Connect Mini vs. Full Views
- Connect essentials

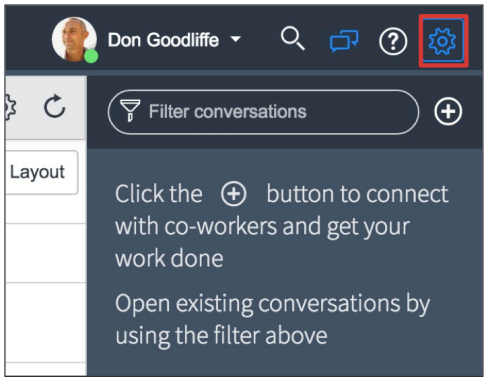
The goal of this lab is to understand how to navigate through Connect as an employee, explore two views of Connect and learn conversation essentials so that you can easily jump in and start collaborating real-time with your colleagues.

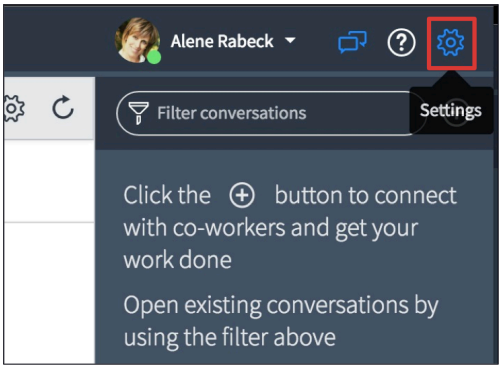
Log on to the Training Instance

1. Navigate to the unique instance URL provided.
2. Log in with the provided employee credentials (as *Don Goodliffe*).
3. Navigate to incognito mode of Chrome browser to the same URL.
4. Log in with the provided employee credentials (as *Alene Rabeck*).

Notifications Preferences

1. As Don Goodliffe in one window and Alene Rabeck in the incognito window, in the banner frame navigate to **System Settings** by clicking the gear icon in the upper-right corner.





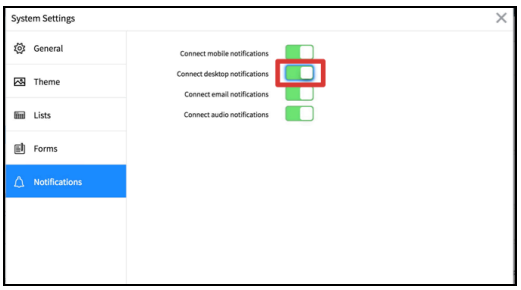
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2. Click the **Notifications** tab in the modal.



3. Enable **Connect Desktop Notifications** by clicking on a toggle.





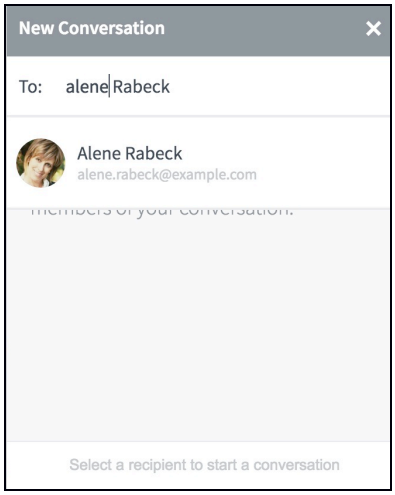
Note: By default, Connect mobile, audio and email notifications are enabled globally. You can also edit which notifications you receive for a specific conversation once you create your first group.

Connect Mini vs. Full Views

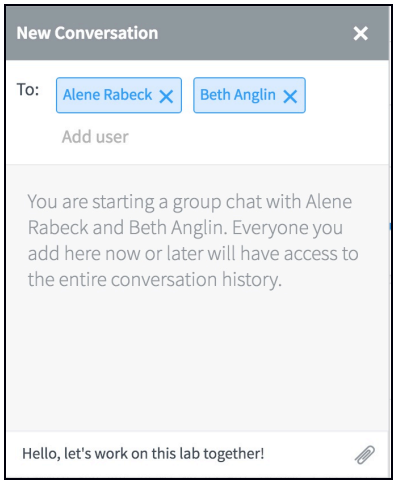
1. As Don, click on the (**+**) next to the **Filter Conversations** field to invoke a Connect Mini Window and start a new conversation.

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2. In a Mini Window in **To:** field type "**Alene**" and choose **Alene Rabeck**.



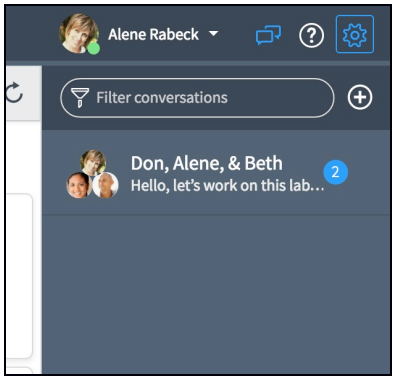
3. Add **Beth Anglin** to a conversation by typing her name. In the input field type a message "**Hello, let's work on this lab together!"** and press **Enter**.



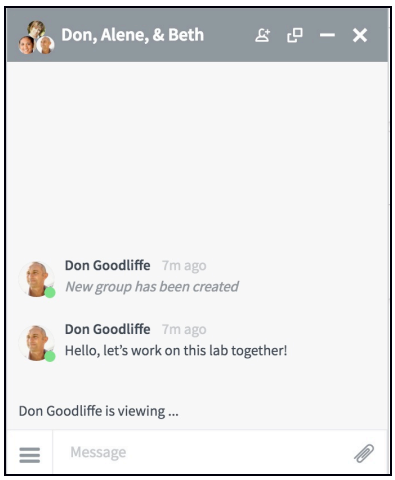
Note: You just created a group conversation using Connect Mini.

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4. Switch to an Incognito window of your browser where you logged in as **Alene Rabeck**. In Connect Sidebar notice a new conversation and unread message count next to it that indicates a new activity.



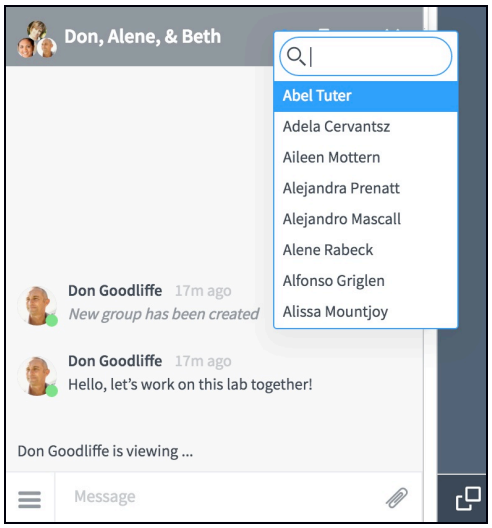
5. Open this conversation in Connect Mini by navigating to and clicking on it.

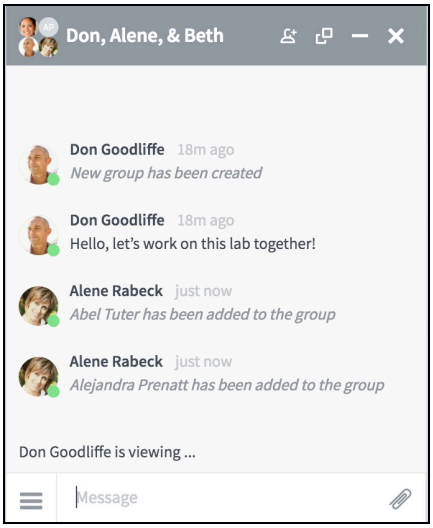


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6. Add more people to a group conversation by clicking on the (**+**) icon in Connect Mini header and choosing **Abel Tuter** and **Alejandra Prenatt** in a drop-down menu.

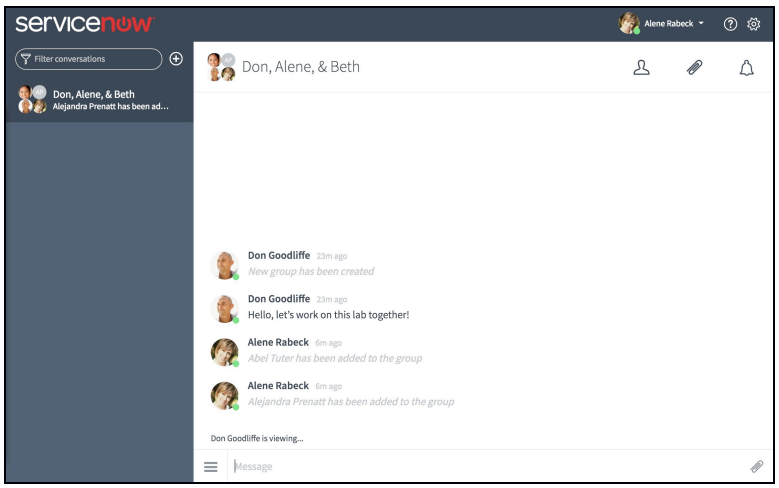






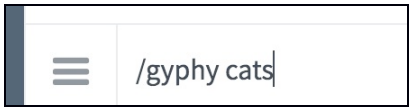
7. Move to Connect Full view by clicking on the **expand** icon in Connect Mini header.

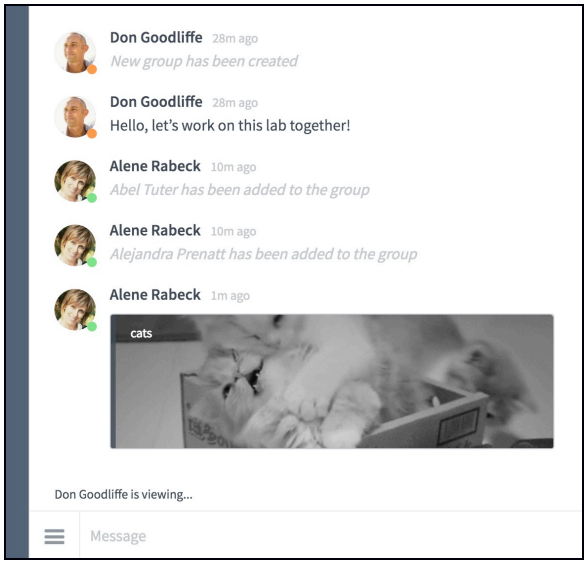




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8. Send a Gyphy to your group. You already know how to do it!

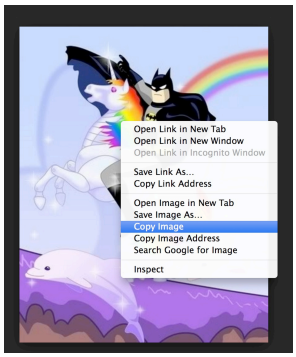




Note: This is Connect Full view – a dedicated workspace where you can view and manage all your current conversations, change notification settings per conversation basis and collaborate with your colleagues around the projects and inside records.

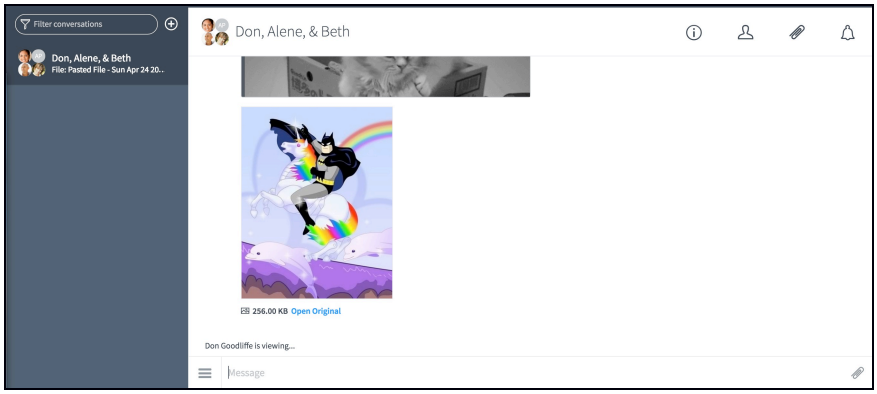
Connect Essentials

1. Open a new tab and navigate to google.com URL. Type "**unicorns**" in Google search and switch to the Images tab. Copy any image.

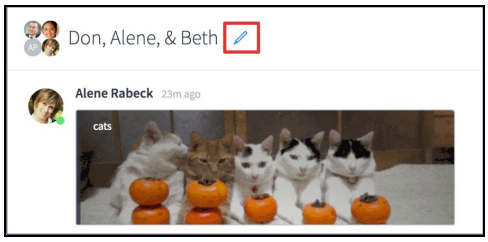


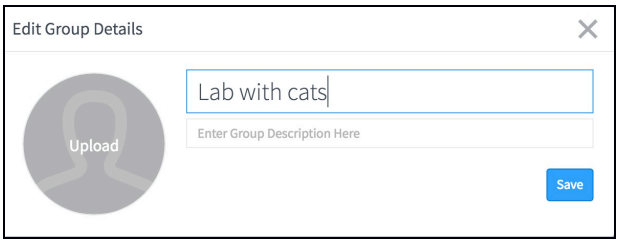
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2. Go back to the Connect Full view tab and paste this image directly into the chat input field.

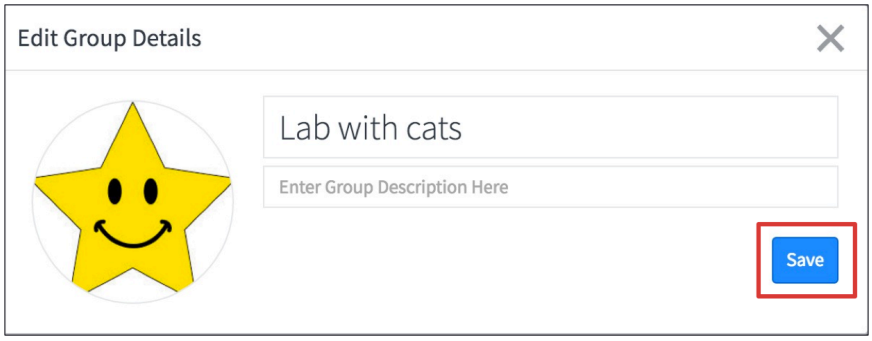


3. Rename your group conversation to "**Lab with cats**" by hovering on the members' names in the header of Connect Full view, click on the **pencil** icon and enter the new name in the input field.



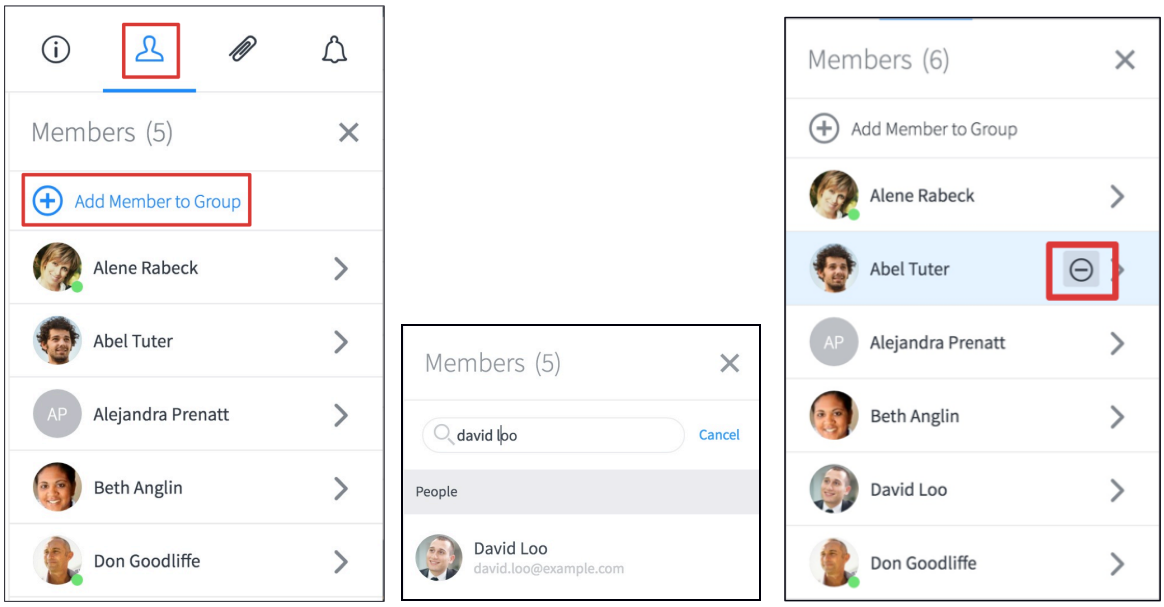


4. Upload a new group avatar by clicking on **Upload** and select the **Star** image from your folder. Click **Save**.

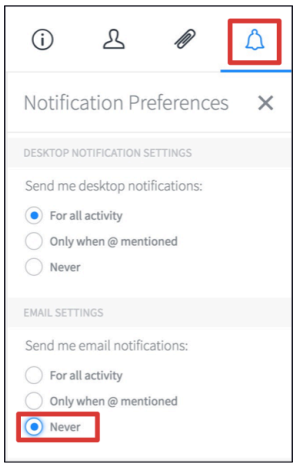


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5. Click the **Members** icon in the same side panel. Add David Loo by clicking on Add **Members to Group** and remove **Abel Tuter** from this conversation by hovering on his name and clicking on the (**–**) icon next to it.

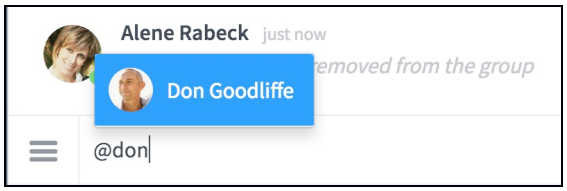


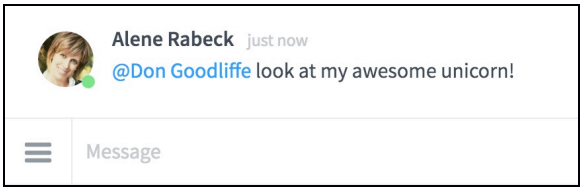
6. Navigate to the **Bell** icon to change your notifications settings for this conversation. Disable Email Notifications for all activity by selecting **Never**.



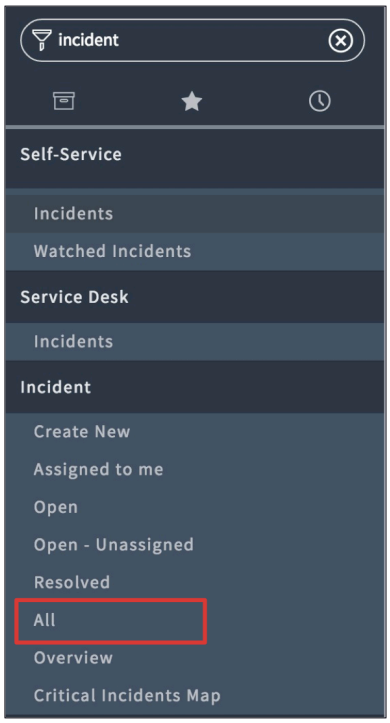
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7. Navigate to a conversation input field and tell Don about your awesome unicorn by mentioning him in this group conversation. Type "**@Don",** selecting Don Goodliffe from a drop-down and enter your message: "**Look at my awesome unicorn**". Press **Enter**.



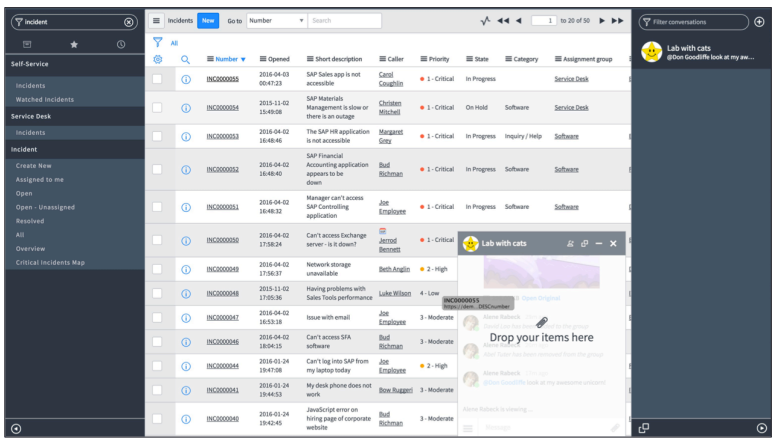


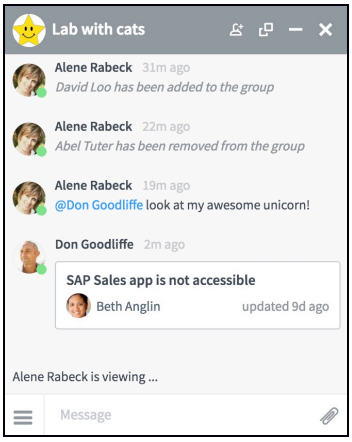
8. Switch to another Chrome window where you logged in as Don. Navigate to **Incidents** using the **Navigator** in the upper-left corner. Select **Incident > All**.



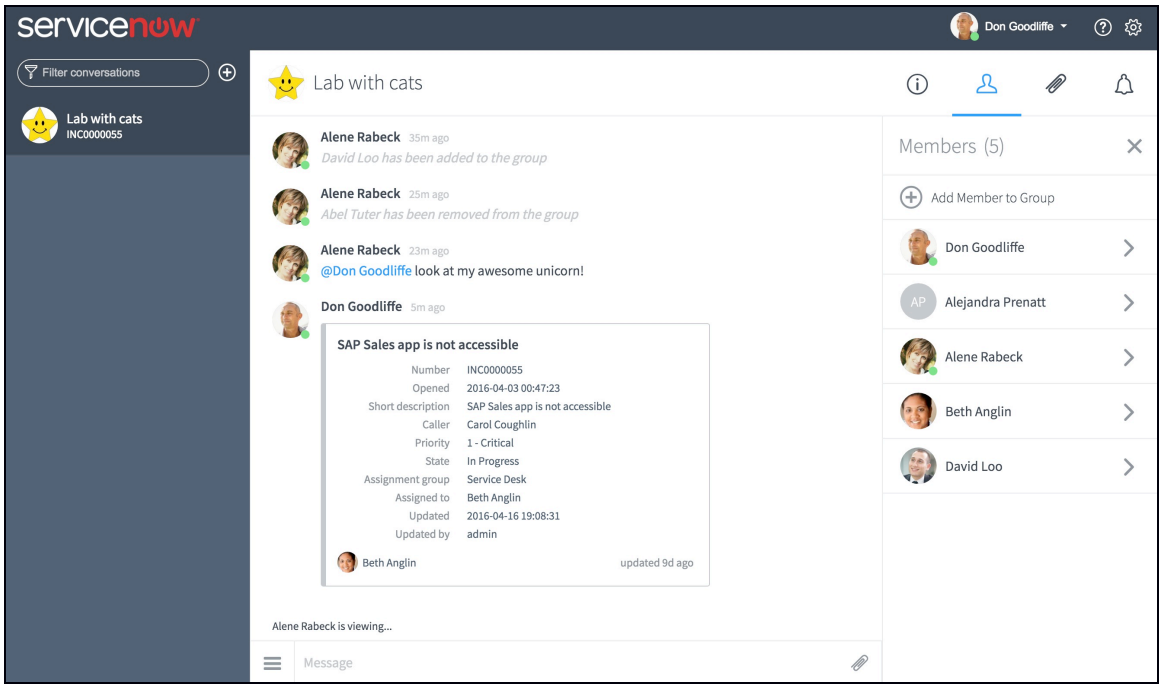
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9. From the list view, share first incident INC0000055 with your group b**y grabbin**g this **incident** with your cursor and dragging it into the **Connect Mini window**.





10. Switch to Connect Full view by clicking on the expand icon in Connect Mini. Notice a record preview rendered inside Connect.



Note: Record preview inside Connect is available to those group members who have SLA access to the record. If you switch to Alene's view, you'll notice she does not have access.

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Lab Goal

Lab 3.0 Collaborate in Real-Time Inside a Record

This lab explains how to work inside a record in real-time using Connect interface. Starting with Geneva, fulfillers can easily collaborate on the records in real-time using engaging chat-like experience with presence, which prevents fields-overwriting, and timely notifications that alert about new activity the moment it happens. Subject areas of the lab include the following:

- Follow a record to get updates via Connect
- Use work notes and comments inside Connect
- @Mention anyone to get their attention fast

The goal of this lab is learn how working inside a record using Connect interface can help fulfillers reduce resolution time from days and hours to minutes.

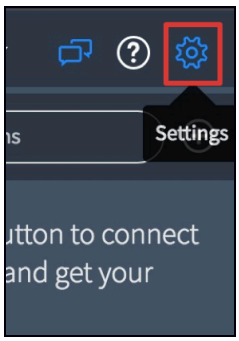
Log on to the Training Instance

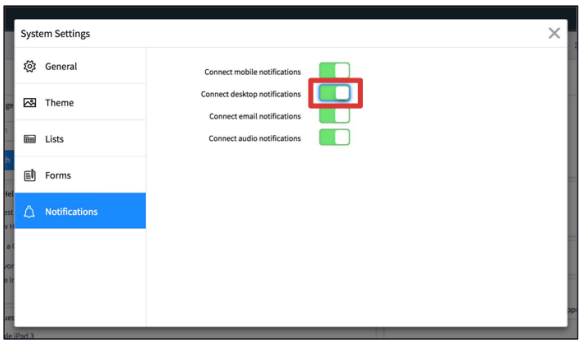
1. Navigate to the unique instance URL provided.
2. Log in with the provided itil #1 credentials (as **David Loo**).
3. Navigate to incognito mode of Chrome browser to the same URL.
4. Log in with the provided itil #1 credentials (as **Beth Anglin**).

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Follow a Record

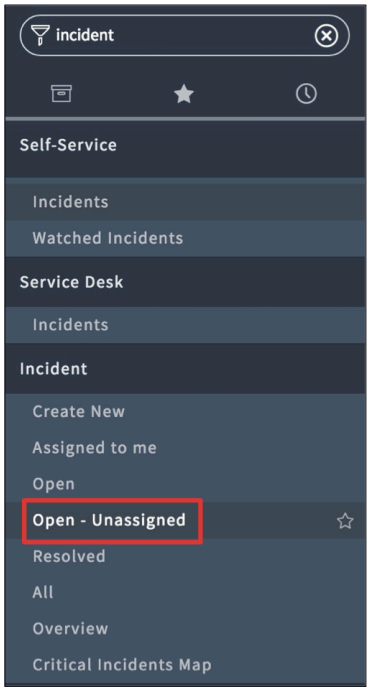
1. As David Loo, enable Connect desktop notifications by navigating to the **Settings** cog in the upper-right corner and clicking the **Notifications** tab.





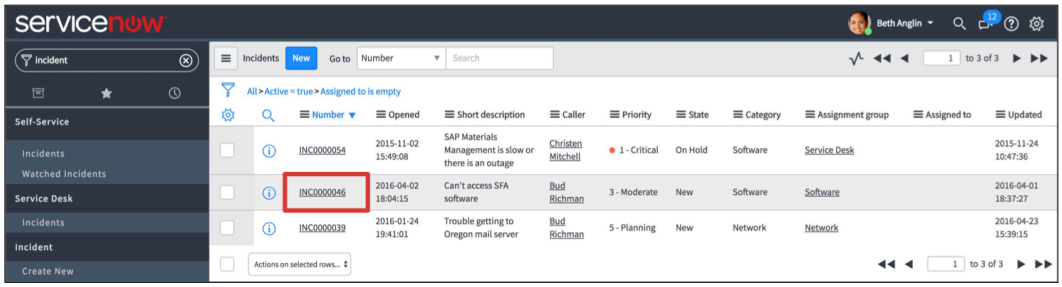
2. Switch to the Beth Anglin instance in Chrome incognito browser.

3. Navigate to **Incident > Open - Unassigned** using search in the upper-left corner.

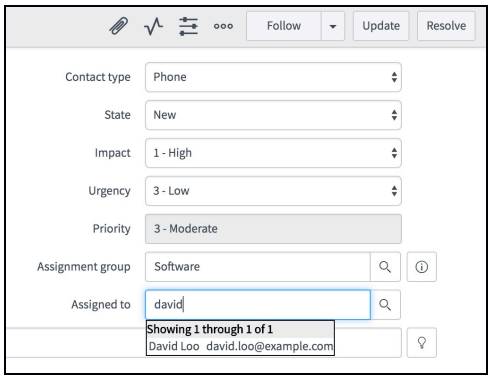


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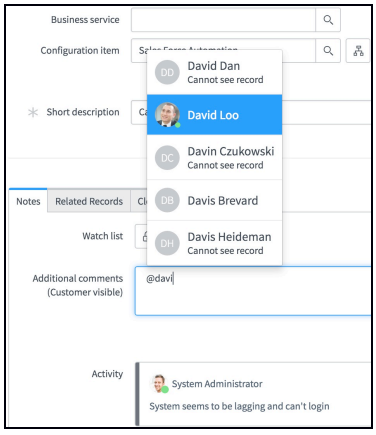
4. From the list view select incident INC0000046 by clicking on it.



5. Assign it to David Loo.



6. Mention David Loo inside work notes using "**@**" sign and enter a note for him: **"@David Loo can you take a look at it ASAP please**". Notice a green dot next to David's avatar that indicates David is currently online.

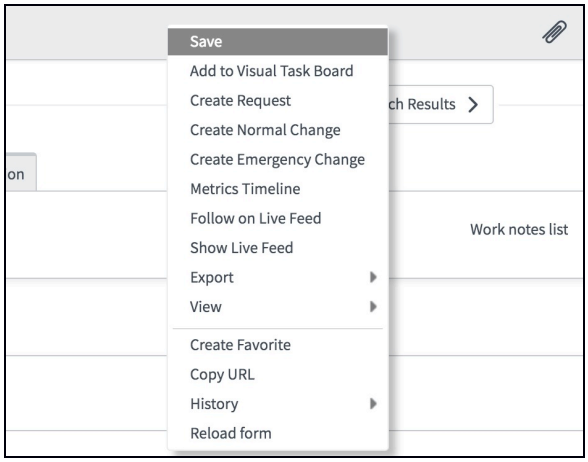


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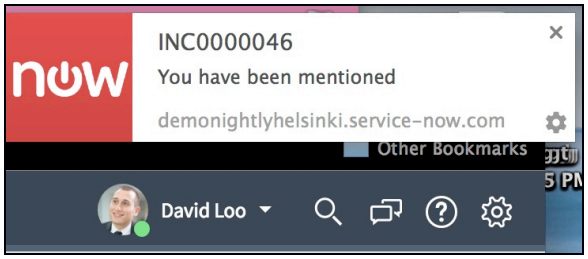
7. Select **Work notes** and click **Post.**



8. Save the form by clicking on the record header and selecting **Save** from the drop-down list.

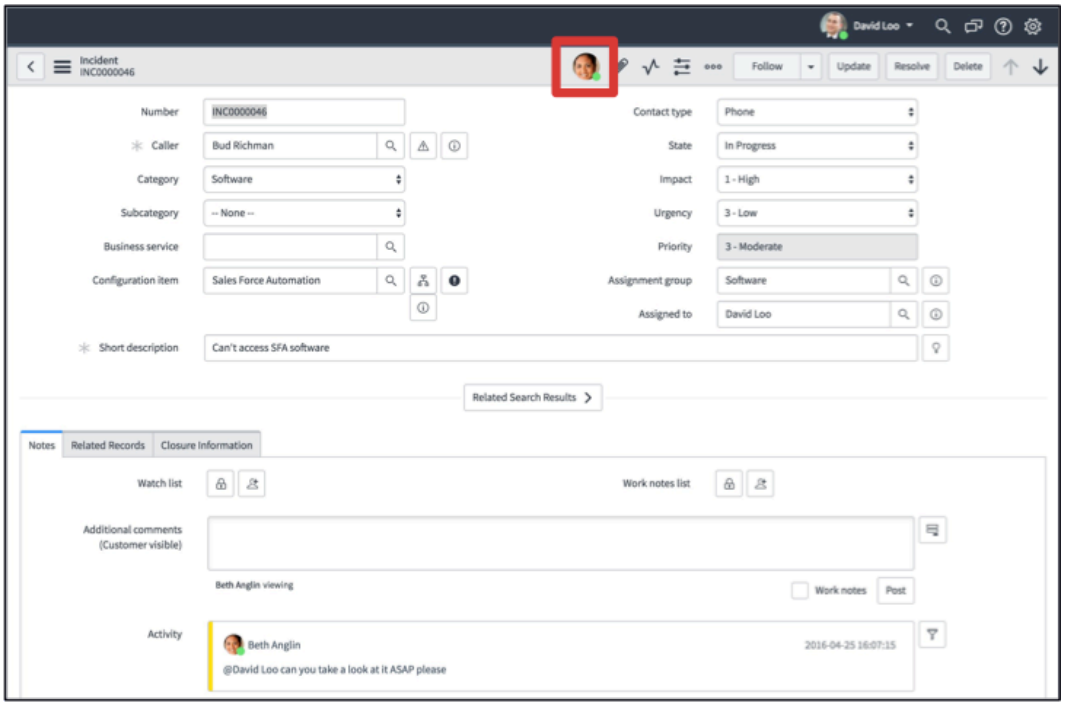


9. As you click **Save** you should see a desktop notification flying in from the upper-right corner informing David Loo that he has been mentioned. **Click this notification**.

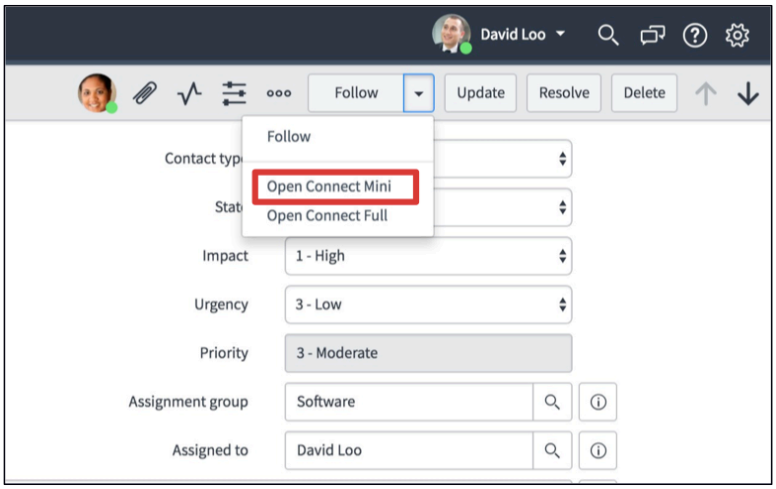


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10. After you click the notification, as David Loo you move to the record were David was mentioned. Notice Beth Anglin's avatar with a **presence dot** next to it in the record's header. This avatar indicates Beth is actively engaged and working on the same record as you are.

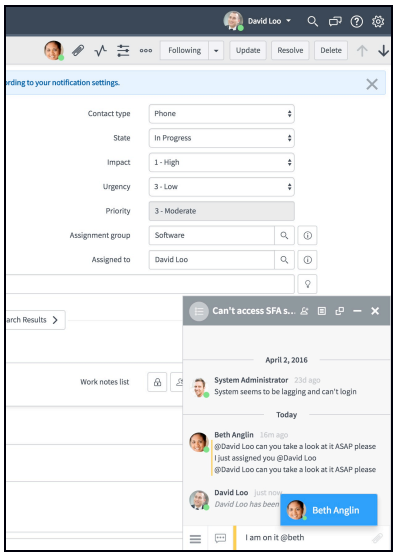


11. Open the record in Connect Mini by clicking the **Follow** drop down list and selecting **Open Connect Mini**.



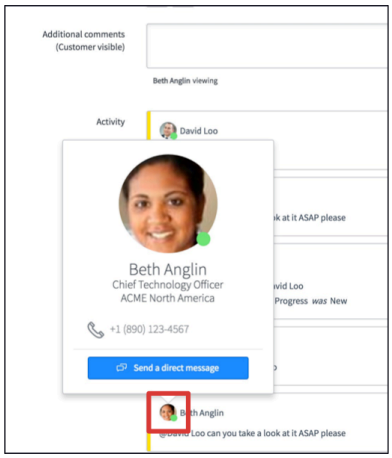
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12. In Connect Mini type a message to Beth using work notes and mention her: "**I am on it @Beth Anglin**".



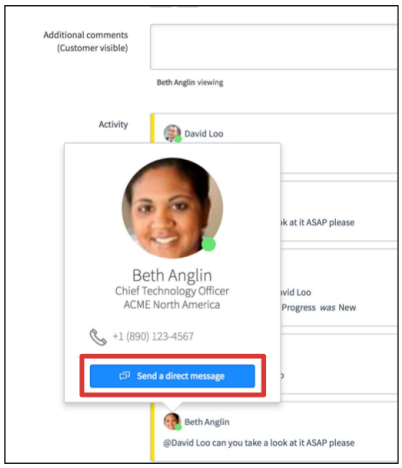
Note: Activity in a record is automatically reflected in Connect, and vice versa, which allows you to easily work inside a record using chat.

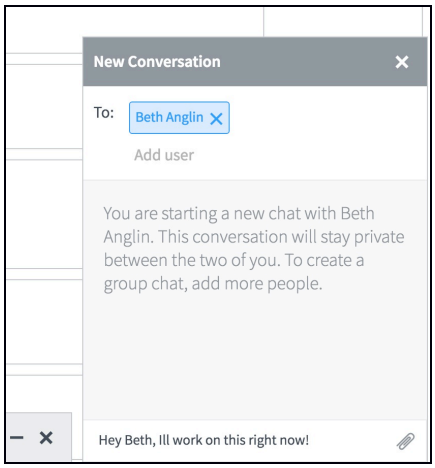
13. Click Beth's avatar inside a record's activity stream to see her profile.



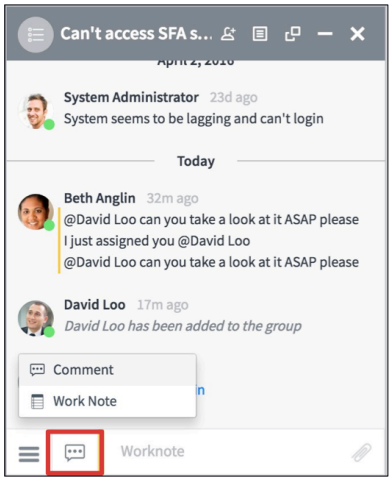
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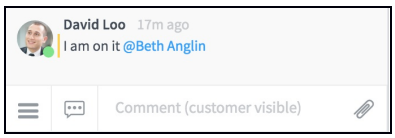
14. Send Beth a message by clicking on **Send a direct message** button: "**Hey Beth, I'll work on this right now!**"





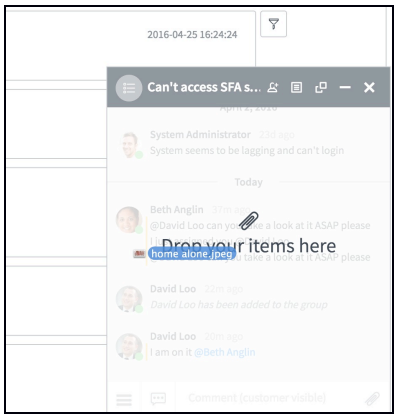
15. Switch to **Comment** using a toggle next to a chat input field.

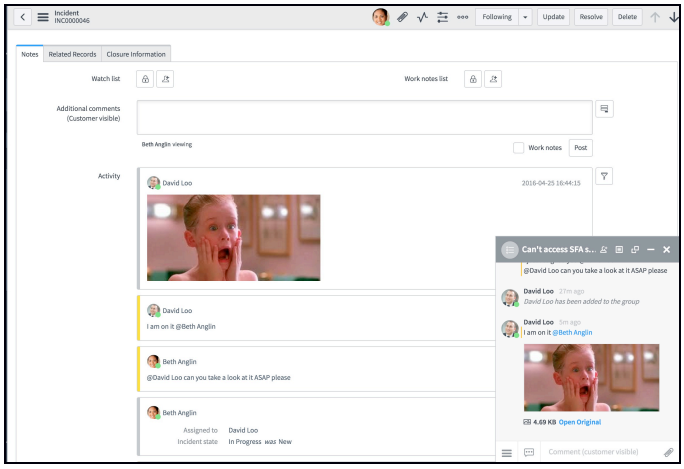




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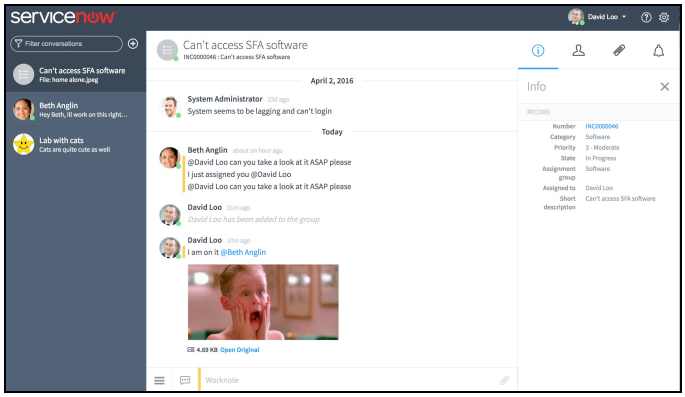
16. Open a desktop folder on your computer, locate an image, grab the file and drop it in Connect Mini.





17. Move to Connect Full view by clicking on the **Expand** icon in a Mini window header.





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Lab Goal

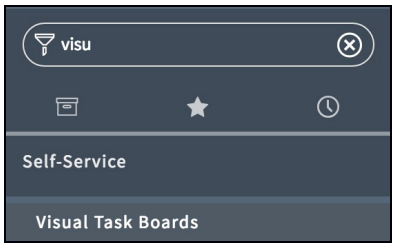
Lab 4.0
Create a VTB Conversation

This lab explains how to create a Visual Task Board conversation so that board members can collaborate in real-time in the context of a board.

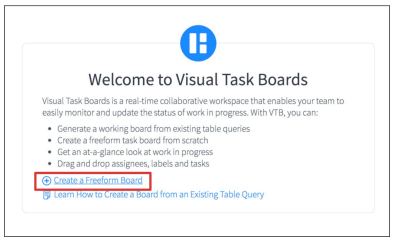
- Create VTB Connect conversation
- Manage Members

Create a Visual Task Board Conversation

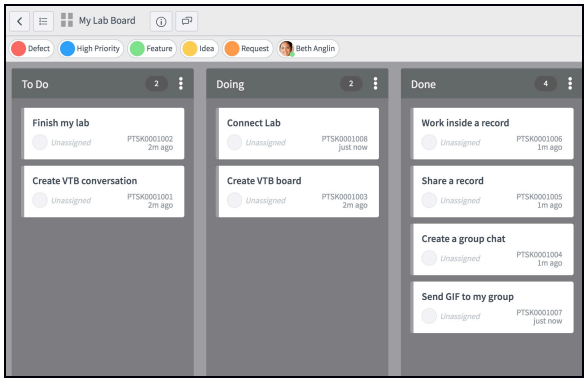
1. As Beth Anglin, navigate to **Self Service** > **Visual Task Boards**.



2. Click **Create a Freeform Board**.

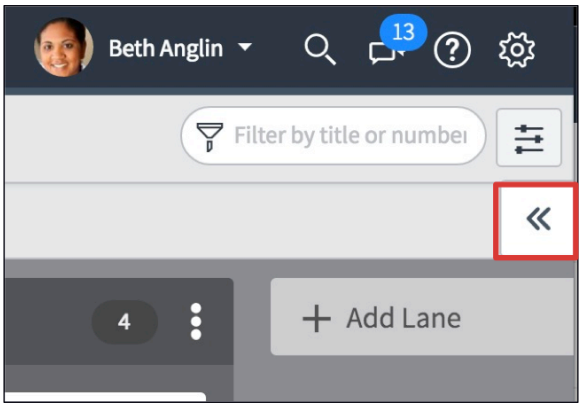


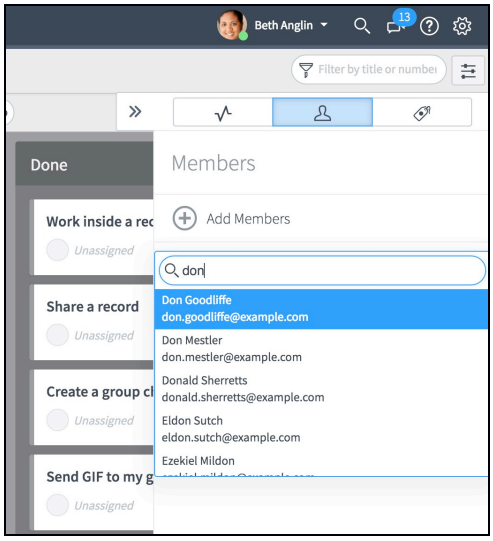
3. Name your board and create a few cards in each lane.



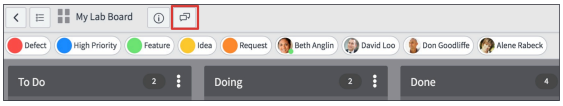
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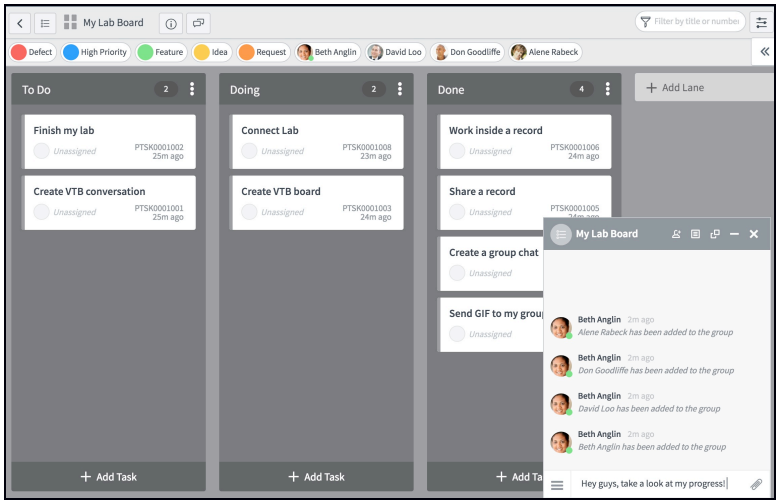
4. By clicking on a toggle in the upper-right corner, add David Loo, Don Goodliffe and Alene Rabeck to this board as members so that they can see your progress.





5. Connect with your board members by starting a collaboration session via Connect. Click the **Chat** icon next to the board name to initiate a real-time conversation.





Note: All board members were automatically added to a new Connect conversation.

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6. Move one of your cards from the **Doing** lane to **Done** while keeping Connect Mini open.



Note: Board activity is reflected in the Connect group chat now.

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Lab Goal

Lab 5.0 Real-Time Assistance via Connect Support

This lab covers Connect Support, a real-time messaging tool that makes service desk agents more productive so that they can resolve incoming requests faster. Connect Support is a part of Connect framework and requires enabling the Connect Support plugin **com.glide.connect.support**.

Connect Support in Helsinki comes with the Reporting dashboard out of the box. As chat admin, you can track metrics such as a number of Active Chats, Waiting Customers, Active Queues/Agents, Average Handle Time and Queue Wait Time in real-time

The goal of this lab is to explore Connect Support as a service desk agent and learn how to resolve incoming requests in real-time via Connect Support interface.

- Accept incoming request
- Explore Support Essentials
- Create a record off a support chat

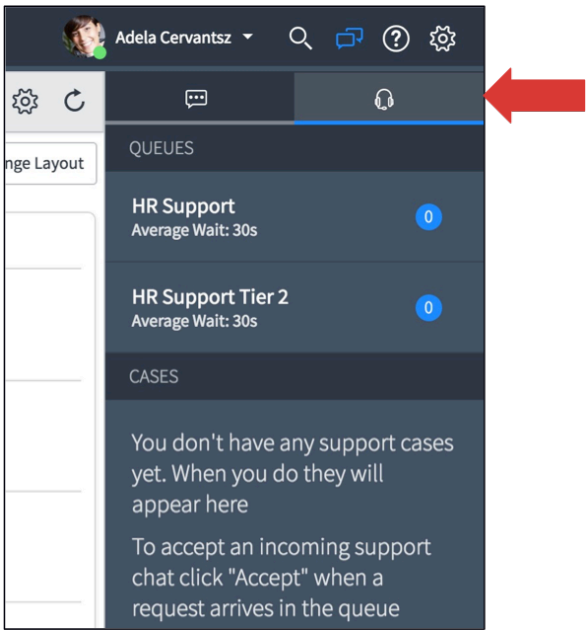
Log on to the Training Instance

1. Navigate to the unique instance URL provided.
2. Log in with the provided service desk agent credentials.

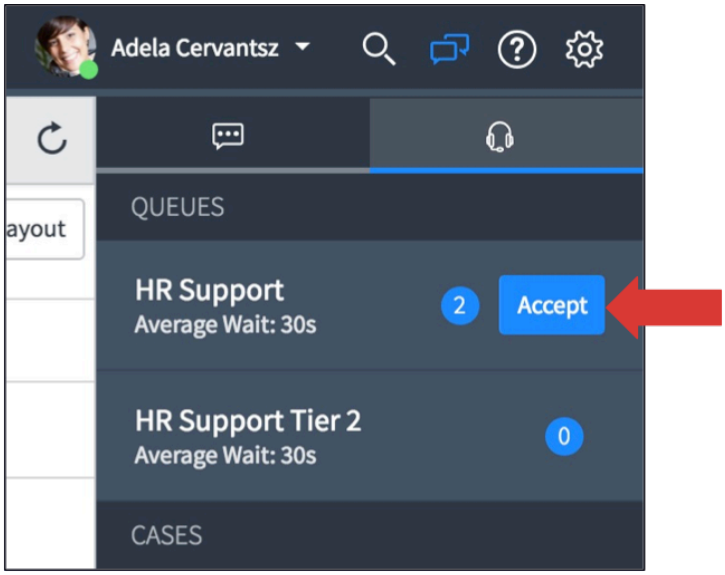
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Accept Incoming Request

1. Navigate to **Connect Sidebar** by toggling the **Chat** Icon in the upper-right corner. Notice the new Support tab with the **Headphone** icon on it.

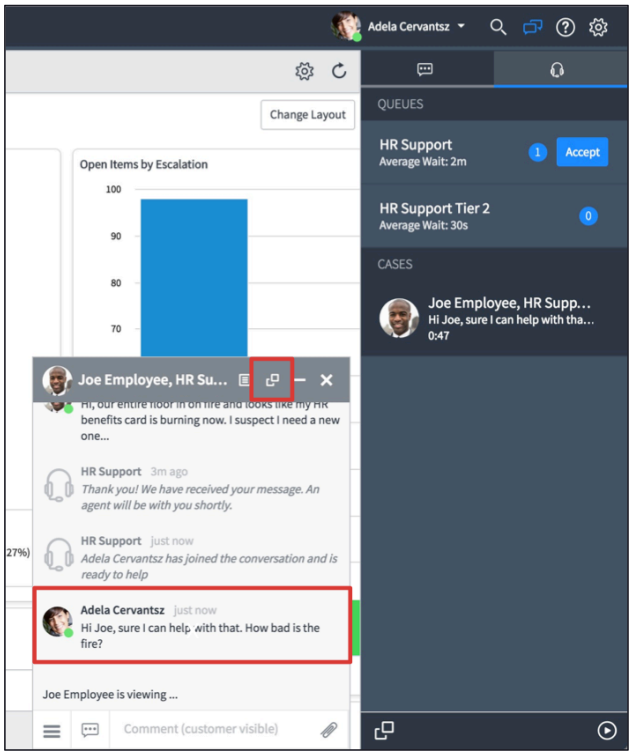


2. Accept incoming request by clicking the **Accept** button.



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3. Send a message to a customer via Connect Mini and click the **Expand** icon to move to Connect Full view.

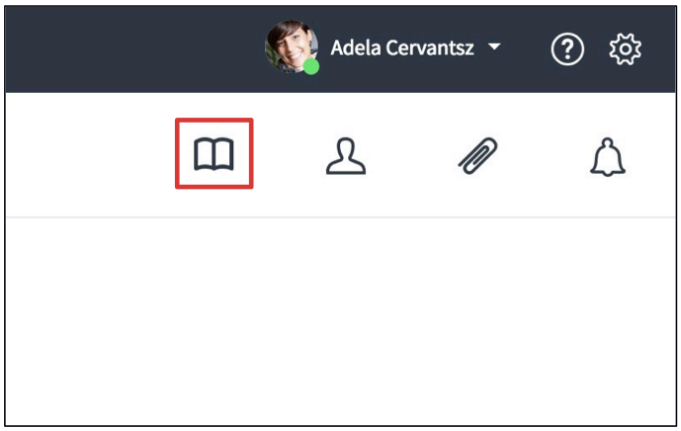


Note: As a service desk agent you don't have to move to the full view – you can assist your customers right from this ITIL interface. However, for a better experience we do recommend using Connect Full.

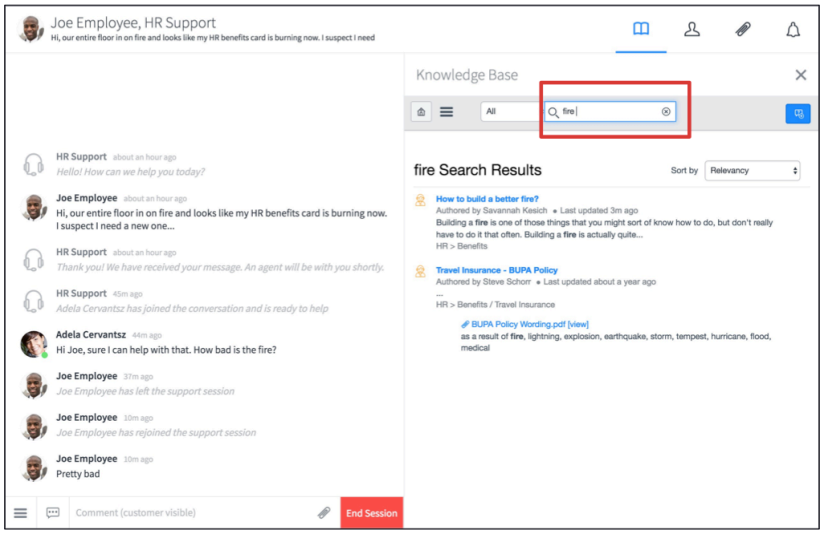
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Explore Support Essentials

1. In Connect Full view, click a **Book** icon to open the Knowledge Base.

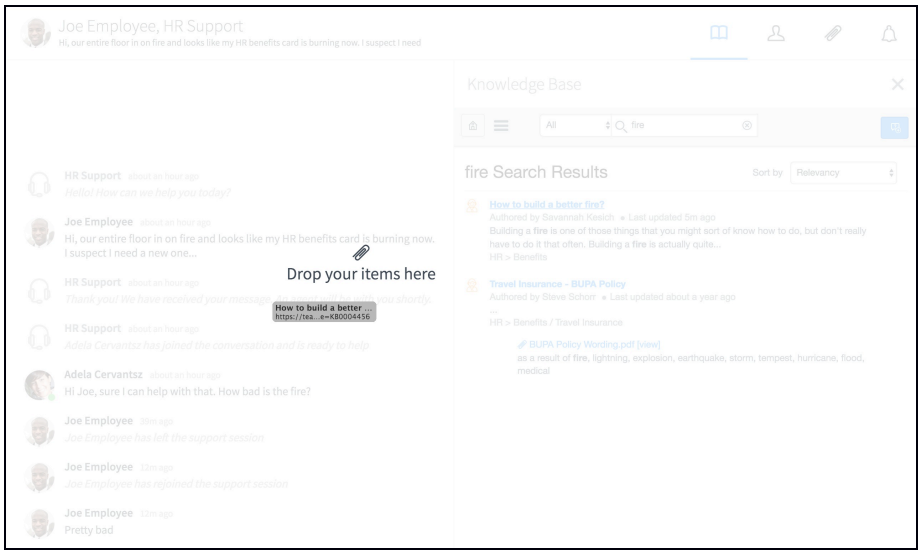


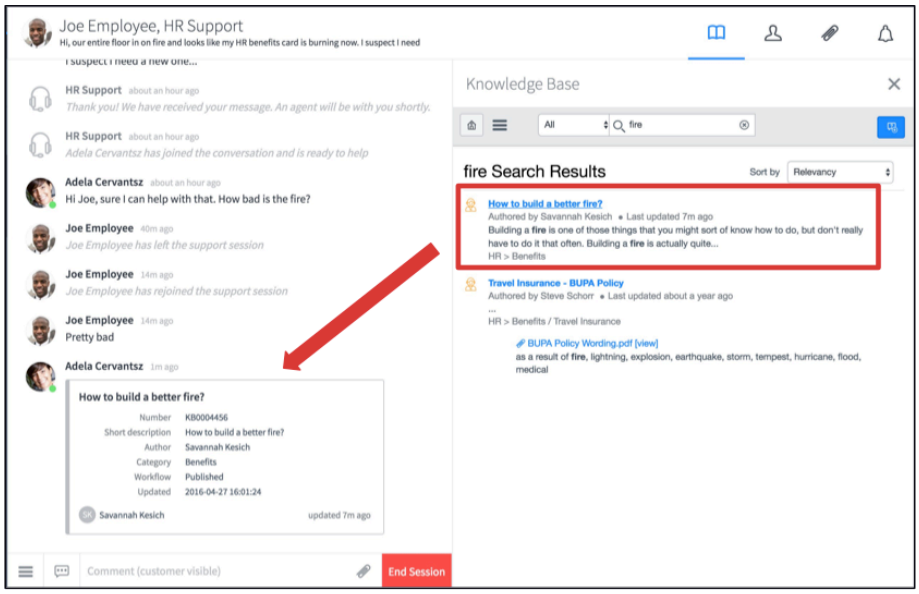
2. Enter a keyword "**fire**" in Search, click **Enter** on your keyboard and locate an article that should help a customer to resolve their issue.



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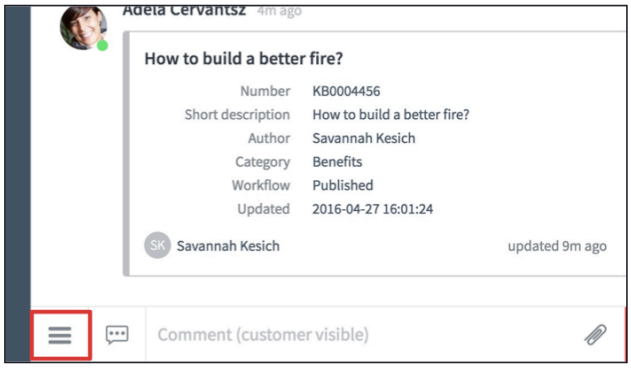
3. Grab an article and drag it into a chat window.

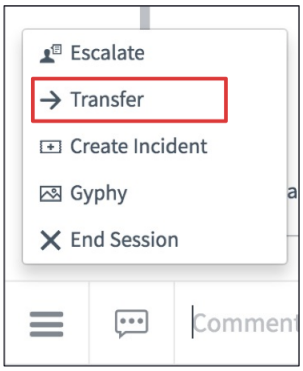




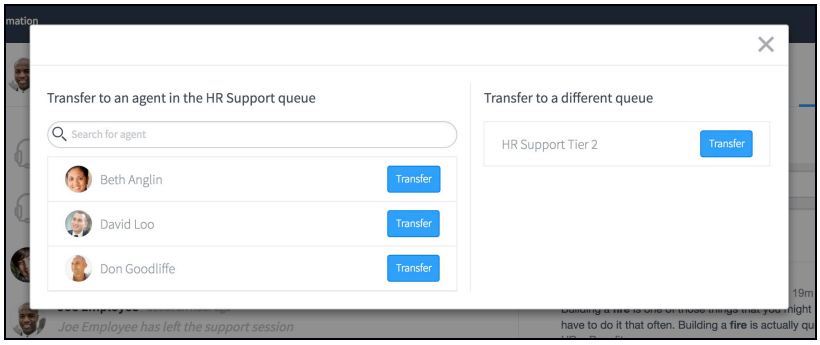
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4. Click on a **hamburger** menu to the left of an input field and select **Transfer**.





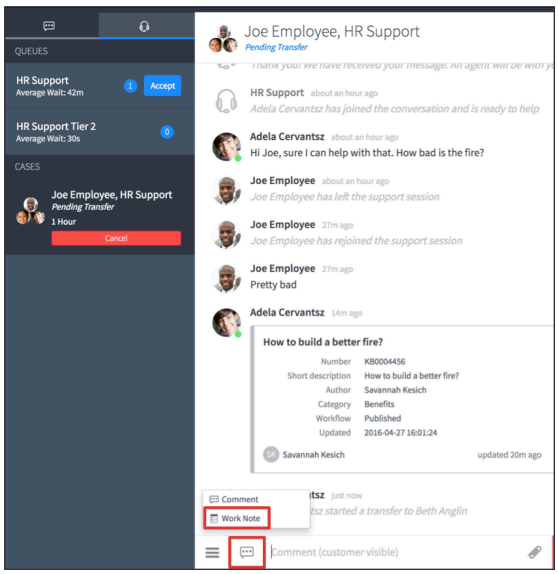
5. In a transfer modal select any agent to whom you want to transfer this chat.

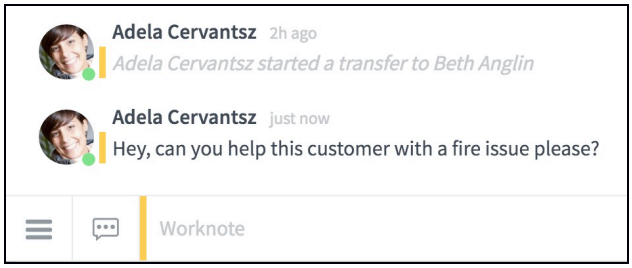


Note: The agent you are transferring this chat to can either accept or decline an incoming transfer.

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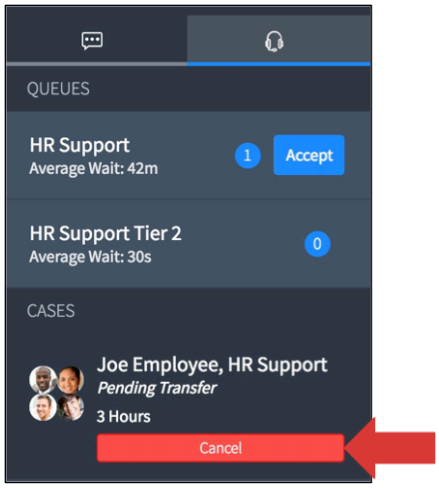
6. Switch to Work notes by using a toggle next to a **hamburger** menu. Send a message to a receiving agent: "**Hey, can you help this customer with a fire issue please?**"





Note: Work notes in Connect Support are visible only to service desk agents; the customer on the other end cannot see them.

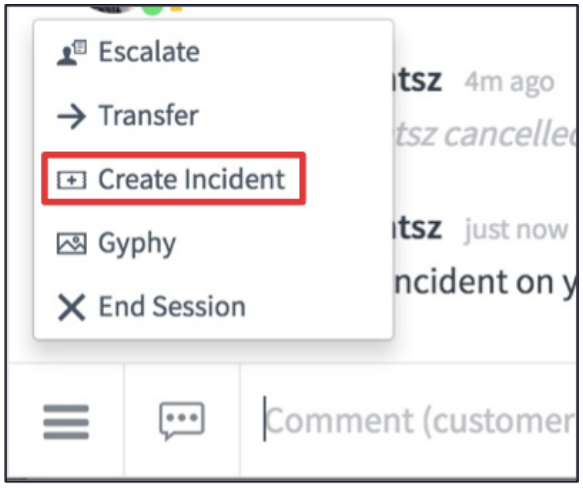
7. Cancel a transfer by clicking the **Cancel** button in the left sidebar.



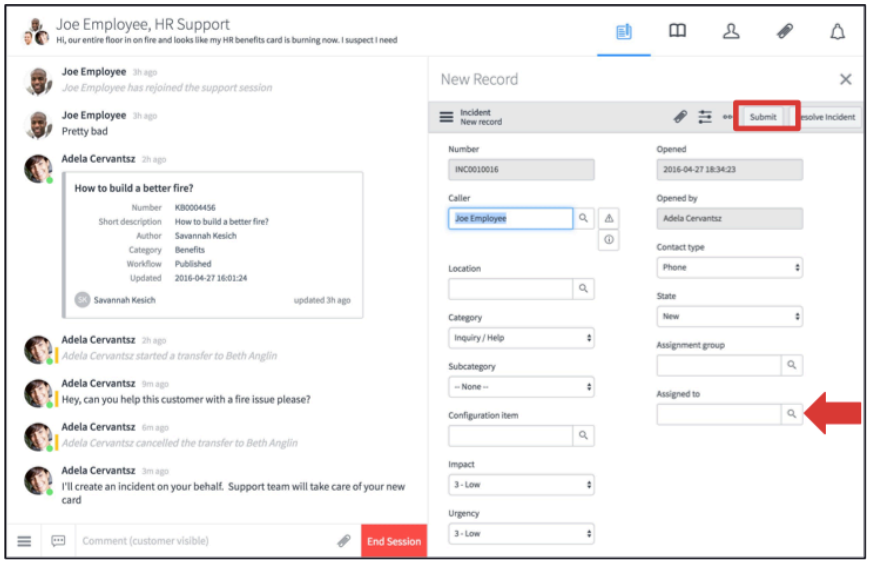
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Create a Record off a Chat

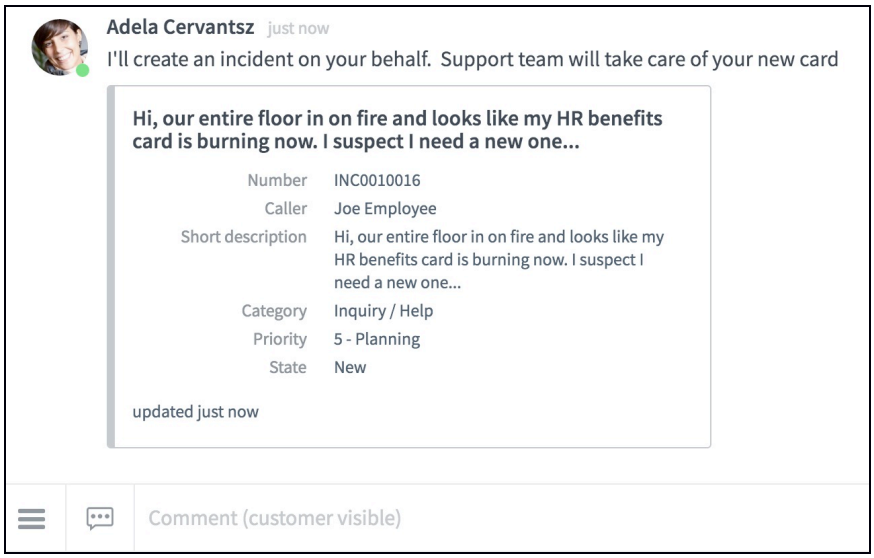
1. From a **hamburger** menu select **Create Incident**.



2. The system pre-fills some fields such as the **Caller** and **Short Description**. Assign the incident to Beth Anglin in the **Assigned to** field and click **Submit** button.

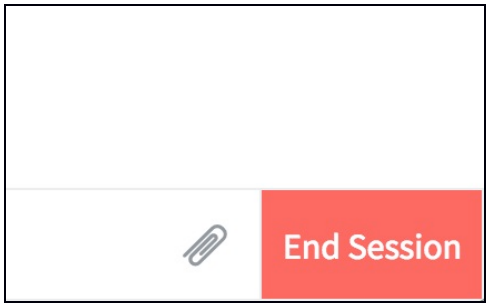


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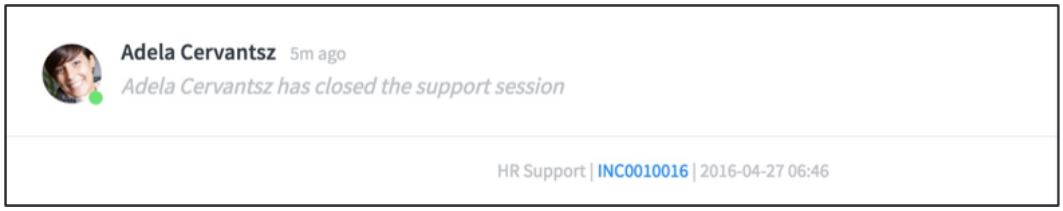


Note: Record preview is visible to both the service desk agent and customer. The customer can click on a card and see a record in a form view, from where they can start following the record to get the updates on the agents' activity.

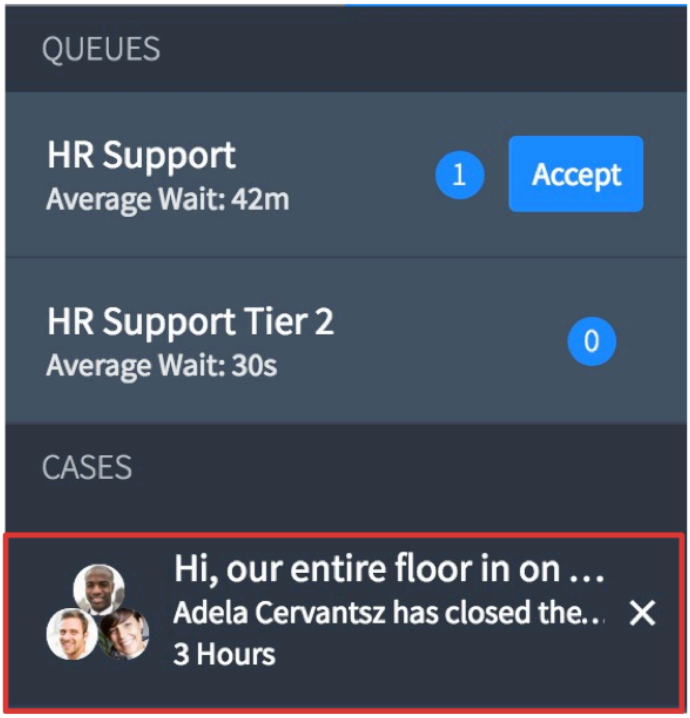
3. Click on the **End Session** button next to the input field to end your support conversation.



Note: Upon completion, notice the incident number on the bottom of the chat. You can also notice how the conversation stays in your Connect sidebar until you close it by clicking on X. Closing your conversation removes the chat from the sidebar.



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Complete

Lab 6.0 Complete

Congratulations on completing Connect: Working in Real-Time lab. Let's quickly review what we've covered during the session:

- Administering Connect
  - Enabling Connect
  - Group Message
  - Private Message
  - Creating Connect Actions
- Getting Around Connect as an Employee
- Working Inside a Record as a Fulfiller
- Collaborating on a Visual Task Board via Connect
- Assisting Customers via Connect Support as a Service Desk Agent

If you have any questions about Connect, or you just want to learn more about it and see how you can bring its power to your organization, connect with our team after the lab!

If you would like to have a deep dive or schedule a demo with your stakeholders after Knowledge, send an email to Katia Suchkova, our Product Manager katia.suchkova@servicenow.com.

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