knowledge17

May 7–11, 2017 • Orange County Convention Center • Orlando, FL

Lab Guide

Learn How to Connect with Connect: Working in Real Time

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Default Login / Password:

admin / Knowledge17

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Lab Goal

Lab 1.0 Connect Overview: Administration

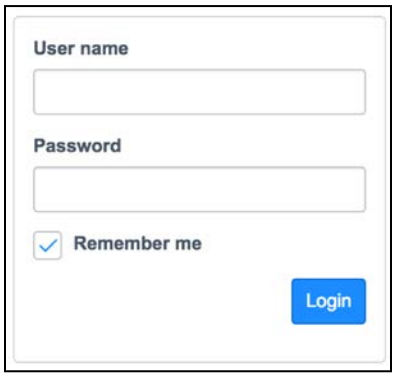
This lab reviews Connect content from an administrative perspective. Subject areas include the following:

- 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, a 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.

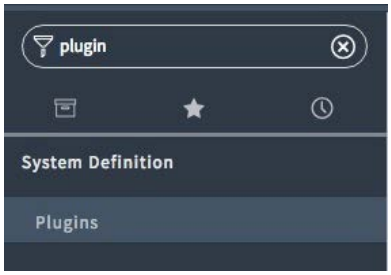


2. Log in with the provided administrator credentials.

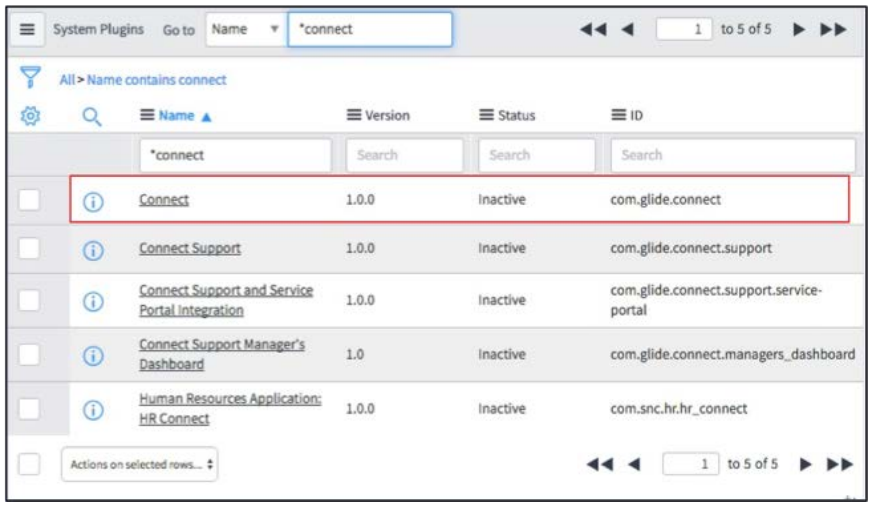
Enable Connect Plugin (informational)

1. Connect is active by default on new instances. For upgraded instances, you can activate the Connect plugin (com.glide.connect) if you have the admin role. This section describes how you activate the plugin. --> *You don't need to do this on your training instance; it's already active.*

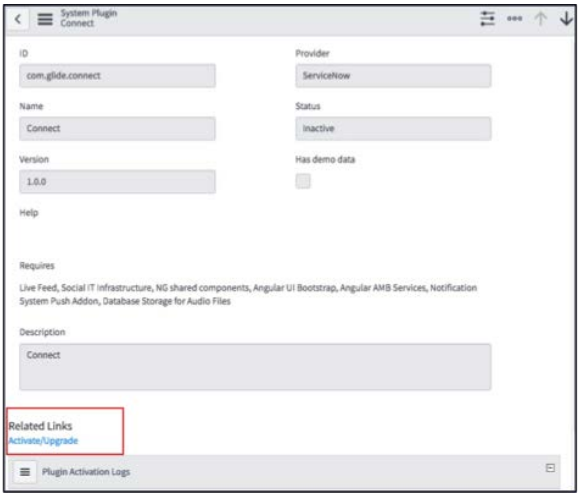
   Using filter in the upper-left corner, navigate to **Plugins (System Definitions > Plugins)**



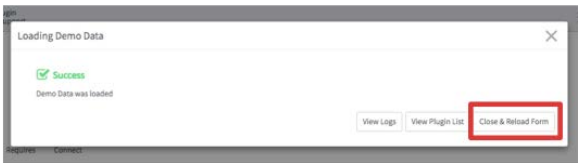
2. Using Search, type ***Connect** in System Plugins search field and navigate to **com.glide.connect** plugin.



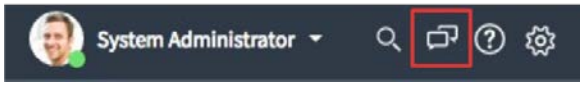
3. In the Connect plugin form, click **Enable/Upgrade** and check the box **Load Demo Data**.



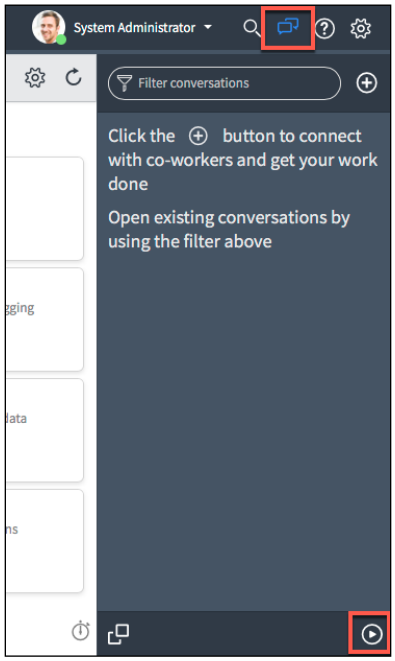
4. Click **Close & Reload Form**.



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

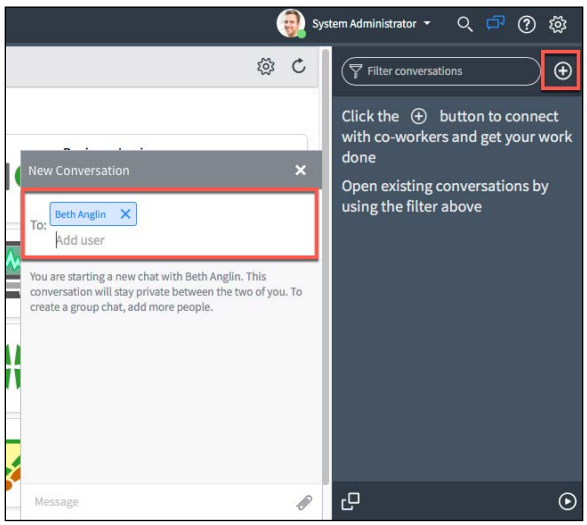


6. Use this **chat** icon as a toggle to open and close **Connect** sidebar. You can also use icon in the lower-right corner inside Connect sidebar to close it.



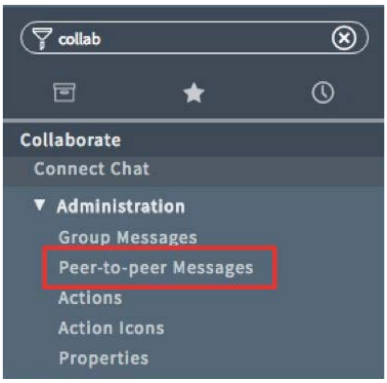
Note: If you are in a Frameset view (view where you can see a navigation menu on the right and your user avatar) the **chat** icon persists, and you can work collectively in real time using Connect, no matter where you are on the platform.

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



Peer-to-Peer Messages

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



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

3. Click on **Peer-to-Peer Messages** under **Administration** to navigate to 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 – the message you just sent to Beth.



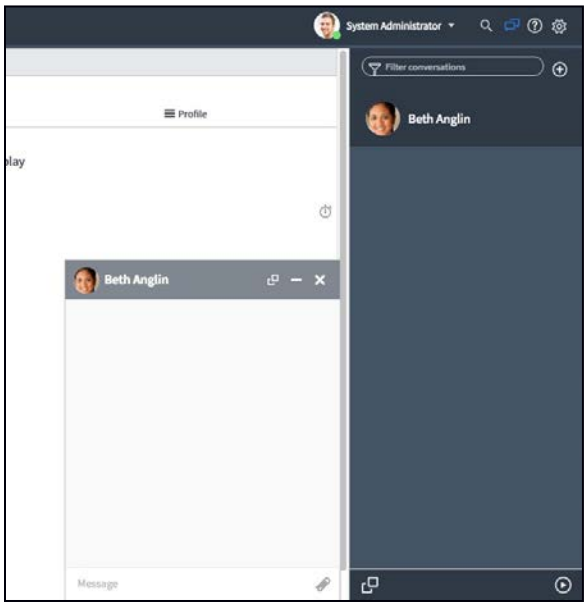
4. Drill down to a message record.



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



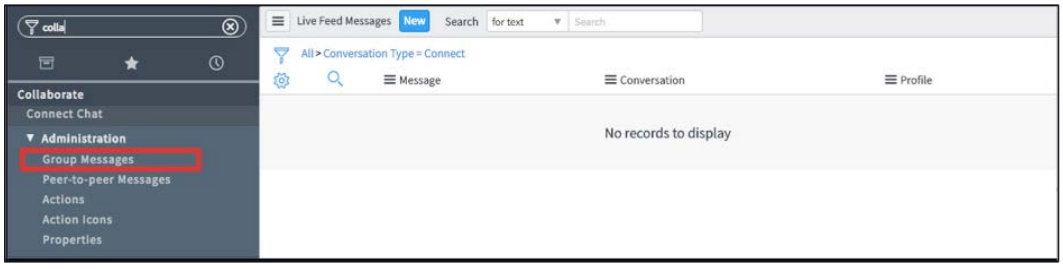
6. After page is refreshed, notice the message you sent to Beth no longer exists.



7. **Note*:*** OOB, deleting messages using this view will permanently remove them from the table.

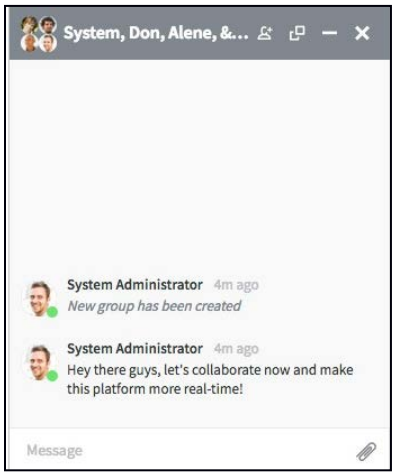
Group Messages

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

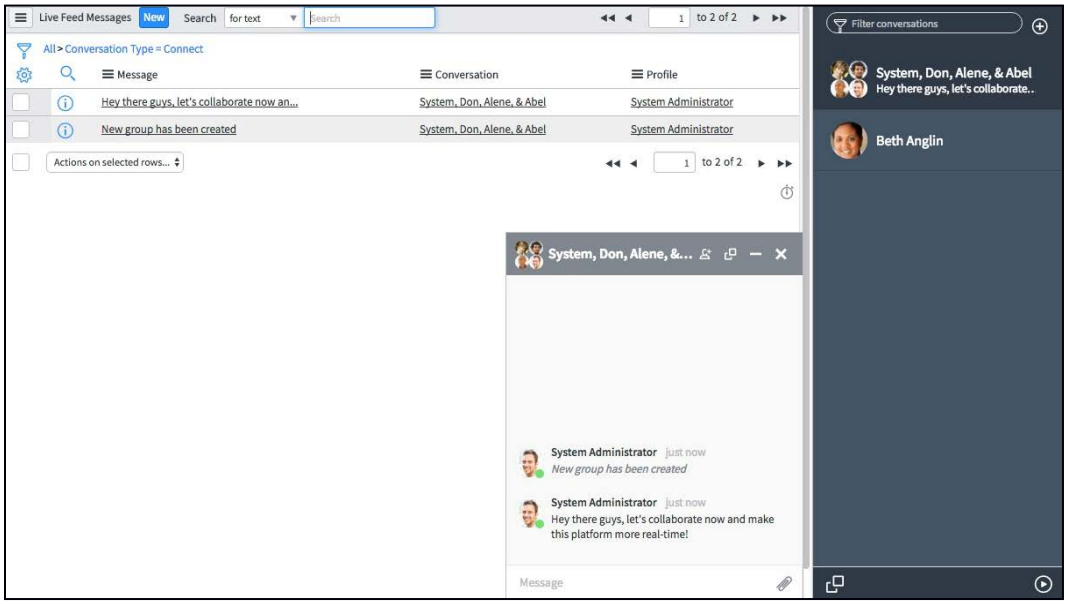


2. Since you have no group conversations, there are no records. Create one!

3. Navigate to "+" next to Filter Conversations fiels and start a new group conversation with your colleagues Don Goodliffe, Alene Rabeck, and Abel Tuter. Send them a short message.



4. 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.

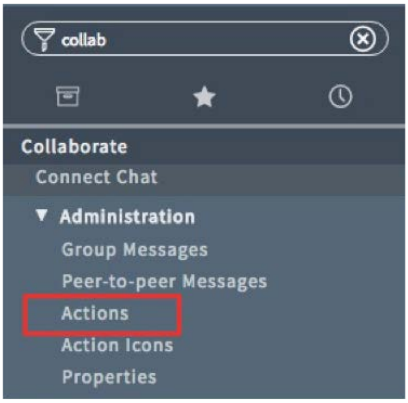


Note*:* "New group has been created" is a message generated by the system.

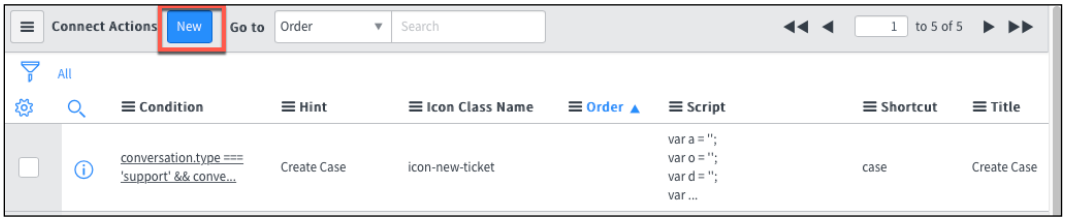
Understand Connect Actions

Connect Actions are intelligent scoops of code you can create or modify to provide custom functionality in conversations. 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, '+') : "";

if(text != ""){
	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);
	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) {

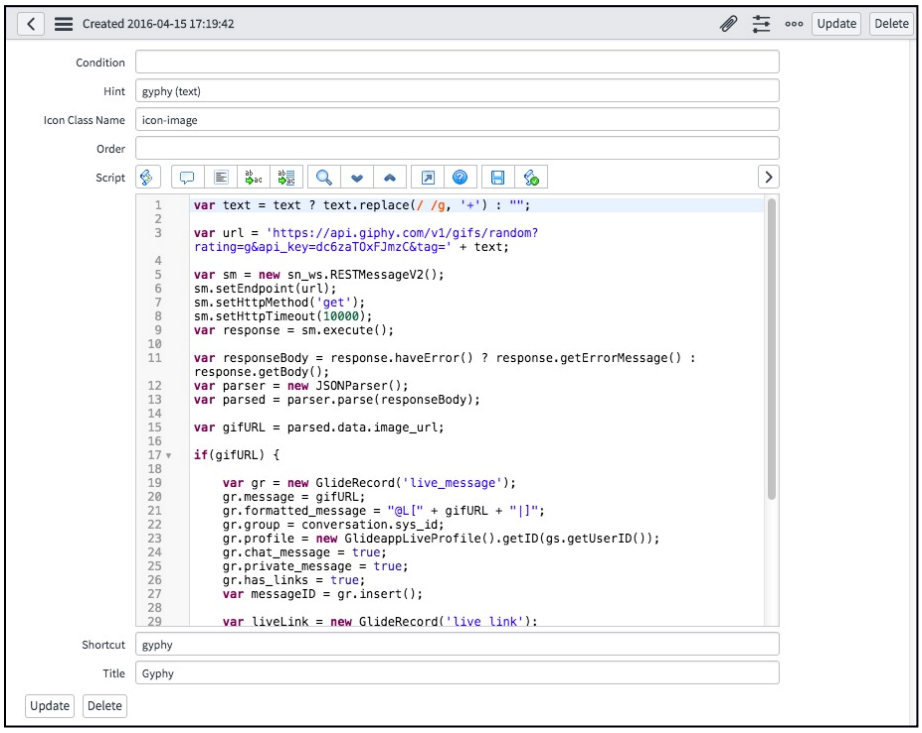
		var gr = new GlideRecord('live_message');
		gr.message = gifURL;
		gr.formatted_message = "@L[" + gifURL + "|]";
		gr.group = conversation.sys_id;
		gr.profile = new GlideappLiveProfile().getID(gs.getUserID());
		gr.chat_message = true;
		gr.private_message = true;
		gr.has_links = true;
		var messageID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

4. Desktop Image:

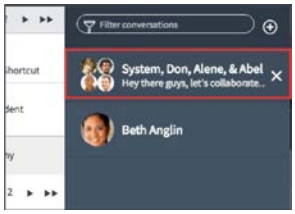


5. Click **Submit**.

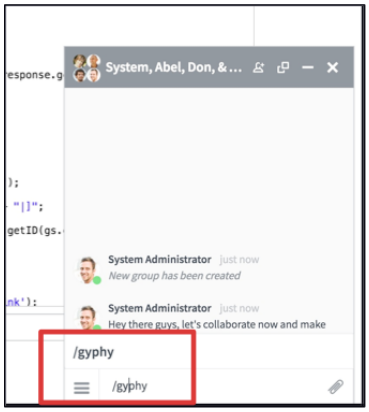


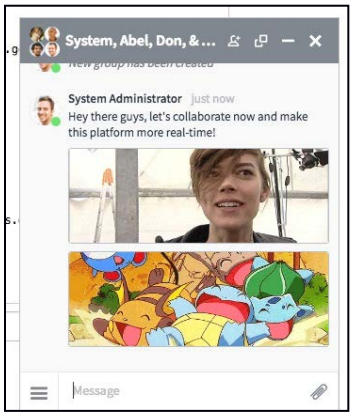
6. See what you just created!

7. Click on a group chat in **Connect** sidebar (conversation list).



8. By clicking on the conversation, you invoke Connect Mini window. In the input field, enter "**/**" (slash) and start typing **gy**. Notice how system suggests "**gyphy**". Press Enter on your keyboard and after **/gyphy** type **fun**.





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

Lab Goal

Lab 2.0 Getting Around Connect

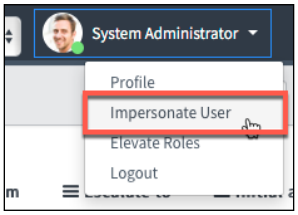
This lab reviews Connect from an employee perspective. Subject areas include the following:

- 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 real-time collaborating with your colleagues.

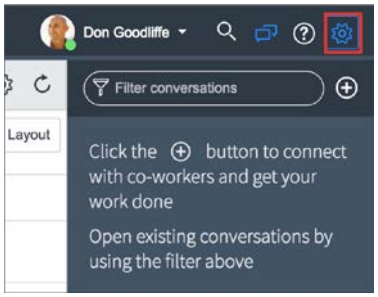
Log on to the Training Instance

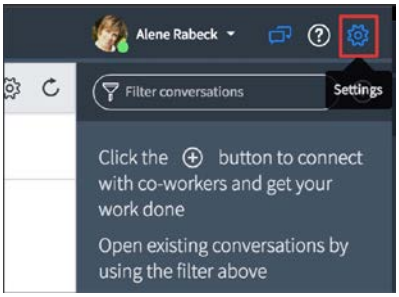
1. Navigate to the unique instance URL provided.
2. Log in with your admin account and impersonate Don Goodliffe.
3. Open a new incognito/private window of your browser and navigate to the same URL.
4. Log in with your admin account and impersonate Alene Rabeck.



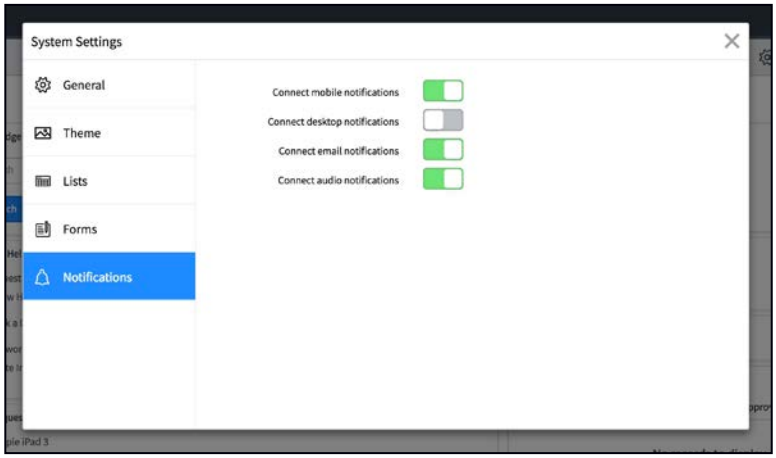
Notifications Preferences

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





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



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



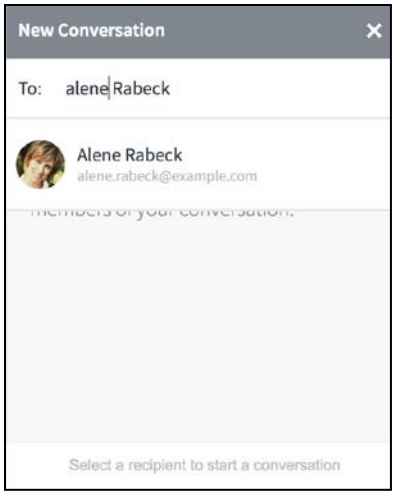


Note*:* By default, Connect mobile, audio, and email notifications are enabled globally. You can also edit which notifications you receive for a specific conversation once you create your first group.

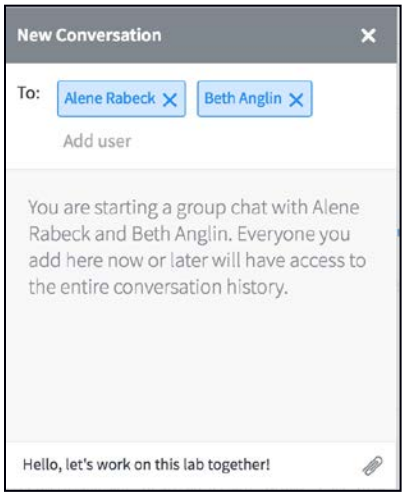
Connect Mini vs Full Views

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

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

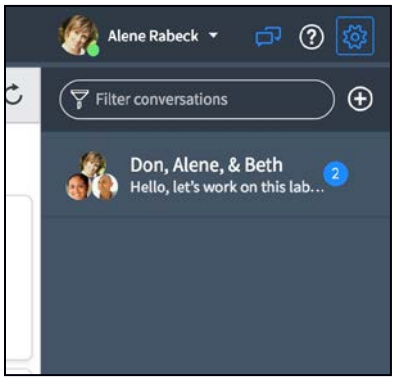


3. Add **Beth Anglin** to a conversation by typing her name. In the input field, type a message "**Hello, let's work on this lab together!**" and press **Enter**.

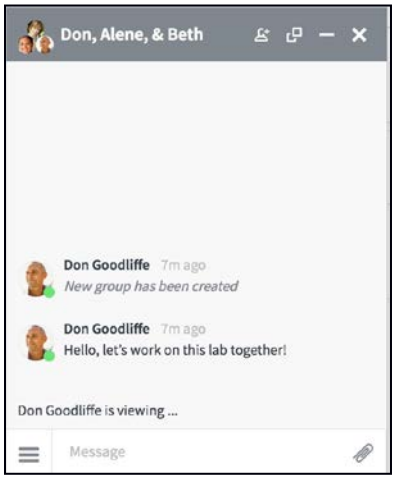


Note: You just created a group conversation using Connect Mini.

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

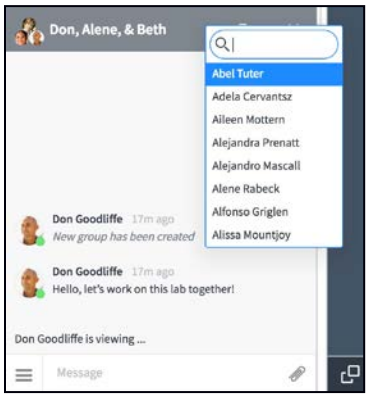


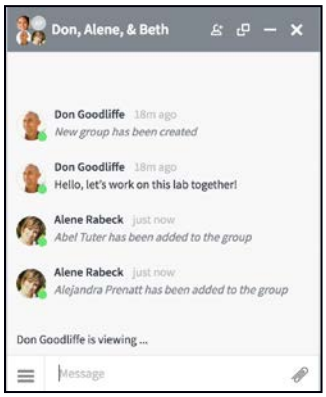
5. Open this conversation in Connect Mini by navigating to and clicking on it.



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

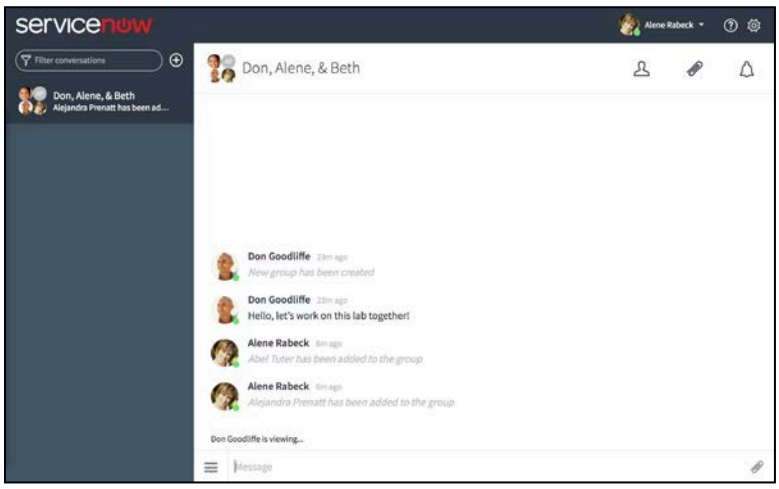




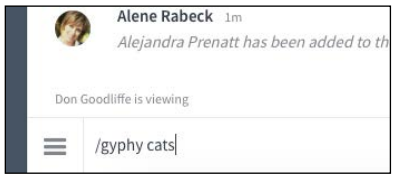


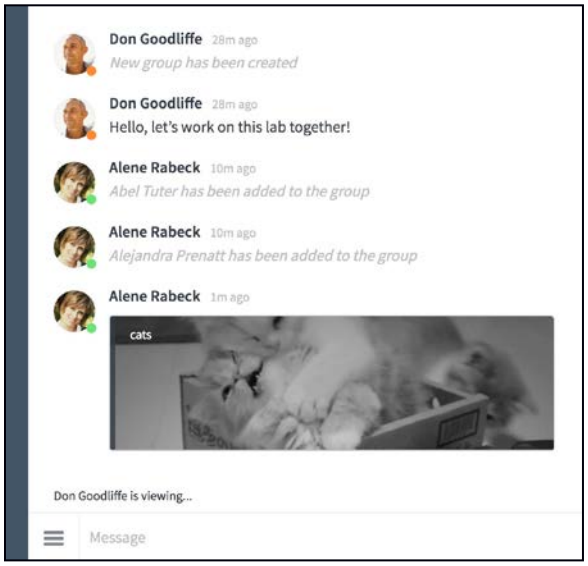
7. Move to Connect Full view by clicking the **expand** icon in Connect Mini header.





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 notifications setting on a per conversation basis, and collaborate with your colleagues on projects and inside records.

Connect Essentials

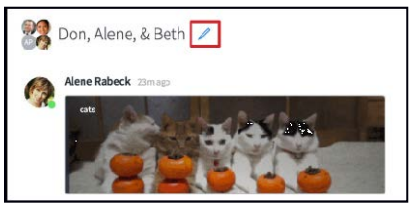
1. Open a new tab and navigate to google.com URL. Type **unicorns** in Google search and switch to the Images tab. Copy any image.

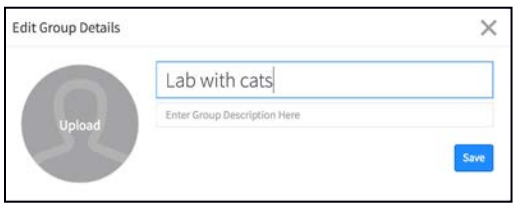


2. Go back to Connect Full view tab and paste this image directly into chat input field.
Note: This does not work in all browsers.



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

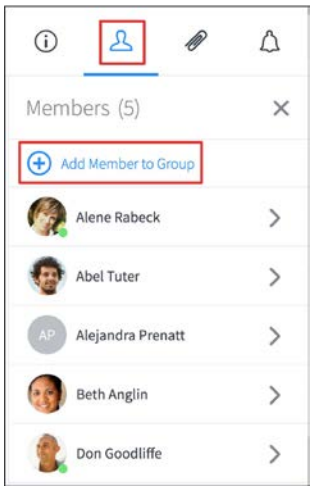


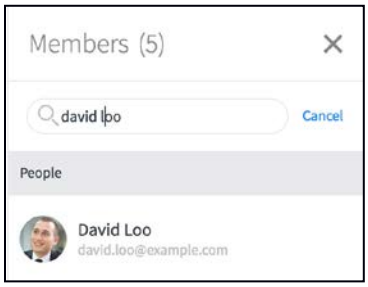


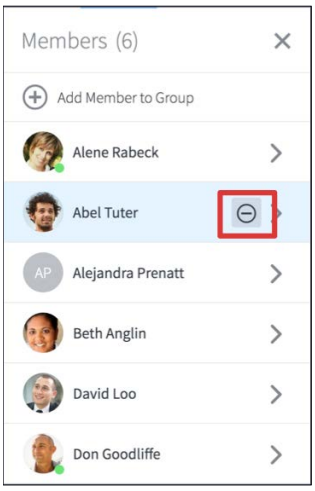
4. Upload a new group avatar by clicking on **Upload** and selecting any image from your computer. Press **Save.**



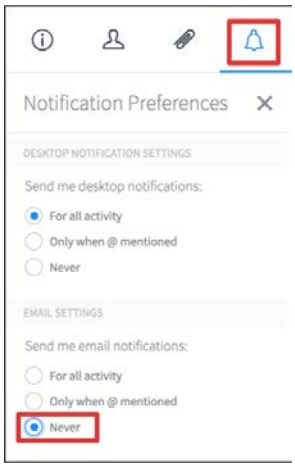
5. Click on the **members** icon in the same side panel. Add David Loo by clicking on **Add Member to Group** and remove **Abel Tuter** from this conversation by hovering on his name and clicking the **"–"** icon next to it.



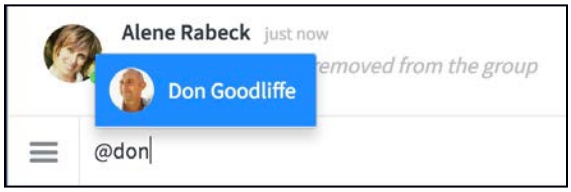


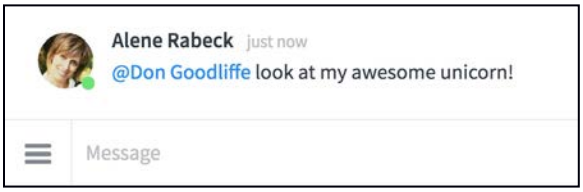


6. Navigate to the **bell** icon to change your notifications settings for this conversation. Disable Email Notifications for all activity by selecting **Never**.

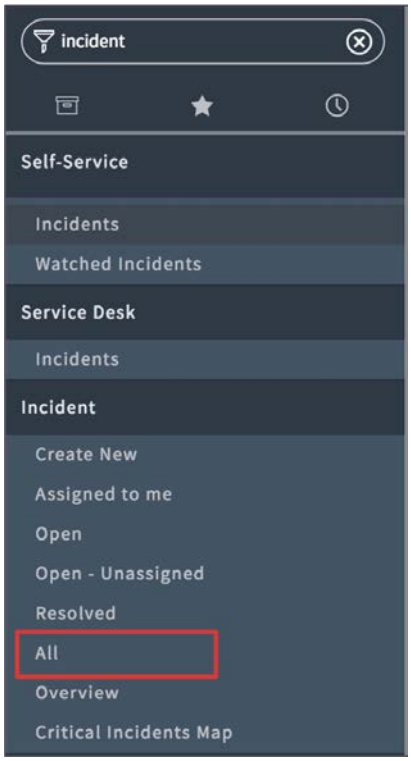


7. Navigate to a conversation input field and tell Don about your awesome unicorn by mentioning him in this group conversation. Type **@Don**, select Don Goodliffe from a drop-down list, and enter your message: **Look at my awesome unicorn**. Press **Enter**.

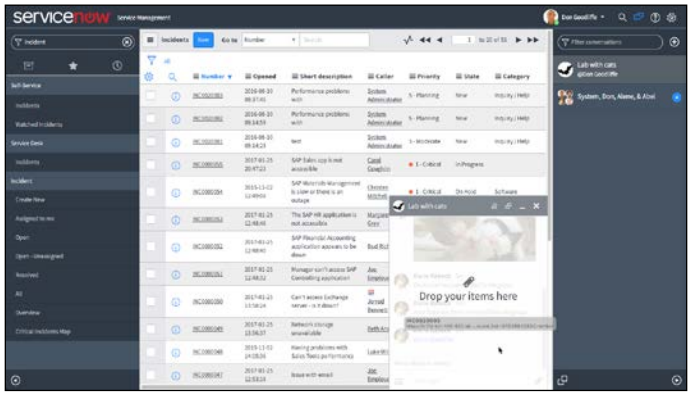


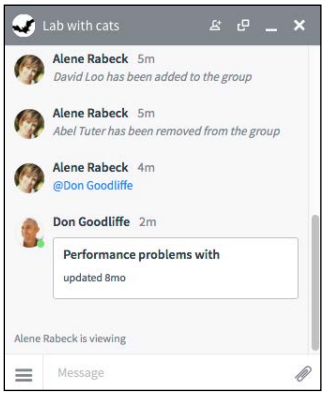


8. Switch to another Chrome window where you logged in as Don. Navigate to **Incidents** using **Navigator** in the upper-left corner. Select **Incident > All.**

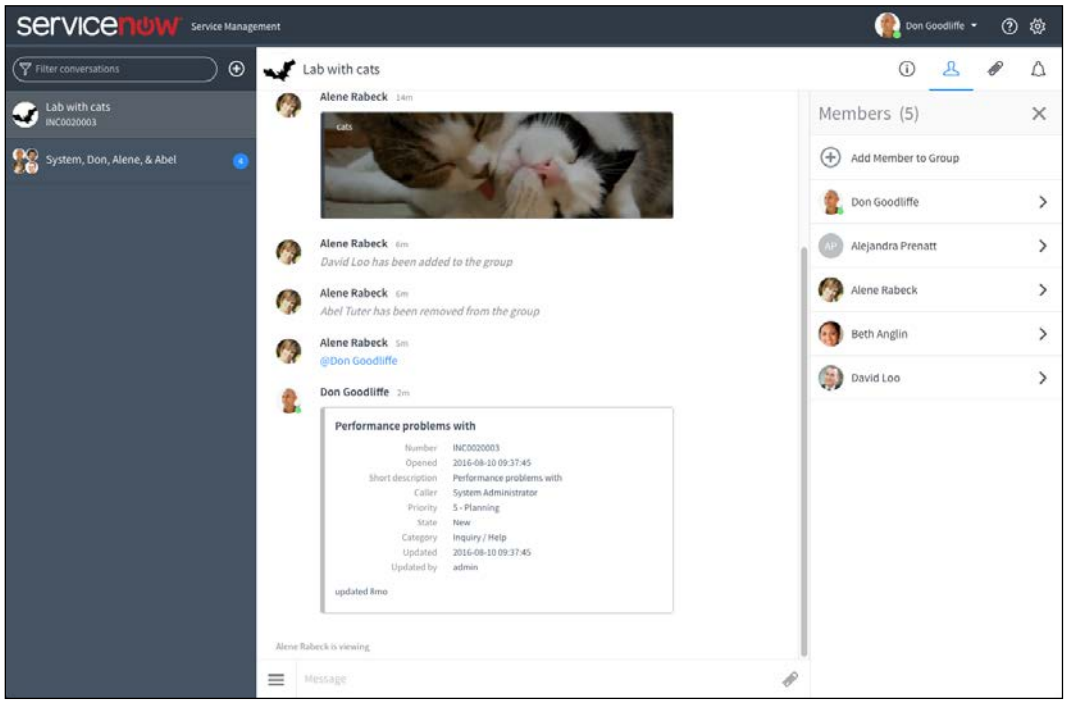


9. From the list view, share first incident **INC0020003** with your group by grabbing this incident with your cursor and dragging it into **Connect Mini** window.

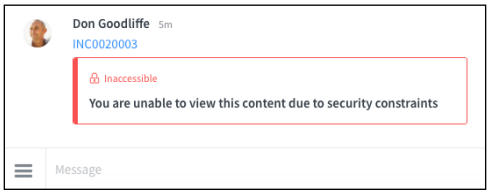




10. Switch to **Connect Full** view by clicking on **expand** icon in Connect Mini. Notice a record preview rendered inside Connect.



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



Lab Goal

Lab 3.0 Collaborate in Real-Time Inside a Record

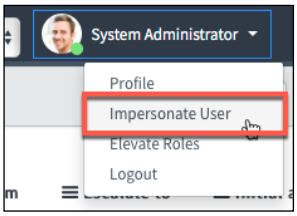
This lab explains how to work inside a record in real-time using Connect interface. Starting with Geneva, fulfillers can easily collaborate on the records in real time using an engaging chat-like experience with presence, which prevents fields-overwriting, and timely notifications that alert about new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

This lab explains how working inside a record using Connect interface can help fulfillers reduce resolution time from days and hours to minutes.

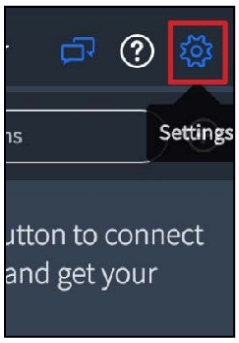
Log On to the Training Instance

1. Navigate to the unique instance URL provided.
2. Log in with your admin account and impersonate David Loo.
3. Open a new incognito/private window of your browser and navigate to the same URL.
4. Log in with your admin account and impersonate Beth Anglin.



Follow a Record

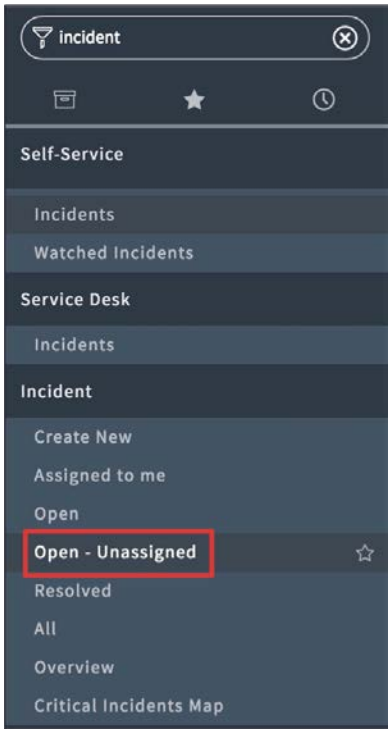
1. As David Loo, enable Connect desktop notifications by navigating to **Settings** cog in the upper-right corner and clicking the **Notifications** tab.



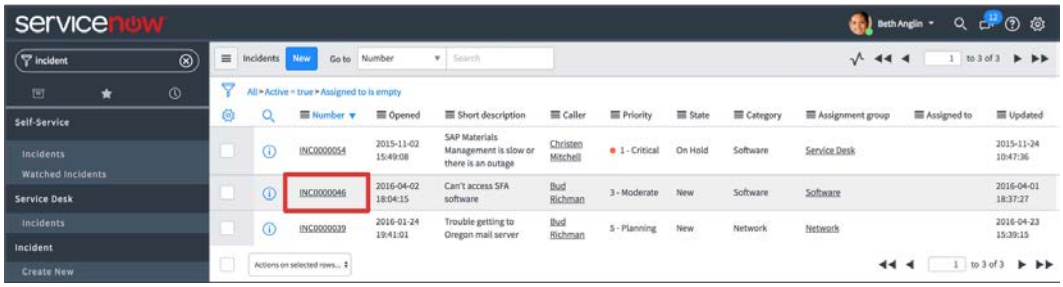


2. Switch to the Beth Anglin instance in your incognito browser window.

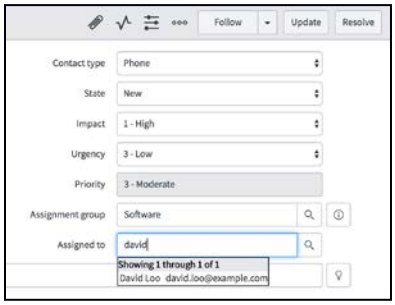
3. Navigate to **Incident > Open - Unassigned** using search in the upper-left corner.



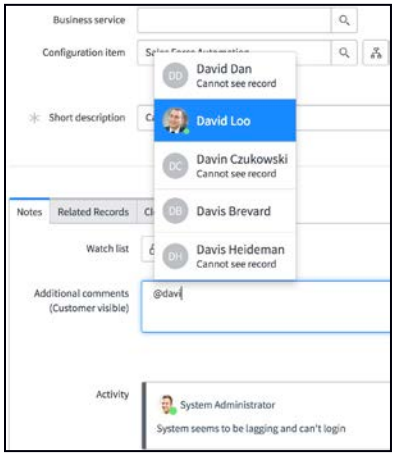
4. From the list view, select incident I**NC0000046** by clicking on it.



5. Assign it to **David Loo**.



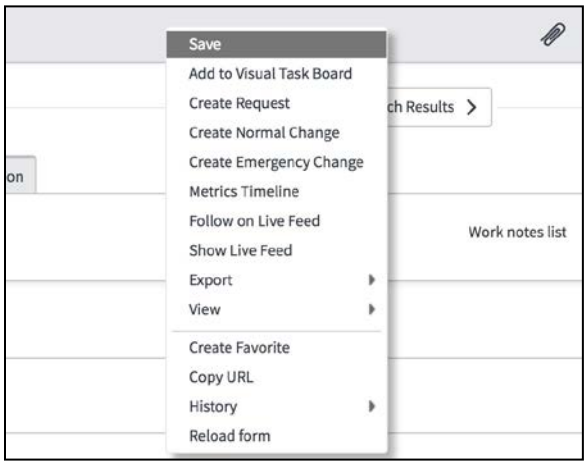
6. Mention David Loo inside work notes using "**@**" sign and enter a note for him: **@David Loo can you look at it ASAP please**. Notice a green dot next to David's avatar that indicates David is currently online.



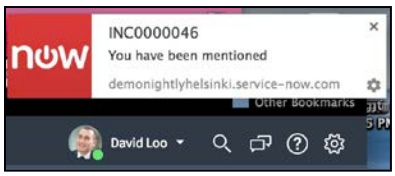
7. Select a **Work note** and press **Post.**



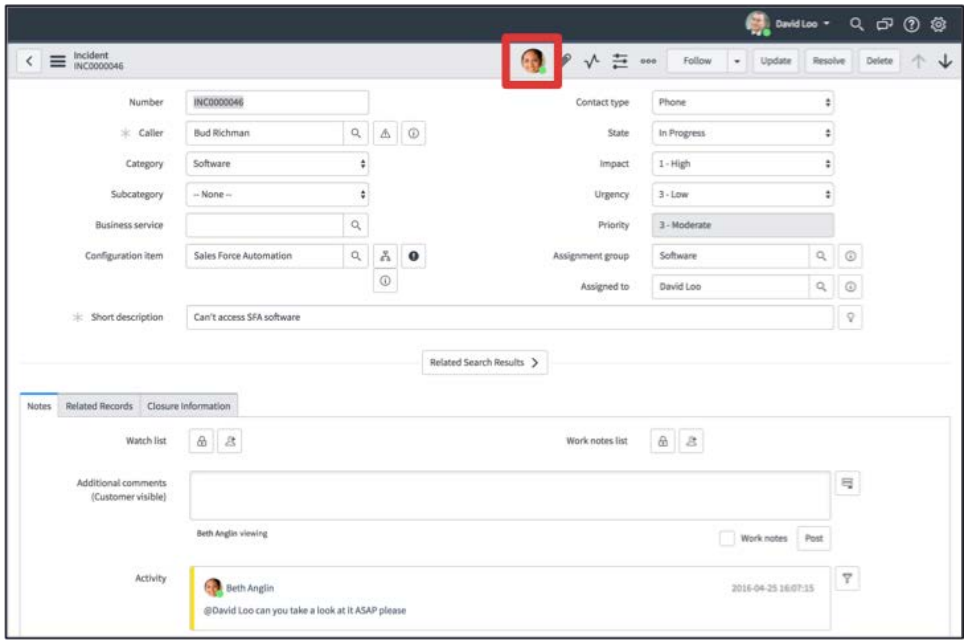
8. Save the form by clicking on the record header and selecting **Save** from the drop-down menu.



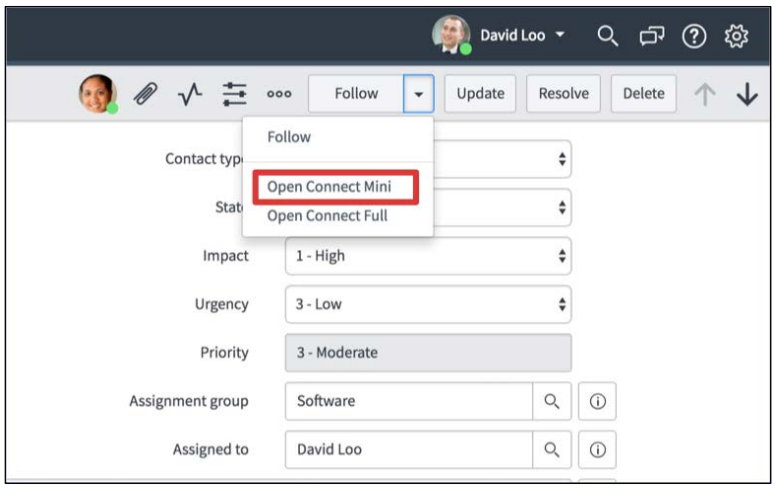
9. As you press **Save**, you should see a desktop notification flying in from the upper-right corner informing David Loo that he has been mentioned. **Click on this notification**.



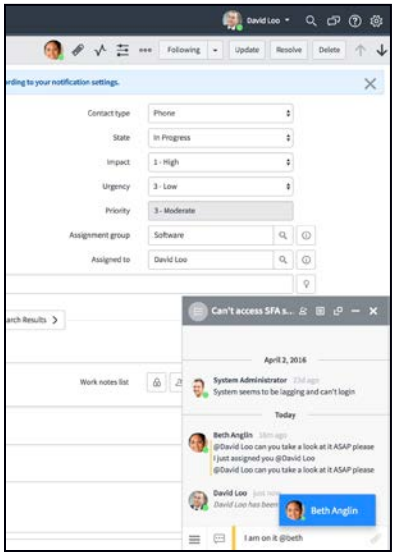
10. After you click on the notification, as David Loo you are taken to the record were David was mentioned. Notice Beth Anglin's avatar in the record's header. This avatar indicates Beth is actively engaged and working on the same record as you are.



11. Open the record in Connect Mini by clicking on **Follow** and selecting **Open Connect Mini**.

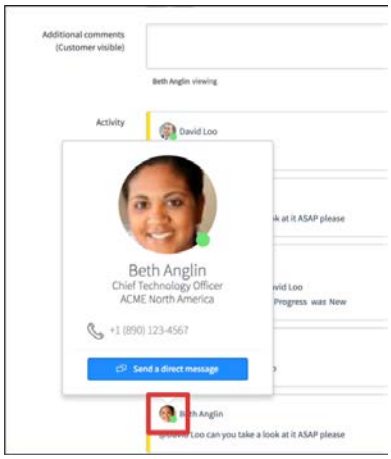


12. In Connect Mini, type a message to Beth using work note and mention her: **I am on it @Beth Anglin**.



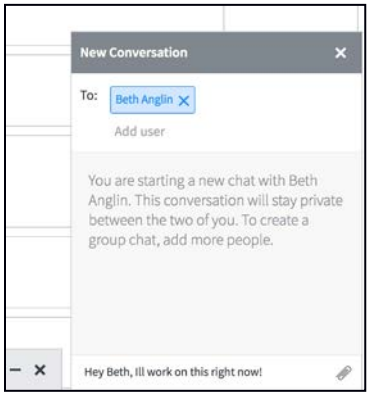
Note: Activity in a record is automatically reflected in Connect, and vice versa, which allows you to easily work inside a record using engaging chat experience.

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

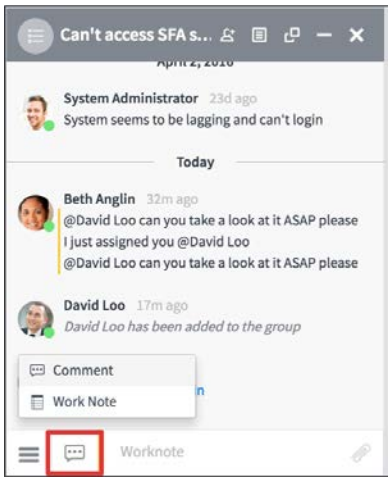


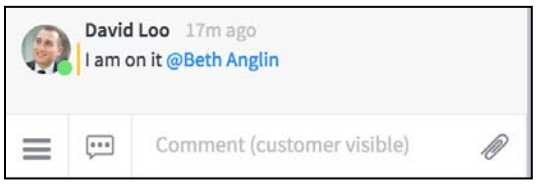
14. Send Beth a message by clicking the **Send a direct message** button: **Hey Beth, I'll work on this right now!**



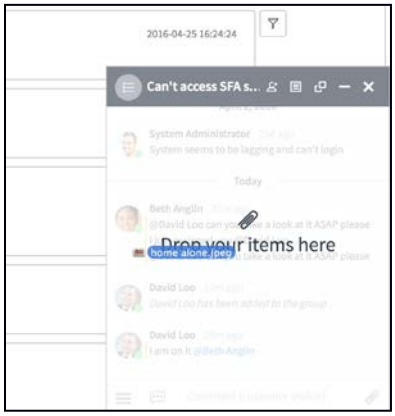


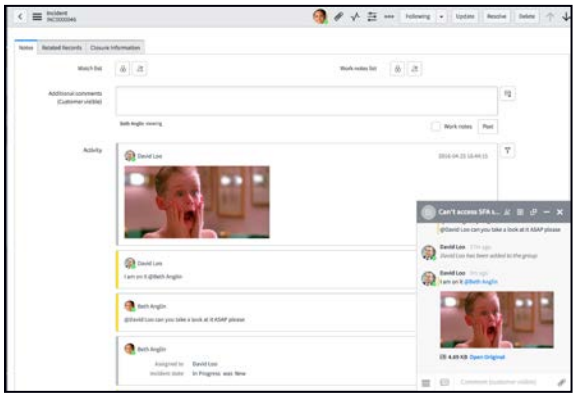
15. Switch to **Comment** using a toggle next to a chat input field.





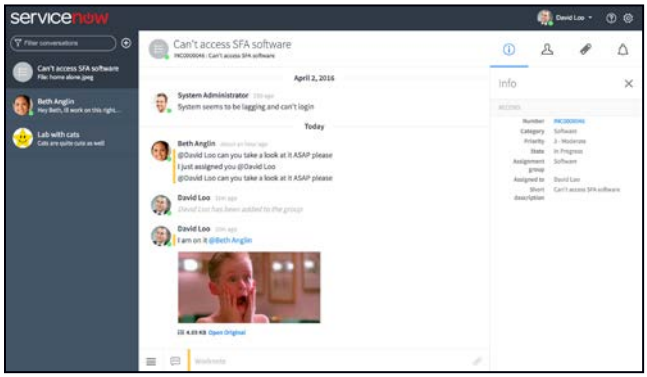
16. Open a desktop folder on your computer, locate an image, grab the file, and drop it in Connect Mini.





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





Note: On the right sidebar, you can check the details of the ticket and add more members to collaborate.

Lab Goal

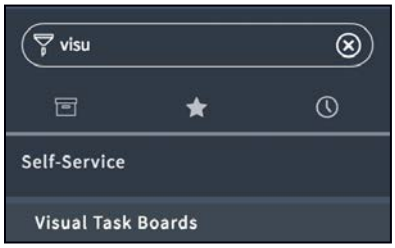
Lab 4.0
Create a VTB Conversation

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.

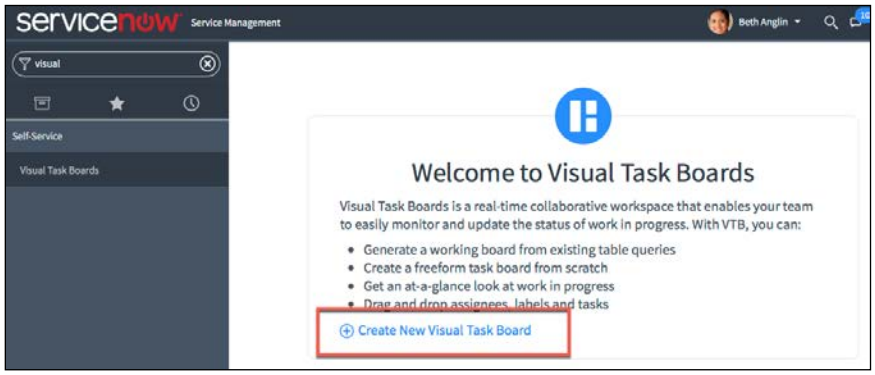
- Create VTB Connect conversation
- Manage Members

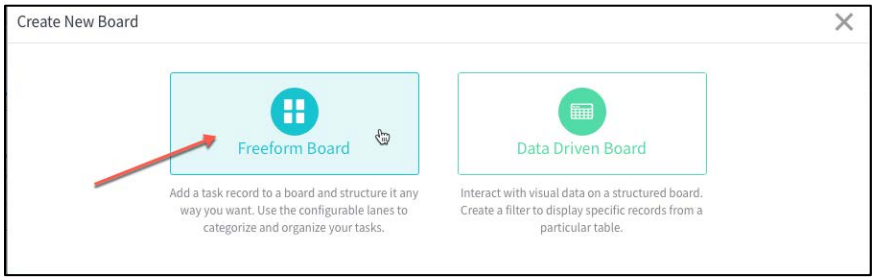
Create a Visual Task Board Conversation

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

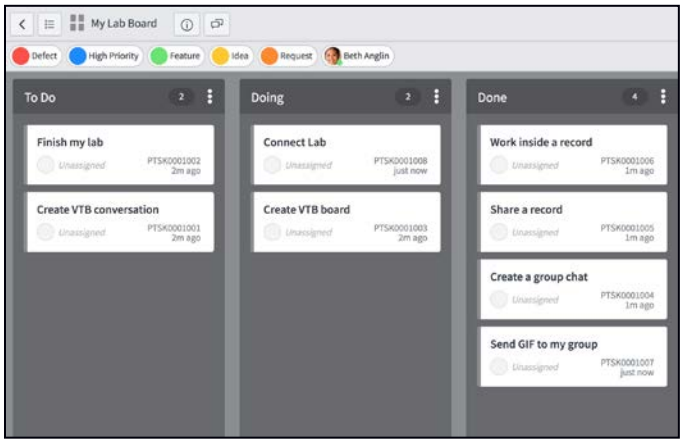


2. Click **New** and **Freeform Board** to create a new board.



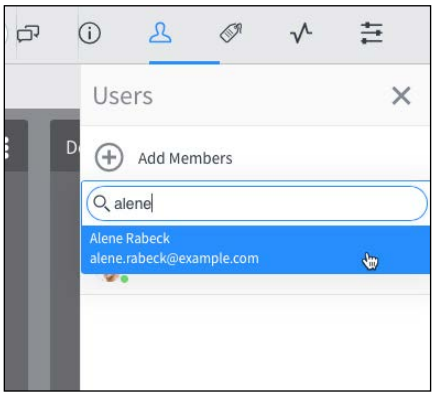


3. Name your board and create a few cards in each lane.



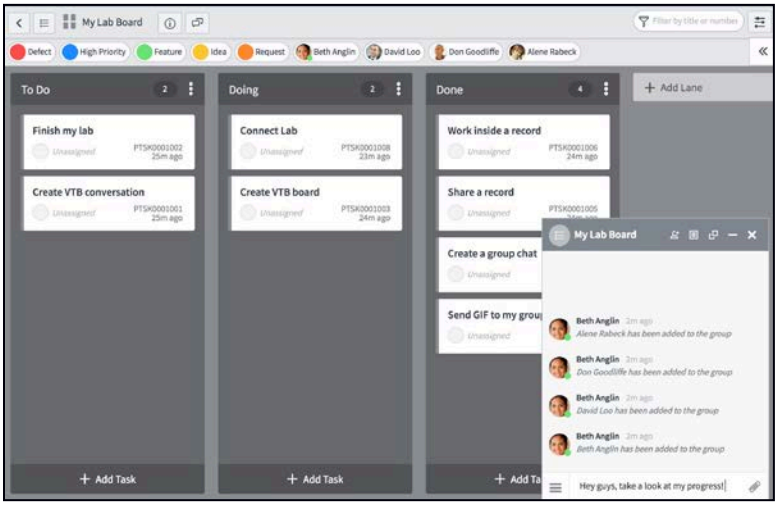
4. By clicking on a toggle in the upper-right corner, add David Loo, Don Goodliffe, and Alene Rabeck to this board as members so that they can see your progress.





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.

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



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

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 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 several 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 service desk agent and learn how to resolve incoming request in real time via Connect Support interface.

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

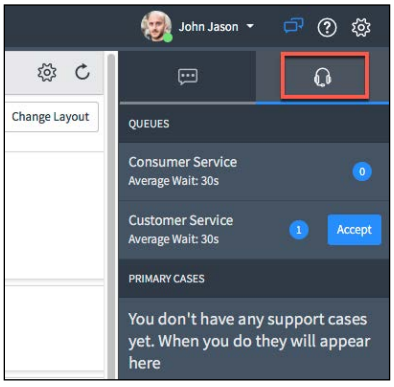
Log On to the Training Instance

1. Navigate to the unique instance URL provided.

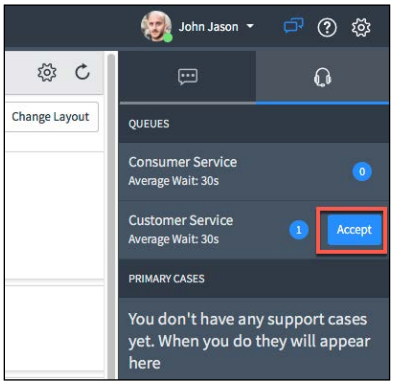
2. Log in with the admin credentials and impersonate **John Jason**.

Accept Incoming Request

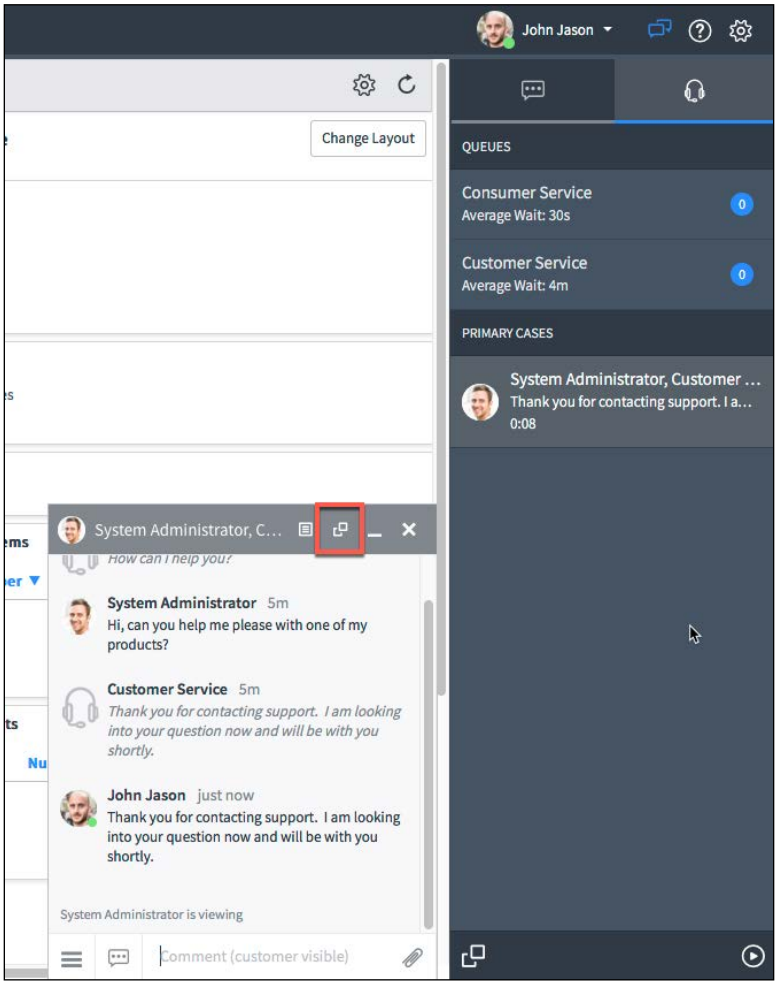
1. Navigate to **Connect Sidebar** by toggling **chat** icon in the upper-right corner. Notice the new Support tab with the **headphone** icon on it. Click this tab.



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



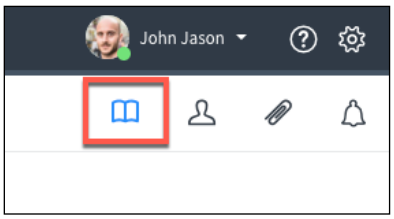
3. Send a message to a customer via Connect Mini and click on the **expand** icon to move to Connect Full view.



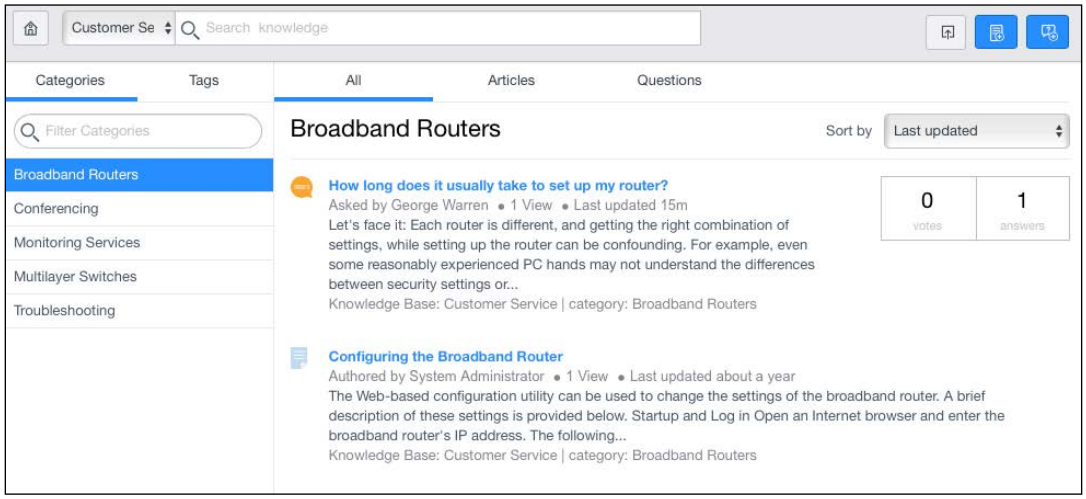
Note: As a service desk agent, you do not have to move to Connect Full view – you can work on your support session in this view. However, we recommend using Connect Full to take advantage of all the features and have a better experience.

Explore Support Essentials

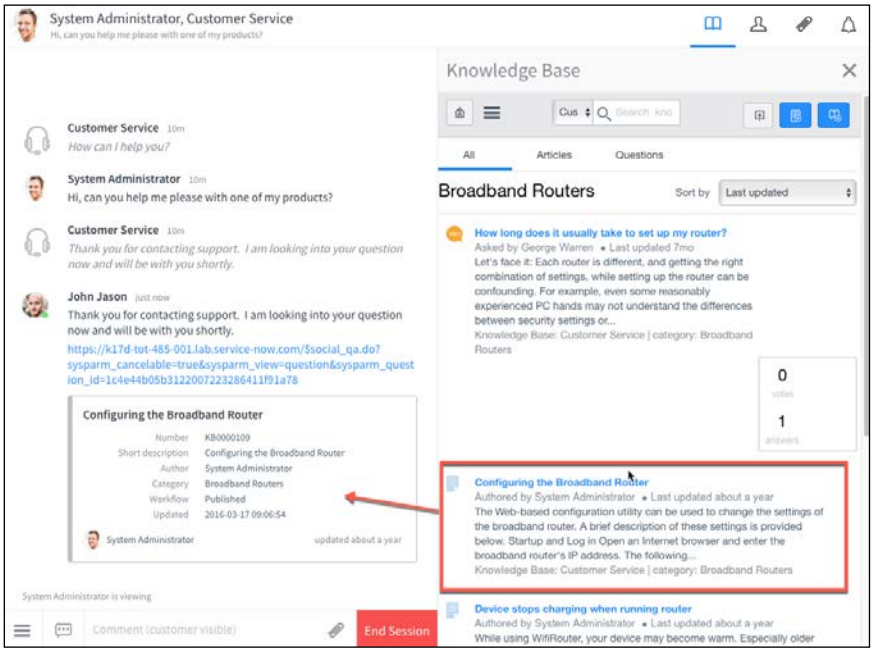
1. In Connect Full view, click on the **book** icon to open the Knowledge Base.

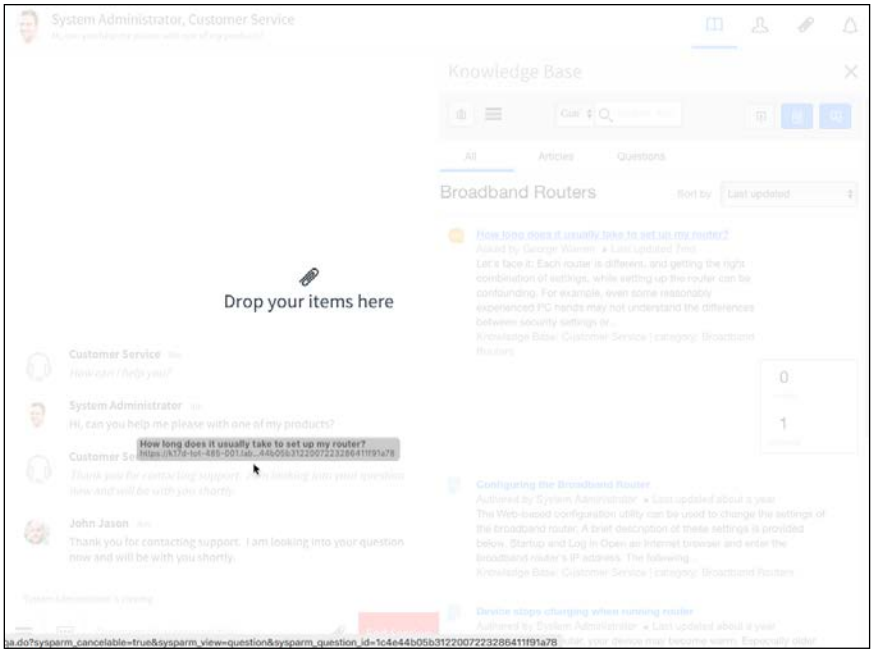


2. Open the Customer Service knowledge base there and locate an article that should help a customer to resolve their issue.

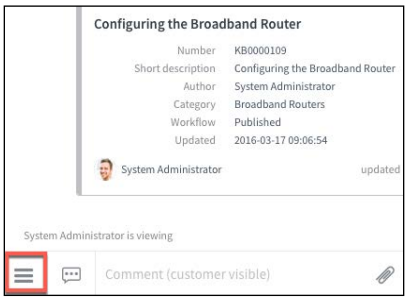


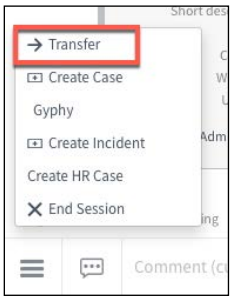
3. Grab an article and drag it into a chat window.



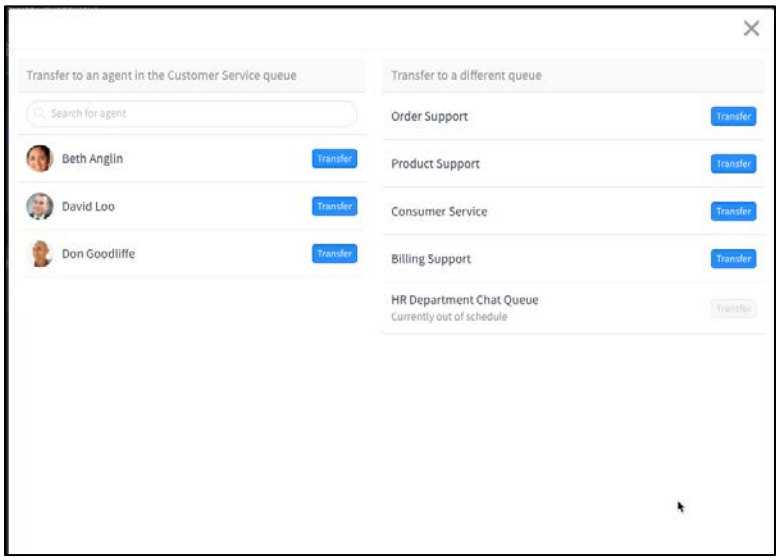


4. Click on the **hamburger** menu to the left of an input field and select **Transfer**.



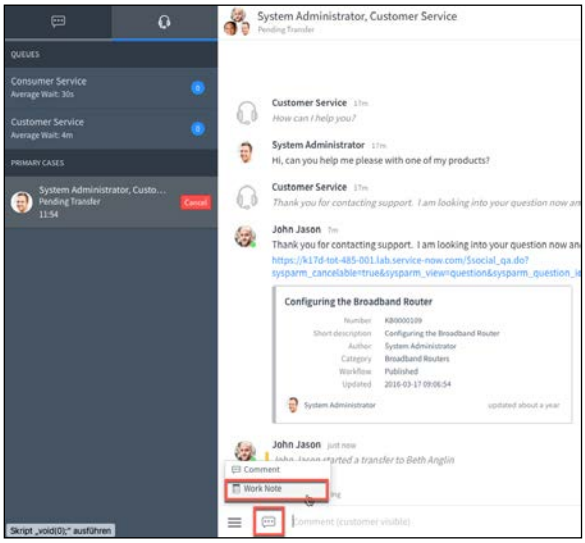


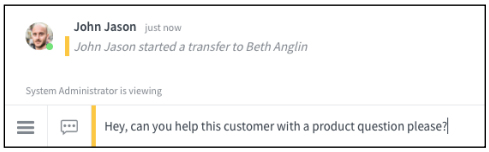
5. In a transfer modal, select any agent to whom you want to transfer this chat.



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

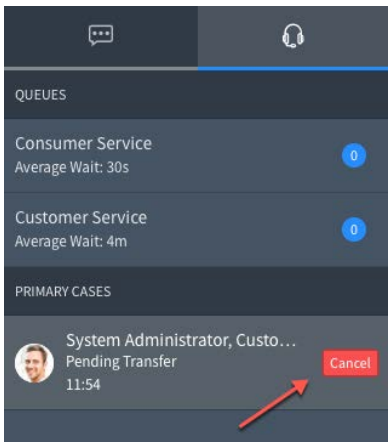
6. Switch to Work Notes by using a toggle next to a **hamburger** menu. Send a message to a receiving agent: **Hey, can you help this customer with a product question please?**





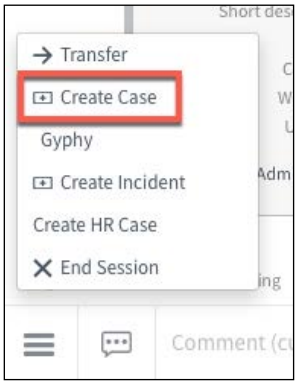
Note: Work notes in Connect Support are visible only to service desk agents during a support session; customers on the other end cannot see them.

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

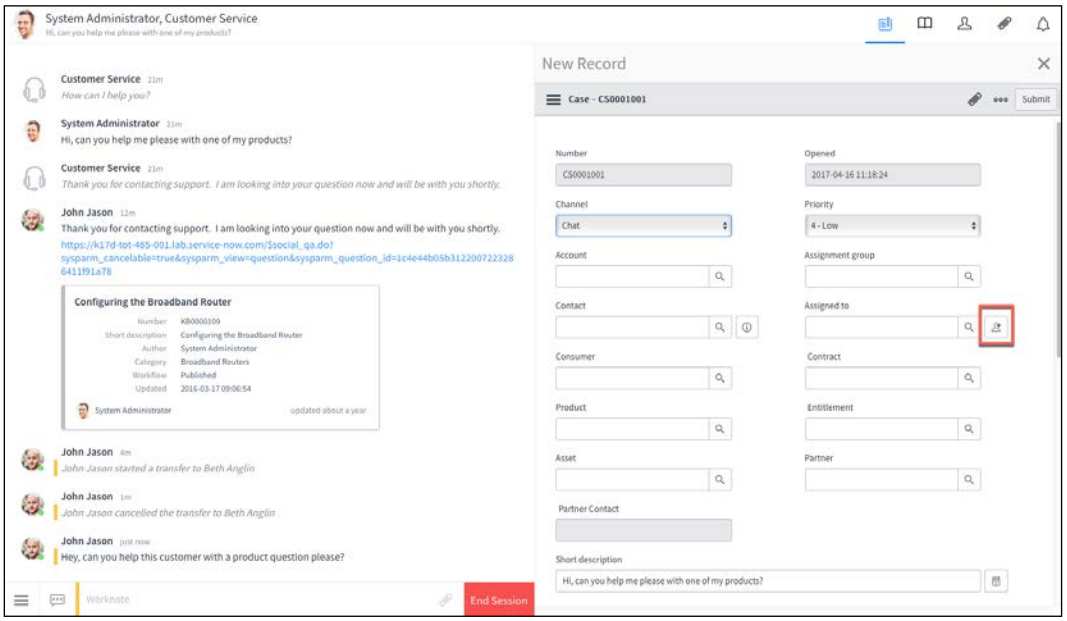


Create a Record off a Chat

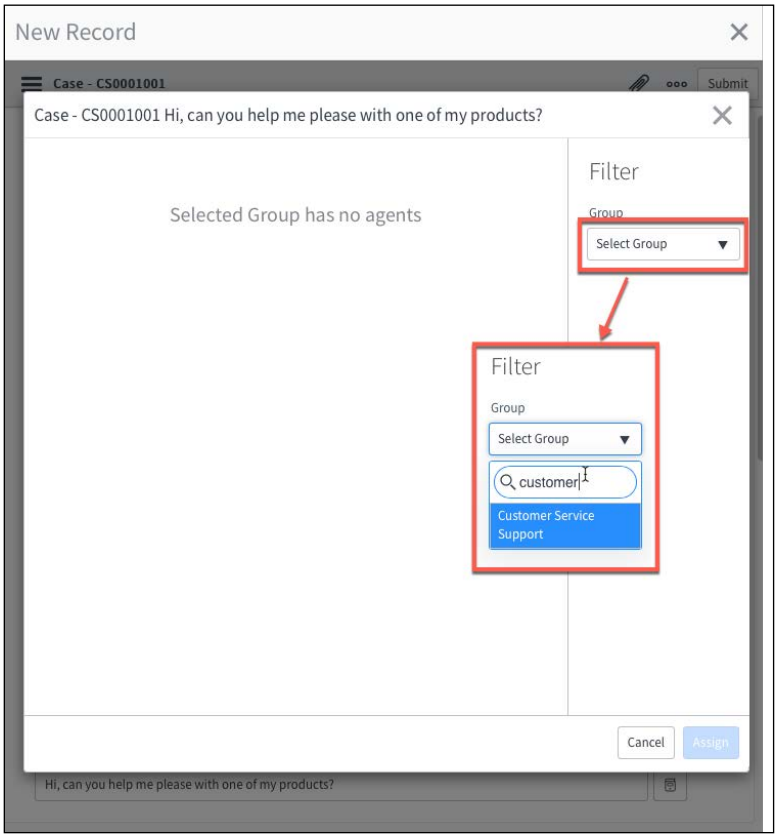
1. From the **hamburger** menu, select **Create Case**.



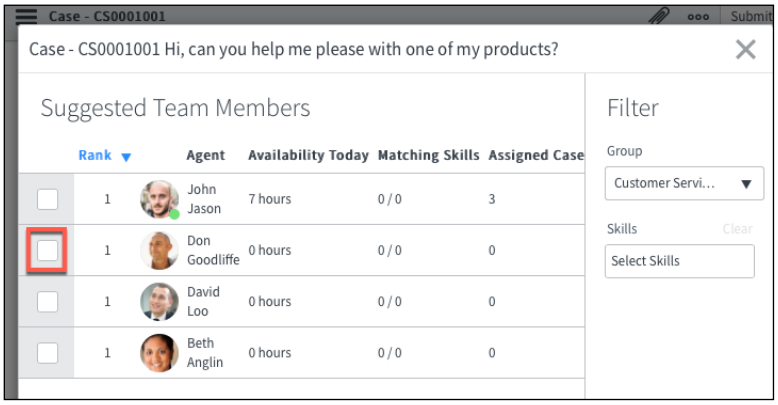
2. The system pre-fills some fields such as **Channel** and **Short Description**. You can assign the case to someone using the little icon behind the **Assigned to** field.

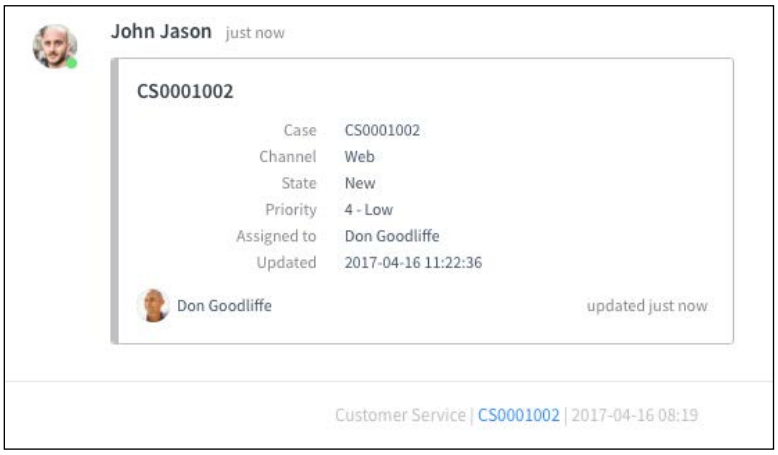


3. In the assignment workbench (comes with the Customer Service Management application), select the **Customer Service Support** group and see who is available to resolve this case.

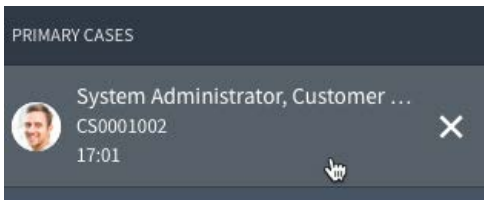


4. The assignment workbench ranks group members based on their availability, matching skills and assigned cases (workload). Select **Don Goodliffe** by selecting the checkbox and clicking the **Assign** button.





Note: Record preview is visible to both service desk agent and customer. Customers can click on a card and view a record in a form view, where they can start following a record to get updates on the comments. Upon completion, notice the case number on the bottom of the chat window. Also notice how the conversation stays in your Connect sidebar until you close it by clicking on **X**. This applies also for created incidents or other records.



Lab Goal

Lab 6.0 Anonymous Chat and Matching Rules

This lab covers the new anonymous chat capability introduced with the Consumer Service Management application in Istanbul.

From the Consumer Service Portal, guest users can click the Live Chat link in the portal header to initiate a chat session with a consumer service agent. Clicking this link opens a form that requests some basic information, including the user's name, email address, and type of issue.

Completing and submitting the form creates a chat request that is routed to the appropriate agent queue based on the selected issue type and the according matching rules.

Subject areas of the lab include the following:

- Activate the anonymous chat and routing plugins
- Setting up and configuring anonymous chat
- Using anonymous chat routing with matching rules

The goal of this lab is to learn how working consumer interaction can be simplified and made user friendly with the Connect capabilities in the Consumer Service Portal.

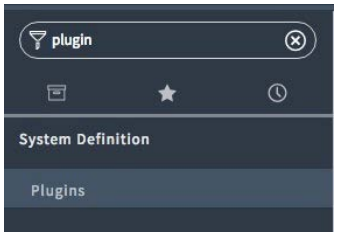
Log On to the Training Instance

1. Navigate to the unique instance URL provided.

2. Log in with the provided admin credentials.

Check the Required Plugins

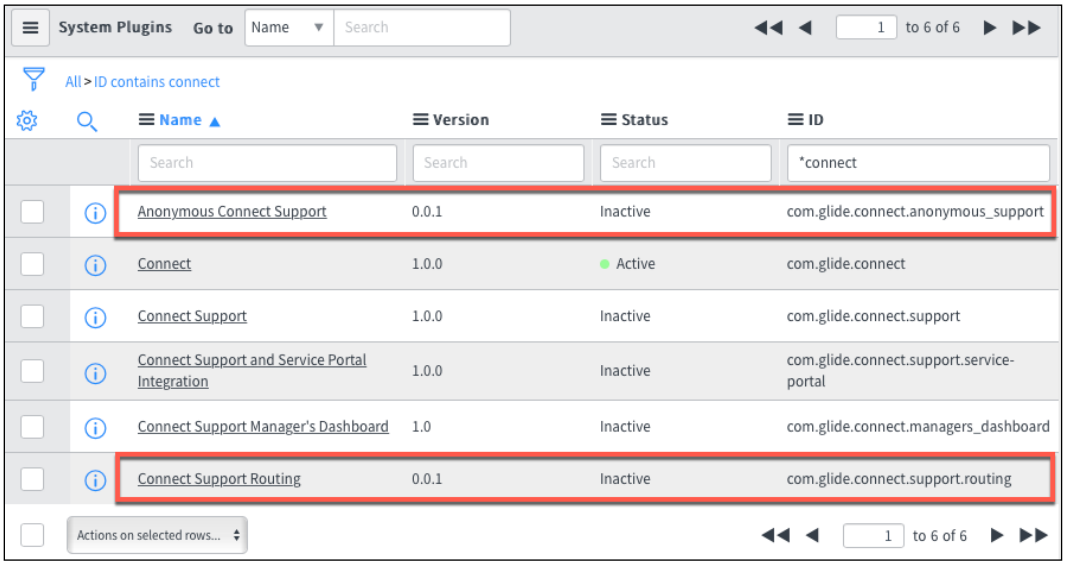
1. Using filter in the upper-left corner, navigate to **Plugins (System Definitions > Plugins)**.



2. Using Search, type ***connect** in System Plugins ID search field and check for these two plugins:
   - **com.glide.connect.anonymous_support**
   - **com.glide.connect.support.routing**.

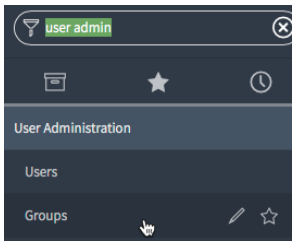
   The **Connect Support Routing** plugin comes together with the **Customer Service** plugin and the **Anonymous Connect Support** plugin with the **Consumer Service Portal** plugin. Both plugins can also be activated standalone, but require a CSM license.

   Verify that both plugins are activated in your instance. If one of the plugins is not activated, please activate it.



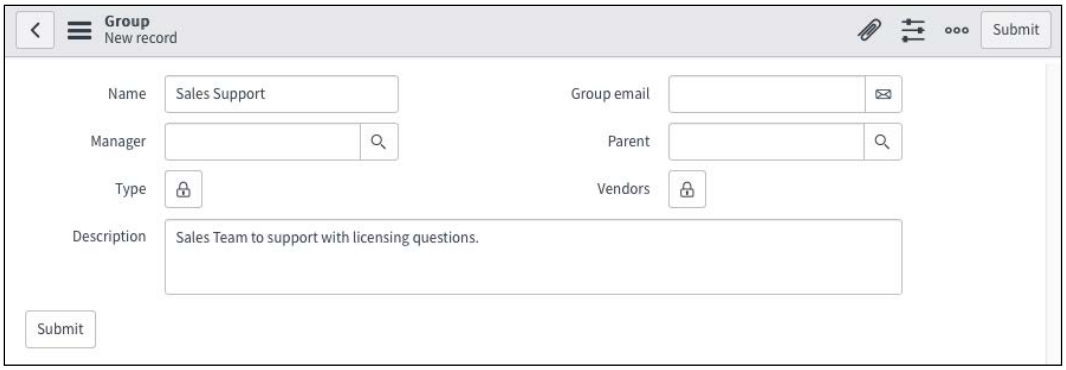
Set Up the Support Team and Matching Rule

1. Using filter in the upper-left corner, navigate to **User Administration (User Administration > Groups)**



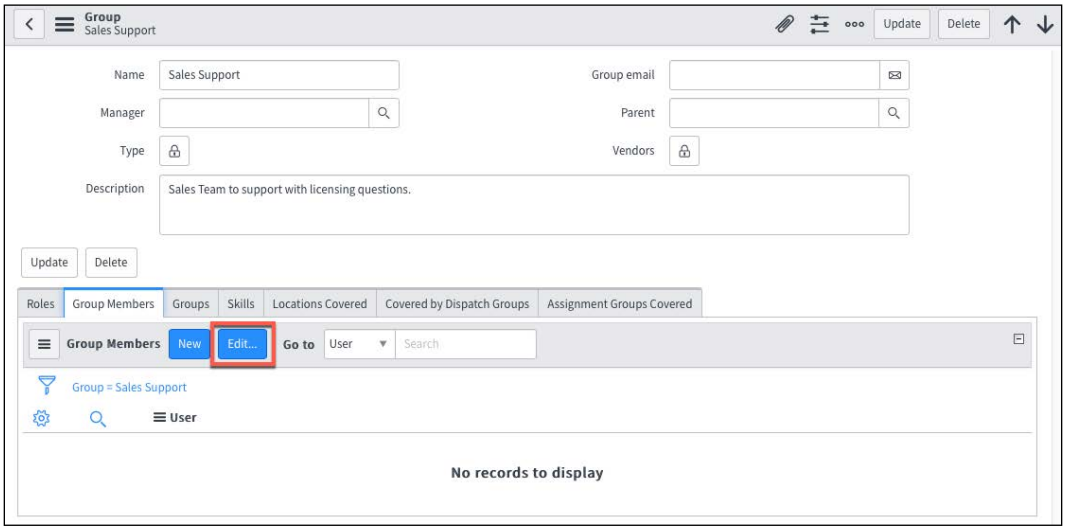
2. Create a new group with the following details:

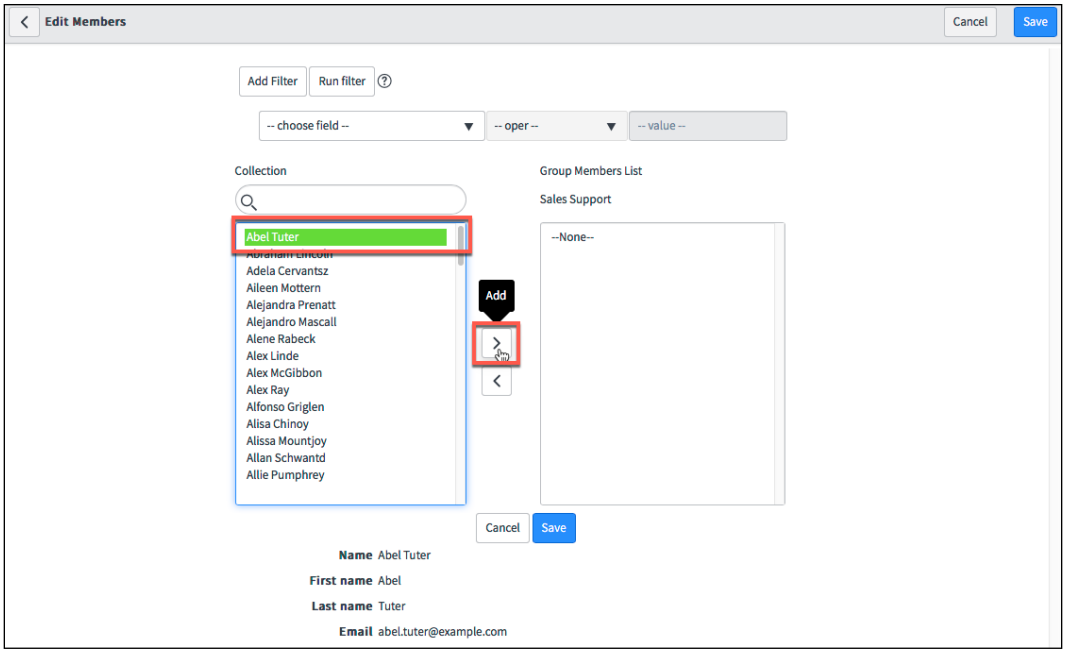
   Name: **Sales Support**
   Description: **Sales Team to support with licensing questions.**



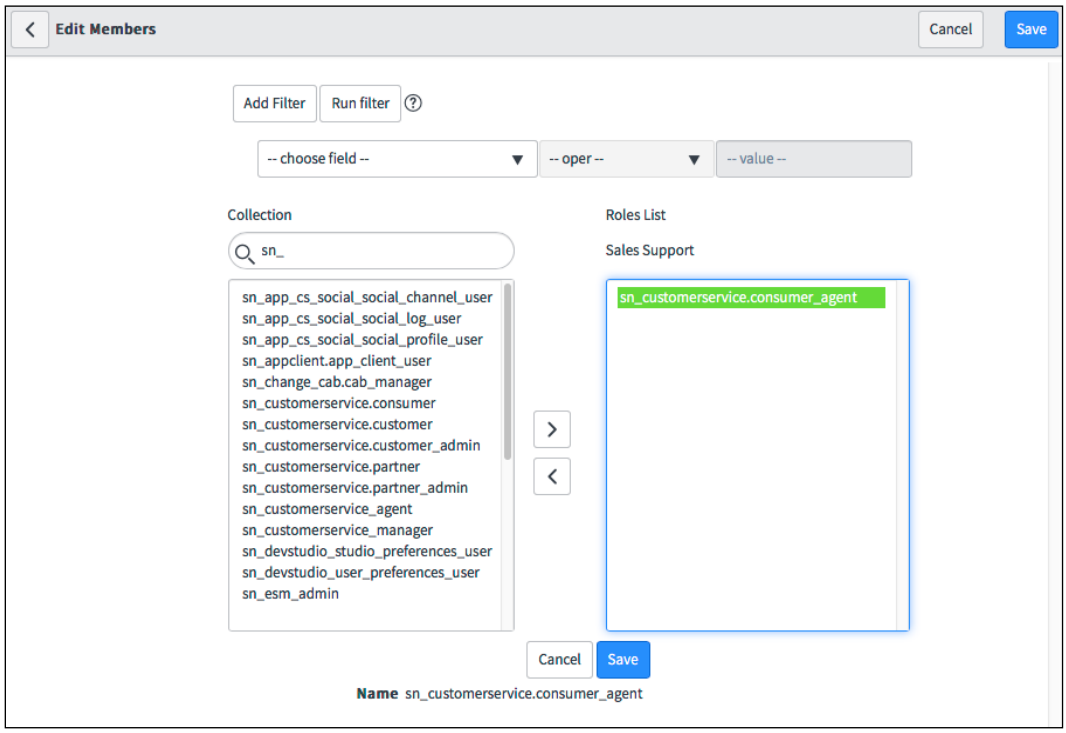
3. Right-click on the header and **Save**.

4. Add "Abel Tuter" to this group. Abel will be the support agent for sales-related chat inquiries.





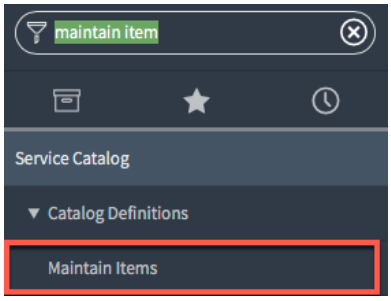
5. In the Roles tab, click on **Edit** and add this role: **sn_customerservice.consumer_agent**



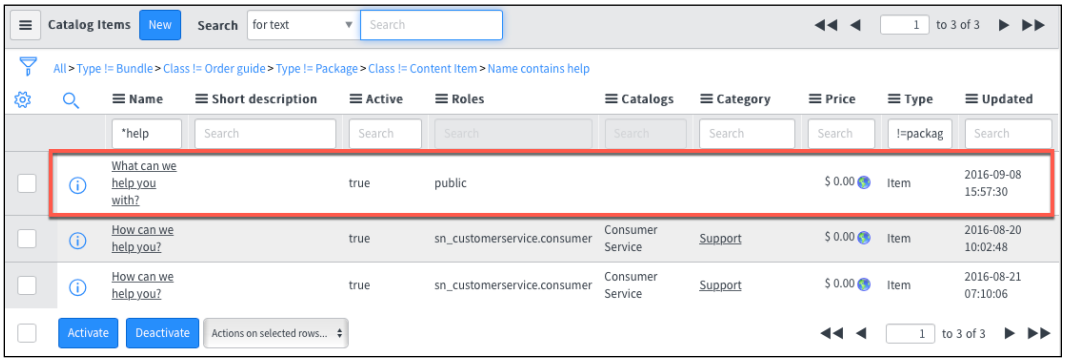
6. Click **Save**. To be able to create cases out of a chat later, the support users require either the role we just added, or alternatively one of these:

   - sn_customerservice_manager
   - admin

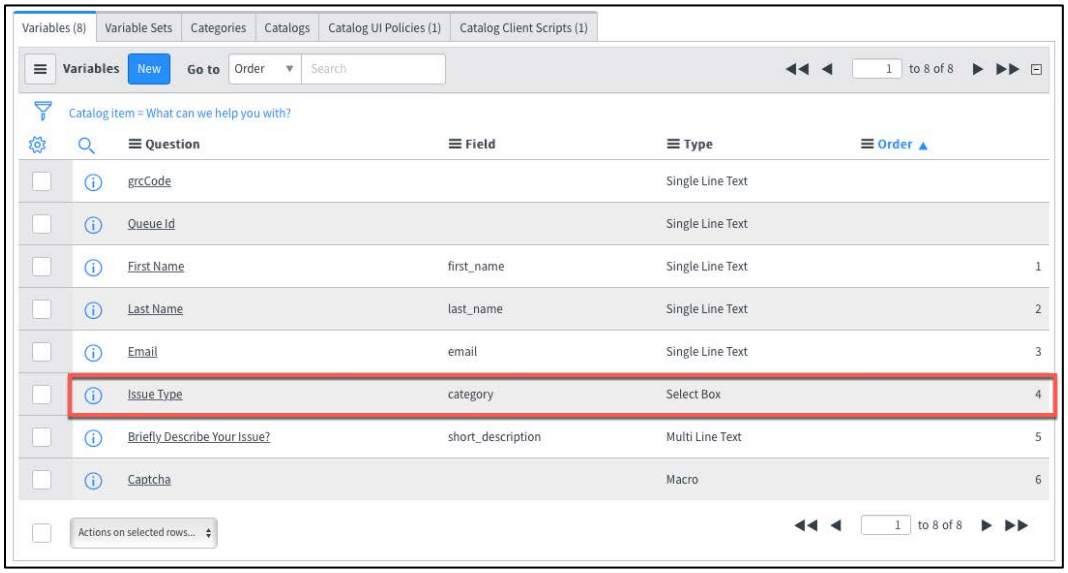
7. Using filter in the upper-left corner, navigate to **Maintain Items (Service Catalog > Maintain Items)**.



8. Using Search, type ***help** in **Name** search field and check for this catalog item **What can we help you with?** This form is used for the anonymous chat. Note that it is public.

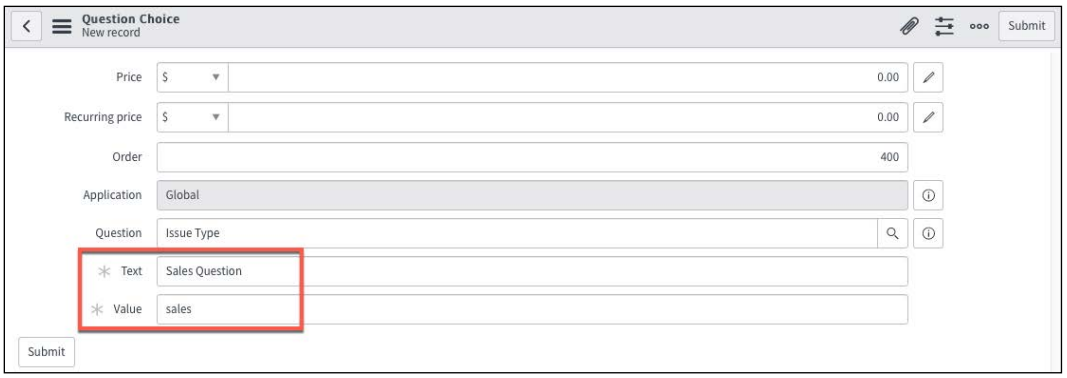


9. Open this item, scroll down, and open the variable **Issue Type**.

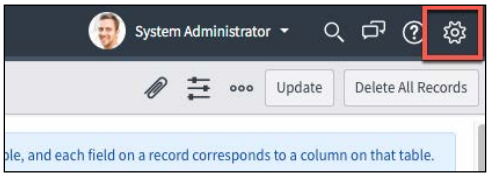


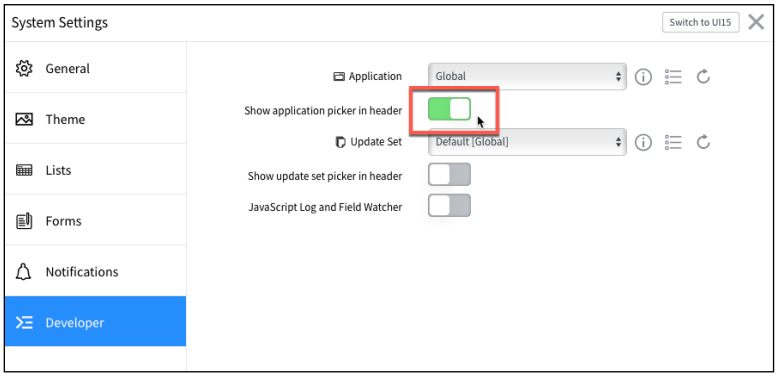
10. At the bottom of the variables form, add a new Question Choice with the following details:

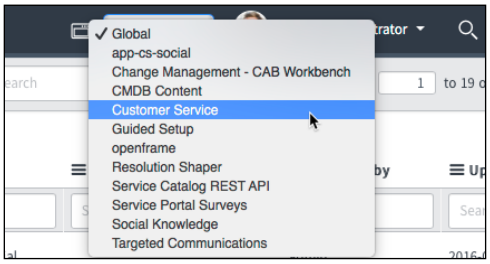
    Text: **Sales Question**
    Value: **sales**
    Then click **Submit**.



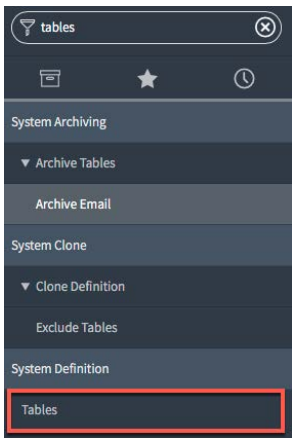
11. Before adding the sales category to the customer interaction table, switch to the Customer Service application. Add the application picker to the header and change the application.



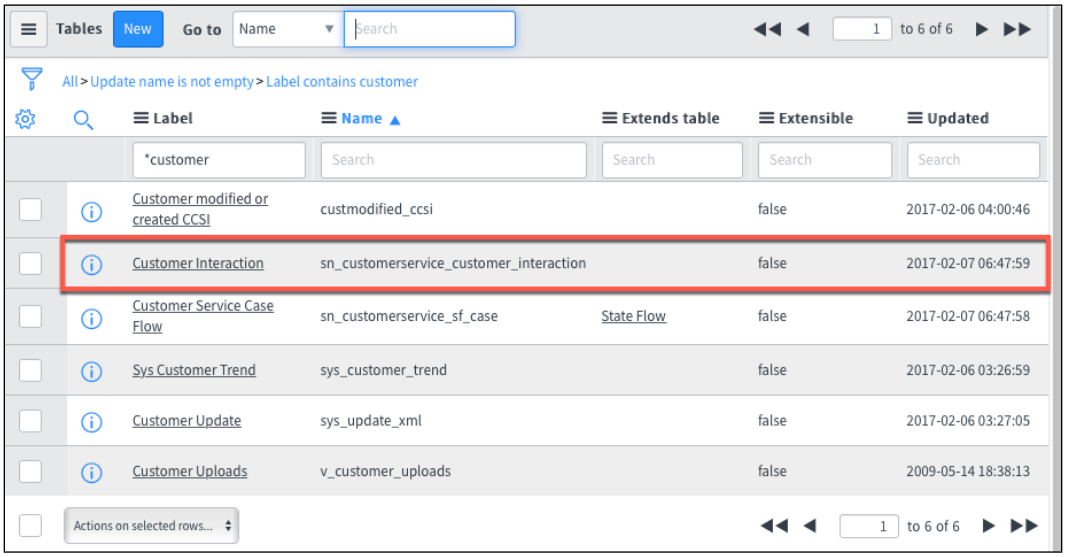




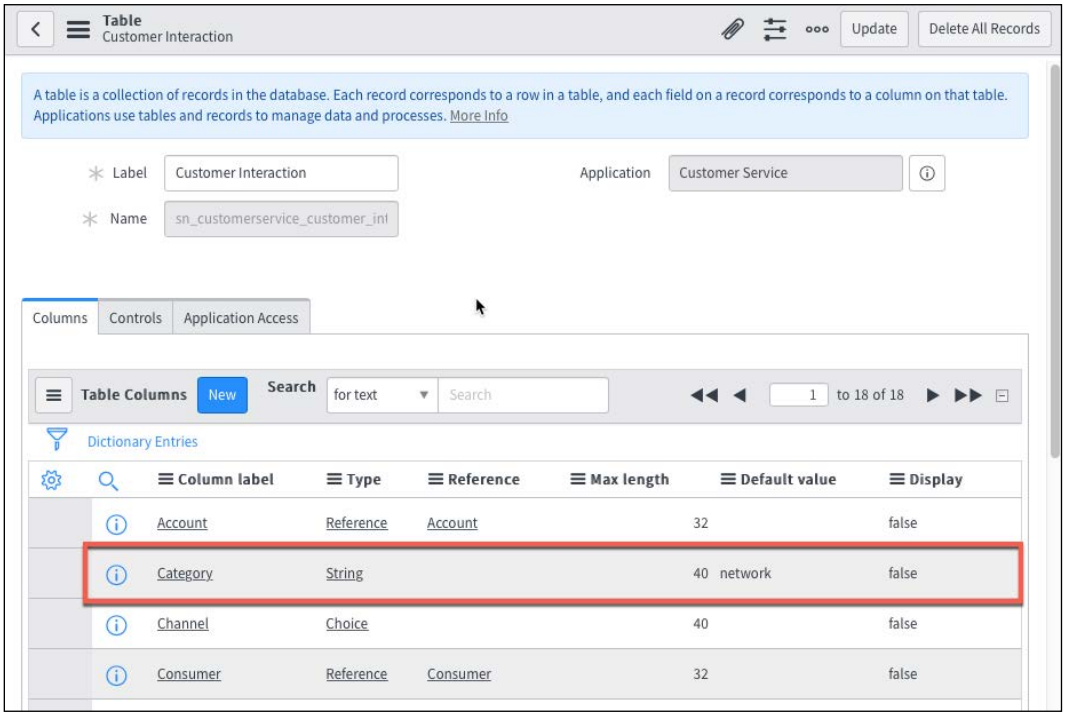
12. Using filter in the upper-left corner, navigate to **Tables (System Definition > Tables)**.



13. Search for the table with the label **Customer Interaction**.

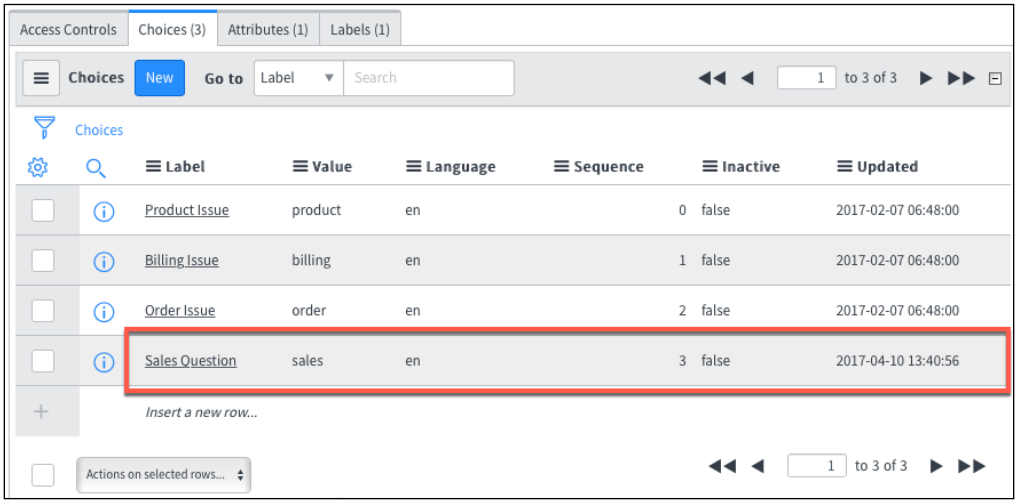


14. Open the column **Category**.

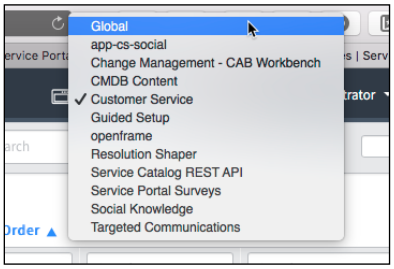


15. In the Choices related list, add a new record with the following details:

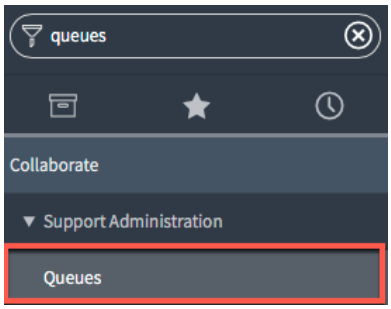
    Label: **Sales Question**
    Value: **sales**
    Language: **en**
    Sequence: **3**
    Inactive: **false**



16. Table is updated. Now, in the application picker, switch back to the **Global** scope.

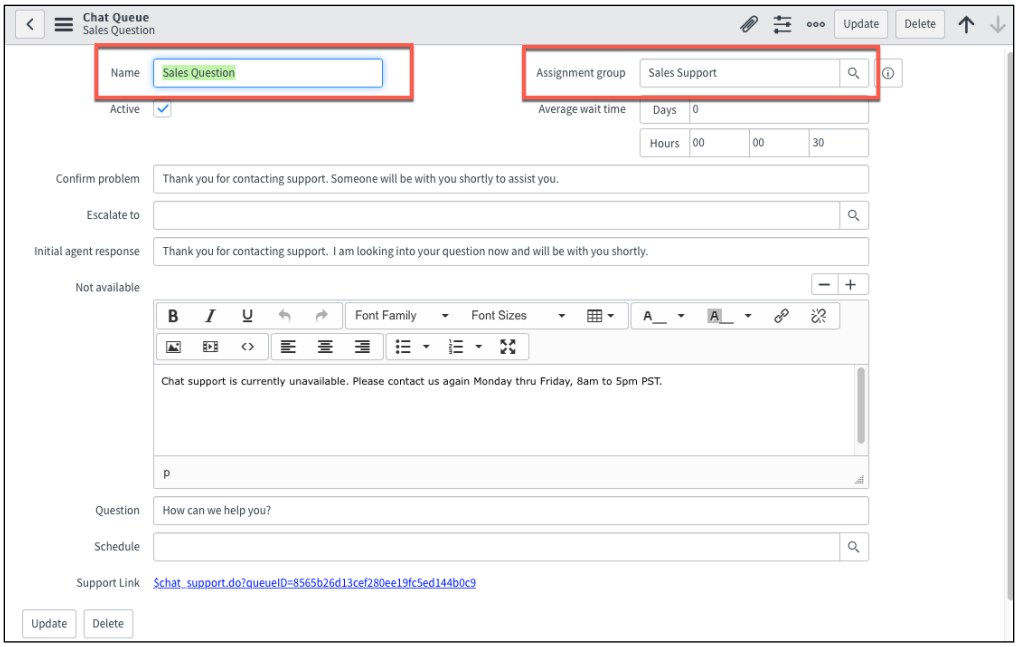


17. Using filter in the upper-left corner, navigate to **Queues (Collaborate > Queues)**.



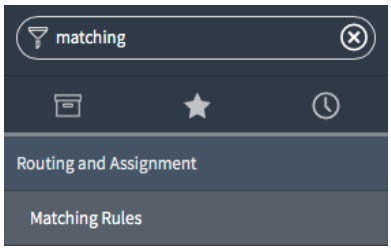
18. Create a new record with these details:

    Name: **Sales Question**
    Assignment Group: **Sales Support**
    Average Wait Time: **1 hour**



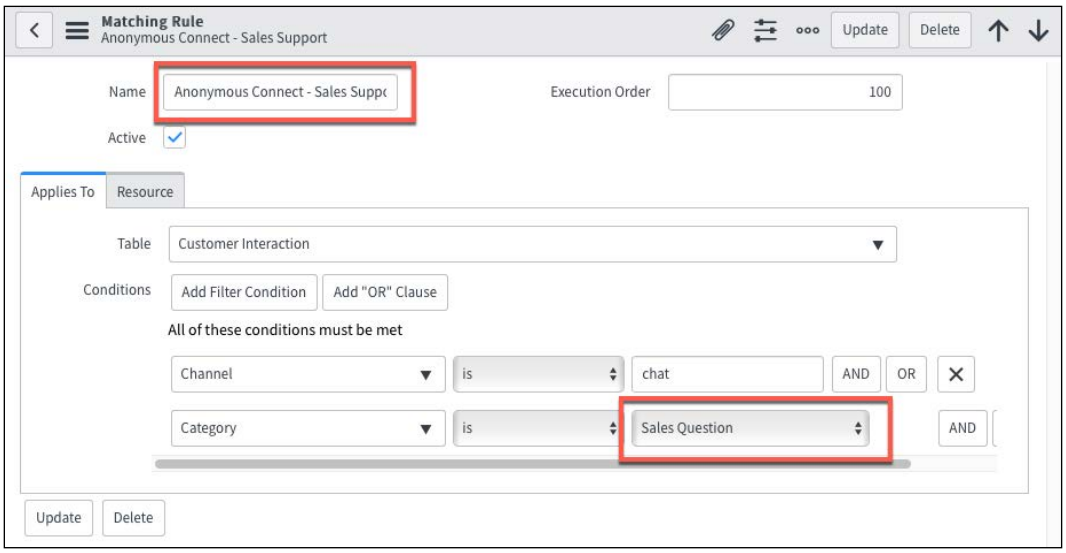
    Then, click **Update**.

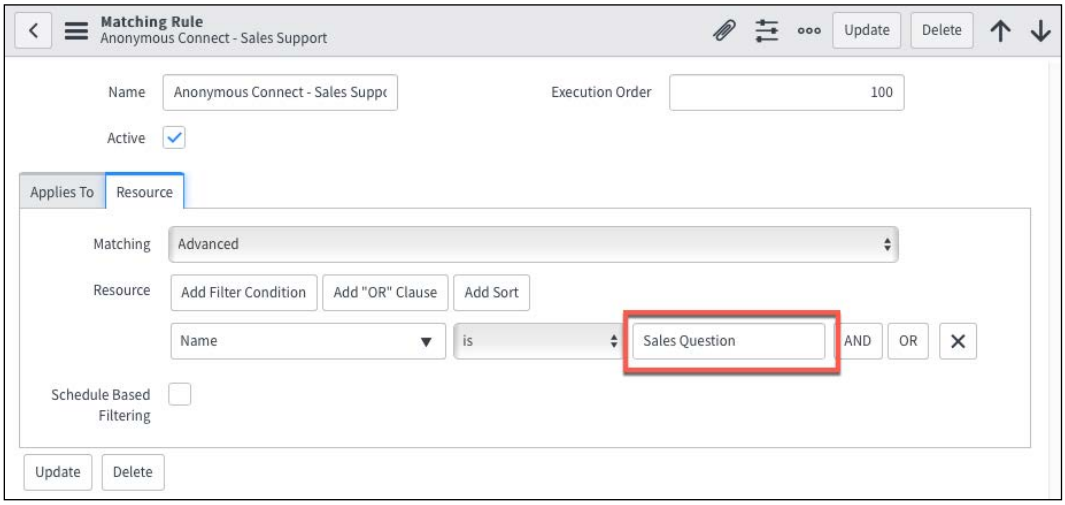
19. Using filter in the upper-left corner, navigate to **Matching Rules (Routing and Assignment > Matching Rules)**.



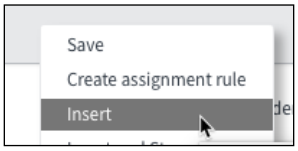
20. Open any of the existing records for Anonymous Connect. Overwrite the following fields:

Name: **Anonymous Connect - Sales Support**
Tab: **Applies To** **Conditions**: **Category** is **Sales Question**
Tab: **Resource** **Resource**: **Name** is **Sales Question**





Don't click on **Update**! Instead, right-click on the header and select **Insert**.

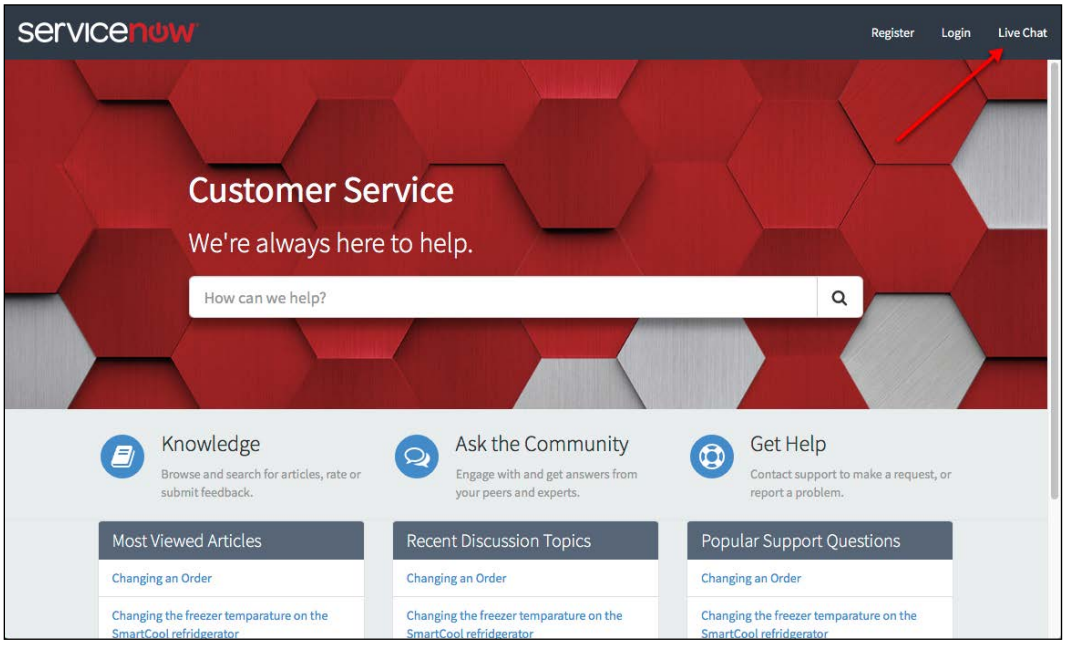


Test the Anonymous Chat

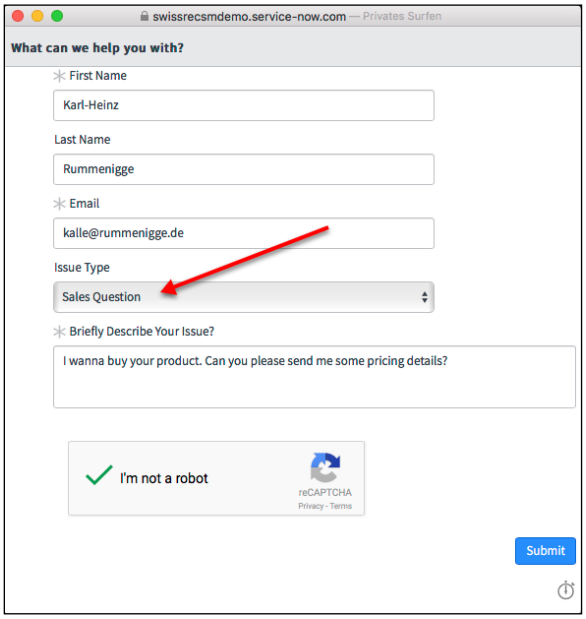
Consumer

1. Open an incognito or private window in your browser and navigate to this URL: **<your instance name>/csp**

   There, open a new Live Chat session.



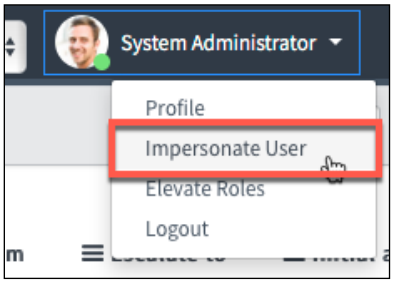
2. In the chat window, fill out your name and email and select **Sales Question** as issue type.



3. After the chat starts, keep the window open and wait for the agent (continue below).

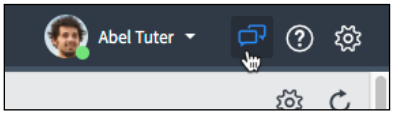
Agent

1. In the main browser window (do not use an incognito/private session), impersonate Abel Tuter.

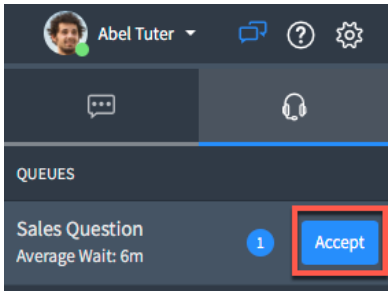




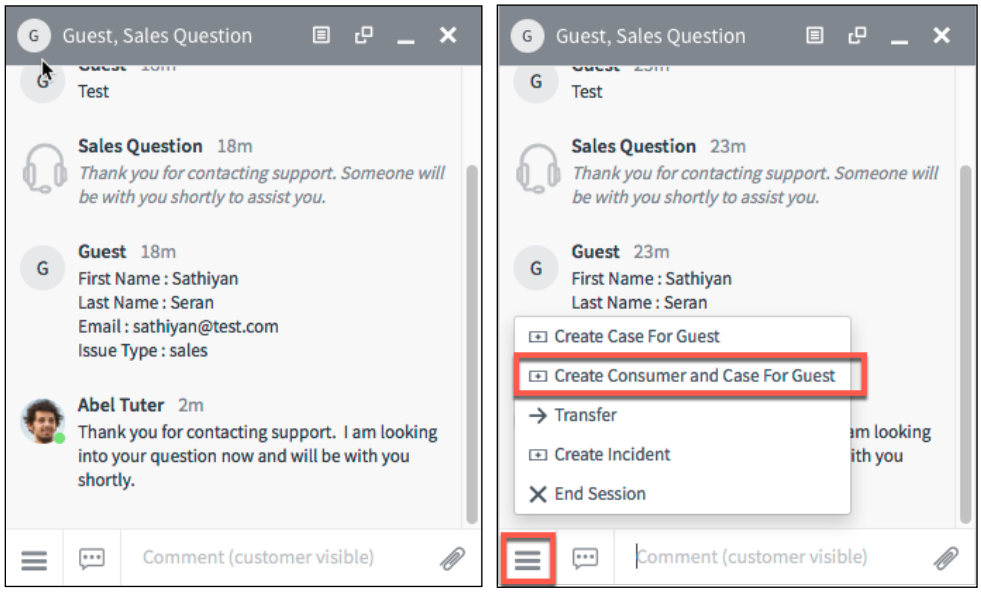
2. Open **Connect**.



3. Open **Connect Support** and **Accept** the incoming chat.



4. In the chat session, you see the guest user with his details. CSM offers new actions to save the guest user as a consumer and open a case directly from the chat window:



5. The consumer record and the case are now created and can be completed before submitting. Note that the case can also be created for a guest user, without saving him as a consumer.

6. For a better experience, we recommend using the Connect Full view as it is optimized for case creation and customer support.

Complete

Lab 7.0 Complete

Congratulations on completing this 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
- How to set up Anonymous Chat and using Matching Rules to route the chat

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!