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Social IT: Streamline Communications with Chat and Live Feed

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About Me



- J. Scott Hadaway
  - Senior Solution Consultant
  - Joined ServiceNow in 2012
  - Previously I was at BMC/Remedy for 20+ Years
- The J in my name stands for Jeffery
- I was named for the Jeffrey Pine but my parents couldn't spell so I shortened it to J
- The Jeffrey Pine actually smells like butterscotch
- I rarely, if ever smell like butterscotch
- I married my high school sweetheart, I am the father of four perfect children and I became a grandfather in February of last year. That's my grand daughter up there in the corner…

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Agenda

Social IT Overview

Chat, Help Desk Chat and Live Feed Overview

Enabling Social IT

Configuring Social IT

Using Social IT

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Social IT Overview

Chat, Help Desk Chat and Live Feed

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Social IT Overview

Social IT is the use of social media technology (such as instant messaging and microblogging) to enhance IT operations.

Benefits include:

- Improve communication throughout an organization
- Use familiar tools from everyday life; users do not need to learn complicated, new products
- Provide a quick way for business users to contact the service desk
- Empower IT and non-IT employees alike to answer IT-related questions
  - Users get answers faster and IT staff have more time to move the business forward with technology
- Integrate task data with conversation history for quicker resolutions and improved knowledge management

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Let's Face it

" Social IT combines Social Media with IT Intelligence to capture and use the most crucial information gathered during any process as it occurs naturally. This is the next logical step in providing and supporting Business Services.

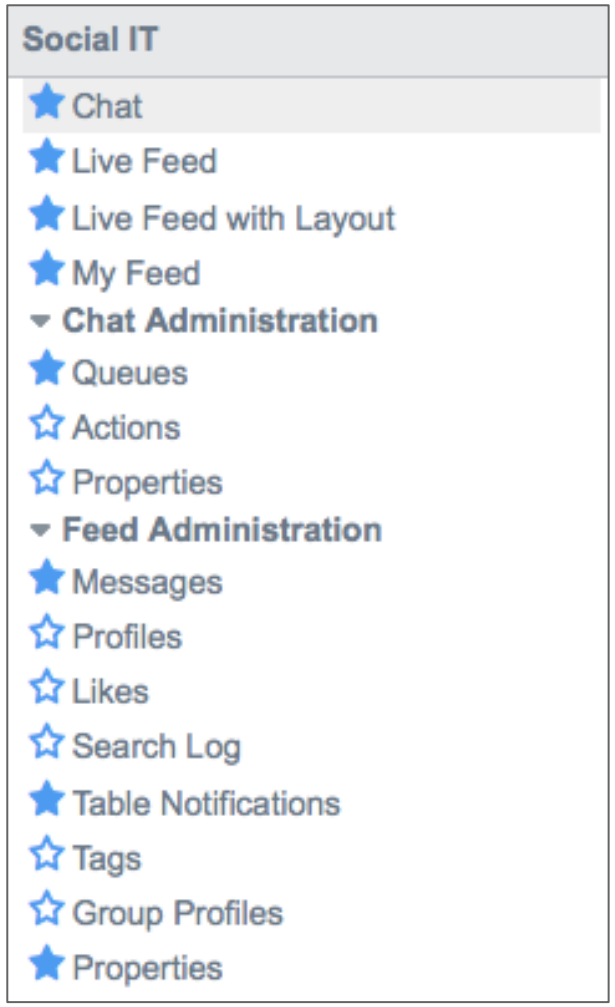
It's the way things are done in nearly every aspect of our lives.

Why should IT be any different?"

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Available features within Social IT

- **Chat**
  - Chat provides real-time communication between users via instant messaging
  - Chats may be one-to-one or between multiple users (chat rooms)
  - Chat rooms can be linked to task records. Users can work together to solve issues, and conversation history can be shared by everyone who needs to reference it.
- **Help Desk Chat**
  - End users can communicate directly with service desk staff via instant messaging from the Employee Self-Service Portal
  - Service desk staff can resolve basic issues in real time or create incidents directly from chat requests for more extensive issues
- **Live Feed**
  - Users can view messages from other users or about specific business services
    - This information forms a searchable knowledge source for sharing information within an organization.



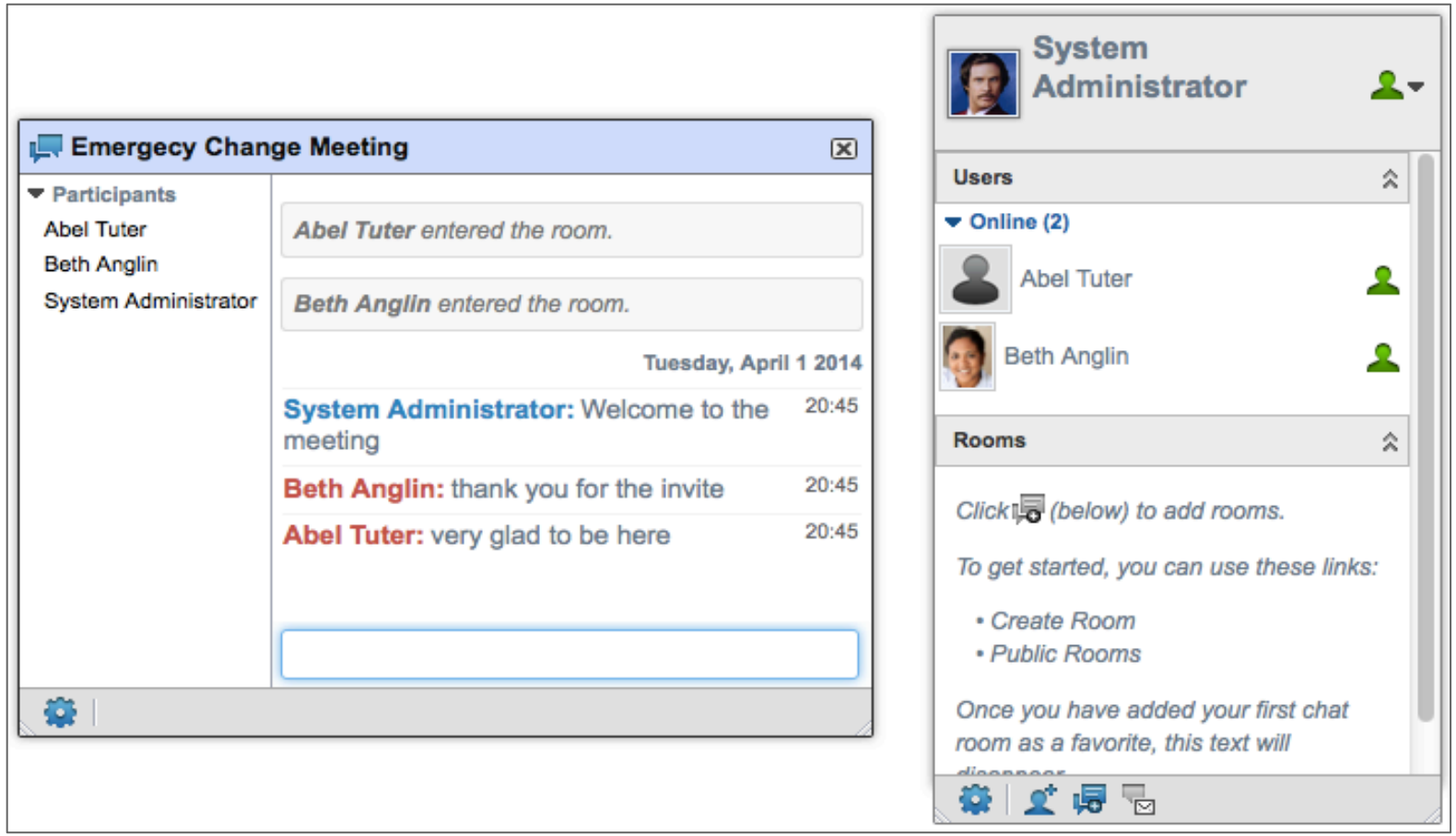
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Chat and Help Desk Chat Overview

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Chat Overview

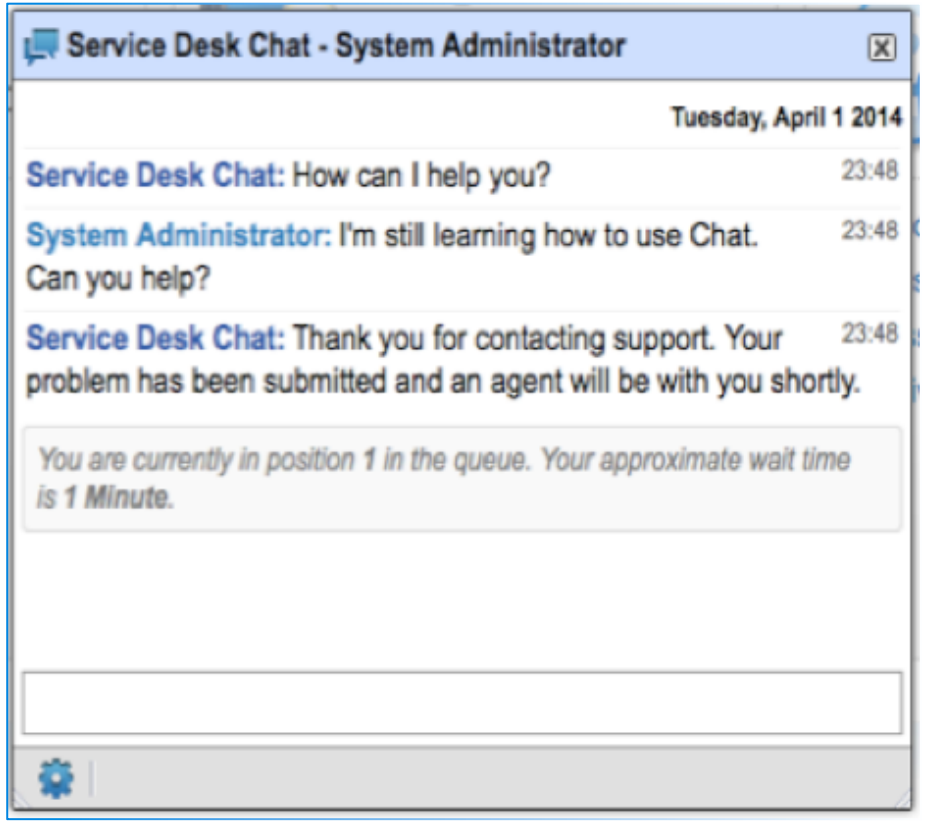
- Chat allows you to interact and collaborate through real-time instant messages with other users in a ServiceNow instance
  - Requires the Chat plugin
- Use chat to:
  - Initiate or participate in chat conversations with one or multiple users
  - Initiate or participate in chat conversations that are attached to task records (such as an incident)
  - See when other users are available to chat



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Help Desk Chat Overview

- Users can communicate directly with service desk staff via instant messaging in a ServiceNow instance
  - Requires the Chat plugin
- Users access live support from the Employee Self-Service Portal
- Service desk staff provide support from the chat desktop



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Live Feed Overview

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Live Feed Overview

- Post and reply to messages
- Upload and share attachments and links
- Rate messages
- Filter, sort and search messages
- Tag messages and search or filter by tags
- Receive email notifications when new messages are posted
- Create and join groups for focused discussions
- Collaborate on important records like incidents, problems, and changes



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Enabling Social IT

Chat, Help Desk Chat and Live Feed

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Enabling Social IT – Chat

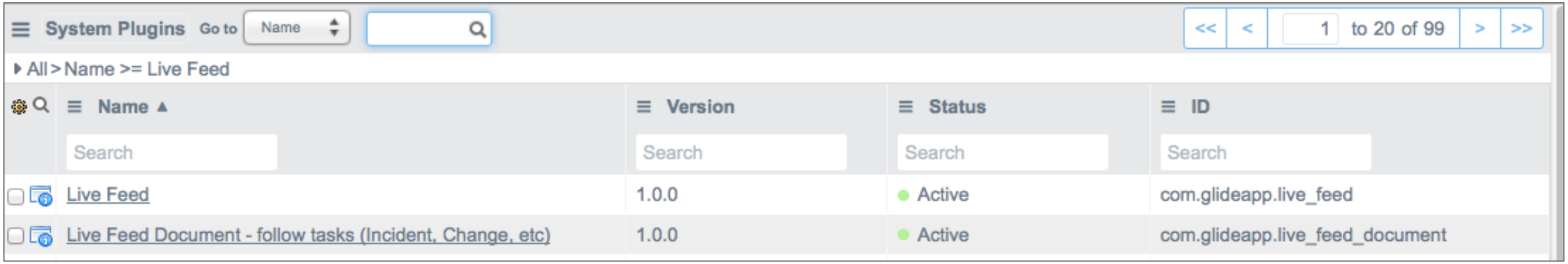
- Enable Chat Plugin
  - Chat
  - Help Desk Chat
  - End User Self Service Chat

Name ▲	Version	Status	ID
Search	Search	Search	Search
Chat	1.3.0	Active	com.glideapp.live

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Enabling Social IT – Live Feed

- Enable Live Feed Plugins
  - Live Feed
  - Live Feed Document – Follow Any Tasks (Incidents, Changes, etc.)
    - Enables Relationship and Interaction with Tasks



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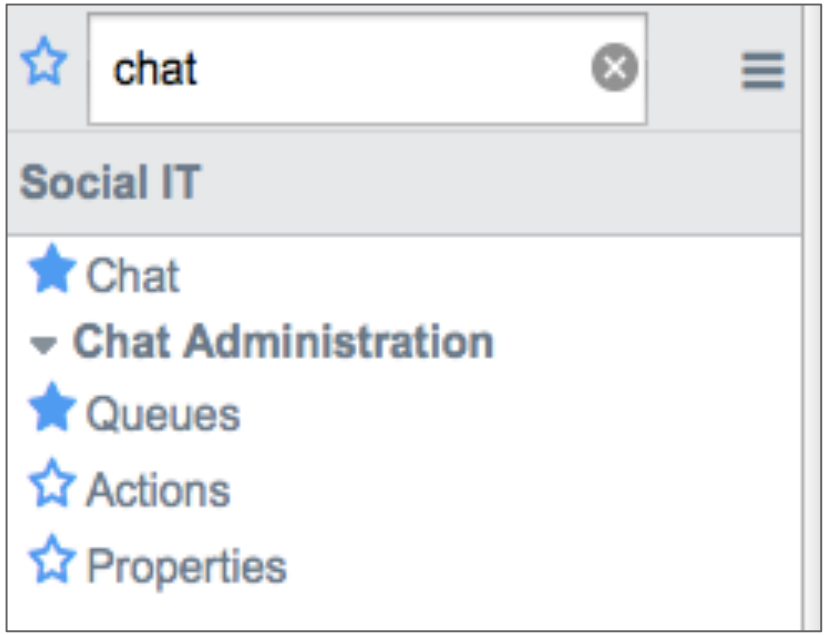
Configuring Social IT

Chat, Help Desk Chat and Live Feed

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Configuring Social IT – Chat

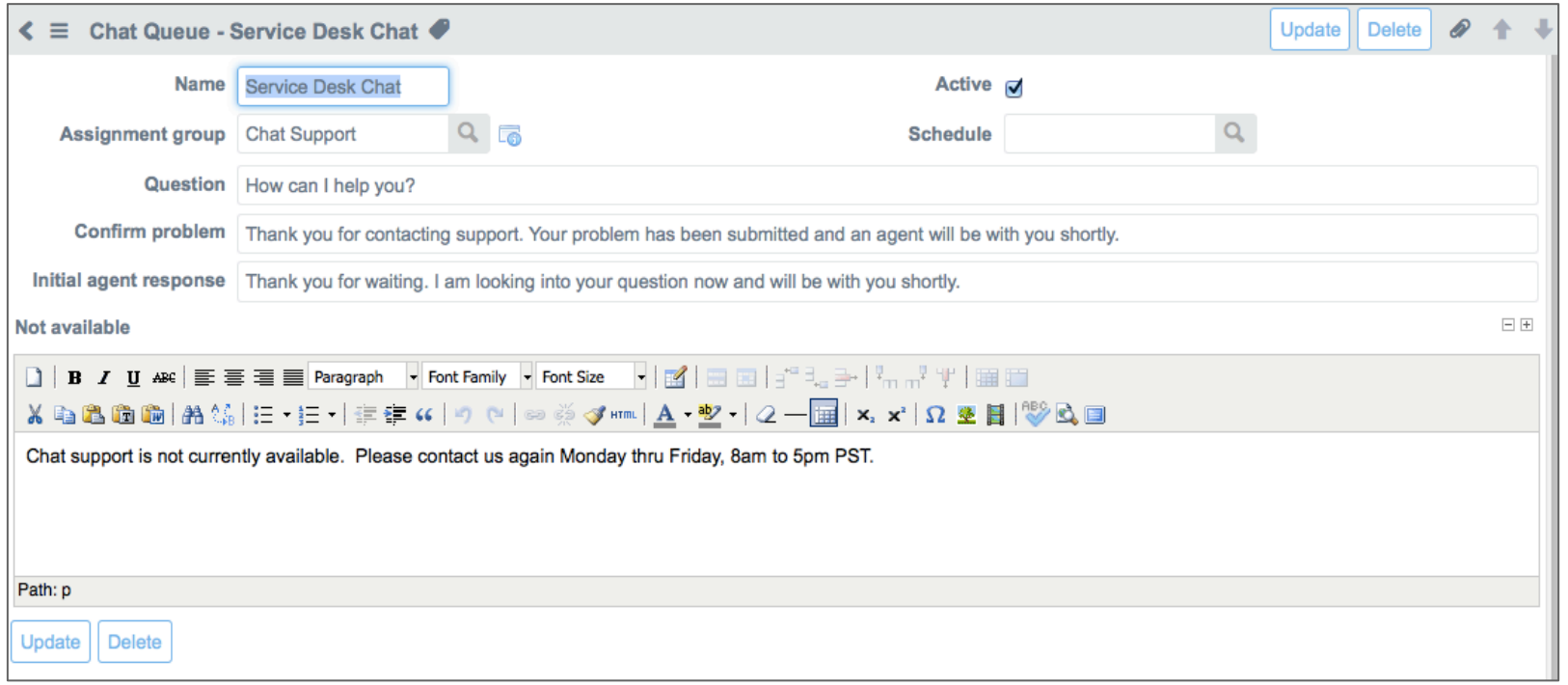
- For administrators and users with the **chat_admin role:**
  - **Queues:** Opens the Chat queues list. Define groups and schedules for providing support via instant message
  - **Actions:** Opens the Chat Actions list. Define additional chat window menu items
  - **Properties:** Opens the Chat Properties page



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Defining Chat Queues

- **To define a chat queue:**
- Navigate to **Social IT > Chat Administration > Queues**
- Select a chat queue to edit or click **New**
- Enter the chat queue details and click **Update** or **Submit**

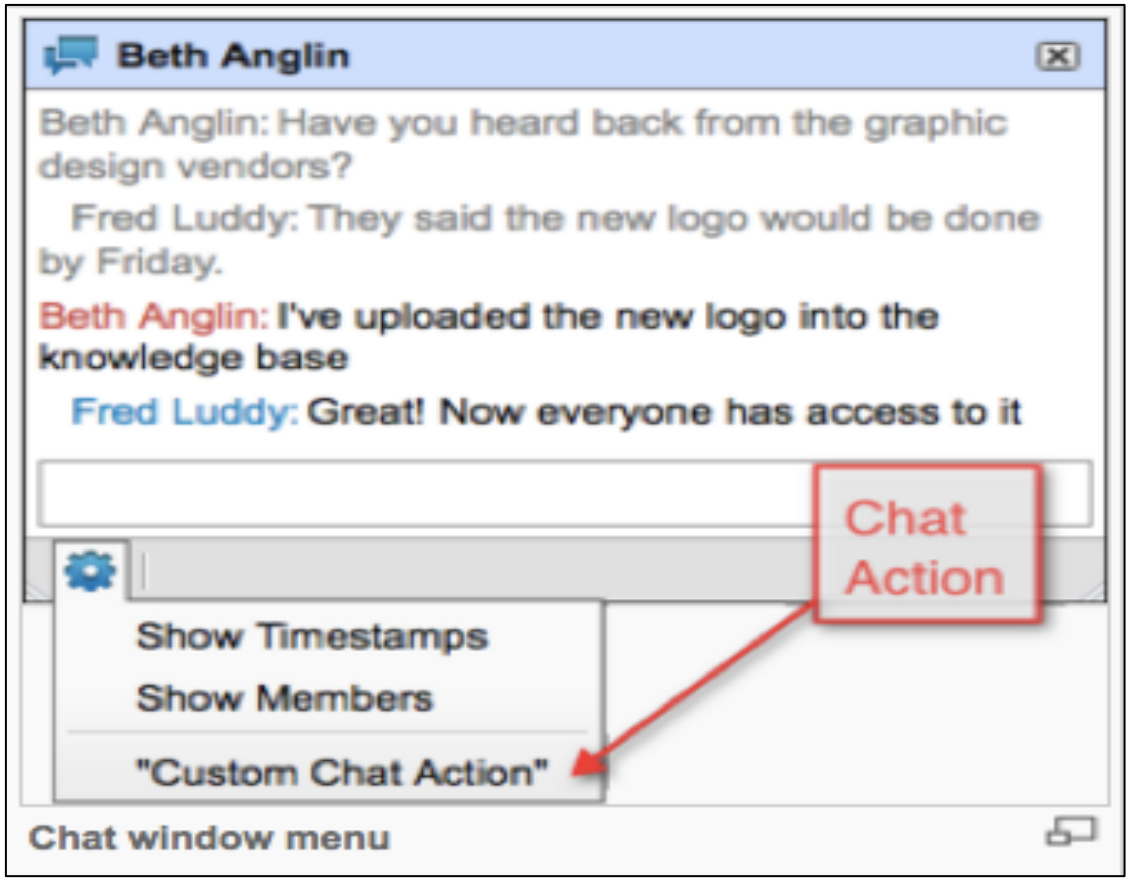


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Defining Chat Actions

Chat actions are additional items that appear in the chat window menu

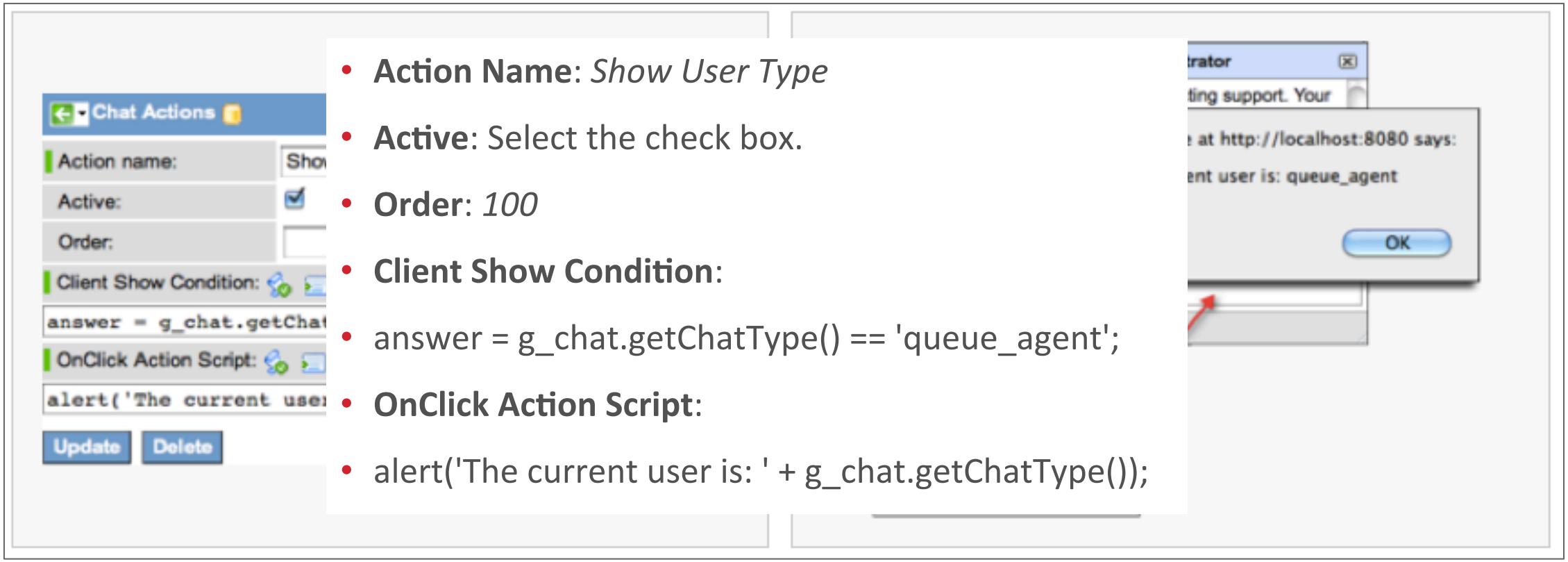
- **To add an action to the chat window menu:**
- Navigate to **Social IT > Chat Administration > Actions**.
- Select an action to edit or click **New**.
- Enter the chat action details and click **Update** or **Submit**.



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Defining Chat Actions - Continued

The following example demonstrates how to add a chat action that appears only on windows where the user is a *Help Desk Agent*. **To add an action to the chat window menu.** The action appears on the menu as **Show User Type** and opens a popup window that indicates a current user of *queue_agent*.



- **Action Name**: *Show User Type*
- **Active**: Select the check box.
- **Order**: *100*
- **Client Show Condition**:
- answer = g_chat.getChatType() == 'queue_agent';
- **OnClick Action Script**:
- alert('The current user is: ' + g_chat.getChatType());

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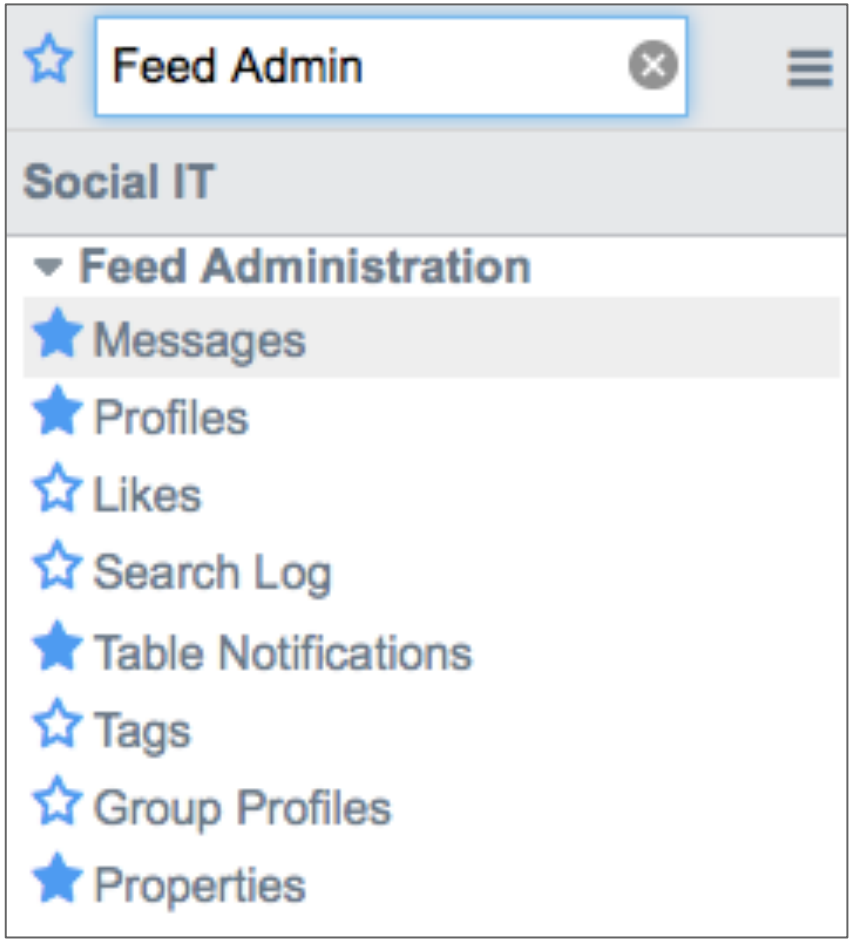
- **The following properties are installed:**
- **glide.short_poll_delay**: Short polling delay for XMPP requests. Enter a value in milliseconds. The default value is *1000* (1 second). With short polling, the browser sends a request to the server in fixed intervals defined by the property. To minimize performance impact, it is recommended that this value is set greater than or equal to the default value.
- **glide.chat.invite_fields**: Comma-separated list of fields used to generate the invites when creating a chat room from a task. The user is presented with check boxes for each of the specified fields to select the invites for the chat room. The fields should be references or glide_lists of sys_user or sys_user_group.
- **glide.chat_room.create_roles**: Comma-separated list of roles that are allowed to create chat rooms.
- **glide.chat.sound.message_received.mp3**: Sound played when a message is received in chat (mp3).
- **glide.chat.sound.message_received.ogg**: Sound played when a message is received in chat (ogg).
- **glide.chat.sound.queue_beep.mp3**: Sound played when a new user enters the chat queue (mp3). Both this property and glide.chat.sound.queue_beep.ogg must be defined for either property to work.
- **glide.chat.sound.queue_beep.ogg**: Sound played when a new user enters the chat queue (ogg).

media/button_toggle_on.oggx

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Configuring Social IT – Live Feed

- **Messages**, **Profiles**, **Likes**, **Search Log**, **Tags**, and **Group Profiles:** provide access to tables for viewing live feed data
  - Extending or modifying data in these tables is not recommended
- **Table Notifications:** opens the Live Table Notifications table, where administrators can define automatically generated messages
  - Table notifications are supported for all task tables by default
- **Properties:** Opens the Social IT Properties page



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Configuring Social IT – Live Feed – Table Notifications

Table Notifications: Opens the Live Table Notifications table, where administrators can define automatically generated messages.

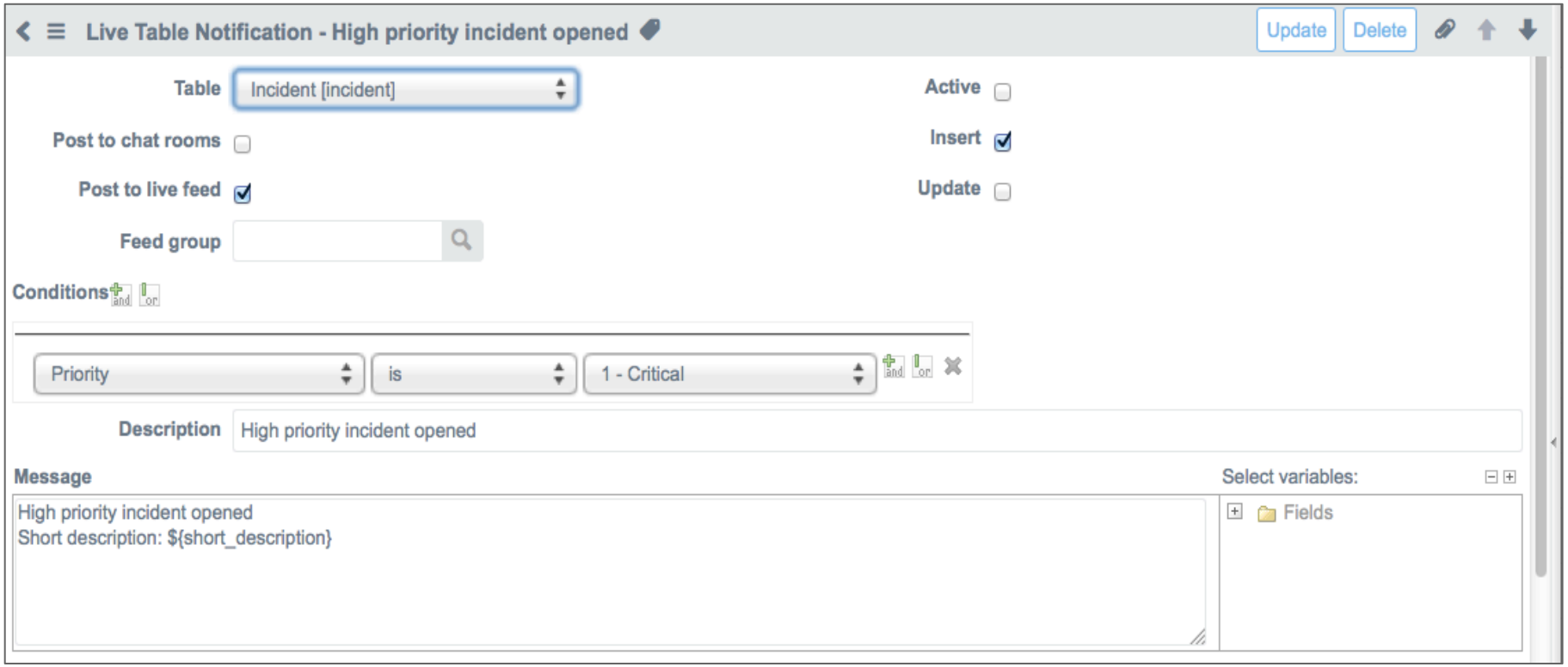
- Live feed table notifications generate automatic live feed messages.
  - When a record is inserted or updated on a specific task table and the notification conditions are met, a message is generated and posted to the specified group or the company feed
- Administrators and users with the *live_feed_admin* or *chat_admin* roles can set up table notifications for any table in an instance

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Configuring Social IT – Live Feed – Table Notifications (Continued)

To setup **Table Notifications**:

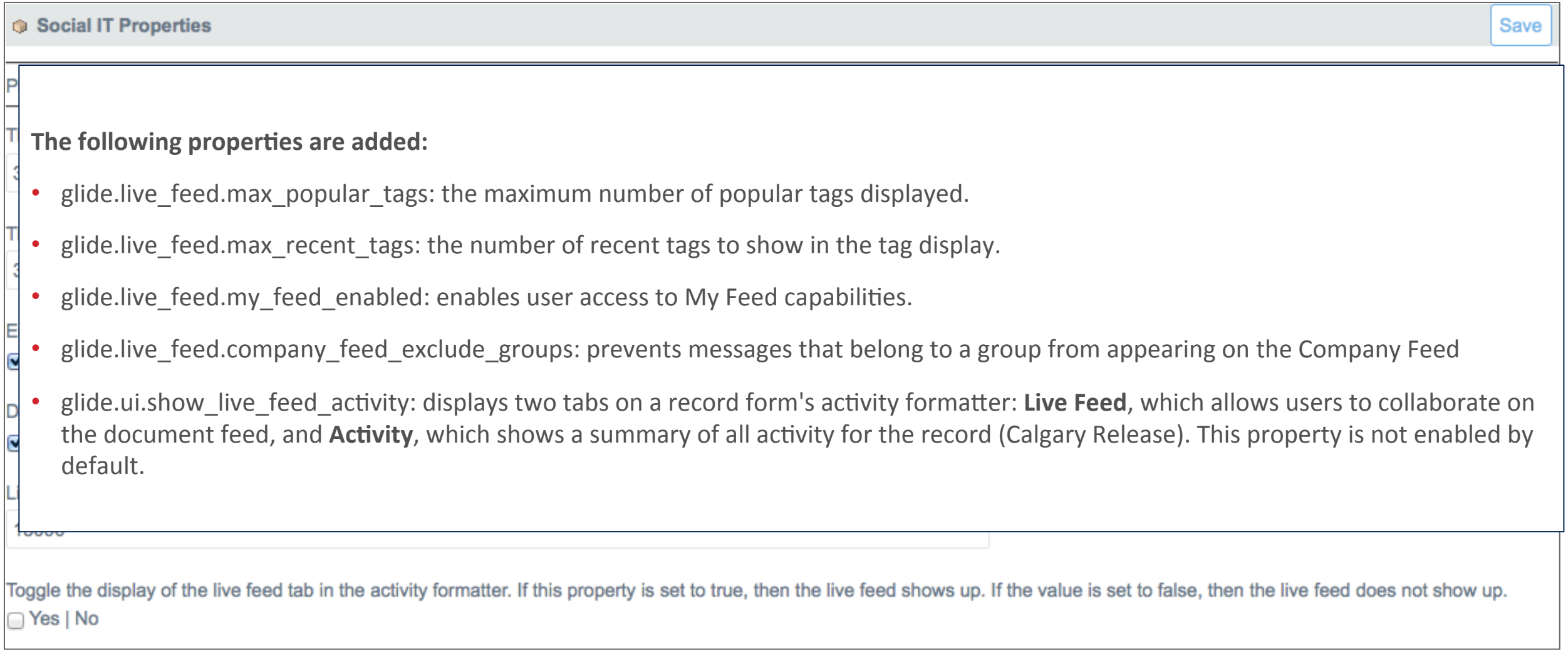
- Navigate to **Social IT > Feed Administration > Table Notifications**
- Click **New** or open the notification you wish to edit
- Enter the table notification details (see table)
- Click **Update** or **Submit**



Additional functionality related to Table Notifications are detailed within the Lab Guide

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Defining Live Feed Properties



The following properties are added:

- glide.live_feed.max_popular_tags: the maximum number of popular tags displayed.
- glide.live_feed.max_recent_tags: the number of recent tags to show in the tag display.
- glide.live_feed.my_feed_enabled: enables user access to My Feed capabilities.
- glide.live_feed.company_feed_exclude_groups: prevents messages that belong to a group from appearing on the Company Feed
- glide.ui.show_live_feed_activity: displays two tabs on a record form's activity formatter: **Live Feed**, which allows users to collaborate on the document feed, and **Activity**, which shows a summary of all activity for the record (Calgary Release). This property is not enabled by default.

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Using Social IT

Chat, Help Desk Chat and Live Feed

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Social IT – Chat, Help Desk Chat and Live Feed

Finally… A Demonstration….

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Top Takeaways *(what exactly defines a Top Takeaway?)*

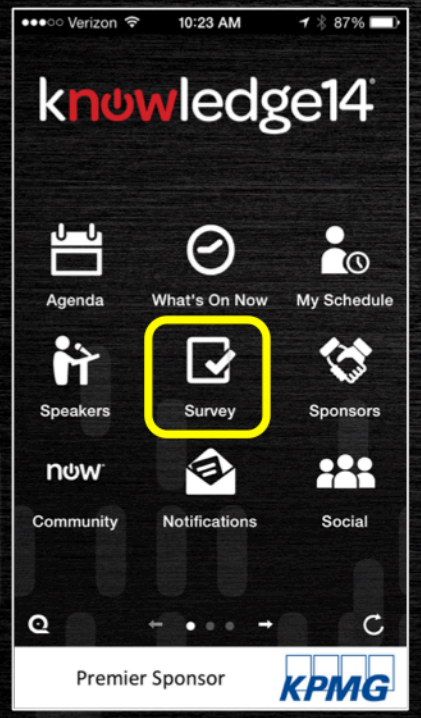
1. *Social IT combines Social Media with IT Intelligence to capture and use the most crucial information gathered during any process as it occurs naturally. This is the next logical step in providing and supporting Business Services.*

2. *It's the way things are done in nearly every aspect of our lives. Why should IT be any different?*

3. *Yes, You can trust a guy wearing bowling shoes…*

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