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Lab Guide

Social IT:
Streamline Communications with Live Feed and Chat

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Lab instance: https://**<<name>>**.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

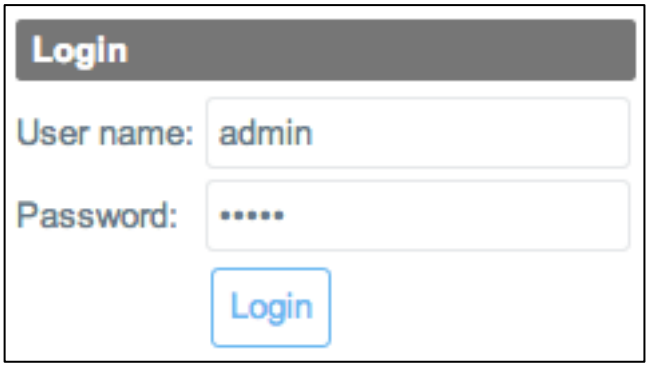
Lab Goal

This lab familiarizes users with enabling the Live Feed Plugin if required. **NOTE:** These steps may not be required during the lab if the plugins are already enabled.

Lab 1
Enable Live Feed Plugin

Log on to Your Training Instance

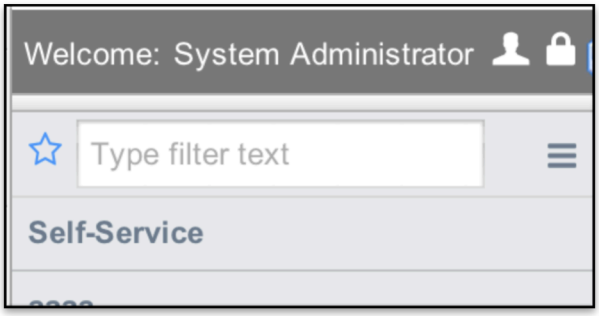
1. Login to the provided training instance URL using the **admin** credentials on the cover.



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Install the Live Feed Plugin

1. Inside of the Navigator on the left, find the input that says *Type Filter Text*

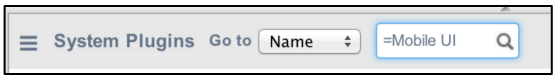


2. Type **plugin**.

3. Locate the **Plugins** link under the application **System Definition**.

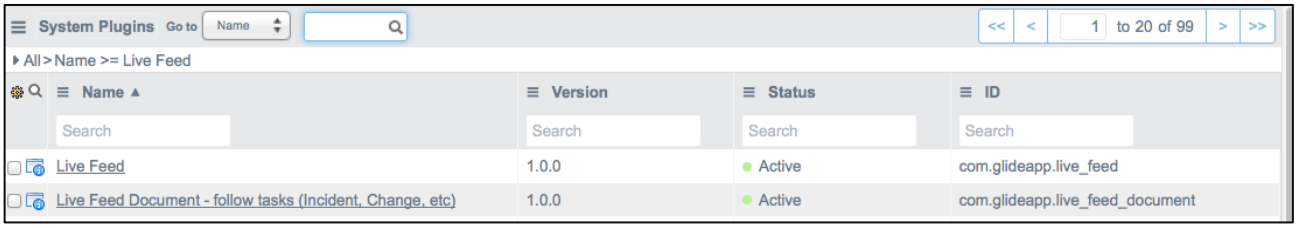


4. Search for the **Live Feed** plugin by entering the name in the **Search** field.

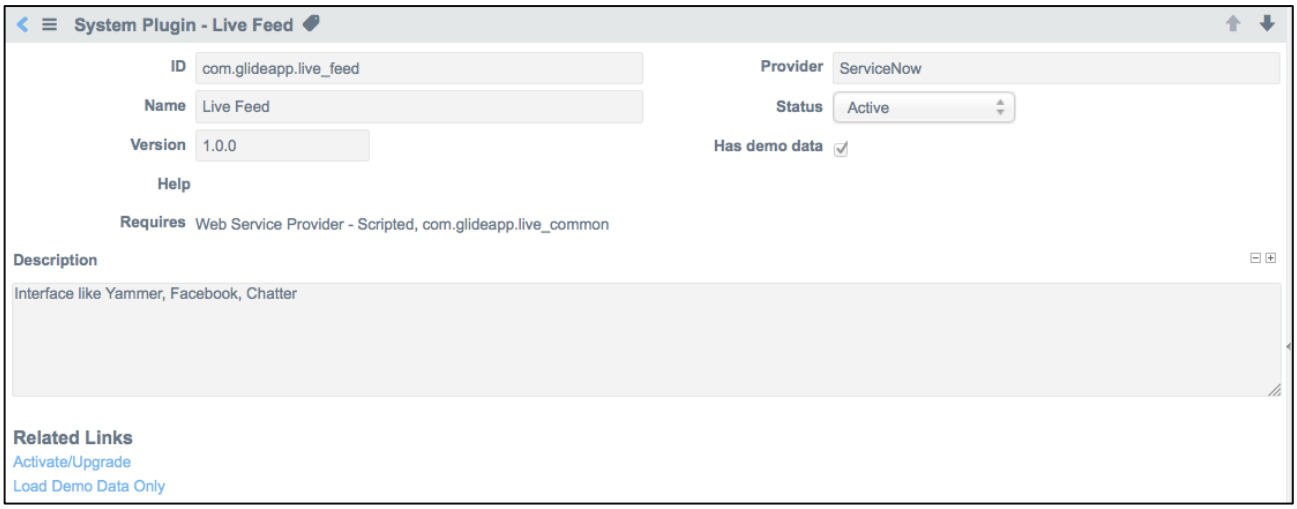


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5. Open the **Live Feed** plugin by clicking its link.



6. Click **Activate/Upgrade** if the plugin **Status** field is not set to **Active – For Lab, Load Demo Data**



7. Repeat the above steps for the **Live Feed Document** Plugin if needed.

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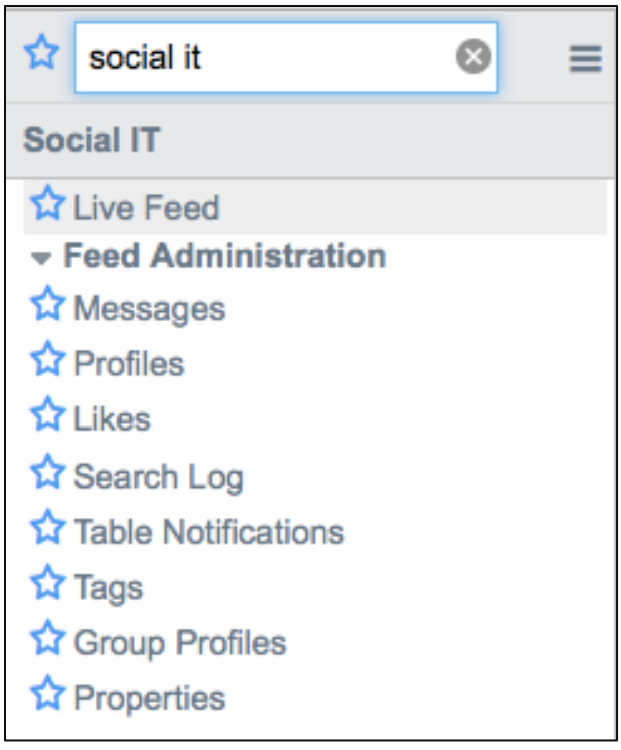
Lab Goal

This lab familiarizes users with finding and accessing Social IT.

Lab 2
Accessing Live Feed

Finding the Module

1. Inside of the Navigator on the left, find the input that says *Type Filter Text* and Type **Social IT** You will see the Social IT Module in the Application Menu under Type Filter Text



Social IT Menu

All users:

Live Feed: opens the live feed application for the current user.

Administrators:

Messages, **Profiles**, **Likes**, **Search Log**, **Tags**, and **Group Profiles:** Provide access to tables for viewing live feed related data.

NOTE: 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.

Properties: opens the Social IT Properties Page.

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Lab Goal

This lab will familiarize users with Live Feed and its various components.

Lab 3
Live Feed
Overview

Overview of Social IT and Live Feed Components

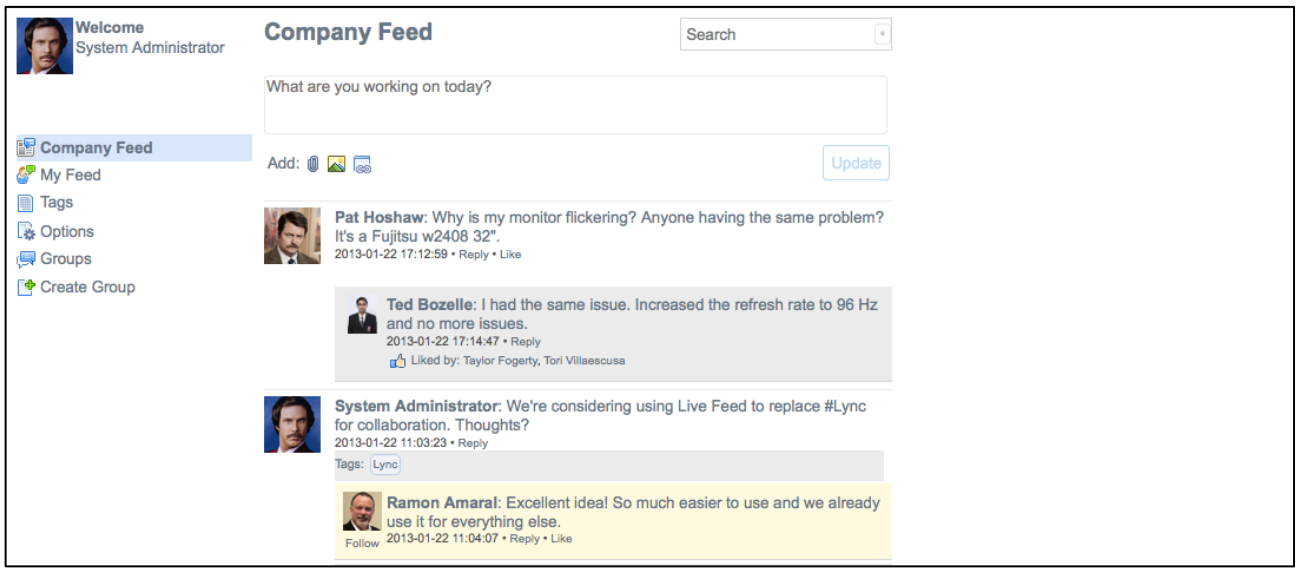
Live feed is a social IT application that provides a place to post and share content in a ServiceNow instance. This content forms a searchable knowledge source for sharing information within an organization. Main features include the following:

- Users can post, reply to, and rate messages, including links and images.
- Administrators can set up automatic messages that are generated when specific records are updated throughout the system.
- Users can subscribe to receive email notifications when new messages are posted.

Live feed includes different types of feeds, including **My Feed**, which shows all messages that are relevant to a specific user.

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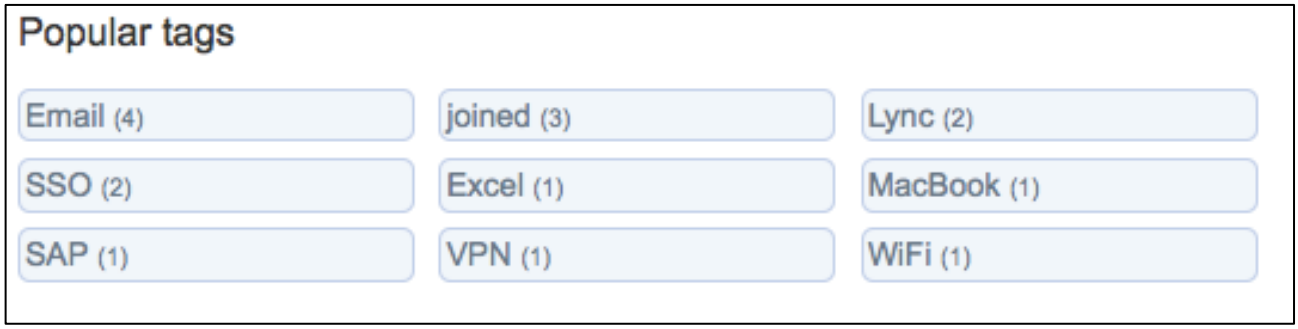
1. Selecting **Company Feed** within the display pane will display all messages/conversations.



Company Feed

2. Selecting **My Feed** within the display pane will display a filtered list of conversations the current user has contributed to.

3. Selecting **Tags** within the display pane will display a list of popular tags. These tags provide a drill down into messages filtered by the specific Tag.

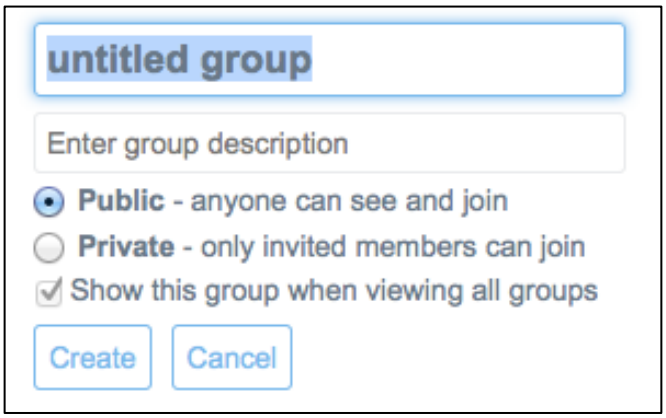


Popular Tags

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4. Selecting **Options** allows the user to select how the messages will be sorted; either by date created or last activity.
5. Selecting **Groups** within the display pane will display a filtered list of the conversations that are posted to a specific group.
    a. The user may also select from the list to show all groups to see all messages for selected groups or a specific group to filter the conversations to that specific group.

6. Selecting **Create Group** allows the user to create either a public or private group for the purpose on filtering future conversations.
    a. Users will provide a group name
    b. Users will then select whether the group should be Public or Private



Create Group

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Lab Goal

This lab will familiarize users with Using Live Feed and its various components.

Lab 4
Using Live Feed

Using Live Feed

Live feed allows users to post and share content with other users in a ServiceNow instance.

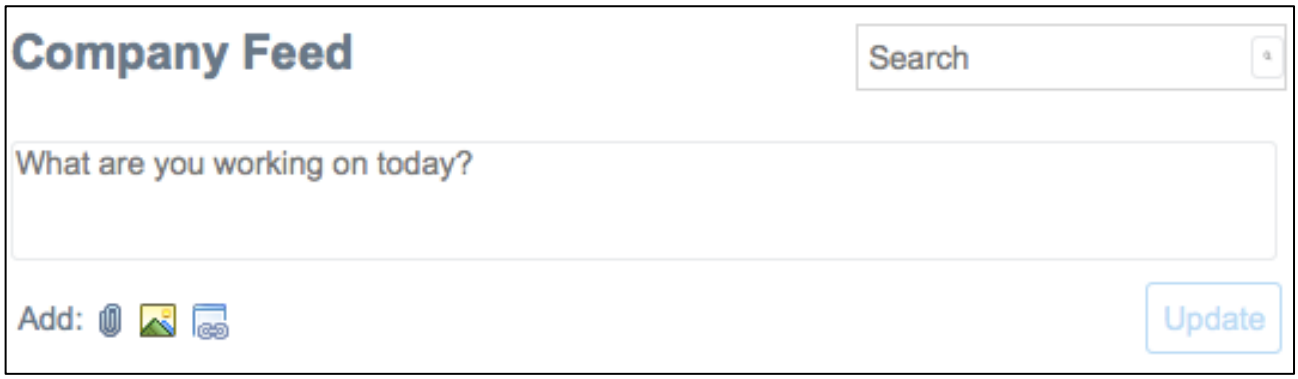
Use live feed to:

- 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.

1. **Updating Your Profile.** Your profile identifies your contributions to conversations. It is created automatically the first time you use live feed and consists of:
    a. **Name**: from your user account in ServiceNow. Your name appears on your messages and on messages you rate.
    b. **Picture**: select any picture. Your picture appears next to your messages and at the top of your feed.
    c. To update your profile picture:
        i. Navigate to **Social IT > Live Feed**.
        ii. Click your picture in the top of the content frame.
        iii. Browse to the desired picture file and click **Open**.
    Note: *Changes to your profile picture affect both chat and live feed*

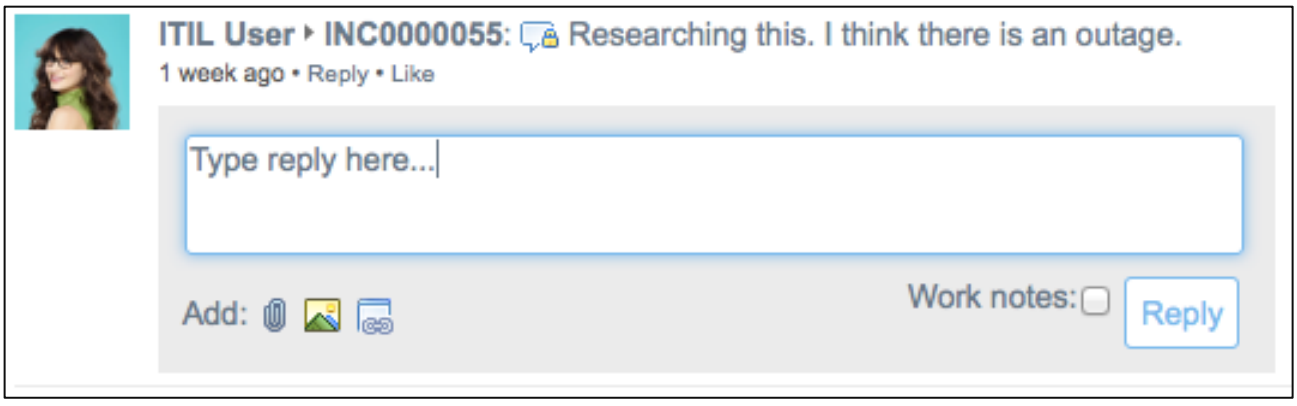
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2. **Posting Messages:** Users of Live Feed can Post a message to open a new topic of conversation. To participate in an existing conversation, see Replying to Messages.
    a. To Post a Message:
        i. Navigate to **Social IT > Live Feed**.
        ii. Enter a message in the **What are you working on?** field. Use Tags, if desired
        iii. Add attachments, links or images if desired.
        iv. Click **Update**.



Posting Messages

3. **Replying to Messages:** Users can Reply to messages to participate in an existing topic of conversation.
    a. To Reply to a Message:
        i. Navigate to **Social IT > Live Feed**.
        ii. Locate Message you'd like to Reply to
        iii. Click Reply under Message Text
        iv. Enter a message in the **Write a reply** field. Use Tags, if desired.
        v. Add attachments, links or images if desired.
        vi. Click **Reply**.



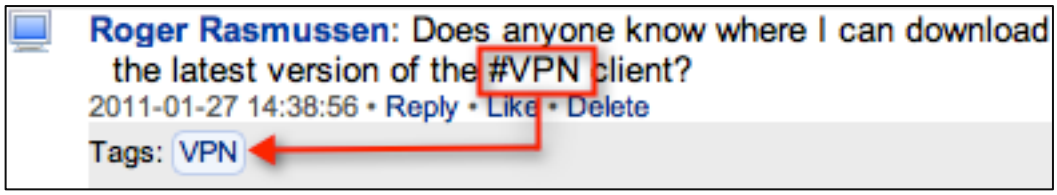
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4. **Deleting Messages:** To delete any of your own posts or replies, click **Delete** under the message text. The message disappears from the feed.

5. **Rating Content:** Users can rate content by indicating that you *like* a message. To *like* a message, click **Like** under the message text. Your name is added to the **Liked by** bar beneath the message.



6. **Searching:** To search all messages, enter a term in the search field and then press **Enter** or click the **Search** button ( ).
7. **Viewing Older Messages:** When first opening a feed, only recent messages are displayed. To view older messages, scroll to the bottom of the feed and click **More**. The next set of messages appears.
8. **Tags:** Tags are words marked with a hash (#) symbol in messages. Tags are a way to categorize messages by keyword or topic for improved search results. For example, to identify messages associated with VPN questions, add the tag *#VPN* in the message text.
9. **Tagging Messages:** To tag a keyword or topic in a message, enter a # symbol before the word. The tag is added to the tag bar beneath the message and all feed users can search and filter by the tag to find the message. Tips for using tags effectively include:
    a. Limit the number of tags per message (no more than 3 is a good guideline).
    b. Use tags only in messages that are relevant to the tag topic.
    c. Write a message first, and then add tags only if they add value. Answer the question, *"What are you working on?"*, rather than *"What tags apply to what you are working on?"*
    d. Use camel case (remove the space and use an uppercase letter to start each word) to create a tag that is more than one word long. For example, to create a topic about the service desk, use *#ServiceDesk*.



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10. **Changing Tag Names:** Over time, users may create many tags with similar names (for example, *competitive*, *competitor*, and *competition*). To combine tags for better searching and filtering, change the names of similar tags to a standard name.
    a. To change the name of a Tag:
        vii. Expand the feed navigator or view the list of available tags ( ).
        viii. Double-click in the empty area beside the tag name. The tag name becomes highlighted.
        ix. Enter a new tag name.
        x. Press **Enter**. The new tag name replaces the old tag name on the tag list and in the text of any messages that include the tag.



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11. **Searching by Tags:** To search for conversations that contain a tag, enter the tag in the search field and then press **Enter** or click the **Search** button (). For example, to search for messages with the *#VPN* tag, enter *#VPN*.

    a. To filter the feed by a tag (show only conversations where at least one of the messages contains the tag), click the tag name in any of the following places:

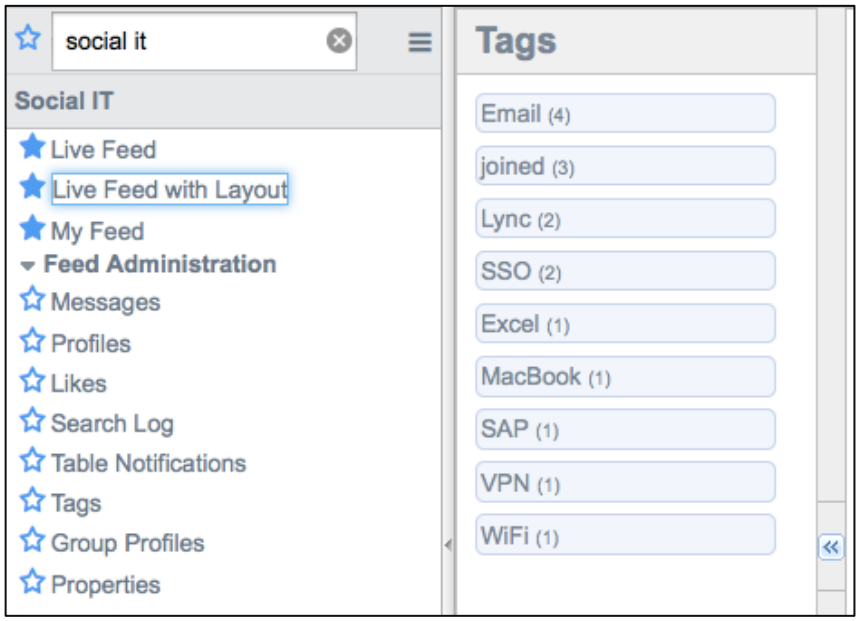
        i. The tag bar under the message text.
        ii. The list of available tags ().
        iii. The feed navigator.

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12. **Using the Feed Navigator:** The feed navigator allows users to view and filter by tags in one click. Administrators must activate the module Live Feed with Layout to provide access to the feed navigator; This is accomplished by accessing the Application Menu and changing the Live Feed with Layout Module Active to True.

    a. To use the feed navigator, navigate to **Social IT > Live Feed with Layout**.

        i. To view the tag list, point to the feed navigator bar next to the application navigator.
        ii. To keep the tag list expanded, click the Expand button (». To collapse an expanded tag list, click the Collapse button («).
        iii. To filter by a tag on the list, click the tag name.



Feed Navigator

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13. **My Feed:** My Feed lets users customize live feed to view the content that is most important to them. This feature is enabled by default. Administrators can disable My Feed by navigating to Social IT > Properties and changing the Enables user access to My Feed capabilities property (glide.live_feed.my_feed_enabled).

    a. With My Feed, users can:

        i. Follow user feeds and tags.
        ii. View messages that are most interesting to you in one place.
        iii. Manage what you are following and which groups you belong to.
        iv. Post messages to any group you belong to.

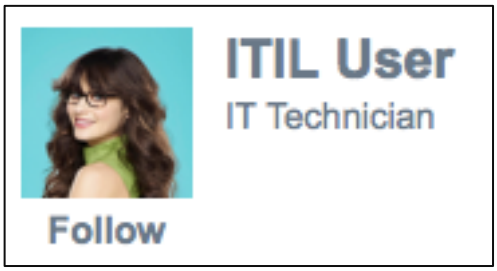
    b. To view your **My Feed**:

        i. Navigate to **Social IT > Live Feed**.
        ii. Click **My Feed**.

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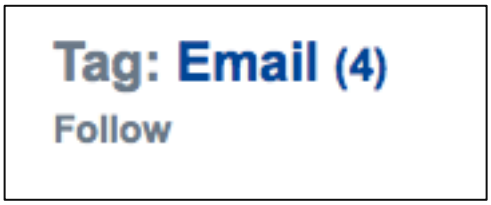
14. **Following User Feeds and Tags**: When you follow user feeds or tags, you are choosing to see the associated messages in your My Feed. You will see only the messages you have access to; you will not see messages that are posted to private or unlisted groups unless you are a member.

    a. To follow a user feed (the conversations a specific user has contributed to), click the **Follow** button under the user's profile picture beside a post.



    b. To follow a tag (the conversations where at least one of the messages contains the tag):

        i. View the tag feed by clicking the tag name under the message, in the list of available tags, or in the feed navigator.
        ii. Click the **Follow** button at the top of the tag feed.



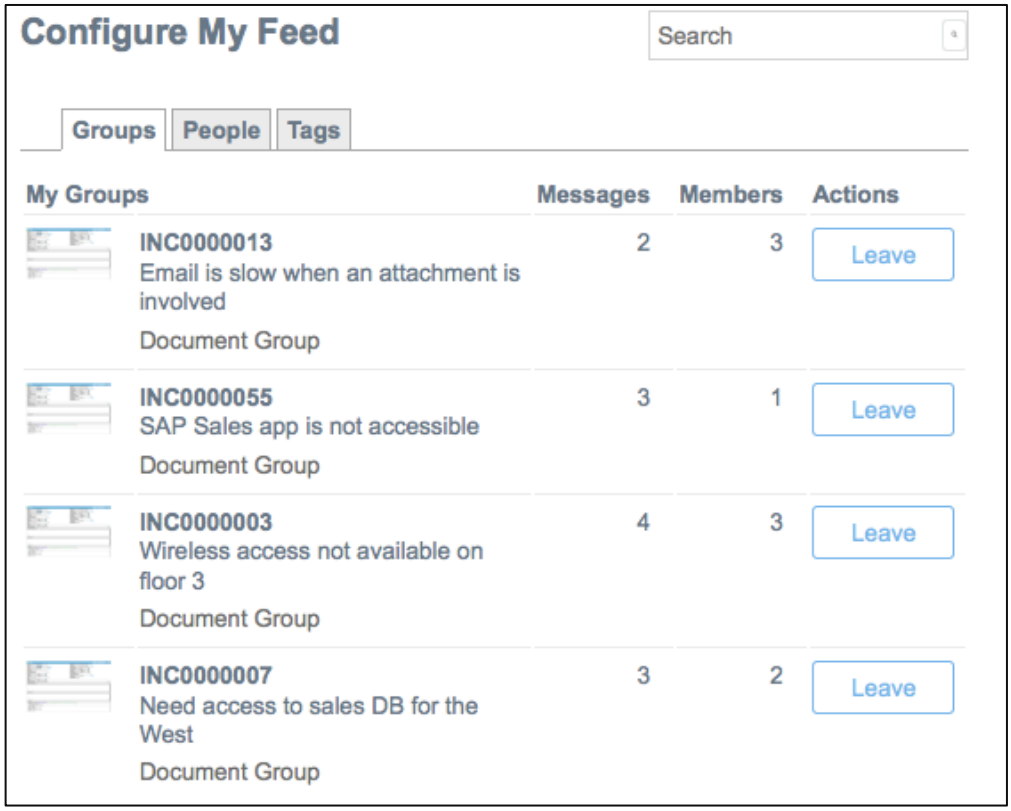
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15. **Configuring My Feed**:

a. To manage what you are following and which groups you belong to:

i. Navigate to **Social IT > Live Feed**.
ii. Click **My Feed**.
iii. Click **Configure My Feed**.
iv. Select a tab for preferences to manage:

1. **Groups:** displays information for the groups you belong to. To leave a group, click **Leave** beside the group information.
2. **Users:** displays information for the users whose feeds you are following. To stop following a user feed, click **Unfollow** beside the user information.
3. **Tags:** displays information for the tags you are following. To stop following a tag, click **Unfollow** beside the tag information.



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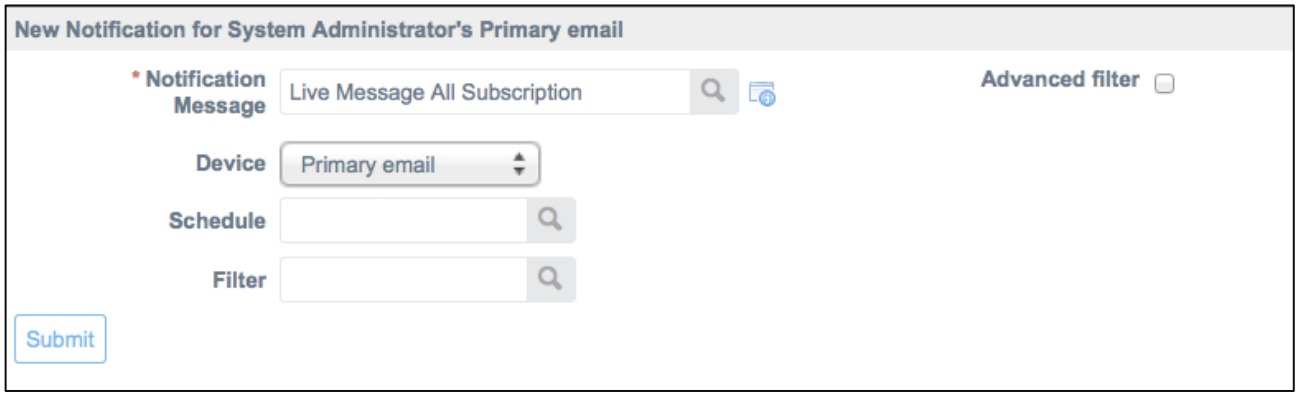
16. **Posting Messages from My Feed:** You can post a new message to any group you belong to or to the company feed from your My Feed.

    a. To post a message from My Feed:

        i. Open your My Feed.
        ii. Compose your message and add attachments and links. To learn more, see Posting Messages.
        iii. In the **To** list, select the group where you want to post the message.
        iv. Click **Update**.

17. **Subscribing to Email Notifications:** To receive an email notification whenever a message is posted:

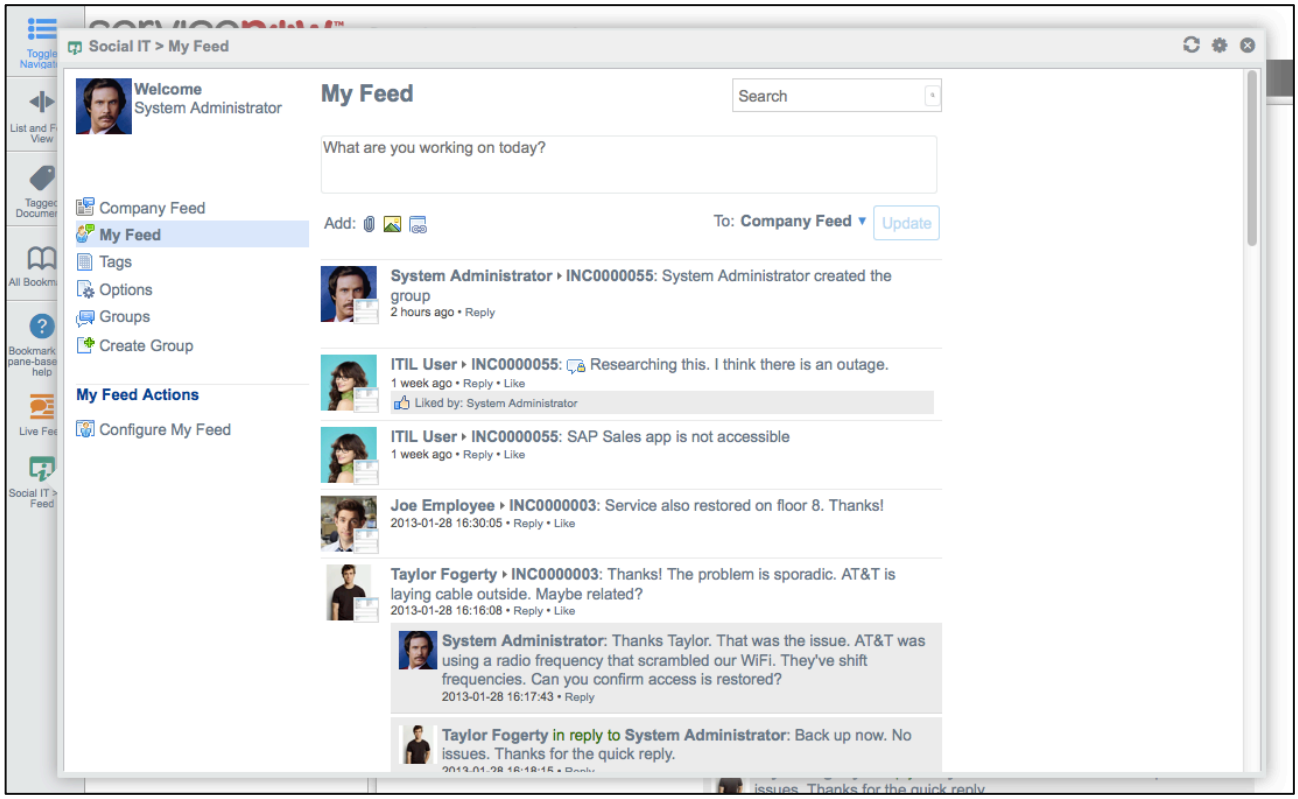
    a. Navigate to **Self-Service > My Profile**.
    b. Click the **Notification Preferences** related link.
    c. Click the green plus sign to add a new subscription.
    d. In the **Notification Message** field, select **Live Message All Subscription**.
    e. [Optional] Define filters and schedules for the Notification
    f. Click **Submit**.



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18. **Using Live Feed with UI11:** To use live feed with UI11 (requires the UI11 plugin):
    a. If do not see a gray toolbar on the left side of the screen (called your edge), click the **Switch to the new UI** link in the banner.
    b. Navigate to **Social IT > Live Feed**.
    c. Drag the **Live Feed** module to the edge.
    d. Point to the bookmark on your edge. When the tip window appears, click **Edit Bookmark**.
    e. Select the **Flyout** check box.
    f. Click **Update**.

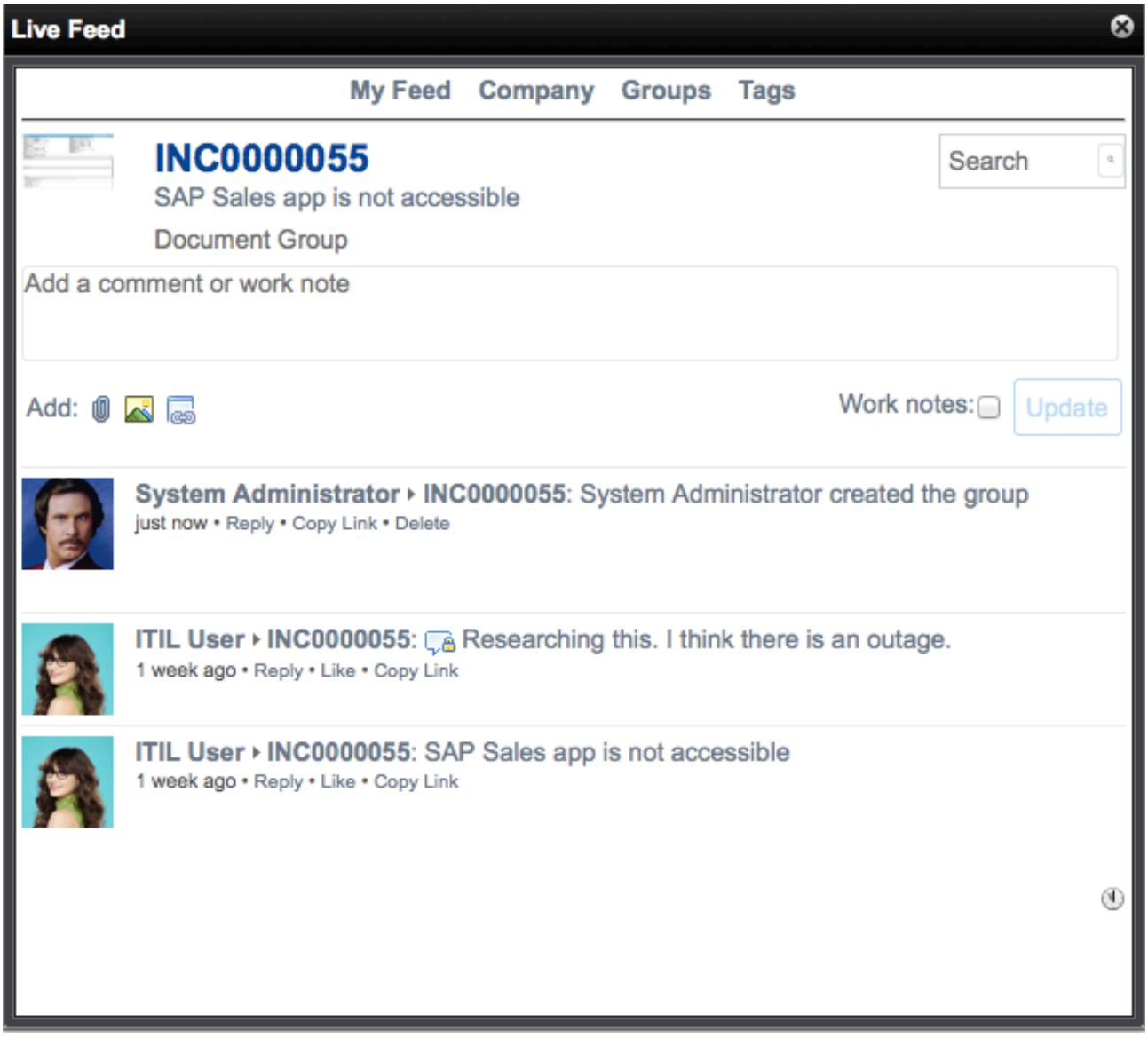
You can now access live feed in a flyout window without navigating away from your working panes. Notifications appear on the edge when new messages are posted in your My Feed.



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19. Users can also post to Live Feed from within other Records, for instance Incident Management.

    a. By Selecting the Show Live Feed button  the user will see the pop out screen below.



    b. This screen allows the user to add a message specific to the Incident selected and all future comments and work notes will be added to the Live Feed Conversation.

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Lab Goal

This lab will familiarize users with Administration of Live Feed and its various components.

Lab 5
Administering Live Feed

Messages, **Profiles**, **Likes**, **Search Log**, **Tags**, and **Group Profiles:** provide access to tables for viewing live feed data.

Note: 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.

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.

To setup **Table Notifications**:

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

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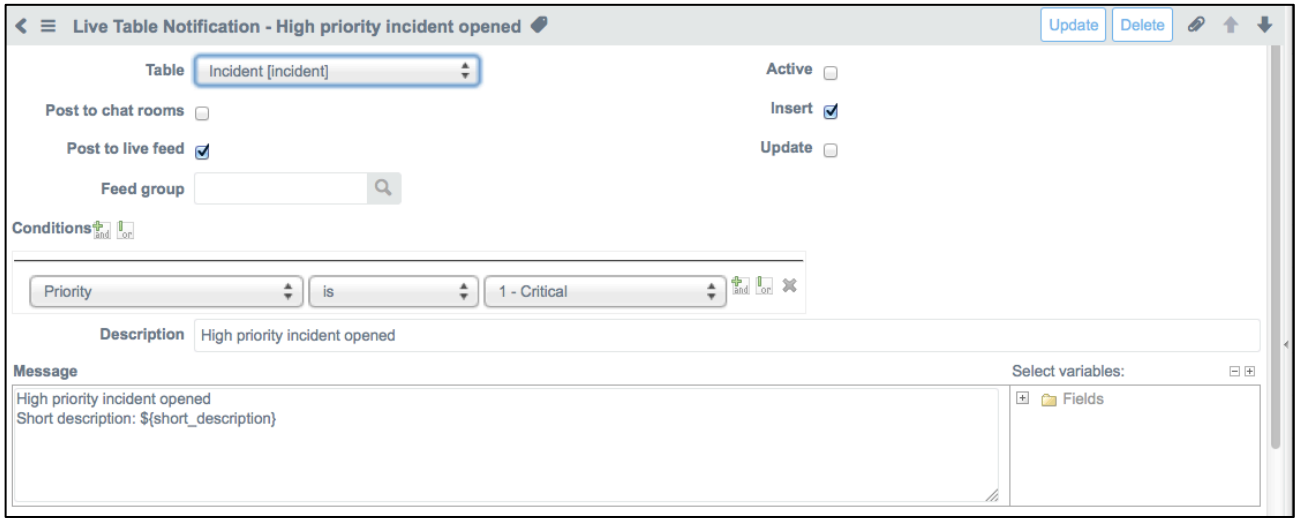


Table notifications are supported for all task tables by default. To set up a table notification for any other table, administrators must perform additional steps.

To set up a table notification for an additional (non-task) table:

1. Navigate to **System Definition > Business Rules**.
2. Open the **live feed events** business rule.
3. Copy the text in the **Script** field.
4. Navigate to **System Definition > Business Rules**.
5. Click **New**.
6. Enter the following values:
    - **Name**: Enter a name (example, *live feed events for my table*).
    - **Table**: Select the table for which you are setting up a notification.
    - **When**: *before*
    - **Active**, **Insert**, **Update**, and **Delete**: Select the check boxes.
    - **Script**: Paste the script from the **live feed events** business rule (step 3).
7. Click **Submit**.

    How it works: The **live feed events** business rule runs on the task table. It fires the **live_feed.update** event, which is associated with the **Live Feed Update** script action. The script action sets up variables and processes the table notifications.

8. Create a live feed table notification record for the new table as you would for a task table.

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To access live feed properties, navigate to **Social IT > Feed Administration > Properties**.

Scripted Web Service:

1. **PostToLiveFeed:** allows external systems to post to live feed. This service is inactive by default. Optional input parameters allow you to:
    a. Define the user or profile to use; otherwise the message posts from the authenticated soap user.
    b. Define the group (using the groupid); otherwise the message posts to the company feed.
    c. Include a link in the post.

Included Web Service:

```
<SOAP-ENV:Envelope xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:SOAP-
ENC="http://schemas.xmlsoap.org/soap/encoding/"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:m="http://www.service-now.com" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/" xmlns:tns="http://www.service-
now.com/PostToLiveFeed"  SOAP-
ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/">   <SOAP-ENV:Body>
<m:execute>       <message xsi:type="xsd:string">Post this message to the Live
Feed</message>       <!-- optional sys_id of a sys_user record to use to get a
live profile -->       <user xsi:type="xsd:string"></user>       <!-- optional
sys_id of a live profile to post as -->       <profile
xsi:type="xsd:string"></profile>       <!-- optional sys_id of a live group to
post the message in-->       <group xsi:type="xsd:string"></group>       <!--
optional URL of a link to include in the message-->       <linkurl
xsi:type="xsd:string"></linkurl>       <!-- optional name for the linkurl
parameter-->       <linkname xsi:type="xsd:string"></linkname>     </m:execute>
</SOAP-ENV:Body> </SOAP-ENV:Envelope>
```

Live Feed Table Access Rules

By default, administrators and users with the live_feed_admin role can view all live feed tables and can modify the following live feed tables:

- **Live Table Notification [live_table_notification]:** set up automatic messages that are generated when specific records are updated throughout the system.
- **Live Feed Message [live_message]:** can be modified if necessary (such as to delete an inappropriate message or restore a message that a user accidentally deleted), but should almost always be managed by system functionality.

Note: Extending or modifying data in any live feed chat table is **not** recommended.

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Limiting Live Feed Access by Role

All active users in the instance have access to live feed by default. To limit access by role:

1. Define the roles that allow users to see the Live Feed module.
    1. Right-click the icon next to the Live Feed module and select **Edit Module**.
    2. Enter the roles that have access in the **Roles** field.
    3. Click **Update**.
2. Define the roles that allow users to see live feed from a mobile device.
    1. Navigate to **System Definition > Applications (Mobile)**.
    2. Click **Live Feed**.
    3. Enter the roles that have access in the **Roles** field.
    4. Click **Update**.
3. Create access control rules to limit who can view the live_feed pages.
    1. **Type:** *ui page*
    2. **Operation:** *read*
    3. **Name:** create one access control rule record for each of the following pages
        - live_feed
        - live_feed_small
    4. Under the **Requires role** related list, add roles to define who can access the live feed pages. Users who do not have these roles cannot access live feed.

Message Content:

For security reasons, any HTML code is automatically stripped out of a message before it is posted. This measure ensures that users cannot modify any page settings by posting a message.

Users can remove their own messages from feeds. If necessary, administrators can remove inappropriate messages that are posted by any user.

To remove a message from all feeds:

1. Navigate to **Social IT > Feed Administration > Messages**.
2. Open the message to be removed.
3. In the **State** field, select **deleted**. You may need to personalize the form to add this field.
4. Click **Update**.

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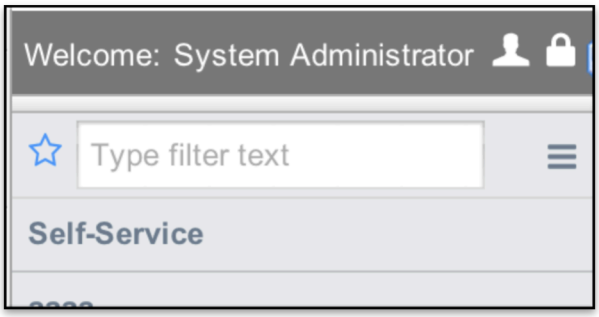
Lab Goal

This lab familiarizes users with enabling the Chat Plugin if required. **NOTE:** These steps may not be required during the lab if the plugins are already enabled.

Lab 6
Enable
Chat Plugin

Install the Chat Plugin

1. Inside of the Navigator on the left, find the input that says *Type Filter Text*



2. Type **plugin**.

3. Locate the **Plugins** link under the application **System Definition**.



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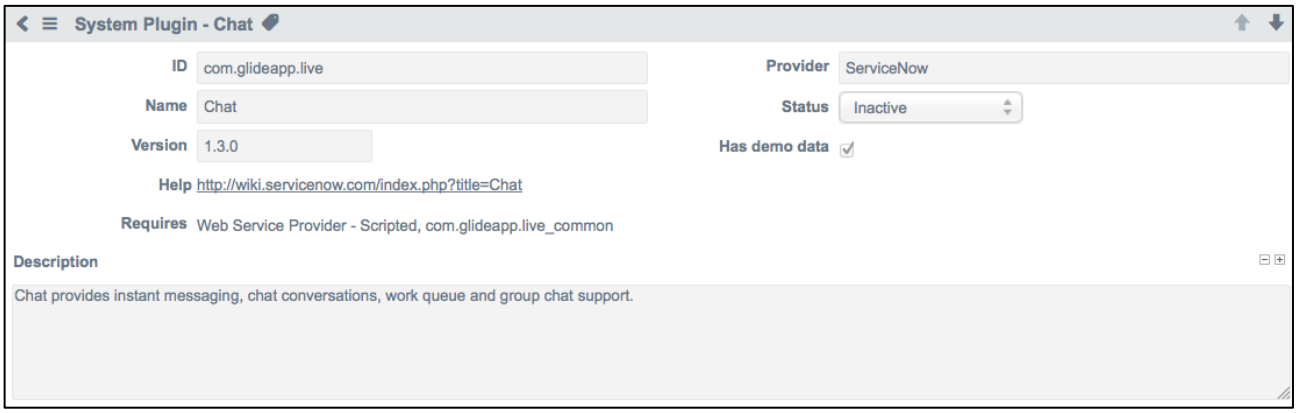
4. Search for the **Chat** plugin by entering the name in the **Search** field.



5. Open the **Chat** plugin by clicking its link.



6. Click **Activate/Upgrade** if the plugin **Status** field is not set to **Active – For Lab, Load Demo Data**



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Lab Goal

This lab will familiarize users with Chat and its various components.

Lab 7
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.

Help Desk Chat allows users to 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.

In both cases users and service desk staff can perform additional actions such as creating incidents or accessing knowledge.

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Lab Goal

This lab will familiarize users with Using Chat and its various components.

Lab 8
Using Chat

Updating Your Profile. Your profile identifies your contributions to conversations. It is created automatically the first time you use live feed and consists of:

- **Name**: from your user account in ServiceNow. Your name appears on your messages and on messages you rate.
- **Picture**: select any picture. Your picture appears next to your messages and at the top of your feed.
- To update your profile picture:
    1. Navigate to **Social IT > Live Feed**.
    2. Click your picture in the top of the content frame.
    3. Browse to the desired picture file and click **Open**.

    Note: *Changes to your profile picture affect both chat and live feed*

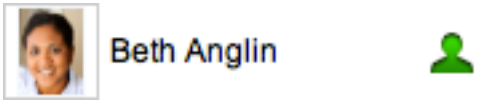
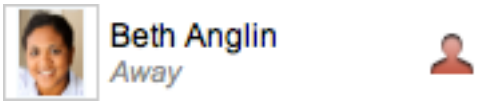
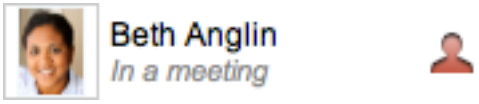
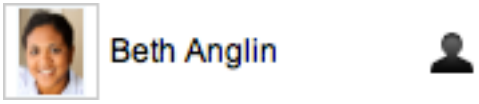
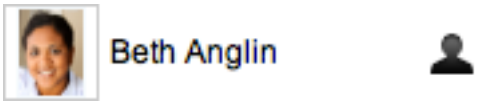
Updating your Status

Your status lets other users know whether you are available to chat. Your current status is indicated by the color of the icon in the upper right of your favorites list, beside your name. View the status of other users in your favorites list.

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To change your status:

a. Click the status icon beside your name.
b. Select a status (see table below).

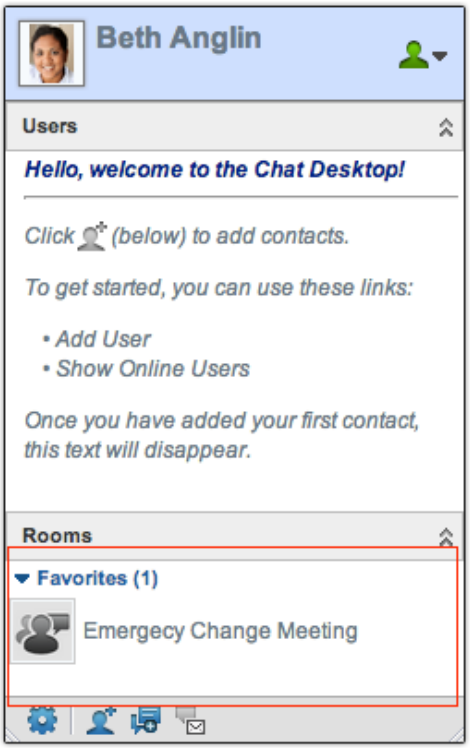
Status	Description	Appears to Others
Online	Indicates that you are available to chat.	Green icon: 
Away	Indicates that you are not available because you are away.	Red icon: 
Away with a message	Indicates that you are not available and gives a reason: • In a meeting • On the phone • Out to lunch You cannot create a custom message from the chat desktop.	Red icon and message: 
Invisible	Indicates that you are not available. You can send and receive messages when your status is **Invisible**. You appear as **Offline** to other users.	Black icon: 
Offline	Indicates that you are not available. You cannot send or receive messages when your status is *Offline*. Users that are not logged in appear as *Offline*.	Black icon: 

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Using your Favorites List:

Your favorites list appears on your chat desktop and provides the following functions.

- Users:
  - Add another user in the system to your favorites list.
  - See if your favorite users are available to chat. Users are organized alphabetically and in sections by status.
  - Start a conversation by double-clicking a name.
  - Expand or collapse a section by clicking **Online** or **Offline**.
- Rooms:
  - See the list of your favorite chat rooms.
  - Join a chat room by double-clicking its name.
- Favorites list toolbar:
  - **Options** ( ): access a menu with options to add a favorite user, view online users, create a chat room, and view chat rooms.
  - **Add User** ( ): add a favorite user.
  - **Create Room** ( ): create a chat room.
  - **Invitations** ( ): respond to invitations to join chat rooms.



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Adding a Favorite User

To add a user to your favorite users list:

1. Click the **Add User** button ().
2. Begin typing a user name and select a user from the list, or click the reference lookup () and select a user from the table.
3. Click **OK**.

Removing a Favorite User

To remove a user from your favorite users list, right-click the user's name and select **Remove From List**.

Viewing Online Users

To view a list of all users who are available to chat (status of **Online**):

1. Right-click the Users section header or click **Options** () on the toolbar.
2. Select **Show Online Users**.
    - Start a one-to-one chat with a user on the list by double-clicking a name.
    - **Send Message** or **Add To Friend List** by right-clicking a name.

Viewing Rooms

To view a list of all public chat rooms:

1. Right-click the **Rooms** section header or click **Options** () on the toolbar.
2. Select **Public Rooms**.
    - To join a room, double-click a name or right-click and select **Join Room**.

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Starting a Chat:

Starting One-to-One Chats

To start a chat with one user in your favorites list, double-click the user's name or right-click and select **Send Message**.

To start a chat with one available user, double-click the user's name on the online users list.

Send a message to start a conversation.

Creating Chat Rooms

To start a chat with multiple users from the chat desktop:

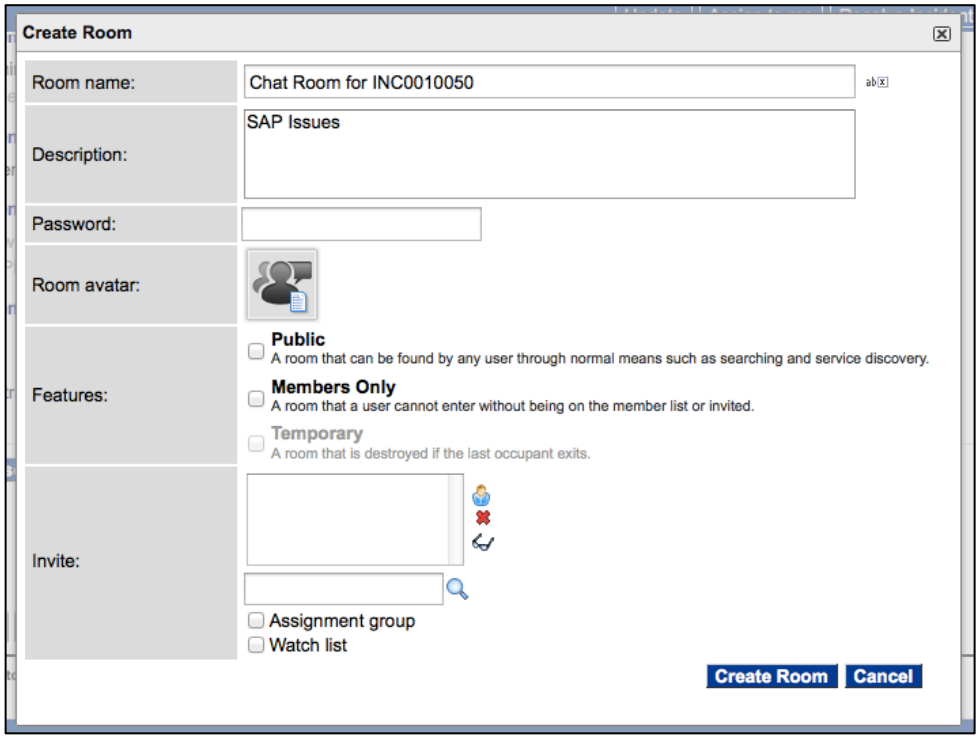
1. Click **Create Room** () on the favorites list toolbar.
2. Enter the room details (see table).
3. Click **Create Room**. An invitation appears in the favorites list of all invited users and a new chat window opens on your chat desktop.

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Creating Chat Rooms for Tasks

To start a chat with multiple users from a task record:

1. Open the record (example, an incident on which you are working).
2. Click the **Create or Join Chat Room** related link.
3. If a chat room already exists, click a name to join the existing chat room. If no chat room exists, continue to the next step to create a new room.



4. Click the **create** link at the bottom of the window.
5. Enter the room details as you would for a chat room.
6. Click **Create Room**. An email notification is sent and appears in the favorites list for all invited users (the assignment group and the watch list, if selected, and additional invited users).
7. In the **New Room Created** message, click **Join Room**.
   - A new chat window opens on your chat desktop.
   - All invited users are listed in the chat member list. Invited users that are not currently participating in the chat are listed in gray.

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Joining a Chat

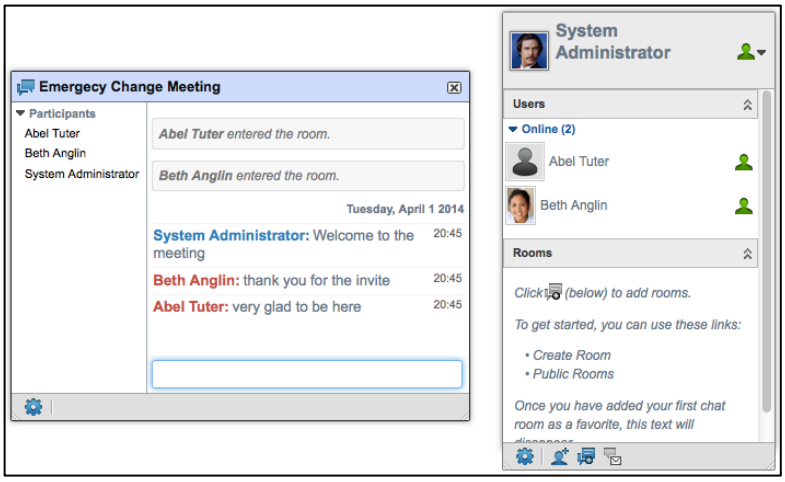
Joining One-to-One Chats

When another user starts a chat by sending a message to you, a chat window opens on your chat desktop. To join the chat, click the window.

Joining Chat Rooms

If another user invites you to join a chat room, an invitation () appears in your favorites list. To respond, click the invitation. A window opens that displays the room name, room description, and the name of the user who invited you.

- To join the chat, click **Join**. When the chat window opens on your chat desktop, click the window.
- To ignore the invitation, click **Decline**.



To rejoin a favorite chat room that you have left, click the chat room name in the Rooms section of the favorites list.

To join a public chat room without an invitation, right-click the Rooms section header and select **Public Rooms**. Double-click a room name on the list.

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Joining Chat Rooms for Tasks

If another user invites you to join a chat room from a task record, you receive an email notification. To join the chat:

1. Click the link in the email notification.
2. If a prompt for a password appears, enter the password listed in the email notification.
3. When the chat window opens on your chat desktop, click the window.

To join a chat room from a task record without an invitation:

1. Open the task record.
2. Click the **Create or Join Chat Room** related link.
3. Click a chat room name.
4. If a prompt for a password appears, contact the person who created the chat room for the password.

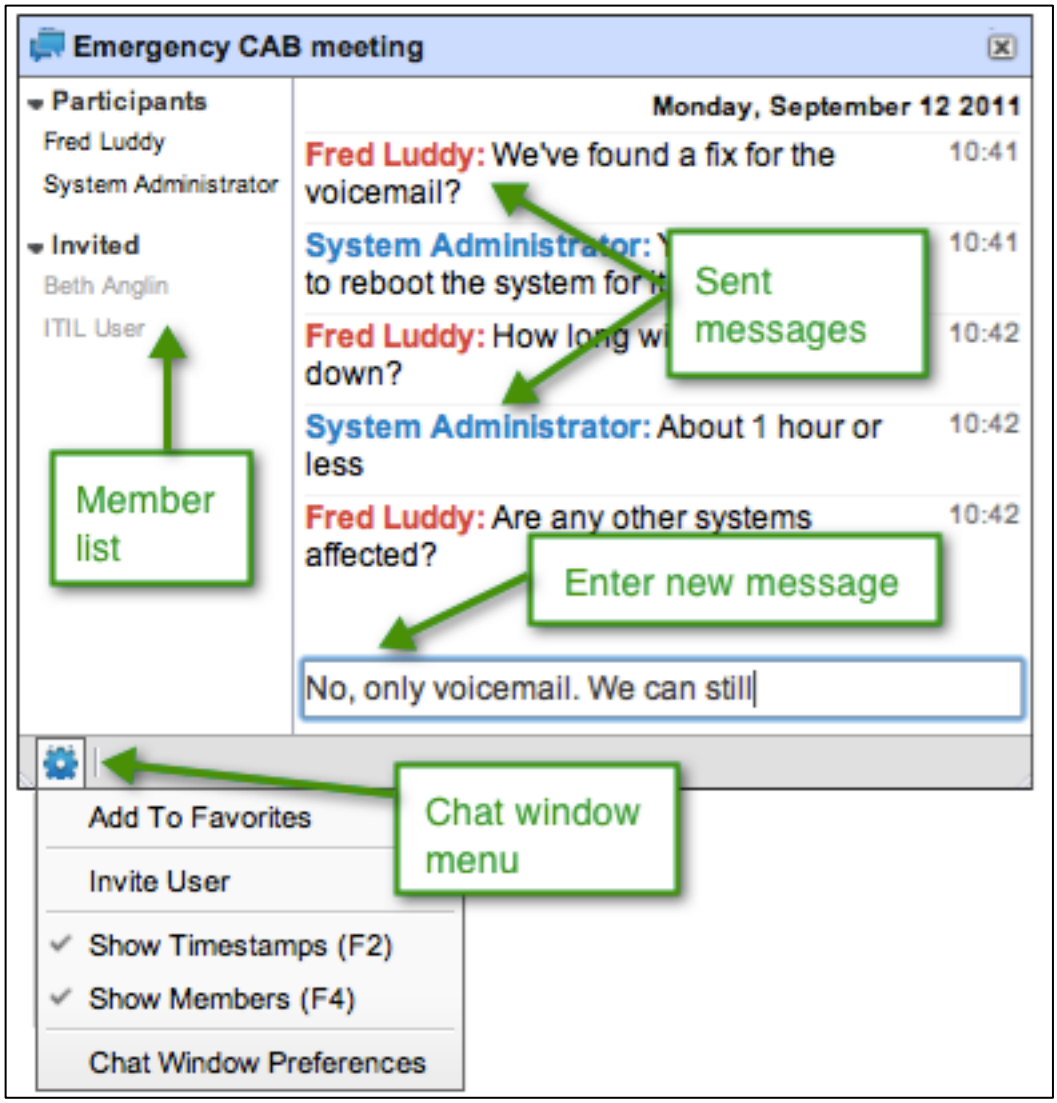
   If a chat room has a password, only users with the password can join the chat.

5. When the chat window opens on your chat desktop, click the window.

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Using a Chat Window

A chat window appears on your chat desktop for each chat conversation that you start or join.



Sending Messages

To **chat** with other users that have joined the conversation, enter your message in the text field at the bottom of the window and press **Enter**. The message appears in the other users' chat windows.

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To send a **link**, type the full URL (example, **http://www.service-now.com**). When the message is sent, the text appears blue and any user in the conversation can click it to follow the link.

Chat **activity** is indicated with the following alerts:

- When a new message is posted to an inactive browser tab, the tab name blinks.
- When a new message is posted to an inactive chat window, the window header appears in yellow and blinks.
- When a user joins or leaves a room, a message appears in the other room members' chat windows.

Sending Emoticons in Messages (Smileys)

To send an emoticon (smiley), type text from the table on the right. When your message is sent, the emoticon appears in place of the text. For example, enter colon followed by a close parentheses (**:)**) and a smiley face () appears in your message.

Text	Image
:) :-)	
B) B-) BD B-D	
:D :-D	
:* :-*	
:(:-(	
<3	
;) ;-)	
:P :-P	
:O :-O	
X(X-(	
:") :">	
:((:-((	
(A)	
:? :-?	

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Changing the Display

To view the chat window menu, click the gear button () in the bottom left.

- To show or hide timestamps, select **Show Timestamps** from the chat window menu or press **F2**.
- To show or hide the chat member list, select **Show Members** from the chat window menu or press **F4**.

To **resize** the window, point to the lower corner (left or right). When the pointer changes shape, drag the window to the desired size.

To **move** the window, point to the header. When the pointer changes shape, drag the window anywhere on your chat desktop.

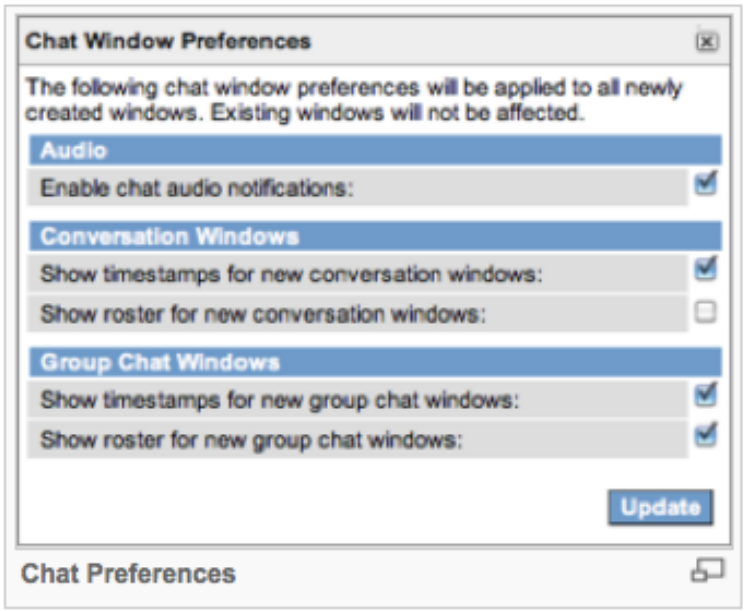
To **close** a chat window, click the X in the upper right corner.

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Setting Your Chat Preferences

Use the **Chat Window Preferences** to set audio notifications and default chat window display options. The default display options control how a chat window looks when you first open it. You can still control the display options for an individual window as described in Changing the Display.

To view your chat preferences, click your name in the upper left corner of the chat desktop and select **Chat Preferences**.



To set your preferences, select or clear the check boxes next to the options, then click **Update**.

- **Audio:** turn audio notifications on or off.
- **Conversation Windows:** set default options for showing timestamps and members in one-to-one chats.
- **Group Chat Windows:** set default options for showing timestamps members in chat rooms.

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Using Help Desk Chat

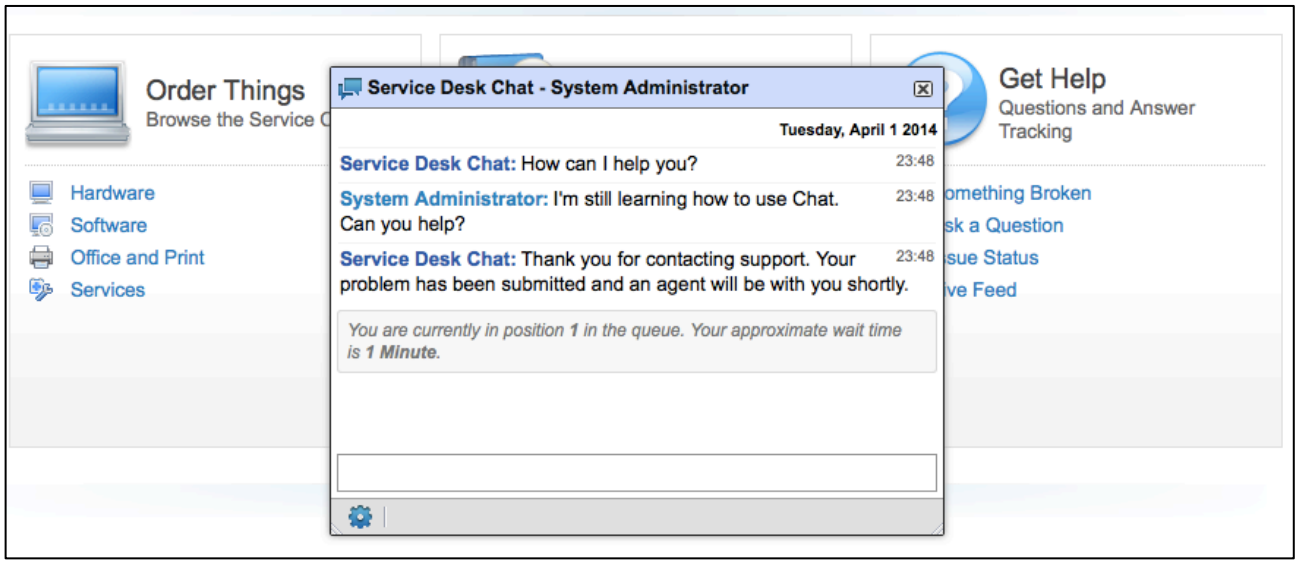
Help Desk Chat allows users to communicate directly with service desk staff via instant messaging in a ServiceNow instance (requires the Chat plugin).

- Users access live support from the Employee Self-Service Portal.
- Service desk staff provide support from the chat desktop.

Getting Support – End Users

1. Open the Employee Self-Service Portal (**https://<instance web address>/ess**).
2. Log in to your ServiceNow account. Only logged in users can use chat.
3. In the upper right, click the **Help Desk Chat** button. A chat window opens.
4. Enter your question in the text field at the bottom of the window and press **Enter**.
    - A message confirms that you have entered the chat queue and indicates your position and estimated wait time.
    - When a support staff member accepts your chat and begins working on your question, another message appears.
5. Chat with your support agent via instant messaging (see Using a Chat Window).

Support staff may lead you through troubleshooting, ask clarifying questions, or create an incident record to address your question.



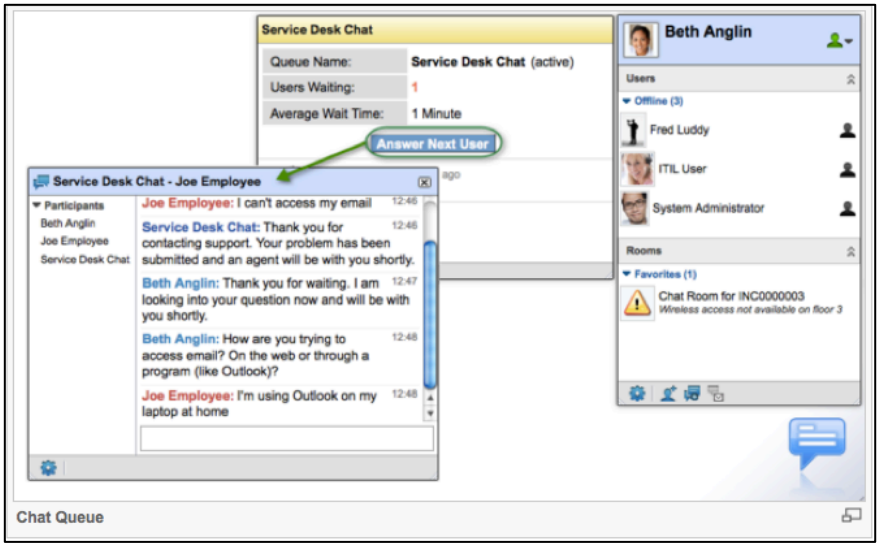
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Providing Support (Service Desk Staff)

Support Staff who are assigned to Help Desk Chat Support can provide live support via instant messaging. Administrators and users with the chat_admin role can assign chat support staff (see Setting Up Chat Queues for Help Desk Chat).

To provide users with live support via instant messaging:

1. Navigate to **Social IT > Chat** to open your chat desktop.
    - A chat queue agent window appears on your chat desktop for each chat queue you are assigned to. If no agent windows appear, ask an administrator to add you as a member of the *assignment group* for a chat queue.
    - The chat queue agent window displays the number of users in the queue and how long they have been waiting.
    - Every member of the assignment group sees the associated chat queue agent window.
2. Click **Answer Next User** to answer the next user or click **Answer** beside a specific user in the queue. A chat window opens.
    - Only the agent and the user can see the chat window.
3. Provide support via instant messaging (see Using a Chat Window). Chat queue agents can access additional support functions in the chat window menu:
    - **Invite User:** invite another expert to assist with a support chat. An invitation appears in the favorites list of an invited user.
    - **Create Incident from Chat:** create a new incident record with the initial question as the short description and the support chat as a linked chat room (accessible from the **Create or Join Chat Room** related link on the Incident form). **Note**: Administrators can edit this action or add additional actions to the chat window menu.



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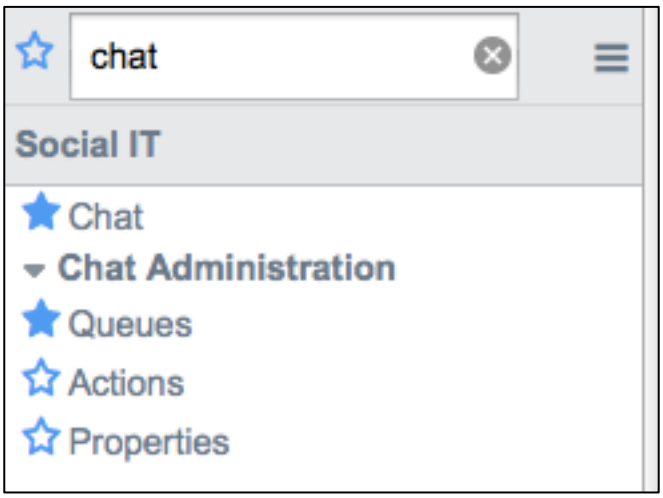
Lab Goal

This lab will familiarize users with Administration of Chat and its various components.

Lab 9
Administering 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.



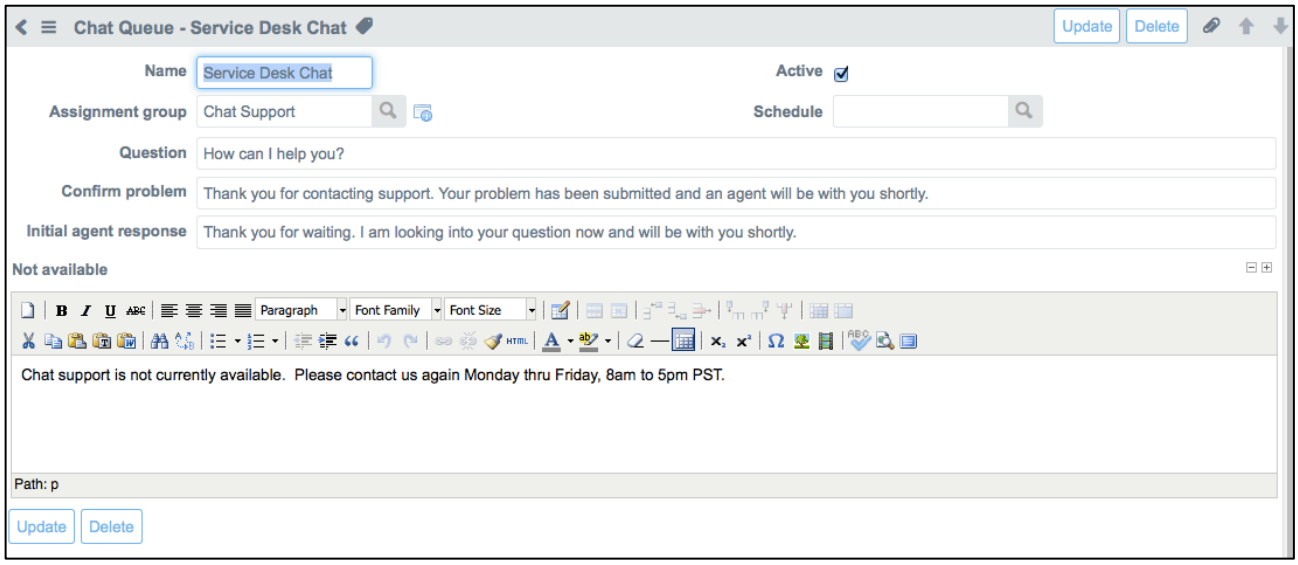
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Defining Chat Queues

Help Desk Chat allows users to communicate directly with Service Desk staff via instant messaging in a ServiceNow instance (requires the Chat plugin). Chat queues define the schedules, staff, and system messages for Help Desk Chat. Administrators and users with the chat_admin role can set up chat queues.

To define a chat queue:

1. Navigate to **Social IT > Chat Administration > Queues**.
2. Select a chat queue to edit or click **New**.
3. Enter the chat queue details and click **Update** or **Submit**.



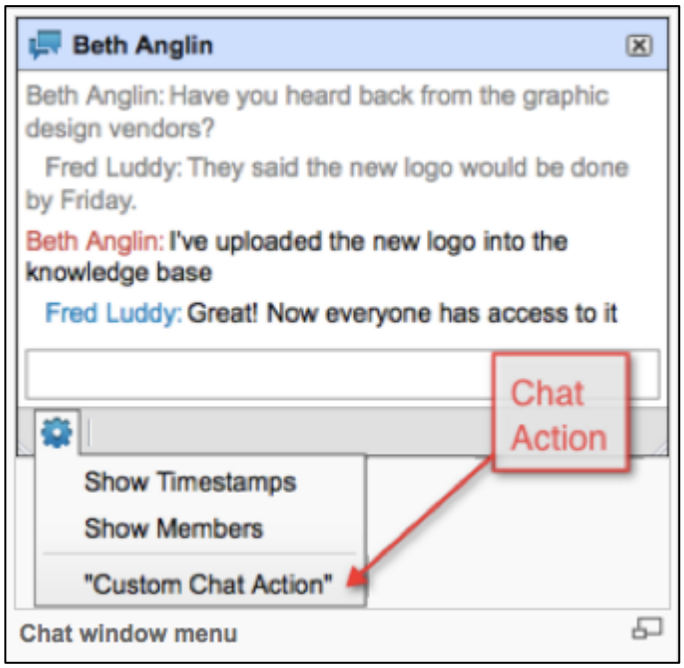
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Adding Actions to Chat Window Menu

Chat actions are additional items that appear in the chat window menu (requires the Chat plugin). These actions appear after the standard menu items, such as **Show Timestamps** and **Show Members**. Administrators and users with the *chat_admin* role can define chat actions.

To add an action to the chat window menu:

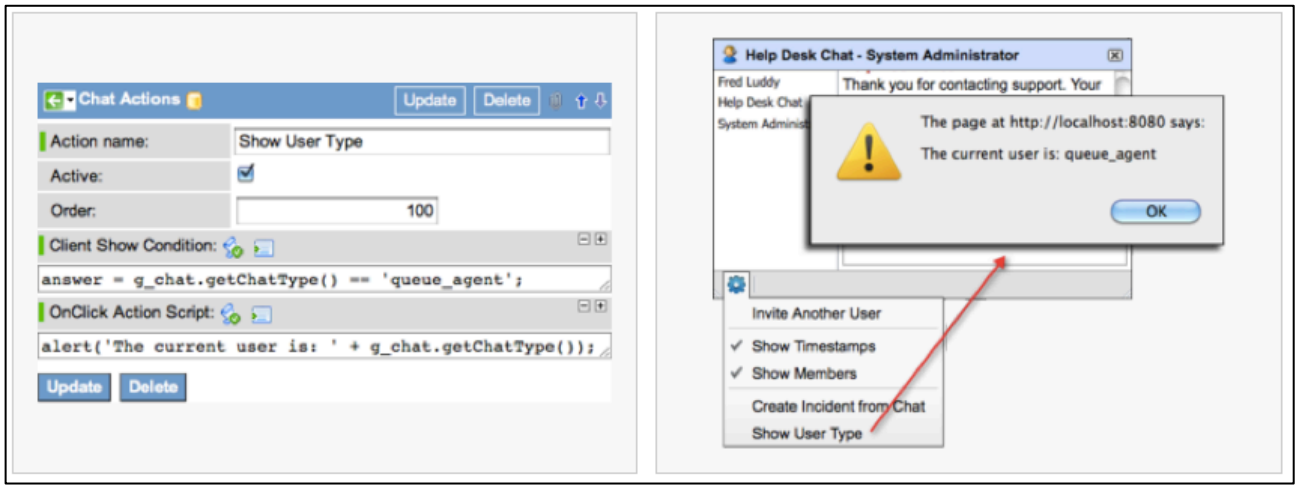
1. Navigate to **Social IT > Chat Administration > Actions**.
2. Select an action to edit or click **New**.
3. Enter the chat action details and click **Update** or **Submit**.



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The following example demonstrates how to add a chat action that appears only on windows where the user is a *Help Desk Agent*. 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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