
Collaborating with Others

This topic discusses how to use the Chat collaboration feature within the Workspace. Guidance is provided on how to initiate or join an ongoing Chat conversation. Responding to a Chat notification or viewing Chat history is also included.

Audience: This information is intended for all users of SBW. System Administrators of the Workspace should refer to the *SBW Administrator's Guide* for information on providing users access to Chat and widgets.

Overview of Chat


Collaboration in the Workspace is accomplished through Chat. Chat conversations are collaborative and contextual, based on the widget from which the chat is initiated. Conversations within a specific work context can only occur between users who are authorized to both the widget and Chat.



Chat opens from multiple locations in the Workspace, as described in the following list.

Chat Opened From	Function
Workspace toolbar	View history Participate in an ongoing chat
Widget title bar	Initiate a chat within a specific context Participate in an ongoing chat
Presence icon of Similar Individual within Collaboration tab of Profile widget	Initiate a chat

Navigating Chat

The Chat elements and functions are listed in the following table and labeled in Figure 1.

Widget context	label	Context of the chat displays in widget title bar.
Search Contact Name	entry area	User search function versus scrolling through the contacts list.
Contacts	tab	Users who are authorized to the widget from which the contextual chat originated.
History	tab	History tab for selecting a context to view chat history.
Add user function		After a user is selected from the Contacts list, the add user button must be clicked to add the user to the chat.

Context	tab	Context tab indicates the context of the chat. There may be multiple context tabs, which allow for switching between chats.
Participant list	photo/avatar	List of users who are engaged in the chat. The presence icon indicates if the user is online or offline. The user name displays when the cursor is paused on the user photo/avatar.
Open Widget		Opens the widget instance in the context of the conversation.
Chat History		Ability to view history of a chat selected in the Context tab.
Message display area	display area	Conversations display by date and time with user name.
Message composition area	entry area	Area for composing message.
Send	button	Click Send or press Enter to send the message.

The Chat elements and functions are annotated and highlighted in Figure 1.

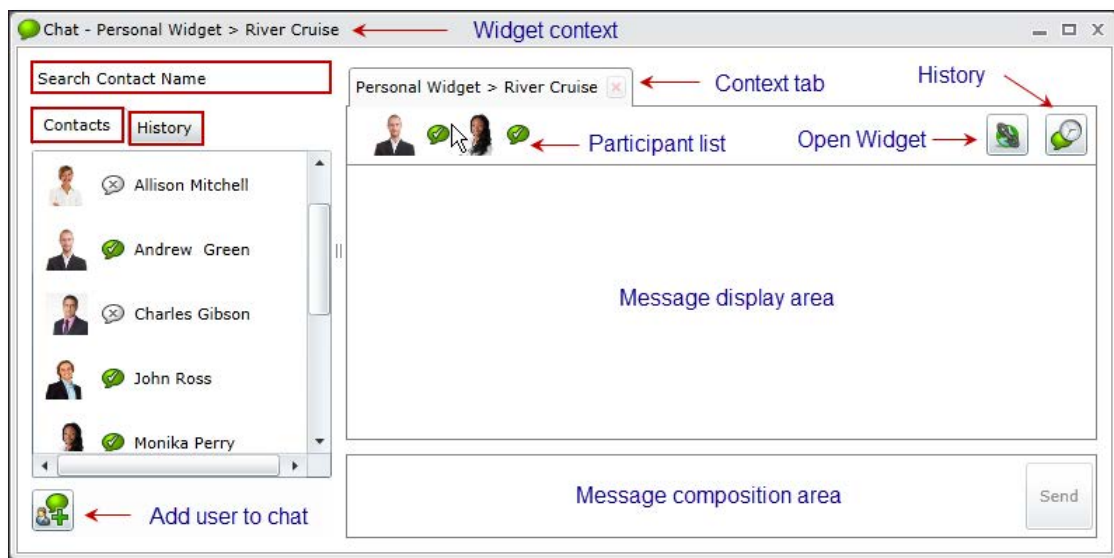


Figure 1. Elements in Chat

Search Contact Name

The Search Contact Name area enables you to locate users in the Contacts list. It is much easier to enter a name or partial name in the Search area versus scrolling through a long list of users in the Contacts list.

To search for a user:

- © Type a user name or partial name in the Search Contact Name area.
Type the first or last name, or a partial first or last name. The user name will display in the Contacts list if the user is authorized to the specific context.

In this example (Figure 2), the entry *charles* displays Charles Bennett and Charles Gibson.

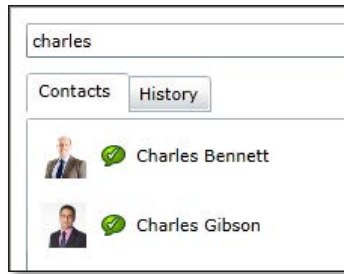


Figure 2. Search Contacts List – results

After a user has been located and selected, a message can be sent.

Contacts Tab

Users who display in the Contacts list are authorized to the widget. The contacts list is displayed in the Contacts tab, on the left side of the window (Figure 1).

To select a user in the Contacts list:

- © Scroll through the user list, or use the Search function to locate a user.
- © Click the user name.

The user name is highlighted and the Add user button displays as active (Figure 3).

You can use the CTRL or SHIFT keys to select multiple users.

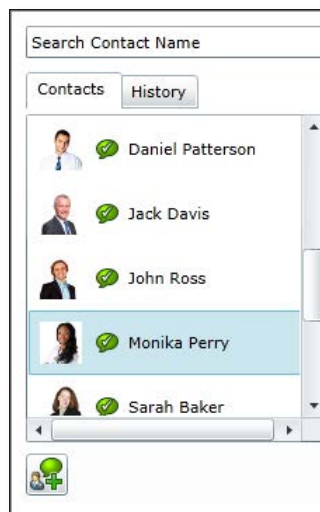


Figure 3. Contacts list – selected user

Once a user has been located and selected, a message can be sent.

History Tab

The History tab lists chats by context. Chats are selected by context for viewing or engaging in a conversation.

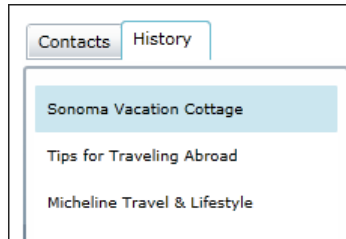



Figure 4. History tab – list of contexts

To view a context in History:

- © Select an entry in the History tab.
- © Click  on the right side of the display (Figure 1).

The history for the selected context displays.

Messages can be viewed from history. You can also participate in a chat session from the chat history.

Context Tab

The Context tab lists the chats in which the user has participated. There may be multiple contexts displayed in the Context tab area.

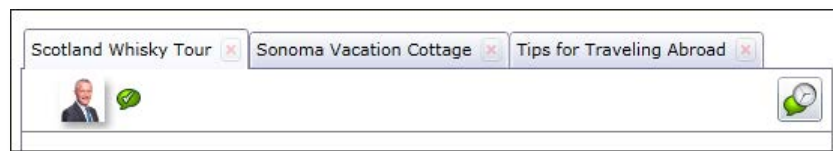


Figure 5. Context tab with multiple contexts

To select a context:

- © Select a context tab.
- Users who have participated in the chat display just below the tab. Messages for the context display below the participants. In this example (Figure 6), there are three participants in the *River Cruise* context, Sofia, Andrew, and Monika.

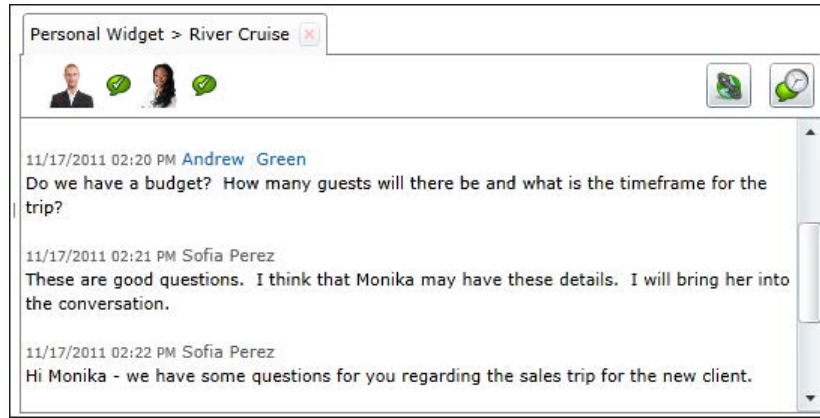




Figure 6. Participants and messages

Contexts display for chats in which the user has participated. However, users who are authorized to the context are able to participate in an ongoing chat by invoking the chat service through the widget title bar.

Participant List and User Presence

Users who participate in a chat are represented by an image and presence indicator, as described in the following table.

	User is active. The indicator displays as green.
	User is offline. The indicator displays as grey.

The participant list displays across the top of the message display area and just below the context tab.

To view all participants in the chat:

- © Click the scroll arrows ◀ and ▶ to scroll left or right.

To view the user name:

- © Pause over the image to view the user name.

Initiating a Chat

The examples in this section reflect users who specialize in travel consulting. The context of the chat example, *Sonoma Summer Cottage*, displays in the title bar of the Chat window. The participants in the example are Daniel, John, and Sofia.

The Personal widget has been configured for this example. Within the widget settings, the Widget Name and Address fields were configured to reflect the work context. Refer to the help topic *Personal Widget* for additional information about using the Personal widget.



To initiate a conversation around a new context, Chat must be opened through a widget that is relevant to the context of the discussion.

To initiate a chat:

- © Select a widget that is relevant to the context of the work discussion.

In this example (Figure 7), the Personal widget displays information about a vacation rental cottage. The context of the work is *Sonoma Summer Cottage*, which displays in the widget title bar.

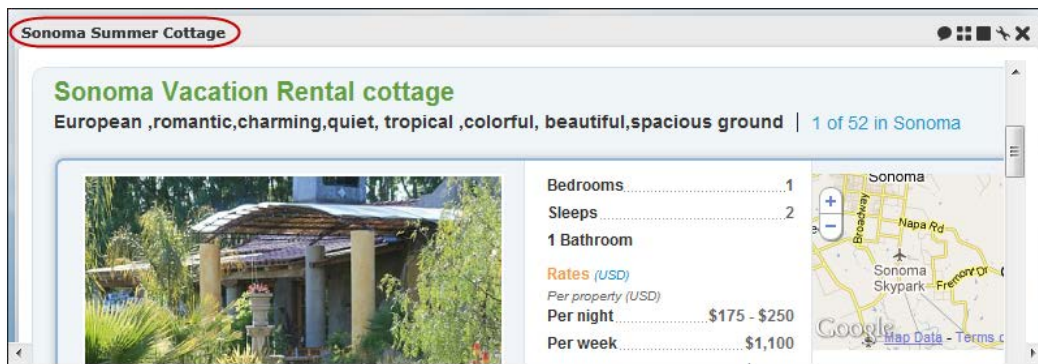


Figure 7. Context of work

- © Click the Chat icon  in the widget title bar (on the right).

The Chat window opens, showing the context in the title bar and in the context tab. This example (Figure 8) displays *Sonoma Summer Cottage* as the context.

The following chat session was initiated by John.

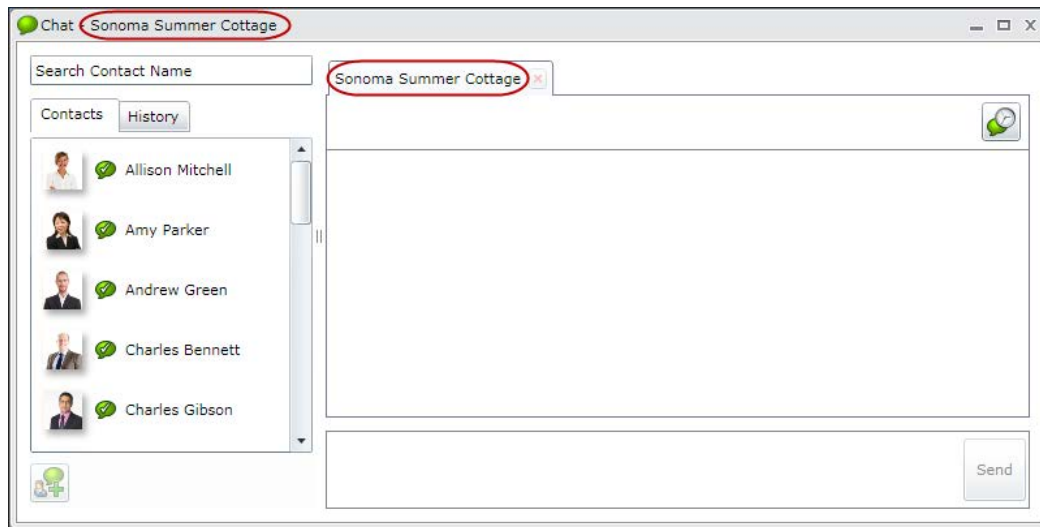


Figure 8. Chat context

- © Locate a user from the contacts list within the Contacts tab on the left (Figure 9).

In this example, John located a user through the Search field. The letters *sof* were entered in the Search box, which rendered one user. However, each time a letter is entered, the Contacts list changes to reflect users with the letter anywhere in their name. For example, the letter *s* displays users with letter *s* anywhere in their name. The letters *so* reflects users with the contiguous letters *so* anywhere in their name.

The user *Sofia Perez* displays in the Contacts list. Alternatively, users can be selected by scrolling through the contacts list.

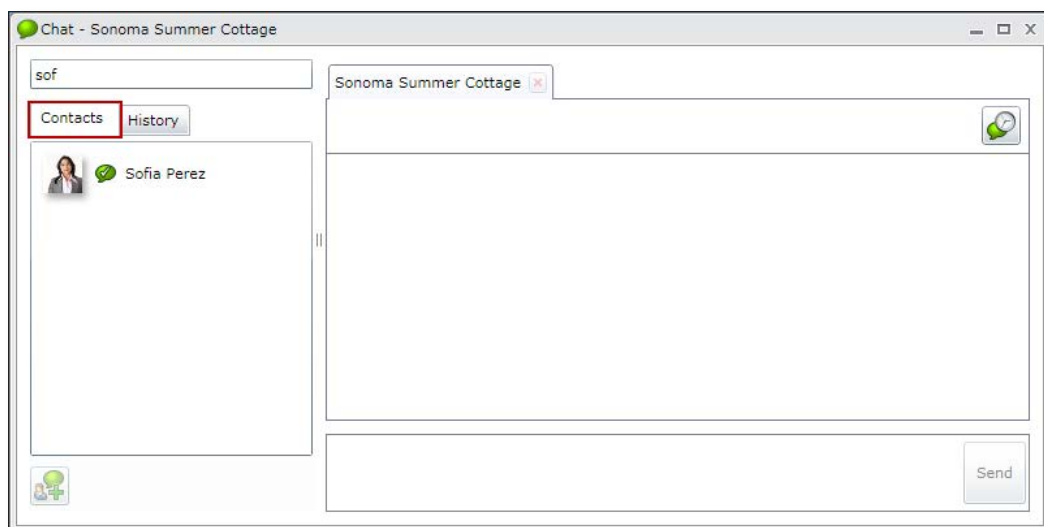


Figure 9. Locate a user

- © Select the user.

Blue highlighting indicates a user has been selected. The user Sofia Perez has been selected.

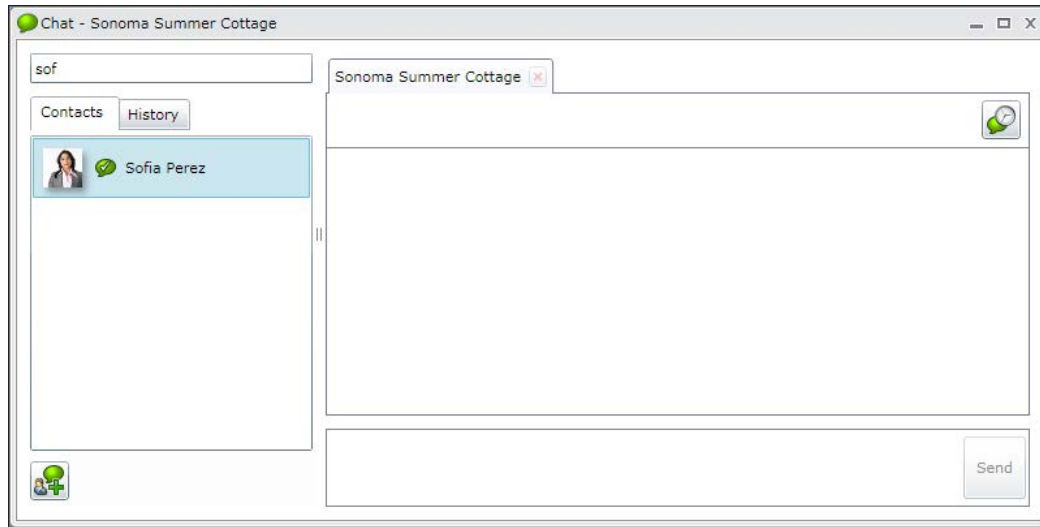



Figure 10. Select user

After a user has been selected, the user must be added as a chat participant using the Add function. The Add function is located in the lower left portion of the Chat window.

- © Click  to add the user to the chat.

The newly added user displays in the participant list under the context tab (Figure 11). In this example, Sofia displays in the participant list in the Sonoma Summer Cottage context tab.

- © You can use the CTRL or SHIFT keys to select multiple users.

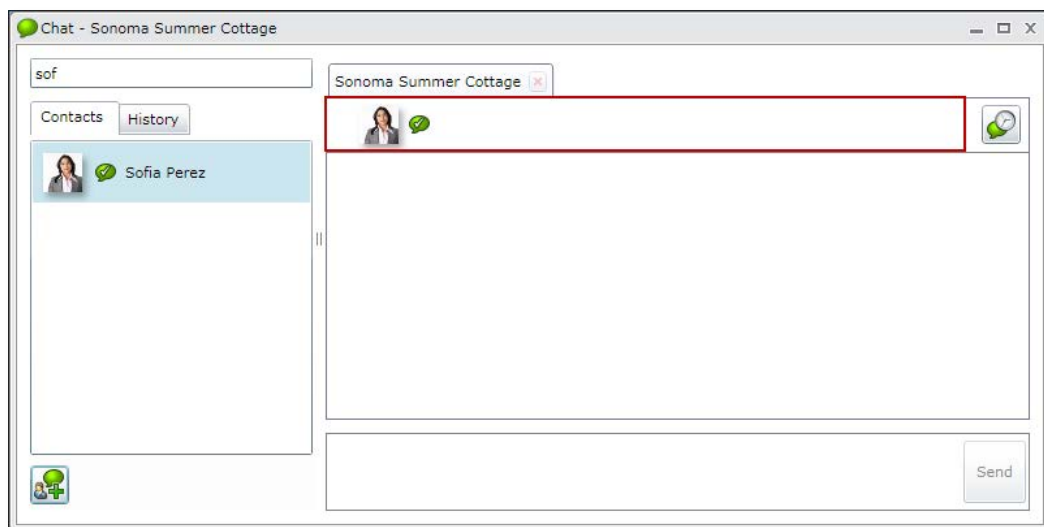


Figure 11. Participant list

- © Type the message in the lower text area (Figure 12).

In this example, the message is sent by John to Sofia, as Sofia is the only user in the participant list.

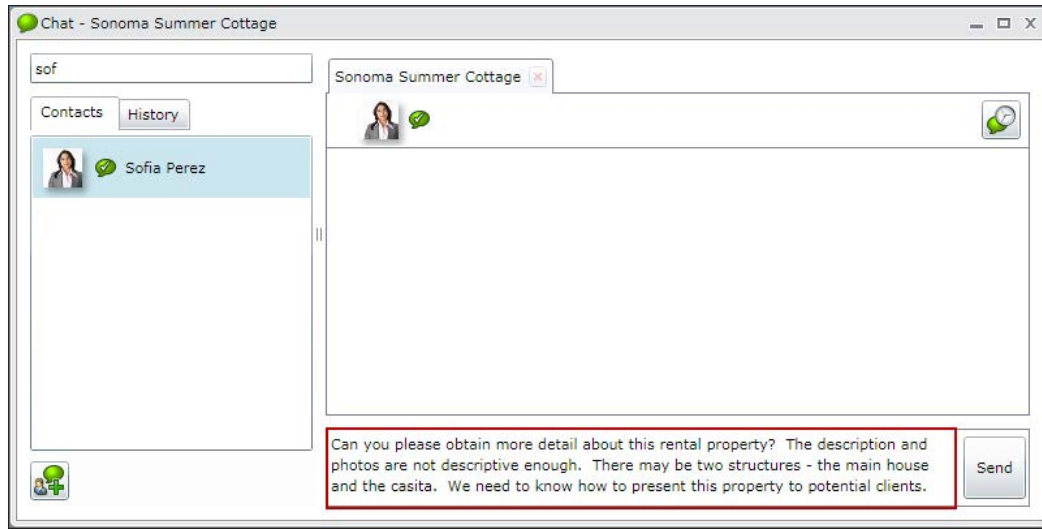


Figure 12. Type message

- © Click **Send** or press **Enter** to send the message.

The message is sent to Sofia.

In the Chat session for Sofia, the participant list shows John. Note that the received message is preceded with the date, time, and name of the user who sent the message (Figure 13).

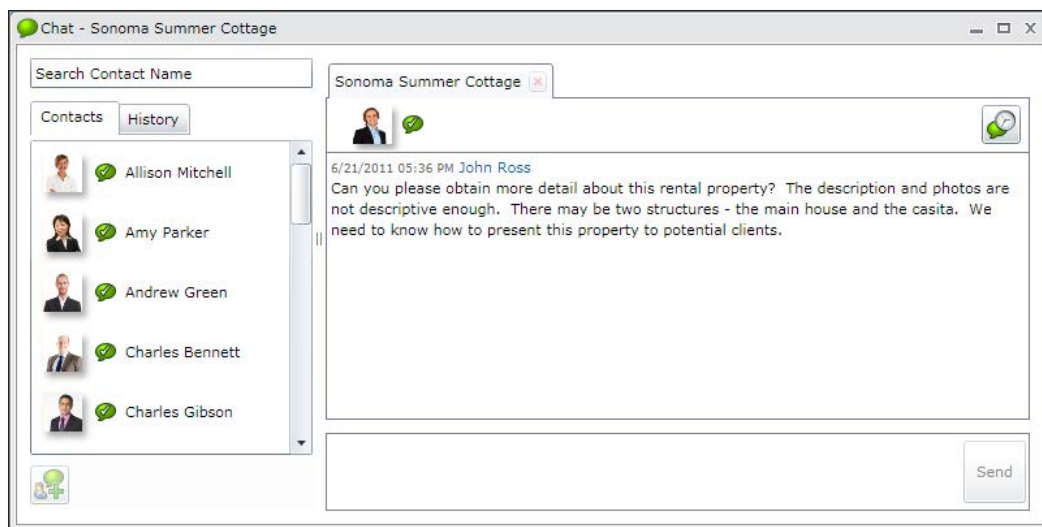



Figure 13. Chat message received

To include additional users in the chat:

- © Select a user from the contacts list and click .

In this example (Figure 14), John and Daniel are participants in the chat with Sofia. Sofia sends a message to Daniel. As a participant in the chat, John can also view the message and respond. Note that participants do not see their image and presence icon when viewing the chat; therefore, Sofia does not see her image and presence icon.

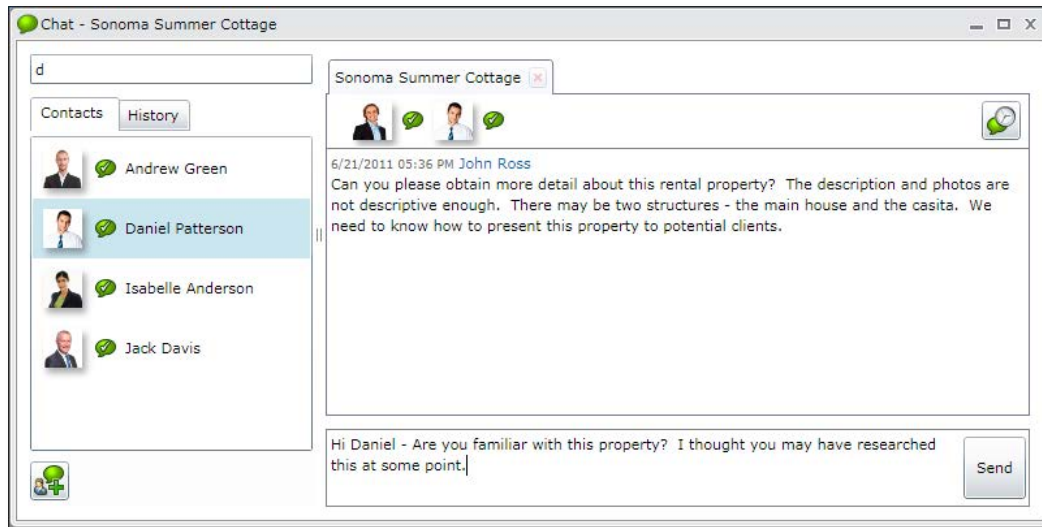


Figure 14. Include additional users

This is how the chat session appears to Daniel (Figure 15). Daniel can see John and Sofia in the participant list; he can view the messages and participate in the chat session.

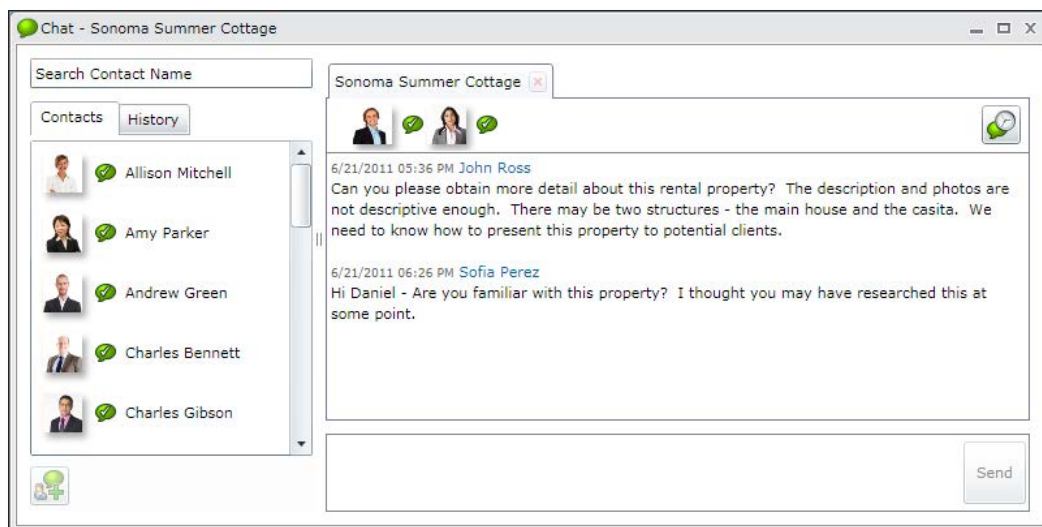


Figure 15. View of chat session

Note that the chat entries for each participant display the user name in light blue. In this example, Daniel can see a message by John and a message by Sofia. Any messages that Daniel submits shows his name in light grey.

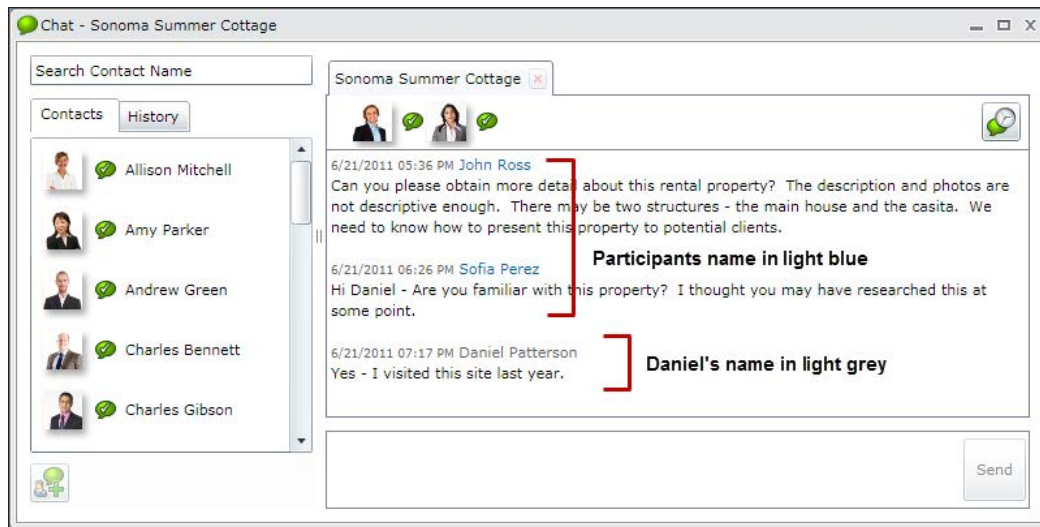


Figure 16. Names in light blue and grey

Responding to a Chat Notification

The examples in this section reflect users who specialize in travel consulting. The context of the chat example, *Cruise Ship Ratings*, displays in the title bar of the Chat window. The participants in the example are Allison and Sarah.

The Personal widget has been configured for this example. Within the widget settings, the Widget Name and Address fields were configured to reflect the work context. Refer to the help topic *Personal Widget* for additional information about using the Personal widget.

Allison



Sarah



In this example, Sarah sends a message to Allison. This view (Figure 20) is from Allison's chat session.

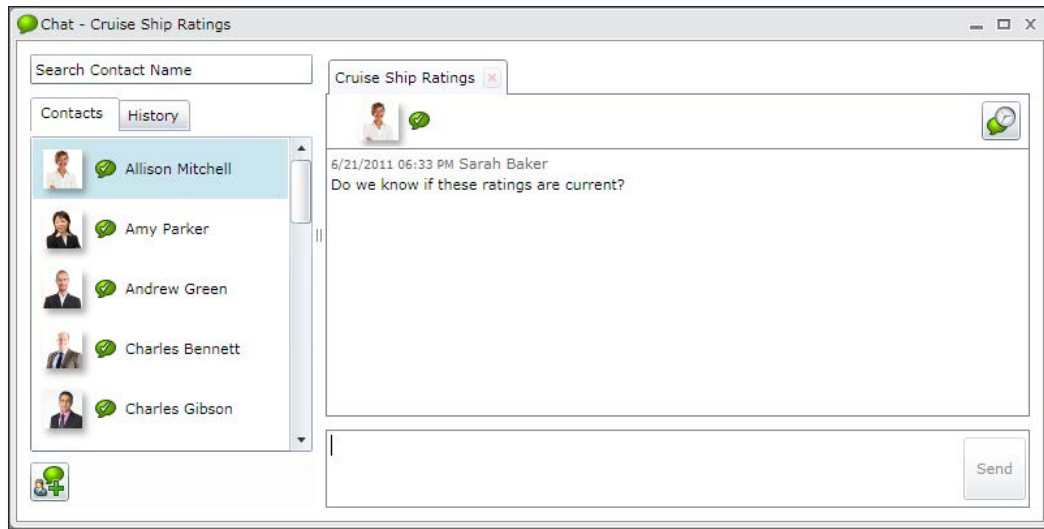


Figure 17. Chat message

Allison is notified of the initiated chat session through the bright green Chat icon on the Workspace toolbar (Figure 19). If this is the first time that Allison has received a message or if she has yet to read any messages, a privacy notice displays (Figure 18).

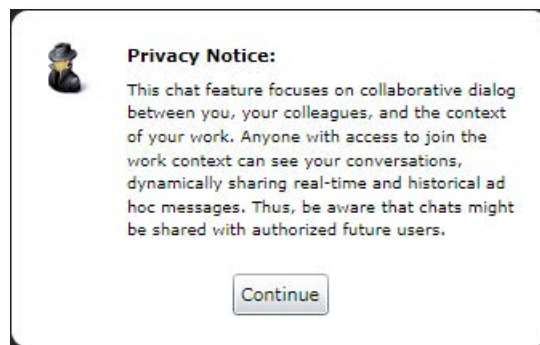


Figure 18. Privacy Notice

- © Read the notice and click **Continue**.

The purpose of this notice is to make users aware of the collaborative dialog within a context and to understand that chats can be shared with users who are authorized to the context, which is widget-based. Current and future users of the context can view conversations through chat history.

To view and respond to messages Allison must:

- © Click the green Chat icon in the Workspace toolbar.

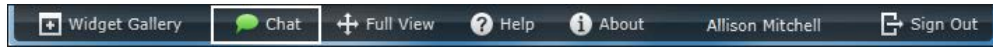


Figure 19. Chat notification in Workspace toolbar

The Chat window opens (Figure 20). The new message displays in the message area. In this example, Allison views the message sent by Sarah. This view is from Allison's chat session.

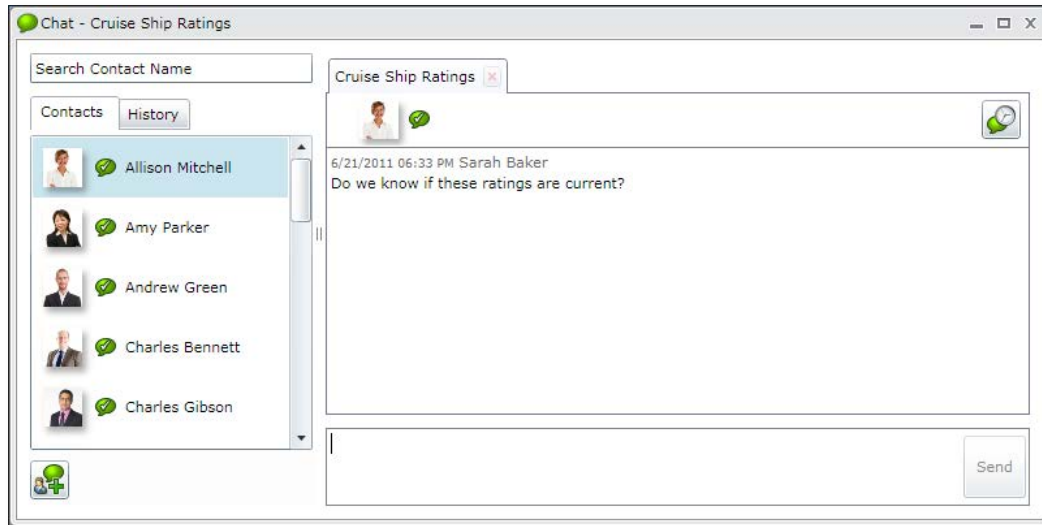


Figure 20. Chat message

- © To respond, type a message in the message composition area and click **Send** or press **Enter**. In this example, Allison responds to Sarah's message.

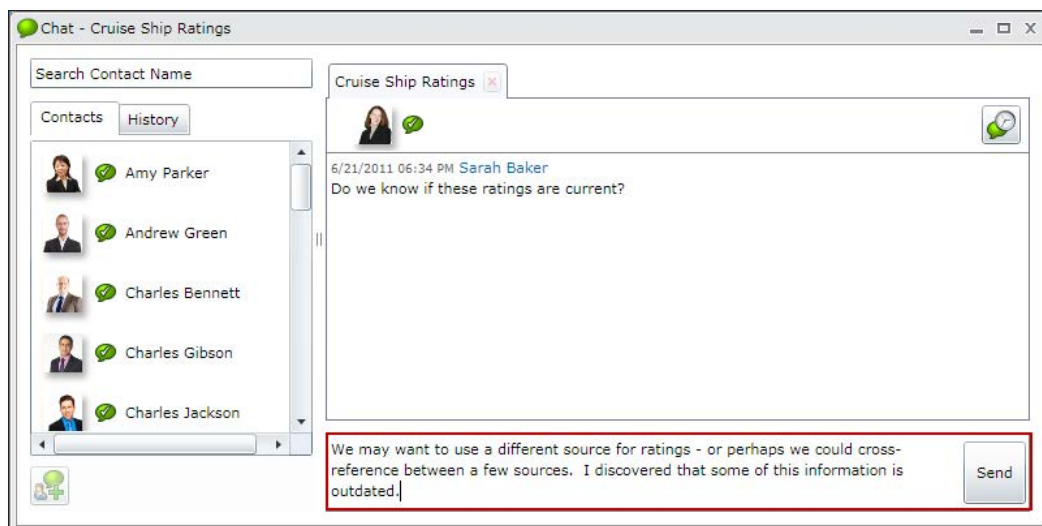


Figure 21. Responding to a message

The new message displays in the message display area with date, time, and name of the user who sent the message. This example shows two messages: the first message was sent by Sarah and the

second message was sent by Allison. This view is from Allison's chat session, as Sarah is the participant. Allison cannot see her image and presence indicator in the participant list of her chat session.

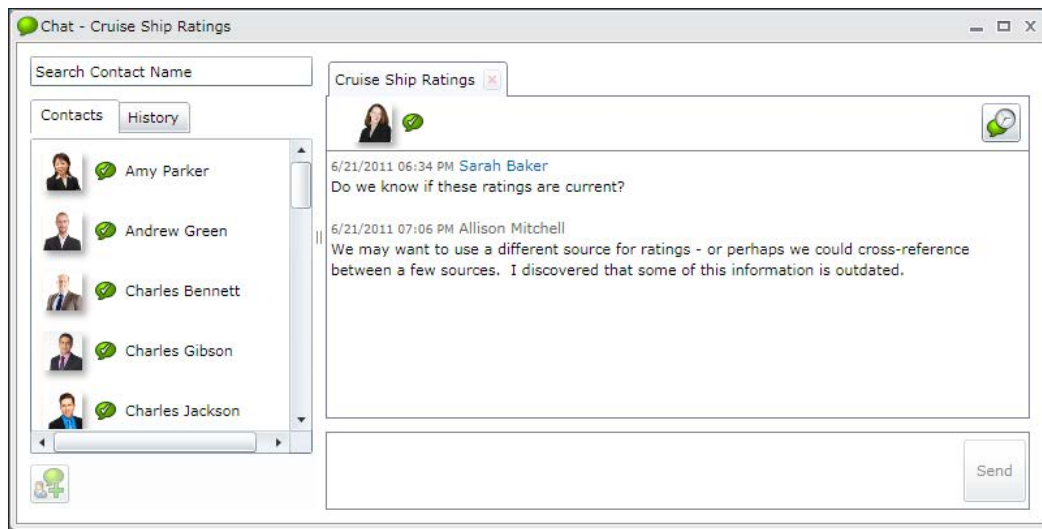


Figure 22. Message displays with date, time, and name of user

Joining an Ongoing Chat

Authorized users can participate in an ongoing chat through the Chat icon on the widget title bar. Once the chat window displays, the ongoing chat displays.

To join an ongoing chat without a notification:

- © Select a widget and click the Chat icon in the widget title bar.

The Chat window opens. If there is an ongoing conversation, messages display when the Chat windows opens.

In this example (Figure 23), Evelyn has joined a chat. She can view the context because she is authorized to this widget. When Evelyn opens Chat, the conversation displays immediately, ready for her to participate.

Anyone listed in the Contacts tab (authorized users) can view and join an ongoing chat.

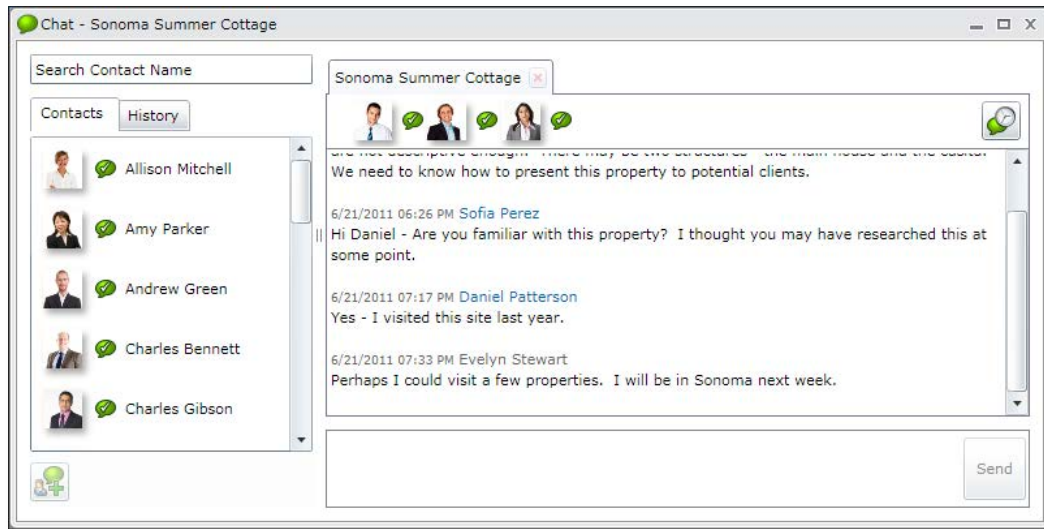


Figure 23. Joining an ongoing chat

Viewing Chat History

A history of chats by context is available through the History tab. Users can view the history of chats in which they have participated. If a user is authorized to the widget, but has not participated in a chat, then the chat history will not be available. History is viewed from the Chat icon on the Workspace toolbar or from the widget title bar.

To view chat history from the Workspace toolbar:

- © Click the Chat icon in the Workspace toolbar.

The Chat window opens (Figure 24). Note, that when there are no notifications, the message display area is blank and there are no contacts in the Contacts tab.

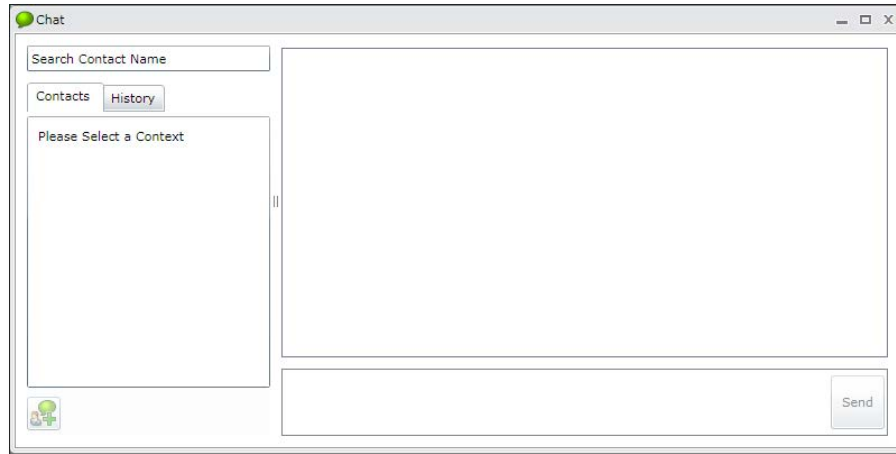


Figure 24. Chat window – open with no notifications

- © Click the **History** tab to display a list of contexts.

The context list displays (Figure 25). If you have not participated in a chat, the History tab list is blank, and displays *No History Available*.

Only chats that you have participated in display in the History tab. In this example (Figure 25), Cole has participated in multiple chats.

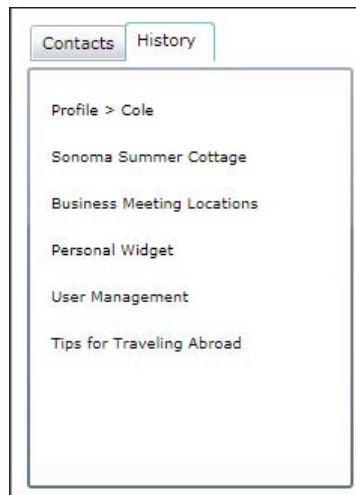


Figure 25. Context list within History

- © Select an entry in the context list.

In this example, *Business Meeting Locations* is selected (Figure 26). The chat participants, Charles and Amy, display under the context tab.

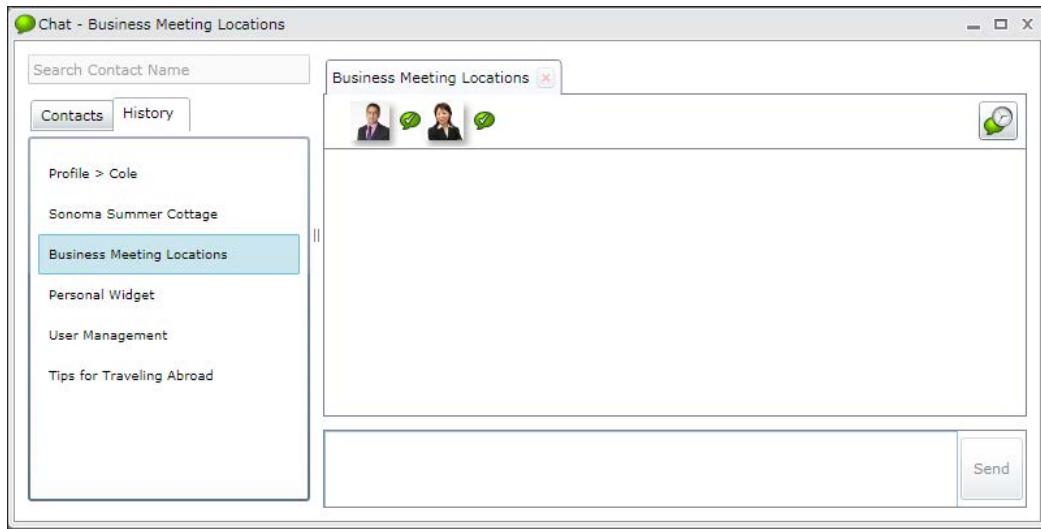



Figure 26. Context selected

- © Click  to view history for the selected context.
History of the chat displays in the message area (Figure 27).

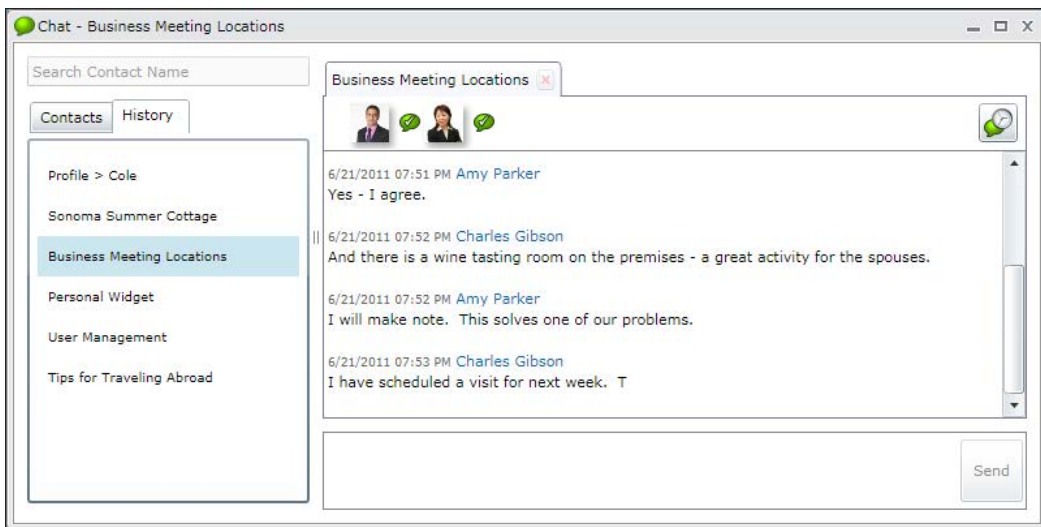


Figure 27. View of chat history

Chat entries are marked with date, time, and the name of the user who issued the message. Entries display in date and time order, with the most recent entry at the bottom. User names display in light blue with the exception of the user who is viewing history. In this example, the names for Charles and Amy display in blue, as the history is being viewed from Cole's chat session.

Linking to Resources and Returning to a Widget in the Context of a Chat

You can share links to resources within Chat and open a widget in reference to a conversation. These functions are described in this section.

Linking to Resources

You can paste links into a chat session for use by all Chat participants. The links are available during the session or later when participants view Chat History.

Links can be from within the Workspace or from outside the Workspace. When a link is sent from within the Workspace using Chat, activating the link uses the existing Workspace session. When a link is sent from outside the Workspace, a new browser instance or browser tab is invoked and the user must sign in to the Workspace. The Workspace page from which the widget link was copied is created for all chat session participants.

Returning to a Widget in the Context of a Chat

During a chat session, users can return to the live source of the information that is being discussed. Keep in mind that Chat is always in the context of the widget from which the session initiates. Participants in a chat can return to the widget in the context of the chat. The context is associated with the instance of the original URL that started the conversation.

Scenario: Linking to a Resource

The examples in this scenario reflect users who specialize in travel consulting. The context of the chat example, *River Cruise* is displayed in the title bar of the Chat window. The participants in the example are Sofia, Andrew, and Monika.

The Personal widget has been configured for this example. Within the widget settings, the Widget Name and Address fields were configured to reflect the work context. Refer to the help topic *Personal Widget* for additional information about using the Personal widget.

Sofia



Andrew



Monika



In this example, Sofia sends a message to Andrew. This view (Figure 28) is from Sofia's chat session. In her second message, Sofia sends Andrew a link to the website for Uniworld, which is a travel corporation that offers boutique river cruises to European destinations.

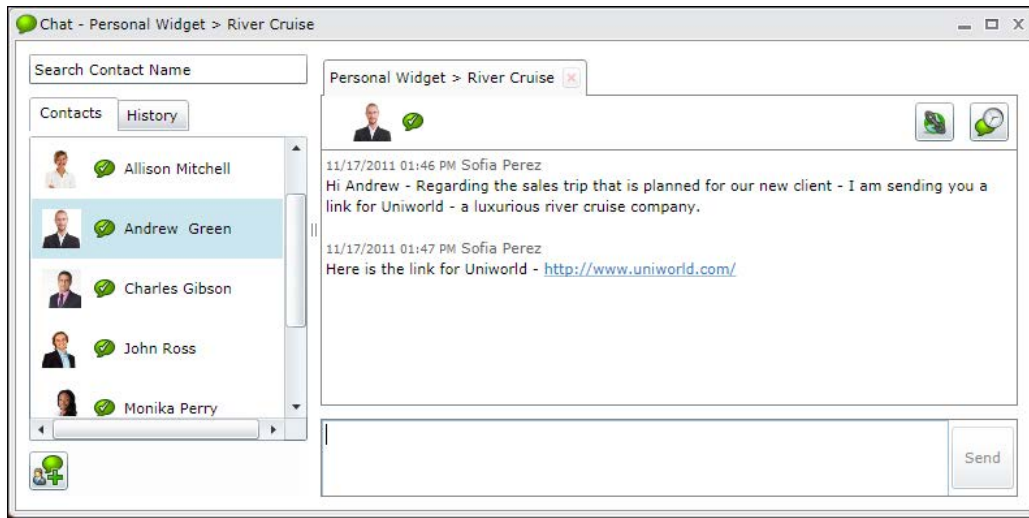


Figure 28. Link to an external resource within Chat

Andrew can link to the website and respond to Sofia about the travel arrangements.

- © To link to a resource within Chat, click the provided link.

In this example (Figure 29), the link is for an external resource, outside of the Workspace. Andrew can link to the resource, which opens a new instance of the browser. He can then comment to Sofia within the chat session about his ideas once he views the site.

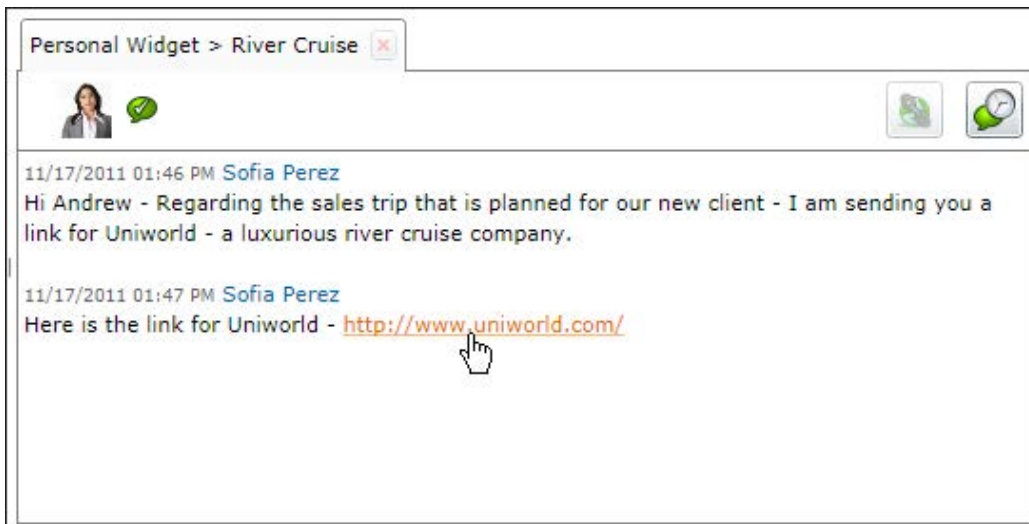


Figure 29. Linking to an external resource from Chat

Additionally, a link to an internal resource can be provided. In this example (Figure 30), Sofia includes Monika in the conversation and provides a link to the travel site using the Personal widget that Sofia previously customized for River Cruises.

- © To access the internal resource, click the provided link.

This example displays the link after Monika selects it (Figure 30).

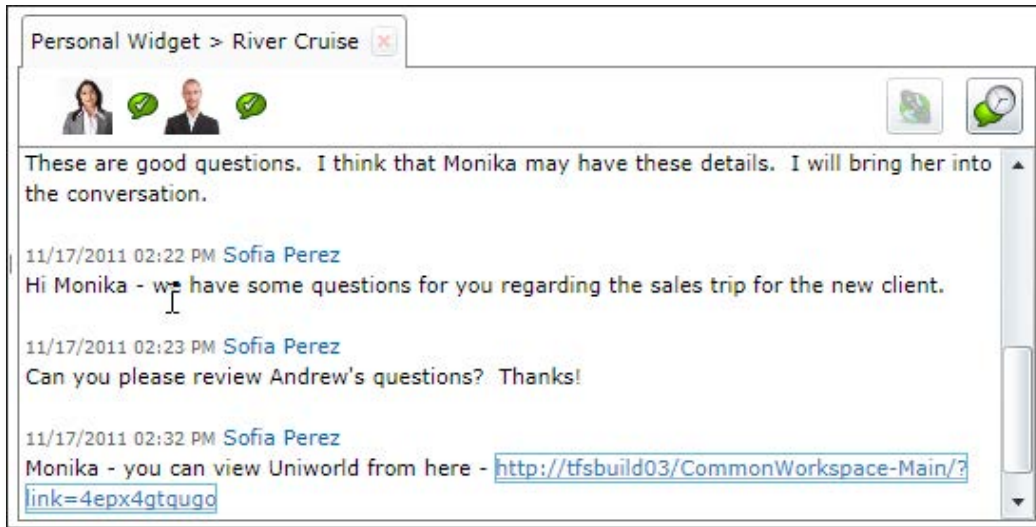


Figure 30. Linking to an internal resource within Chat

When Monika invokes the link, she can view the travel site (Figure 31).

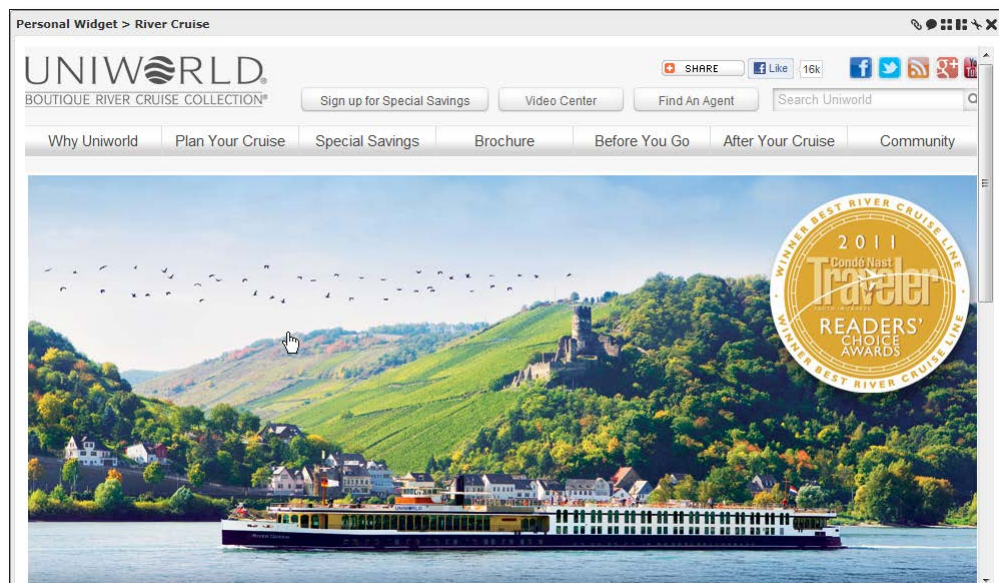


Figure 31. Viewing an internal resource using a Chat link

Scenario: Returning to the Widget in the Context of a Chat

The Open Widget function is similar to linking to a resource; however, Open Widget returns the user to the widget in the context of the chat. The Open Widget function opens the widget instance in the context of the conversation.

The Open Widget button is highlighted in the sample chat (Figure 32). This example shows the conversation from Sofia's chat session. The Open Widget button is available to all participants in the chat session.

To open the widget:

- © Click the Open Widget icon  (Figure 32).

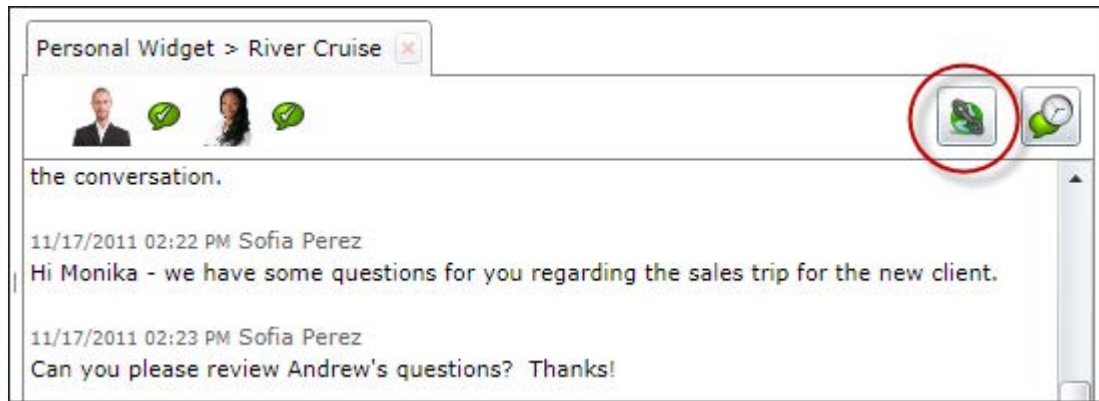


Figure 32. Open Widget function in Chat

The widget opens (Figure 33). You may need to minimize the chat session to view the widget.

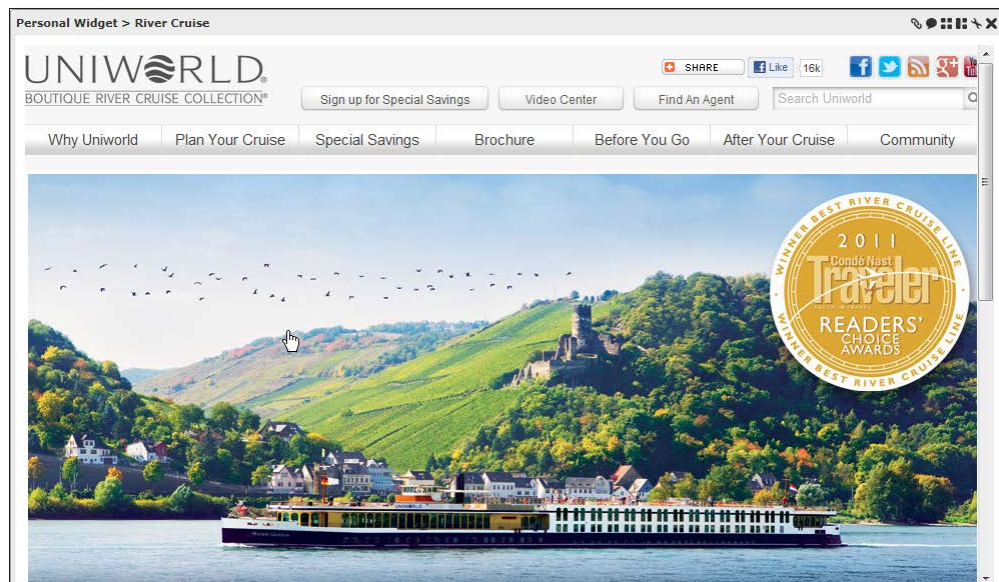


Figure 33. Viewing the widget in context from Chat

Authorization to View Linked Content

If a user is not authorized to view the linked content, an error message displays in a new Workspace page. The widget title bar displays *Access is denied*. Additionally, a message displays in the middle of the blank widget *You are not authorized to view the content!*

To determine the importance or significance of the error message, contact the original sender of the link or contact your manager if more privileges are required.

Notices

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