Social IT

Chat and Live Feed

Introduction

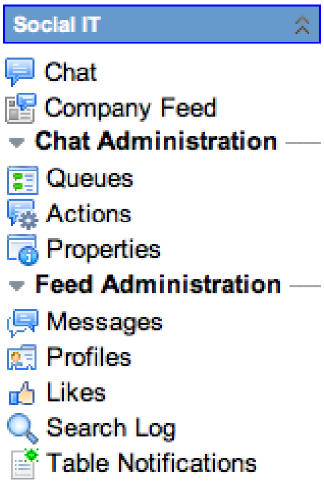
Social IT

Note: *This article applies to Fuji and earlier releases. For more current information, see Legacy: Chat* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**

Overview

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

- Improves communication throughout an organization.
- Uses familiar tools from everyday life; users do not need to learn complicated, new products.
- Provides a quick way for business users to contact the service desk.
- Empowers 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.
- Integrates task data with conversation history for quicker resolutions and improved knowledge management.



Social IT application

Several Social IT features are available in a ServiceNow instance:

- **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.

Getting Started with Social IT

To get started with Social IT in ServiceNow:

1. **Establish use guidelines.** Social media can improve communication and aid productivity. To get the most out of these tools, establish clear and simple social media guidelines that foster information sharing and a comfortable work environment.
2. **Activate the plugins.**
   - Chat plugin: activates the Chat and Help Desk Chat features.
   - Live Feed plugin: activates the Live Feed feature.
3. **Configure security settings.** Users must log in to use the Social IT features in ServiceNow. The standard system security settings and Social IT-specific security settings are available. To learn more about setting up these features, refer to the plugin activation pages.
   - Chat rooms may be *Public* (any user can join) or *Private* (only invited users can join).
   - Administrators can limit who can read chat messages on tasks and who can create chat rooms.
   - Live Feed is domain-separated (users can only read messages posted in their domain).

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/use/using-social-it/concept/c_Chat.html

Chat

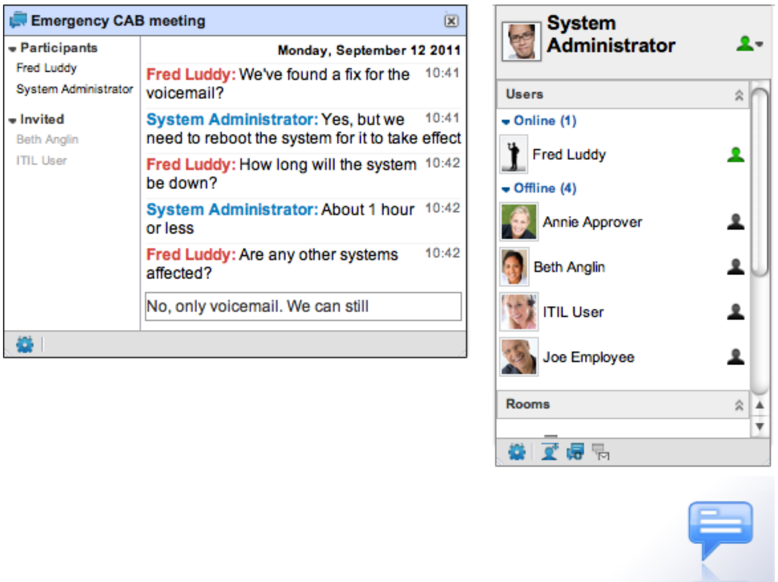
Note: *This article applies to Fuji. For more current information, see Chat* [1] *at* http://docs.servicenow.com The Wiki page is no longer being updated. Please refer to http://docs.servicenow.com for the latest product documentation.

Overview

Chat provides real-time communication via instant messaging between users in a ServiceNow instance. Features include:

- One-to-one chats (instant messaging) between users.
- Chat rooms for conversations with multiple users. Chat rooms may be *public* (any user can join) or *private* (only invited users can join).
- Chat rooms 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 access live support via instant messaging. Service desk staff can resolve basic issues in real-time or create incidents directly from chat requests for more extensive issues.

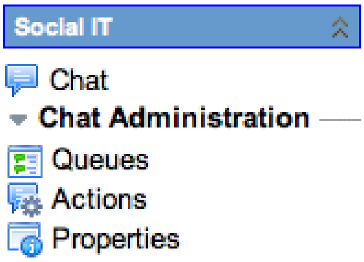
This article helps administrators activate and configure the Chat plugin.



Chat Desktop

Application and Modules

The Social IT application is added to the application navigator, with modules for using and administering instant messaging services.



Social IT application

For all users:

- **Chat:** Opens the chat desktop.
  - All users can have a conversation with one or multiple co-workers and view status updates. To learn more, see Using Chat.
  - Service desk staff can provide live support to users via instant messaging. To learn more, see Using Help Desk 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. To learn more, see Setting Up Chat Queues for Help Desk Chat.
- **Actions:** Opens the Chat Actions list. Define additional chat window menu items. To learn more, see Adding Actions to the Chat Window Menu.
- **Properties:** Opens the Chat Properties page. To learn more, see Properties.

Activating Chat

Before activating the Chat plugin, consider the installed components, dependencies, and impact.

- **Installed Components**: Include tables, a field, business rules, a script include, an application, a user role, properties, an event, and an email notification. For more information, review the components that are installed with chat.
- **Dependencies** (installed automatically): Social IT Infrastructure
- **Impact**: The plugin installs new features; it does not overwrite or impact current configurations. It has minimal impact on the system. However, when the system is configured to use short polling (see Properties) and the client is in debug mode, users may experience a performance impact. Polling also keeps the session alive when the chat desktop is open (see Modifying Session Timeout).

Click the plus to expand instructions for activating a plugin.

If you have the admin role, use the following steps to activate the plugin.

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.

   If the plugin depends on other plugins, these plugins are listed along with their activation status.
3. [Optional] If available, select the **Load demo data** check box.

   Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.
4. Click **Activate**.

Securing Chat

Accessing Chat Tables

By default, administrators and users with the chat_admin role can view all chat tables and can modify the following chat tables:

- Chat Actions [chat_actions]: Defines additional chat window menu items (see Adding Actions to the Chat Window Menu).
- Chat queue [chat_queue]: Defines groups and schedules for providing support via instant message (see Setting Up Chat Queues for Help Desk Chat).
- Chat room [chat_room]: Can be modified if necessary (such as to change a chat room from *public* to *private*), but should almost always be managed by system functionality.

Extending or modifying data in any other chat table is *not* recommended.

Restricting Chat Room Creation

To define the access rights for creating chat rooms:

1. Navigate to **Social IT > Chat Administration > Properties**.
2. Locate the property **Comma-separated list of roles that are allowed to create chat rooms.**
3. Enter user roles. A user must have one of the specified roles to create a chat room.

Restricting Access to Chat Activity on Task Records

Administrators can associate a chat room with a record, such as an incident, and add the chat messages to a **Chat Activity** journal field on the form.

By default, a user can read the chat messages for a room if either of the following is true:

- The room is public
- The user is a member of the room

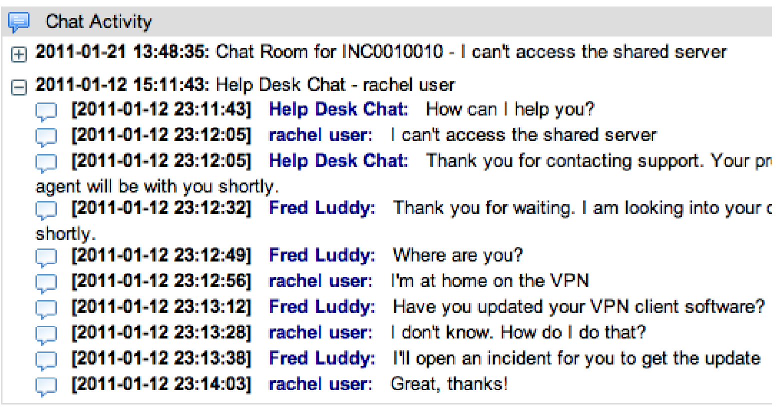
Read access to the messages displayed is handled by the access control list security operation `chat_messages_read` on the Chat room [chat_room] table. To change chat room message read access, modify the **Chat message** access control rule or create a new rule. For more information, see Using Access Control Rules.

Configuring Chat Activity on Task Records

Chat rooms can be linked to any task record in the following ways:

- Create a room from the record. See Creating Chat Rooms for Tasks.
- Create a record from a chat room, such as creating an incident from a Help Desk Chat. See Providing Support (Service Desk Staff).

To view the chat messages as a journal field, administrators can personalize the task record form to select the **Chat Activity** field. The maximum number of chat messages that are displayed by this field is 1000.



Chat Activity journal field

Enhancements

Calgary

The Calgary release includes chat properties that allow administrators to customize chat room sounds for all users. Administrators can upload .mpp or .ogg files for new chat room alerts when users enter the chat room and when users receive messages.

Live Feed

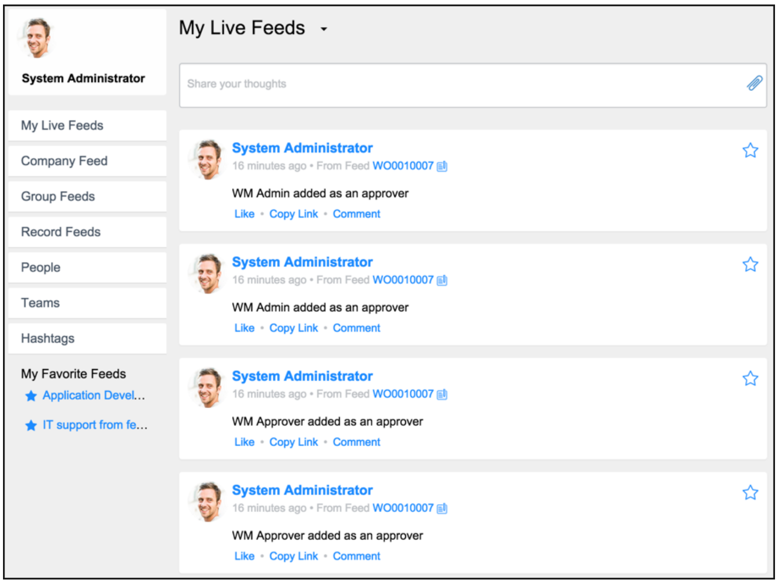
Note: *This article applies to Fuji and earlier releases. For more current information, see Live Feed* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**'

Overview

Live feed [2] 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 [3].



An example of the My Live Feeds feature

See Live Feed UI Overview for general instructions on using live feed features. See Using Live Feed to Work on Records for information on how to interact with live feed on record forms.

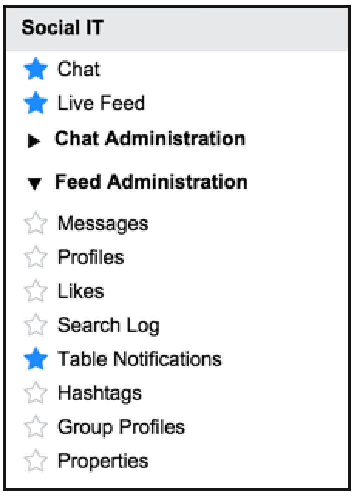
Note: *Many of these features are part of live feed v2, which is available starting with the Fuji release. Live Feed v2 is active for all new instances by default. If you are upgrading from an earlier version of ServiceNow, you need to activate live feed v2 to use these features. If you are using live feed v1, or have not activated live feed v2, see Legacy: Live Feed.*

Browser Support

The Live Feed v2 plugin does not support Internet Explorer 7 through 9. Users who access the instance from those browser versions can use Live Feed v1 functionality. Users who access the instance from browsers that are compatible with HTML5 can use Live Feed v2 functionality.

Menus and Modules

The **Social IT** application appears in the application navigator, with modules for using and administering live feed.



Social IT application

For all users:

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

Administrators and users with the live_feed_admin role see the following items under **Feed Administration**:

- **Messages**, **Profiles**, **Likes**, **Search Log**, **Hashtags**, and **Group Profiles:** provide access to tables for viewing live feed data (see New Tables). 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. To learn more, see Setting Up Live Feed Table Notifications.
- **Properties:** opens the Social IT Properties page.

Activating Live Feed

Live feed is active for all instances. Live feed v2 is active on all new instances starting with the Fuji release. For instances upgrading from a version prior to Fuji, an administrator can activate the Live Feed v2 plugin.

Click the plus to expand instructions for activating a plugin.

If you have the admin role, use the following steps to activate the plugin.

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.

   If the plugin depends on other plugins, these plugins are listed along with their activation status.
3. [Optional] If available, select the **Load demo data** check box.

   Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.
4. Click **Activate**.

Enhancements

Fuji

- Table notification filter conditions support changes, changesTo, and changesFrom operators.
- Knowledge article IDs added to live feed messages are automatically converted to links to a knowledge base in organization's instance.
- URLs added to live feed messages are automatically converted to links.
- Code added to live feed messages retains newline and tab formatting.
- Using My Feed, new messages and replies to existing messages can be sent to all users in the feed.
- Using Company Feed, replies to existing messages can be sent to all users in the feed.
- A new property, `glide.live_feed.auto_join_document_group`, enables automatic membership to a record feed whenever the associated document is visited and the user clicks Show Live Feed. This behavior is also active if the `glide.ui.show_live_feed_activity` property is set to true.

Eureka

- Domain separation is enabled for the Live Feed application. This enhancement adds a **sys_domain** field to live feed tables. For more information, see Domain Assignment.

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/use/live-feed/concept/c_GetStartedWithLiveFeed.html
[2] https://docs.servicenow.com/bundle/helsinki-servicenow-platform/page/use/live-feed/concept/c_GetStartedWithLiveFeed.html
[3] https://docs.servicenow.com/bundle/helsinki-servicenow-platform/page/use/live-feed/reference/r_LiveFeedUIOverview.html

Use

Using Chat

Note: *This article applies to Fuji and earlier releases. For more current information, see Legacy: Chat Use* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**

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.

To open the chat desktop, navigate to **Social IT > Chat**.

Features may vary depending on the version of your instance. If features appear different in your version, you can review a list of recent changes.

Note: *Service desk staff may also provide live support to other users via chat. See Using Help Desk Chat, Providing Support.*

Chat desktop

Updating Your Profile

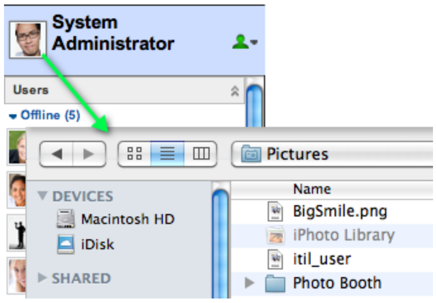
Your profile identifies your contributions to conversations. It is created automatically the first time you use chat and consists of:

- **Name**: from your user account in ServiceNow. Your name appears on your messages and in the member list of any chat room you join.
- **Picture**: select any picture. Your picture appears beside your name in other users' favorites list and at the top of your favorites list.

To update your profile picture:

1. Click your picture in the top of the favorites list.
2. Browse to the desired picture file and click **Open**.

Note: *Changes to your profile picture affect both chat and live feed if the Live Feed plugin is activated).*



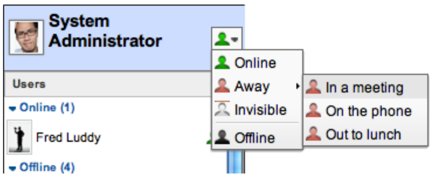
Profile picture

Updating Your Status

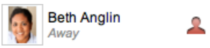
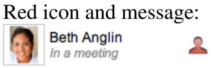
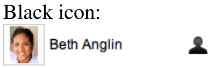
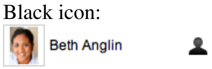
Your status lets other users know whether you are available to chat. Your current status is indicated by the color of the icon in the upper right of your favorites list, beside your name. View the status of other users in your favorites list.

To change your status:

1. Click the status icon beside your name.
2. Select a status (see table).

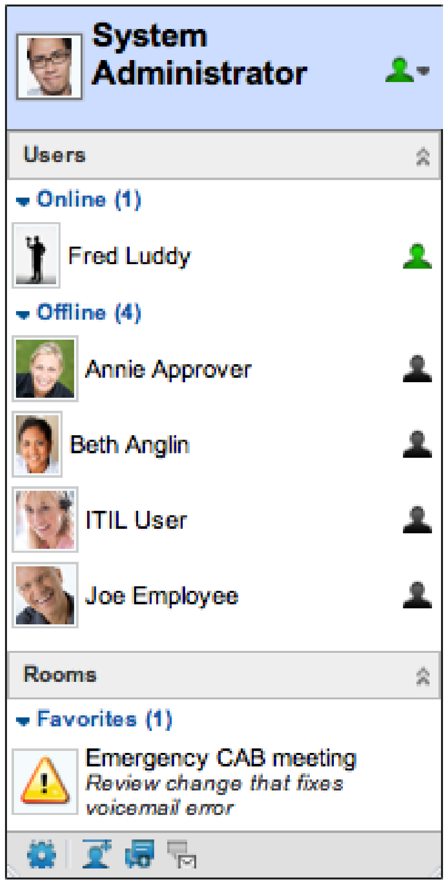


Select a status

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: 

Using Your Favorites List

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



Your favorites list

- 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.

To expand or collapse a section in the favorites list, click the section header or click the arrows ( ) on the section header.

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**):

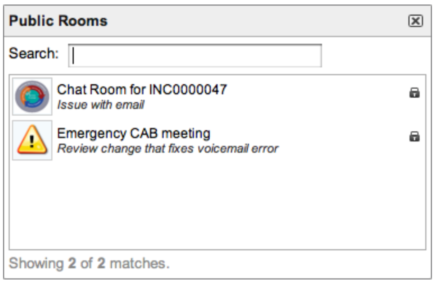
1. Right-click the Users section header or click **Options** ( ) on the toolbar.
2. Select **Show Online Users**.
   - Start a one-to-one chat with a user on the list by double-clicking a name.
   - **Send Message** or **Add To Friend List** by right-clicking a name.

View online users

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**. See Joining Chat Rooms.



View rooms

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**.

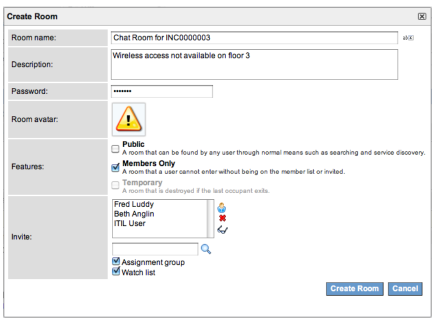
To start a chat with one available user, double-click the user's name on the online users list. See Viewing Online Users.

Send a message to start a conversation.

Creating Chat Rooms

To start a chat with multiple users from the chat desktop (requires access rights):

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.



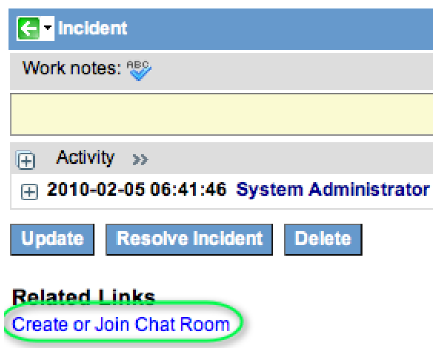
Create a chat room

Field	Value
Room name	Enter a name to appear on the chat window header or click the **Generate a unique room name** button ( ) to use a system-generated name. The default name for a room created from a task is **Chat Room for <Task Number>**.
Description	Enter a room description that appears under the name in the rooms list. The default description for a room created from a task is **<Short Description>**.
Password	Enter a password, if desired. If a password is specified, only users with the password can join the chat room.
Room avatar	Upload an image that appears beside the room name in the list of rooms. Click the picture and browse to the desired image file.
Features	Select all applicable check boxes: • **Public** if all users can see the room in the rooms lists. • **Members Only** if only invited users can join the room. • **Temporary** if the room is not saved once all participants have left. This feature is not available for rooms created from tasks; task chat rooms are always available on the task record.
Invite	Add invited users by using the glide list. For a room created from a task, you can also select all applicable check boxes: • **Assignment group:** invite all users in the assignment group for the task. • **Watch list:** invite all users on the watch list for the task.

Creating Chat Rooms for Tasks

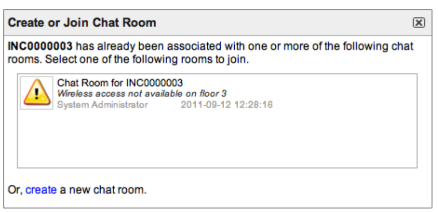
To start a chat with multiple users from a task record:

1. Open the record (example, an incident on which you are working).



Incident record

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.



Existing rooms for the task

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.

Joining a Chat

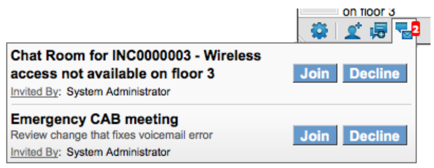
Joining One-to-One Chats

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**.



View invitations

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.

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.

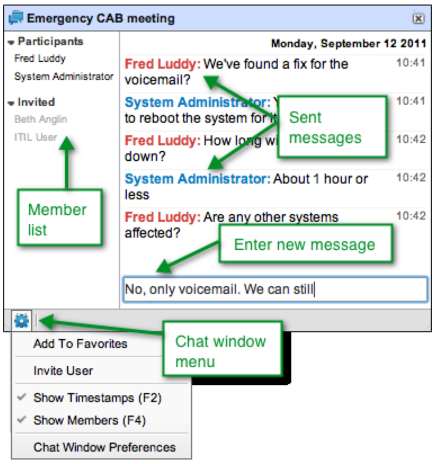
To join a chat room from a task record without an invitation:

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.

Using a Chat Window

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



Chat window

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.

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.

To send a **smiley face**, type a colon followed by a close parentheses (**:)**). When the message is sent, a smiley face () appears in place of the text. For more emoticons, see Sending Emoticons in Messages (Smileys).

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 following table. 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)	
:? :-?	

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.

Inviting Users into Chats

To invite another user into a chat:

1. Select **Invite User** from the chat window menu ( ).
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**.

   An invitation is sent to the selected user. One-to-one chats are automatically converted into temporary chat rooms.

Adding Favorite Rooms

To add a room to your favorites, click the chat window and select **Add To Favorites** from the chat window menu ( ).

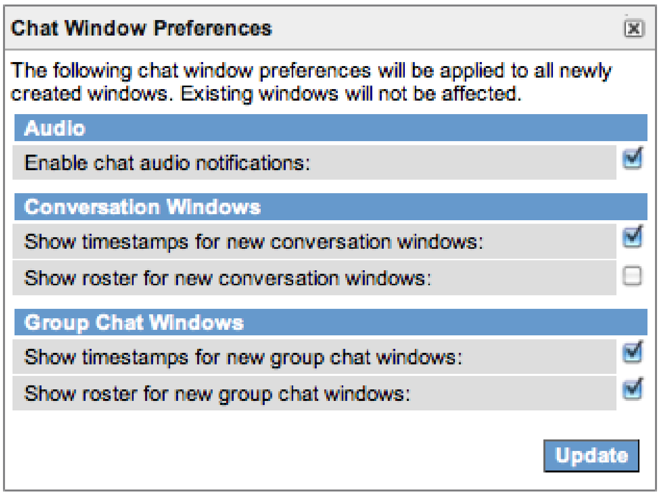
Removing a Favorite Room

To remove a room from your favorites, right-click the room name and select **Remove From List**.

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**.



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.

Deleting a Chat Room

Users with the chat_admin role can delete chat rooms. Note that when you delete a chat room, the system also deletes the records for any chat members and messages.

In the application navigator filter, enter **chat_room.list**. Delete multiple chat rooms from the list or open a chat room record and click **Delete**.

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/use/using-social-it/concept/c_UseChat.html

Using Help Desk Chat

Note: *This article applies to Fuji and earlier releases. For more current information, see Legacy: Help Desk Chat* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**

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.

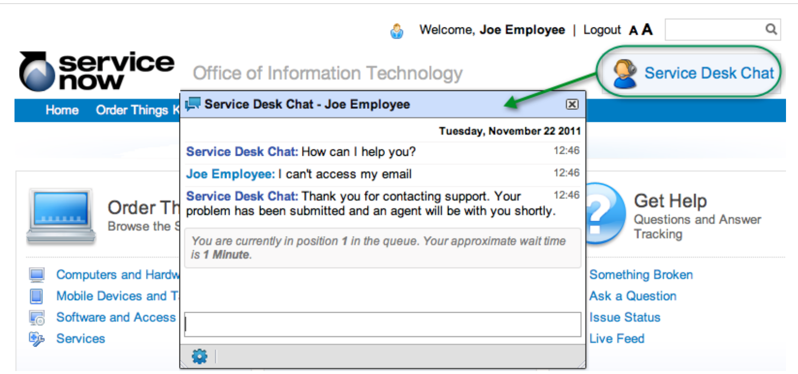
Getting Support (End Users)

To obtain live support via instant messaging:

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**.
    1. A message confirms that you have entered the chat queue and indicates your position and estimated wait time.
    2. 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.

Note: *Administrators can configure Help Desk Chat to be accessible on content management (CMS) pages.*



Chat Support

Providing Support (Service Desk Staff)

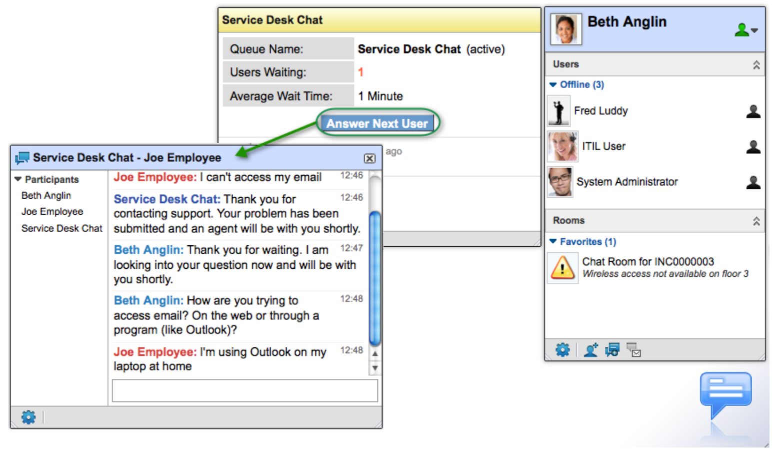
Staff who are assigned to Help Desk chat support can provide live support via instant messaging. Administrators and users with the chat_admin role can assign chat support staff (see Setting Up Chat Queues for Help Desk Chat).

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.



Chat Queue

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/use/using-social-it/concept/c_HelpDeskChat.html

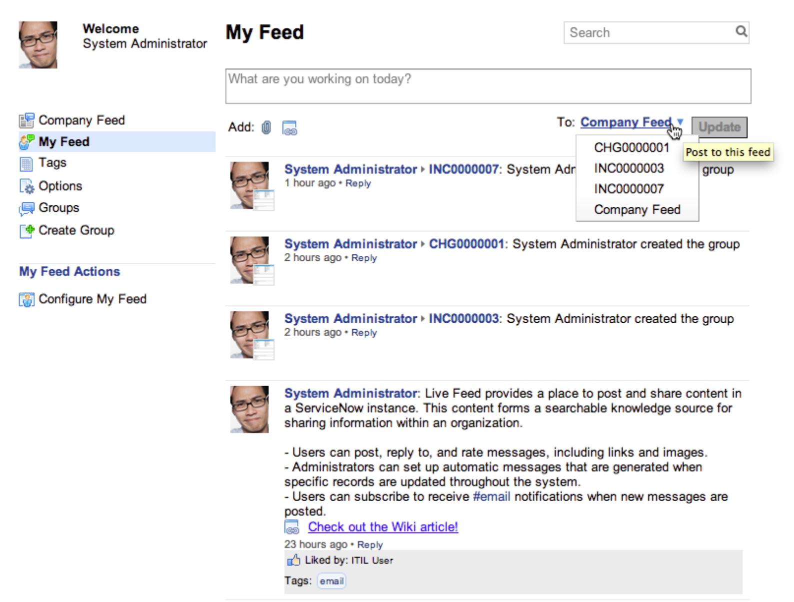
Using Live Feed

Overview

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. See Using Live Feed for instructions on how to use all live feed features. See Using Live Feed to Work on Records for information on how to interact with live feed on record forms.

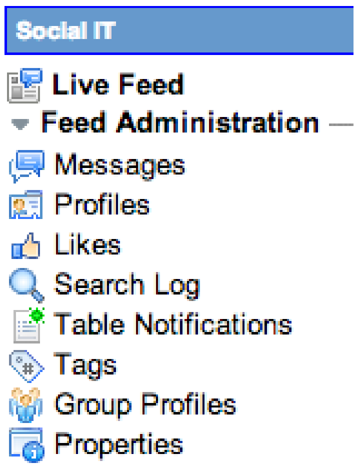


An example of the My Feed feature in live feed

Note: *The live feed functionality changed significantly in live feed v2 (starting with the Fuji release). This page describes live feed v1. For information on live feed v2, see Live Feed.*

Application and Modules

The **Social IT** application appears in the application navigator, with modules for using and administering live feed.



Social IT application

For all users:

- **Live Feed:** opens the live feed application for the current user. To learn more, see Using Live Feed.

Administrators and users with the live_feed_admin role see the following items under **Feed Administration**:

- **Messages**, **Profiles**, **Likes**, **Search Log**, **Tags**, and **Group Profiles:** provide access to tables for viewing live feed data (see New Tables). 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. To learn more, see Setting Up Live Feed Table Notifications.
- **Properties:** opens the Social IT Properties page.

Activating the Plugin

Before activating this plugin, consider the installed components, dependencies, and impact.

- **Installed Components:** Include an application, tables, business rules, a script include, events, email notifications, a script action, a user role, and security rules. For more details, see Installed Components.
- **Dependencies** (installed automatically): Social IT Infrastructure.
- **Impact:** The plugin installs new features; it does not overwrite or impact current configurations.

This plugin is automatically activated for new instances. For older instances, activate the plugin.

Instructions for activating a plugin.

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.
3. [Optional] Select the **Load demo data** check box.

   Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when first activating the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.

   If the plugin depends on other plugins, these plugins and their activation status are listed.
4. Click **Activate**.

Installed Components

New Tables

The following tables are added:

Display Name (Table Name)	Description
Live Feed Searches (live_feed_search)	Stores live feed text searches. Access at **Social IT > Feed Administration > Search Log** (administrator, text_search_admin, and live_feed_admin).
Live Tag Follows (live_tag_follow)	Maintains users' follow preferences for tags.
Live Follows (live_follow)	Maintains users' follow preferences for user feeds.
Live Group Profile (live_group_profile)	Stores group properties, including name, description, and public status.
Live Group Member (live_group_member)	Maintains the member lists for groups.
Link attachments (live_link)	Stores links and attachments that are added to messages (read access for administrator and live_feed_admin).
Messages Liked by (live_message_like)	Maintains *like* ratings for posts. Access at **Social IT > Feed Administration > Likes** (administrator, live_feed_admin, and chat_admin).
Live Message Tag (live_message_tag)	Stores messages associated with user-created tags (read access for administrator and live_feed_admin). Appears as a related list on Live Tag records.
Live Messages (live_message)	Stores messages. References sys_user table. Access at **Social IT > Feed Administration > Messages** (administrator and live_feed_admin).
Live Profiles (live_profile)	Stores user live feed profiles. References sys_user table. Access at **Social IT > Feed Administration > Profiles** (administrator and live_feed_admin).
Live Table Notification (live_table_notification)	Generates automatic table notifications, such as when a user reads live feed for the first time and when a high priority incident is opened. Access at **Social IT > Feed Administration > Table Notifications** (administrator, chat_admin, and live_feed_admin).
Live Tag (live_tag)	Maintains user-created tags. Access at **Social IT > Feed Administration > Tags** (administrator and live_feed_admin).

Business Rules

The following business rules are added:

- **Feed Group Creator Becomes Admin:** designates the group creator as the group administrator.
- **live feed events:** runs on task insert, update, and delete. Triggers event associated with the **Live Feed Update** Script action that processes Live Table Notifications to auto-generate live feed messages.
- **Live feed group member update events:** generates a notification event when member state changes (invited, accepted, declined, left, rejected, request, request_accepted).
- **Live feed new group member events:** generates a notification event when new members are added.
- **live feed profile events:** runs on live_profile insert/update/delete, triggers event associated with the **Live Feed Update** script action that processes Live Table Notifications to auto-generate live feed messages.
- **Live message events:** runs on live_message, notification event trigger for new live messages.
- **Live message like events:** runs on live_message_like, notification event trigger for new like records.
- **LiveFeed Group Member Visibility:** ensures users can only see the members list for public groups and groups they belong to.
- **LiveFeed Group Profile Validation:** ensures that a public group is visible.

- **LiveFeed Group Profile Visibility:** ensures that the list of all groups only displays public groups, private groups that are visible, and groups the user belongs to.
- **LiveFeed Membership Changes:** enforces that only the group administrator and users with live_feed_admin role can manage membership for a group.
- **LiveFeed Single Group Membership:** ensures that a user is not added multiple times to the same group.

Script Includes

The following script includes are added:

- **LiveMsgUtil:** helper functions for working with live_message records.
- **LiveFeedFilter:** query filters for working with live_feed records.
- **LiveFeedUtil:** helper functions for working with live_feed records.

Events

The following events are registered:

- `live_message_like.inserted`: triggers an email notification when another user *likes* a message that a user posts.
- `live_message.replied`: triggers an email notification to all users in a conversation thread when a user posts a reply.
- `live_message.inserted`: triggers an email notification to subscribed users when a new message is posted.
- `live_feed.update`: triggers the Live Feed Update script action.
- `live_message.group_inserted`: triggers an email notification to subscribed users when a new message is posted to a group.
- `live_group_member.invited`: triggers an email notification when a user is invited to join a private group.
- `live_group_member.accepted`: triggers an email notification when a user accepts an invitation to join a group.
- `live_group_member.declined`: triggers an email notification when a user declines an invitation to join a group.
- `live_group_member.request`: triggers an email notification when a user requests to join a private group.
- `live_group_member.request_accepted`: triggers an email notification when a user's request to join a private group is accepted.
- `live_group_member.rejected`: triggers an email notification when a user's request to join a private group is rejected.
- `live_group_member.left`: triggers an email notification when a user leaves a group.

Email Notifications

The following email notifications are added:

- **Live Message Liked:** sends an email to the creator of a message when another user *likes* the message (*live_message_like.inserted* event).
- **Live Message Reply:** sends an email to all users in a conversation thread when a user posts a reply (*live_message.replied* event).
- **Live Message All Subscription:** sends an email to subscribed users when any message (new or reply) is posted.
- **Live Message New Posts Subscription:** sends an email to subscribed users when a new (not reply) message is posted.
- **Live Group Member Accepted:** sends an email when a user accepts an invitation to join a group.
- **Live Group Member Declined:** sends an email when a user declines an invitation to join a group.

- **Live Group Member Invited:** sends an email when a user is invited to join a group.
- **Live Group Member Left:** sends an email when a user leaves a group.
- **Live Group Member Request:** sends an email when a user requests to join a private group.
- **Live Group Member Request Accepted:** sends an email when a user's request to join a private group is accepted.
- **Live Group Member Request Rejected:** sends an email when a user's request to join a private group is rejected.
- **Live Message Group Subscription:** sends an email to subscribed users when a message is posted to a group.
- **Live Message Group Reply Subscription:** sends an email when a member replies to a message in a group.

Script Actions

The following script action is added:

- **Live Feed Update:** generates system messages when an update occurs on a table that is relevant to live feed.

User Roles

The following user roles are added:

Role	Description
live_feed_admin	Can manage live feed functions.
chat_admin	Can manage chat functions (if the Chat plugin is activated).

Security Rules (ACL) on Existing Tables

The following security rules (ACL) on existing tables are included:

Table	Description
sys_attachment	Allow users to read and write live feed and live profile attachments

Table Notifications

The following live feed table notifications are included:

- **User joined live feed:** *Active* by default.
- **High priority incident opened:** Not active by default.
- **Incident resolved:** Not active by default.

Properties

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

  To configure this property (Calgary release): navigate to the **Social IT > Feed Administration > Properties** page and modify the **Do not show messages that belong to a group on the Company Feed** option.
- `glide.live_feed.message_poll_interval`: how frequently live feed is updated with new messages.

To configure this property (Calgary release): navigate to **Social IT > Feed Administration > Properties**. Enter the polling value in the **Live message poll interval time in ms.** field.

- `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.

Scripted Web Services

This following scripted web service is installed:

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

Sample SOAP envelope

```
<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>
```

User Preferences

Live feed uses the following user preferences:

- **live_tag.feed.order:** tracks user's choice of tag display sorting.
- **live_message.feed.last_display:** tracks last feed user has viewed. The last viewed feed is displayed the next time the user opens live feed. The first time a user opens live feed, the Company Feed is displayed.

Security

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 (see Setting Up Live Feed Table Notifications).
- **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.

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

Domain Separation

Using domain separation with the Live Feed application allows administrators to keep user content within a specific domain. Parent and child domains define the live feed content that can be viewed and shared with other users.

- A user in a parent domain can see users and content within their domain and within all child domains that are lower in the domain hierarchy.
- A user in a child domain can see users and content within their domain but cannot see the parent domain or other child domains at the same level in the domain hierarchy.

For more information about parent-child relationships, see Data Separation.

Enabling Domain Separation for Live Feed

Domain separation for the Live Feed application is available starting with the Eureka release. For current users upgrading to Eureka, a **sys_domain** column is added to existing live feed-related database tables. For existing database records, the value of the **sys_domain** field is set to empty (global). This allows the new domain separation feature to work with existing live feed records.

For more information, see Domain Separation.

Showing or Hiding the Live Feed Application for a Domain

The administrator can show or hide live feed for a domain. This includes:

- Displaying live feed in the application navigator.
- Following a document feed for a record.
- Viewing live feed from a record.

For more information, see Enabling and Disabling Application Menus or Modules.

Using Live Feed with Domain Separation

All of the live feed features are available to users within a domain and work the same way, with some exceptions to visibility.

- **Posting and sharing content**
  - Users in a child domain can interact with other users in the same domain. This includes posting and replying to messages, deleting messages, attaching files and links, and rating content.
  - Users in a parent domain can interact with other users in the same domain and with users in any child domains. In addition to the above interactions, users in a parent domain can see and add messages to threads in any child domain. Messages that are added to child threads by parent users are given the visibility of the child domain, not the parent domain.
- **Viewing content**
  - Users in a child domain can view content that resides within their domain. This includes filtering by feed, sorting, searching, and viewing older messages.
  - Users in a parent domain can view content that resides withinin their domain and within any child domains.

  - Using My Feed shows messages, groups, and tags based on the user's domain. Showing another user's feed only shows posts visible in the current user's domain.
- **Using tags**
  - Tags are separated by domain. Users in a child domain can use all of the tag functions within their domain. This includes tagging messages, viewing available tags, changing tag names, and searching and filtering by tag.
  - Users in a parent domain can use all of the tag functions within their domain and can see tags in any child domains.
- **Using groups**
  - Groups are separated across domains. Users in a child domain can join and follow groups within their domain, and can invite other users within their domain to join groups. Users in a parent domain can join and follow groups that belong to their domain or to any child domains.
- **Exceptions to groups**
  - New groups are created in the user's domain. However, if the group has a record associated with it, then the group is created in record's domain.
  - New threads in an existing group are created in the domain of the existing group.
  - When a user is creating a new group from a document, if the document domain is not empty or global, set the group domain to be the document's domain.
  - For a document-generated group, when the domain of the document changes, the domain of all related live feed records changes as well.
- **Subscribing to email notifications**
  - Users can subscribe to email notifications from users and groups only within their domain.

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.
   - **Type:** *ui page*
   - **Operation:** *read*
   - **Name:** create one access control rule record for each of the following pages
     - live_feed
     - live_feed_small
   - 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 configure the form to add this field.
4. Click **Update**.

Group Security

Administrators can restrict who can create groups by modifying the following access control rule:

- **Table:** *Live Group Profile [live_group_profile]*
- **Operation:** *create*

Restricting Tag Renaming

Administrators can restrict who can rename tags by modifying the following access control rule:

- **Table:** *Live Tag [live_tag]*
- **Operation:** *write*

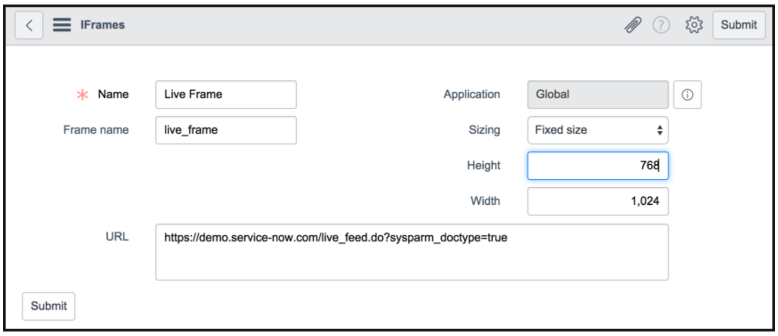
Providing Access to Live Feed from Content Management Pages

You can provide access to Live feed from pages built in the Content Management System (CMS). For example, allow an end user to access your company feed via the ESS portal.

The ESS Portal template includes the **Portal - Live page** and **Live Feed** dynamic block (requires the Live feed plugin). To provide access to Live feed from CMS pages, add the Live Feed dynamic block to a CMS page or include the **Portal - Live page** in a site.

To add Live feed in an iFrame:

1. Navigate to **Content Management > iFrames**.
2. Click **New**.
3. Enter the iFrame block details:
   - **Name**: enter a unique name (**Live Frame**)
   - **Frame Name**: enter a frame name (**live_frame**)
   - **URL**: *https://INSTANCE/live_feed.do?sysparm_doctype=true* where *INSTANCE* is your instance URL (example, *<instance name>.service-now.com*)
   - **Sizing**: select **Fixed Size** and enter height and width pixel dimensions according to the page on which you plan to display the feed (example, width of *1024* and height of *768*)
4. Click **Submit**.
5. Add the block to a page.



iFrame live feed definition

Enhancements

Eureka

- Domain separation is enabled for the Live Feed application. This enhancement adds a **sys_domain** field to Live Feed tables. For more information, see Domain Assignment.

Calgary

The following enhancements were added as of the Calgary release:

- Users can attach any type of supported file to a feed. With previous releases, users could attach images only.
- All live feed properties are now available to administrators in the **Social IT > Feed Administration > Properties module**.
- The **Live Feed** module now appears in the Self-Service application in addition to the Social IT application on the application navigator.

Using Groups in Live Feed

Overview

Groups allow users to create focused discussions in live feed. Users can view or join groups based on the access level of the group:

- **Public:** any user can see the name on the list of all groups, see the feed, and join. Messages appear on the company feed with a link to the group feed.
- **Private:** any user can see the name on the list of all groups, but only invited members can see the feed and join. Messages do not appear on the company feed.
- **Unlisted:** only invited users can see the name on the list of all groups, see the feed, and join. Messages do not appear on the company feed. Private groups may be listed or unlisted.

The group access level is configured by the user who creates the group. The group creator is also the group administrator. Any user can create a group; however, ServiceNow administrators can restrict the ability to create groups.

Note: *The live feed functionality changed significantly with live feed v2 (available with the Fuji release). This page describes live feed v1. For information about live feed v2, see Live Feed.*

Joining Groups (Group Members)

When you join a group, you become a group member. Group members can:

- View messages posted to the group (group feed). Non-members can also view the feed for a public group.
- View a list of group members.
- Invite another user to join the group.
- Subscribe to group email notifications.
- Leave the group.

To join a group:

1. Navigate to **Social IT > Live Feed**.
2. Click **Groups** ( ) and select **View all groups**.
   - If you received an invitation, click **Accept**. You can **Decline** the invitation if you do not want to join the group.
   - If the group is public, click **Join**.
   - If the group is private, click **Request**. The group administrator receives an email notification and must accept your request before you can join the group.

Automatic Group Participation

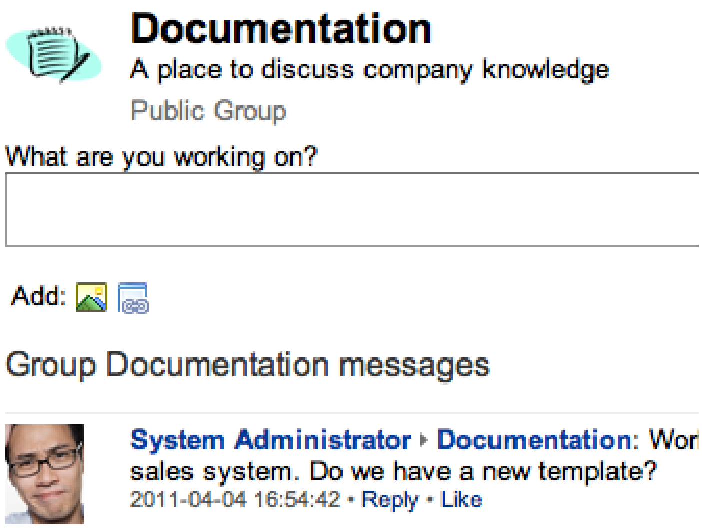
Users who view records on tables that have live feed enabled, such as the Incident table, automatically join the document group (Calgary Release). If the user creates a record on a table with live feed enabled, the user becomes the document group administrator. Document groups like these are not public. Any user who has access to the record also has access to the document group associated with that record.

Viewing Group Feeds

To view a group feed:

1. Navigate to **Social IT > Live Feed**.
2. Click **Groups** ( ). A list of groups you belong to and an option to view all groups appear.

- To view a group you belong to, select the group name.
- To view a public group you do not belong to, select **View all groups** and then click the group name. You must be a member to view the feed for a private group.

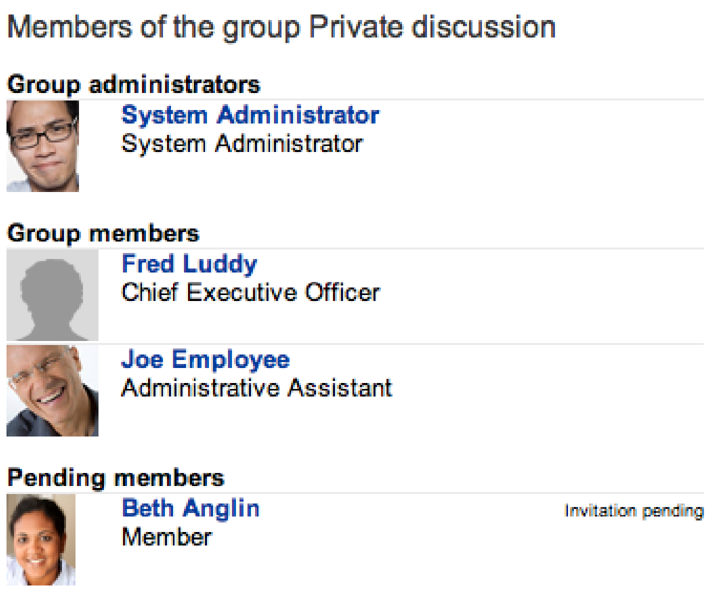


Group feed

Viewing Group Members

To view a list of group members:

1. Navigate to **Social IT > Live Feed**.
2. Click **Groups** ( ) and select the group name.
3. Click **Members** ( ). The list of group members appears, organized by group administrators, group members, and pending members.



Group members list

Inviting New Members

Any group member can invite another user to join a group.

1. Navigate to **Social IT > Live Feed**.
2. Click **Groups** ( ) and select the group name.
3. Click **Invite Member** ( ).
4. Begin entering a user name and select a user from the list, or click the reference lookup icon ( ) and select a user from the table.
5. Click **OK**. The invited user receives an email notification.

Subscribing to Email Notifications

To receive an email notification whenever a message is posted:

1. Navigate to **Social IT > Live Feed**.
2. Click **Groups** ( ) and select the group name.
3. Click **Subscribe** ( ).

You can **Unsubscribe** ( ) from a group to stop receiving email notifications.

Leaving Groups

To leave a group (give up membership):

1. Navigate to **Social IT > Live Feed**.
2. Click **Groups** ( ) and select the group name.
3. Click **Leave**.

Note: *If you leave a document group associated with a record, such as an incident, you automatically rejoin that group if you modify the associated record again (Calgary release).*

Creating Groups (Group Administrators)

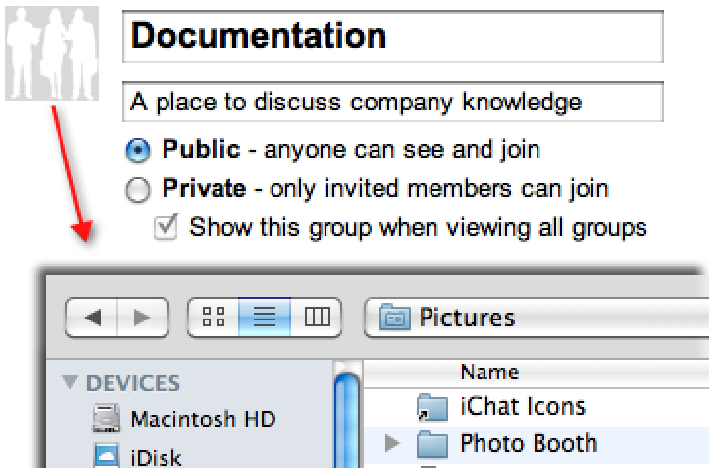
When you create a group, you become the group administrator. Group administrators can:

- Modify group properties
- Accept or reject membership requests
- Delete the group
- Perform all group member functions

To manually create a new group:

1. Navigate to **Social IT > Live Feed**.
2. Click **Create Group** ( ).
3. Enter a **Name** to appear at the top of the group feed and in messages posted to the group (links to the group feed).

4. Enter a **Description** to appear at the top of the group feed and under the group name in the list of all groups.
5. Configure the access level for the group:
   - For a public group, select **Public**.
   - For a private group, select **Private** and select the **Show this group when viewing all groups** check box.
   - For an unlisted group, select **Private** and clear the **Show this group when viewing all groups** check box.
6. [Optional] Select a picture for the group.
   1. Click the picture beside the group name.
   2. Browse to the desired picture file and click **Open**.
7. Click **Create**. The group is created with you as the group administrator.



Create a new group

Automatic Group Creation

If you create records on tables that have live feed enabled, such as the Incident table, a live feed group is automatically created at the same time (Calgary release).

Modifying Groups

To modify an existing group (group administrator only):

1. Navigate to **Social IT > Live Feed**.
2. Click **Groups** ( ) and select the group name.
3. Click **Modify Group** ( ).
4. Modify the group properties or picture.
5. Click **Update**.

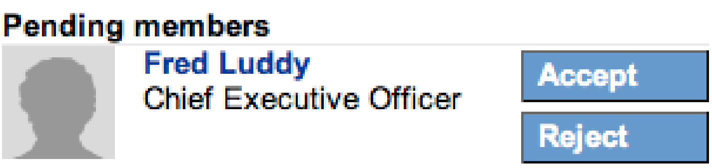
Managing Membership Requests

When a user requests membership for a private group, the group administrator receives an email.

To manage membership requests (group administrator only):

1. Navigate to **Social IT > Live Feed**.
2. Click **Groups** ( ) and select the group name.
3. Click **Members** ( ).
4. In the **Pending Members** section, click **Accept** or **Reject** for each membership request.

   The user receives an email notification to confirm whether the request was accepted or rejected.



Pending membership request

Deleting Groups

To delete a group (group administrator only):

1. Navigate to **Social IT > Live Feed**.
2. Click **Groups** ( ) and select the group name.
3. Click **Delete Group** ( ).

4. Click **Yes** to confirm deletion. The group is deleted from live feed. Messages posted to a private group are deleted; messages posted to a public group remain on the company feed without a group link.

If you delete a group that is associated with an active record, such as an incident that has not yet been closed, the group becomes active again when any user modifies that record or follows the record on live feed. The first user who modifies the record becomes the group administrator. The previous messages that existed as part of the document feed are not deleted (Calgary release).

Administration

Installed with Chat

Note: *This article applies to Fuji and earlier releases. For more current information, see Legacy: Installed with Chat* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.'**

Overview

The following components are installed with the Chat plugin:

- Fields
- Tables
- Properties
- Script Includes
- Business Rules
- Other

Demo data is available for chat. The demo data creates a chat queue called *Help Desk Chat* that is supported by the assignment group *Chat Support*. Additionally, the *Help Desk Chat* link is added to the header of the Employee Self-Service portal. To learn more, see Setting Up Chat Queues for Help Desk Chat.

Fields

Fields on the following tables are modified.

Display Name [Table Name]	Description
Header [content_block_header]	Adds the Help Desk Chat link to the ESS portal page.

Tables

Chat includes the following tables.

Table	Description
Chat Actions [chat_actions]	Defines additional chat window menu items. Access at **Social IT > Chat Administration > Actions** (administrator and chat_admin).
Chat Channel [chat_channel]	Stores chat channels, which are chats between members. This table is extended by Chat thread [chat_thread] (a one-to-one chat) and chat_room (a multi-user chat).
Chat Channel Member [chat_channel_member]	Relationship table that associates channels and members.
Chat Message [chat_message]	Stores instant messages sent from any chat window.
Chat Presence [chat_presence]	Stores presence (status) information for a user.
Chat Queue [chat_queue}	Stores the groups and schedules for providing support via instant message. Defined at **Social IT > Chat Administration > Queues** (administrator and chat_admin).
Chat Queue Entry [chat_queue_entry]	Stores user requests for live support. Extends Task [task]. On a chat queue record, the **Chat queue entries** related list displays the entries that are associated with that chat queue.
Chat Room [chat_room]	Stores chat rooms (multi-user chat). Extends Chat channel [chat_channel].
Chat Roster [chat_roster]	Maintains users that are associated with a user's My Friends list.
Chat Roster Member [chat_roster_member]	Tracks users that are members of a chat room.
Chat Thread [chat_thread]	Stores one-to-one chats. Extends Chat channel [chat_channel].
Live Headline [live_headline]	Sends system messages. For example, the system may send a message when a user enters or leaves a chat room.
Live Poll Message [sys_live_message]	System table that stores and manages chat messages.
Live User [sys_live_user]	System table that stores and maintains chat users.
Stores the last live sequence number [sys_live_last_sequence]	Stores the last sequence ID.

Properties

Chat includes the following system properties.

Name	Description
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. • **Type:** string • **Default value:** assignment_group,watch_list • **Location:** Social IT > Chat Administration > Properties
glide.chat.show_emoticons	false • **Default value:** true • **Location:** Social IT > Chat Administration > Properties
glide.chat.sound.message_received.mp3	Sound played when a message is received in chat (mp3). Available starting with the Calgary release. • **Type:** string • **Default value:** media/rcvmsg.mp3x • **Location:** Social IT > Chat Administration > Properties
glide.chat.sound.message_received.ogg	Sound played when a message is received in chat (ogg). Available starting with the Calgary release. • **Type:** string • **Default value:** media/rcvmsg.oggx • **Location:** Social IT > Chat Administration > Properties

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. Available starting with the Calgary release. • **Type:** string • **Default value:** media/button_toggle_on.mp3x • **Location:** Social IT > Chat Administration > Properties
glide.chat.sound.queue_beep.ogg	Sound played when a new user enters the chat queue (ogg). Available starting with the Calgary release. • **Type:** string • **Default value:** media/button_toggle_on.oggx • **Location:** Social IT > Chat Administration > Properties
glide.chat_room.create_roles	Comma-separated list of roles that are allowed to create chat rooms. • **Type:** string • **Default value:** itil • **Location:** Social IT > Chat Administration > Properties
glide.short_poll_delay	Short polling delay for XMPP requests. Enter a value in milliseconds. The minimum value is 250. 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. • **Type:** integer • **Default value:** 1000 (one second) • **Location:** Social IT > Chat Administration > Properties

Script Includes

Chat includes the following script include.

Name	Description
ChatUtils	Provides utilities for chat conversations.

Business Rules

Chat includes the following business rules.

Name	Table	Description
Chat Queue [Task.active] Updater	Chat Queue Entry [chat_queue_entry]	Sets the chat queue entry **Action** field to **Waiting** when the action changes.
SNC - Chat Queue Average Wait Time	Chat Queue Entry [chat_queue_entry]	When a chat queue entry is accepted, calculates the average wait time for the queue by averaging the last 20 chat queue entries.

Other

- **Event:** A new event called `chat.invite` is registered to trigger an email notification when users are invited into a chat room. This applies only if the chat room was created from an incident (via **Create or Join Chat Room**).
- **Email Notification:** An email notification called **Chat Room Invite** is added to send when users are invited to a chat room.

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/use/using-social-it/reference/r_InstalledWithChat.html

Setting Up Chat Queues for Help Desk Chat

Note: *This article applies to Fuji and earlier releases. For more current information, see Legacy: Set Up Chat Queues for Help Desk Chat* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.'**

Overview

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.

Defining 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**.

-- Chat Queue Details --

Field	Description
Name	Enter the name that end users see as a title for the queue.
Active	Select the check box to activate or clear the check box to deactivate the chat queue.
Assignment group	Select the group that contains the support staff for the chat queue. Every agent sees the chat queue on their chat desktop and can answer any user that is waiting in the queue. To assign staff members to the group, see Assigning Service Desk Staff to Chat Queues.
Schedule	(Optional) Select a schedule that defines when a queue is available (see Using Schedules). If the queue is always available, clear the field.
Question	Enter the initial question that end users see when they open a new Help Desk Chat. For example, *How can I help you?*
Confirm problem	(Optional) Enter the confirmation message that end users see when they enter an initial question. For example, *Thank you for contacting support. Your problem has been submitted and an agent will be with you shortly.*
Initial agent response	(Optional) Enter the message that end users see when an agent accepts their chat. For example, *Thank you for waiting. I am looking into your question now and will be with you shortly.*

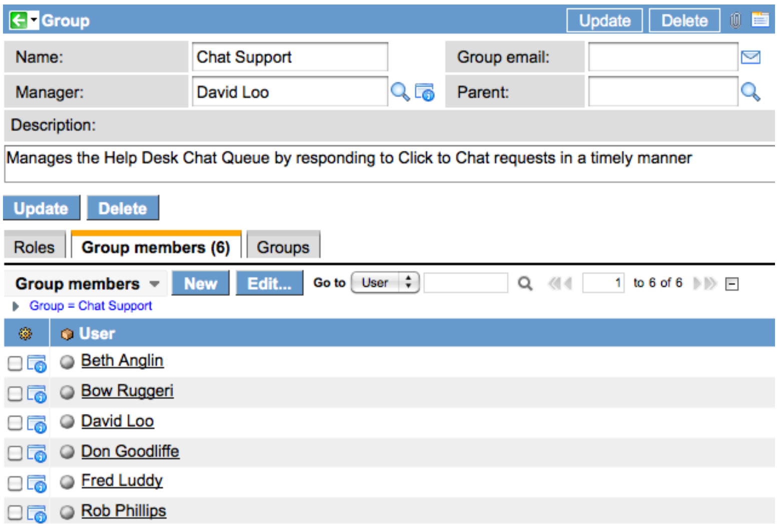
Not available	Enter the message that end users see when a Help Desk Chat request is not accepted because the queue is outside its scheduled availability (defined by the **Schedule** field).

Assigning Service Desk Staff to Chat Queues

Chat queue agents are Service Desk staff that are members of a chat queue's *assignment group*.

To assign agents to a chat queue:

1. Navigate to **User Administration** > **Groups**.
2. Select an existing assignment group or click **New**.
3. Enter or modify the group details (see Creating Groups).
4. Right-click the header and select **Save**.
5. In the **Group members** related list, click **Edit**.
6. Using the slushbucket, add support staff to the group.
7. Navigate to **Social IT > Chat Administration > Queues**.
8. Select the chat queue for which the group provides support.
9. In the **Assignment Group** field, select the group.



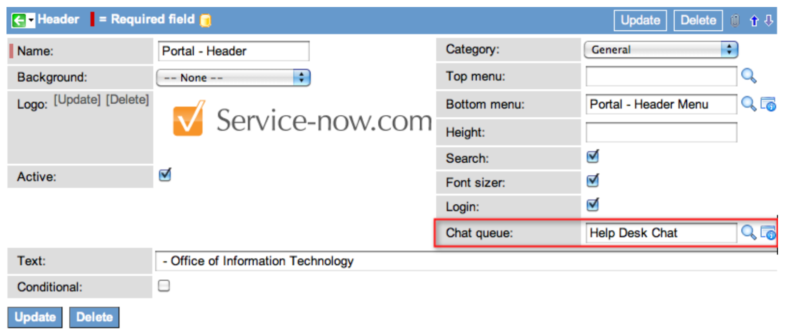
Chat Queue Assignment Group. All group members are chat queue agents.

Making Help Desk Chat Accessible to End Users

Users access live support from the Employee Self-Service Portal (ESS Portal). To make a Help Desk Chat queue accessible to end users, add a link to the ESS Portal (requires the Content Management Plugin).

To change the default link in the ESS header:

1. Navigate to **Content Management > Headers**.
2. Open **Portal - Header**.
3. In the **Chat queue** field, enter the chat queue that users access by clicking the link in the ESS header. Clear the field to remove the chat queue link.
4. Click **Update**.



ESS header link

To add a custom link elsewhere on the ESS portal:

1. Navigate to **Content Management > Static HTML**.
2. Click **New**.
3. Enter a **Name**.
4. In the **Static content** field, click **Toggle HTML Source** (HTML) to edit the field in HTML source mode.
5. Create a link to the desired Help Desk Chat queue (see Link Syntax).
6. Click **Submit**.
7. Add the new content block to the desired location on the portal (see Adding Content to the Page).

Link Syntax

To open a Help Desk Chat queue from a custom link on the ESS Portal, you must call the CustomEvent.fire method using appropriate arguments. Details of the API call and an example that generates an anchor link are provided below.

API Call:

```
CustomEvent.fire(LiveEvents.LIVE_EVENT,
LiveEvents.LIVE_WINDOW_JOIN_QUEUE_QUERY, CHAT_QUEUE_SYS_ID,
CHAT_QUEUE_SYS_NAME);
```

where the variables are:

- **CHAT_QUEUE_SYS_ID**: Specifies the sys_id for the chat queue.
- **CHAT_QUEUE_SYS_NAME**: Specifies the name of the chat queue (must match the value the **Name** field of the chat queue record).

Example: This example creates an anchor link that opens the *Help Desk Chat* queue.

```
<a href="#" onclick="CustomEvent.fire(LiveEvents.LIVE_EVENT,

LiveEvents.LIVE_WINDOW_JOIN_QUEUE_QUERY,

'c54f0abf0a0a0b452db84664f409c79c',
                                        'Help Desk Chat'); return false;">
  Help Desk Chat
</a>
```

Monitoring Chat Queues

Chat queues can yield useful Key Performance Indicators (KPI) for evaluating support effectiveness.

- **Queue Wait Time**: amount of time a user waits in the queue before a help desk agent accepts the request.
- **Percentage of Chats Abandoned**: users that exit the queue before an agent responds (user stopped waiting).
- **Percentage of Chats Accepted**: requests that are answered by an agent.

Note: *This information is not calculated automatically. Administrators may calculate these values based on data collected by chat queues.*

Monitoring Help Desk Chat Tasks

Help Desk Chat requests are tracked in the *Chat queue entries* table, which appears as a related list on the associated chat queue record. Because this table extends the *Task* table, administrators can take advantage of core task functionality. For example, administrators can attach Service Level Agreements (SLAs) to chat queue entries to evaluate the response time of Help Desk Chat support. To learn more about managing tasks, see Driving Tasks.

References

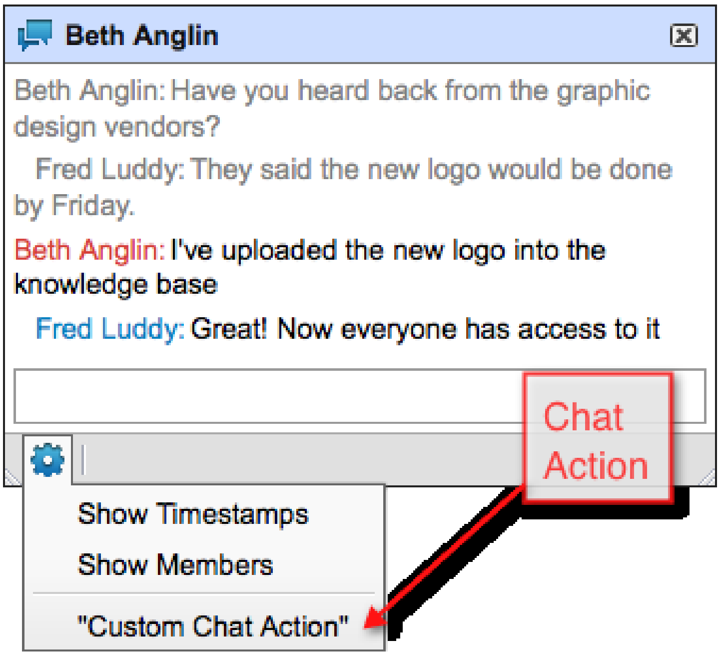
[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/use/using-social-it/concept/c_SetUpChatQueuesForHelpDeskChat.html

Adding Actions to the Chat Window Menu

Note: *This article applies to Fuji. For more current information, see Add Actions to the Legacy Chat Window Menu* [1] *at* http://docs.servicenow.com The Wiki page is no longer being updated. Please refer to http://docs.servicenow.com for the latest product documentation.

Overview

Chat actions are additional items that appear in the chat window menu (requires the Chat plugin). Administrators and users with the *chat_admin* role can define chat actions.



Chat window menu

Adding Actions to the Chat Window Menu

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**.

-- Chat Action Details --

Field	Description
Action Name	Enter a label for the action as it appears in the menu.
Active	Select the check box to activate or clear the check box to deactivate the action. Only active actions may appear in the menu.
Order	Enter the order in which the action appears in the menu. Standard menu items (such as **Show Timestamps**) always appear at the top of the chat menu, followed by chat actions in order.
Client Show Condition	Define the conditions under which this menu option appears. The show condition must set the pre-defined **answer** variable to a boolean value.
OnClick Action Script	Enter the JavaScript code that runs when the menu item is selected.

Example

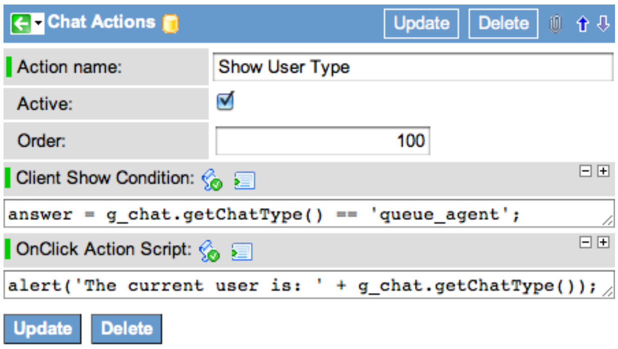
The following example demonstrates how to add a chat action that appears only on windows where the user is a *Help Desk Agent*. The action appears on the menu as **Show User Type** and opens a popup window that indicates a current user of *queue_agent*.

- **Action Name**: *Show User Type*
- **Active**: Select the check box.
- **Order**: *100*
- **Client Show Condition**:

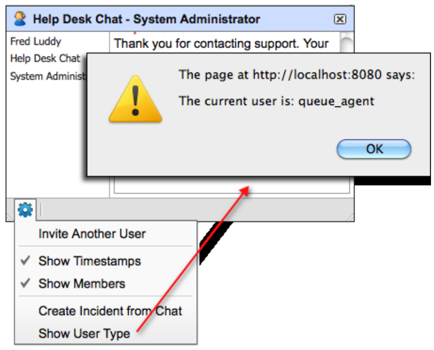
```
answer = g_chat.getChatType() == 'queue_agent';
```

- **OnClick Action Script**:

```
alert('The current user is: ' + g_chat.getChatType());
```



Chat action definition



Window menu item

API

The *g_chat* variable is a chat window object that is available in the **Client Show Condition** and **OnClick Action Script** of a chat action definition. The following table defines the available methods associated with this object.

Method Summary	
Return Object	**Details**
Array	**getActiveUsers** () **Returns the active users.** **Returns:** `Array` - Returns the active users.
String	**getChannelJID** () **Returns the channel JID, which is a sys_id for a record chat_channel table.** **Returns:** `String` - Returns the channel JID.
String	**getChatType** () **Determines the chat window type.** **Returns:** `String` - Returns one of the following values that specifies the type of user: • *queue_agent*: Help Desk Chat support agent • *queue_user*: Help Desk Chat end user • *group_chat*: The individual is a member of a chat room (multiple users) • *conversation*: The individual is a member in a private chat with another user

String	**getChatQueueAgent** () **Returns the sys_id for agent that is administering this thread.** **Returns:** `String` - Returns the sys_id of the chat queue agent.
String	**getChatQueueUser** () **Returns the sys_id for end user of the chat queue.** **Returns:** `String` - Returns the sys_id of the chat queue user.
String	**getThreadID** () **Returns the thread ID. This returns the same value as g_chat.getChannelJID().getID().** **Returns:** `String` - Returns the thread ID.

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/script/chat-api/task/t_AddingActionsToTheChatWindowMenu.html

Setting Up Live Feed Table Notifications

Overview

Live feed table notifications generate automatic live feed messages. These messages can be generated when specific actions occur in other tables if live feed v2 is active. 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.

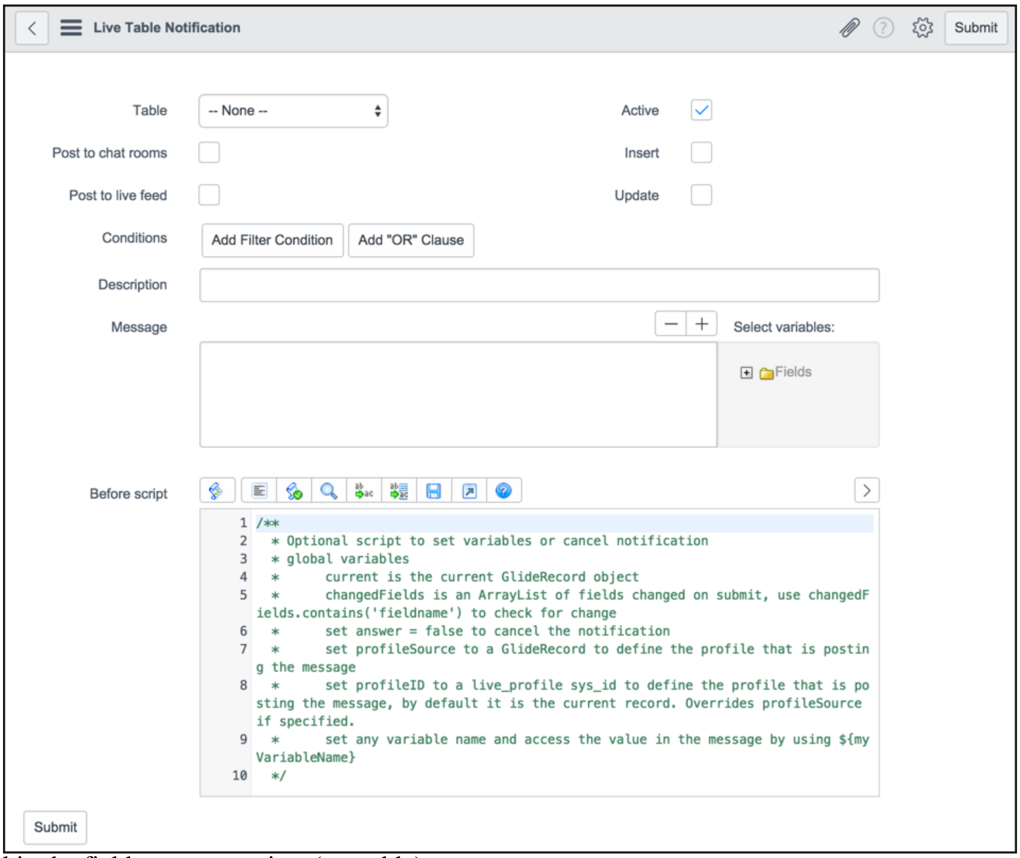
Administrators and users with the live_feed_admin or chat_admin roles can set up table notifications for any table in an instance. To view the table notifications that are available by default, see installed components.

Note: *Many of these features are part of live feed v2, which is available starting with the Fuji release. If you are using live feed v1, or have not activated live feed v2, see Legacy Live Feed.*

Setting Up Table Notifications for Task Tables

To set up a table notification:

1. Navigate to **Social IT > Feed Administration > Table Notifications**.
2. Click **New** or open a notification.



3. Fill in the fields, as appropriate (see table).
4. Click **Submit** or **Update**.

Field	Description
Table	Select the table for which notifications are generated. **Note:** *The list shows only tables and database views that are in the same scope as the table notification (starting with the Fuji release).*
Post to chat rooms	Select the check box to generate the notification in chat rooms that are associated with the record (task records only, requires that the Chat plugin is active).
Post to live feed	Select the check box to generate the notification on live feed. If **Record Feeds** are not set up and the **Feed group** field is blank, the notification is posted to the company feed.
Record Feeds	Enter the record feeds to which notifications are posted. Clear the field to post notifications on the company feed. This field is available only if **Post to live feed** is selected.
Application	Select the application that contains this record.
Active	Select the check box to enable the notification.
Insert	Select the check box to generate the notification when a record is inserted into the database.
Update	Select the check box to generate the notification when a record is updated.
Feed	Select the live feed team to which you want to post messages. This field is available only if **Post to live feed** is selected.

Conditions	[Optional] Create the condition that must be met to generate the notification. If you add a condition statement, the system evaluates the condition first and parses the **Before script** field only if the condition is met. You may choose to leave this field blank and include conditions in the script.
Description	Enter a description of the table notification.

Message	Construct the automatic message you want to generate. You can include field values as variables and a link to the record. To add a variable, position the cursor in the text and then click the field name in the **Select variables** field. To add a link to the record, enter **${URI}** in the message text. The following is an example of message syntax:
	`High priority incident opened: ${URI}`
	`Short description: ${short_description}`
	Note: For security reasons, any HTML code is automatically stripped out of a message before it is posted.

Before script	[Optional] Create a script that runs before a notification is generated. The script runs only if the condition evaluates to **true** or is empty. The following variables are available in the script: • **current**: the GlideRecord object that triggered the notification. • **changedFields**: an ArrayList of fields changed on submit. Use changedFields.contains('fieldname') to check for change. • **answer**: set answer to false to cancel the notification. • **profileSource**: set to a valid GlideRecord object to define the profile that is posting the message. • **profileID**: set to a live_profile sys_id to define the profile that is posting the message; by default it is the current record. Overrides profileSource if both are specified. Any custom variable created in the script is also exposed to the message in the form of `${myVariableName}`.

Setting Up Table Notifications for Additional (Non-Task) Tables

Table notifications are supported for all task tables by default. If you have the live_feed_admin or chat_admin role, you can set up a table notification for any other table.

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. Select and copy the text in the **Script** field.
4. Navigate to **System Definition > Business Rules**.
5. Click **New**.
6. Enter the following values at the top of the form:
   - **Name**: Enter a name, such as *live feed events for my table*.
   - **Table**: Select the table for which you are setting up a notification.
   - **Active** and **Advanced:** Select these check boxes.
7. In the **When to run** section, enter the following values:
   - **When**: Enter *before*.
   - **Insert**, **Update**, and **Delete**: Select the check boxes.
8. In the **Advanced** section, paste the script from the **live feed events** business rule (step 3) into the script box.
9. Click **Submit**.

   The **live feed events** business rule runs on the non-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.
10. Create a live feed table notification record for the new table as you would for a task table.

Setting Up Table Notifications for Related Feeds

In addition to being able to set up table notifications for a specific feeds, administrators can also set up table notifications to be sent out to related feeds. For example, a table notification can be set up so that whenever the status of a story in the SDLC application changes, a message is sent to the related sprint, release, or epic. The messages are posted only if the related feed already exists; it will not create a new feed.

For additional details, see Example 4. Table Notification to Related Feeds.

Examples

Example 1. Workaround Posted

This example demonstrates a table notification that generates an automatic message on live feed whenever a workaround is added to an open problem.

- **Table**: *Problem [problem]*
- **Active**: Select the check box.
- **Update**: Select the check box.
- **Post to live feed**: Select the check box.
- **Conditions**: *State is Open*
- **Description**: *Workaround Posted*
- **Message**:

```
${sys_updated_by} posted a workaround for ${URI}.
Short description: ${short_description}
```

- **Before script**:

```
// only post to live feed when the Workaround field changes
answer = changedFields.contains("work_around");
```

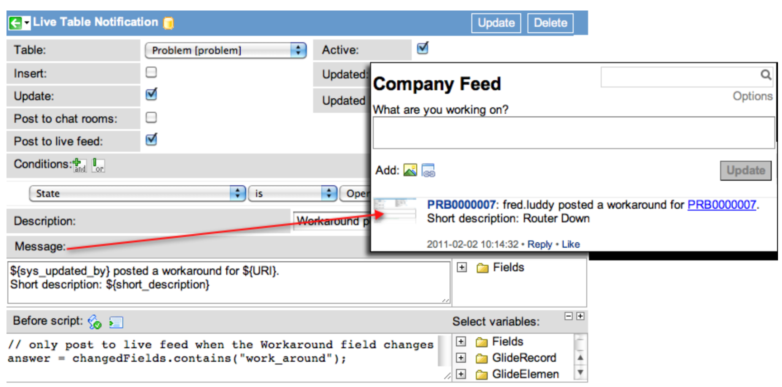


Table notification. Posts a message to live feed when a workaround is posted on an open problem.

Example 2. Problem Resolved (Advanced)

This advanced example demonstrates a table notification that generates an automatic message on live feed whenever a problem is closed. It also adds a message about the assigned user and posts the message from the assignment group profile instead of the problem record.

- **Table**: *Problem [problem]*
- **Active**: Select the check box.
- **Update**: Select the check box.
- **Post to live feed**: Select the check box.
- **Conditions**: *Problem State is Closed/Resolved*
- **Description**: *Problem Resolved*

- **Message**:

```
Problem ${number} - ${short_description} has been resolved. ${fixedByMsg}
```

- **Before script**:

```
//cancel if we didn't just change the problem state
if (!changedFields.contains("problem_state"))
answer = false;

//if we have an assigned_to value add a comment about who it was
//create a new variable fixedByMsg that we can access from the message
fixedByMsg = "";
if (!current.assigned_to.nil())
fixedByMsg = " Thank you " + current.assigned_to.getDisplayValue();

//make the message appear to come from the assignment group if we have
one
if (!current.assignment_group.nil())
profileSource = current.assignment_group.getRefRecord(); //need
GlideRecord object
```

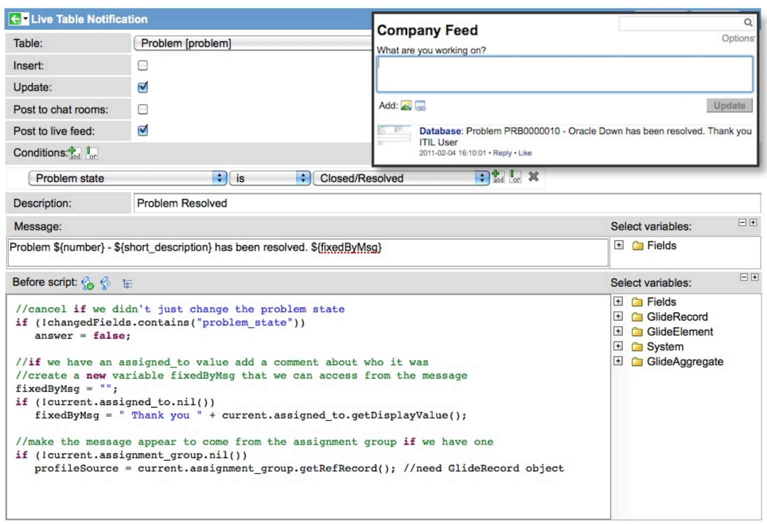


Table notification. Posts a message to live feed when a problem is resolved.

Example 3. Opportunity Won (Non-Task)

This example demonstrates a table notification on a non-task table. It generates an automatic message on live feed whenever a sales opportunity is won (requires the Sales Force Automation plugin).

Create a business rule on the Opportunity [sales_opportunity] table that matches the **live feed events** business rule on the task table.

Create a table notification with the following values:

- **Table**: *Opportunity [sales_opportunity]*
- **Active**: Select the check box.
- **Update**: Select the check box.
- **Post to live feed**: Select the check box.
- **Conditions**: *State is Closed Won*
- **Description**: *Opportunity won*
- **Message**:

```
${owner} closed a sale with ${account}!
```

- **Before script**:

```
//make the message appear to come from the assigned salesperson if
there is one
if (!current.owner.nil())
profileSource = current.owner.getRefRecord(); //need GlideRecord object
```

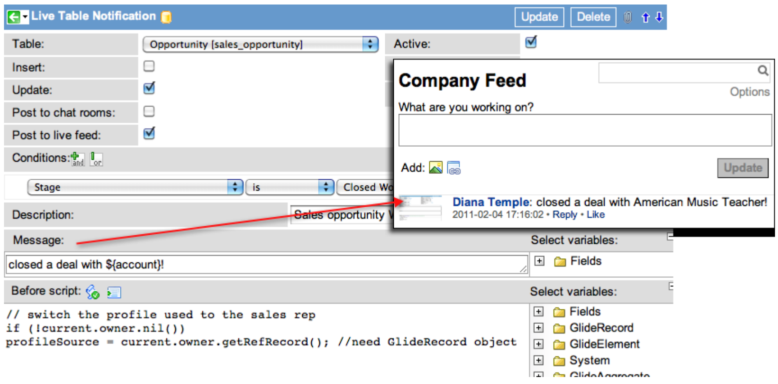


Table notification. Posts a message to live feed when a sales opportunity is won.

Example 4. Table Notification to Related Feeds

This example demonstrates table notifications to be sent out to related feeds. For this example, a table notification is set up so that whenever the status of a story changes to **Complete**, a message is sent to the related sprint, release, or epic. Messages are posted only if the related feed already exists; this notification does not create a new feed.

Create a table notification with the following values:

- **Table**: *Story [rm_story]*
- **Active**: Select the check box.
- **Update**: Select the check box.
- **Post to live feed**: Select the check box.
- **Record Feeds**: move **Sprint**, **Release**, and **Epic** to the **Selected** column.
- **Conditions**: *State changes to Complete*
- **Description**: *Story is done; message to Epic, Release and Sprint*
- **Message**:

```
${URI} status changed to ${state}
```

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