Collaboration

Introduction

Collaboration

Overview

The collaboration feature provides a chat interface optimized to facilitate collaborative work on tasks. Collaboration integrates seamlessly with other social IT and task management features within the ServiceNow system, such as visual task boards. The collaboration interface overlays the standard interface, which allows users to participate in conversations while they work. Features include:

- Individual conversations between users.
- Group conversations with multiple users.
- Conversations linked to records. Comments and work notes appear in conversations in real time and users can update the record directly from the conversation.
- Drag-and-drop sharing of links, files, and ServiceNow records.

Collaboration is available starting with the Fuji release when UI15 is enabled.

Note: *Collaboration does not replace chat but offers some of the same functionality.*

Browser Support for Collaboration

- Firefox version 26 and up
- Chrome version 39 and up
- Safari version 6.1 and up
- Internet Explorer version 10 and up (compatibility mode is not supported)

Menus and Modules

The Collaboration menu contains the following modules:

- **Collaborate:** Open the collaboration workspace.
- **Messages**
  - **Group:** View records of all group messages for administrative purposes.
  - **Peer-to-peer:** View records of all individual messages for administrative purposes.

Activating Collaboration

An administrator must activate the Collaboration plugin (com.glide.collaboration) to enable the collaboration feature. You may need to refresh the browser window to show the collaboration interface after activating the 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**.

Installed with Collaboration

Overview

The following components are included with Collaboration:

- Tables
- Properties
- Email Notifications

Tables

Collaboration includes the following tables for system use.

Name	Description
Collaborator [collaborator]	Stores a record for each conversation, for each conversation member.
Collaborator Presence [collaborator_presence]	Stores a record for each collaboration user to track availability.

Properties

Collaboration includes the following system properties. All of the properties are located on the System Property [sys_properties] table.

Name	Description
collaboration.email_interval	Sets the number of minutes the system waits before sending a collaboration notification email to an inactive user. • **Type:** integer • **Default value:** 3 • **More information:** Configuring the Email Notification Interval
collaboration.frameset	Determines whether the collaboration overlay is visible (enabled). • **Type:** true | false • **Default value:** true • **More information:** Disabling Collaboration
collaboration.polling_interval	Sets the number of seconds the system waits between polling for new collaboration messages. • **Type:** integer • **Default value:** 10 • **More information:** Configuring the Polling Interval
glide.live_feed.task_header_button	Determines whether the show live feed and show in collaboration icons are available in the form header of tables that have the `live_feed=true` dictionary attribute. The available choices are **both**, **live_feed**, **collaboration**, and **none**. • **Type:** choice list • **Default value:** both • **More information:** Configuring Record Conversations

Email Notifications

Collaboration includes the following email notifications.

Name	Description
Collaboration Offline Group Message(s)	Notifies offline users when there are new messages in group chats they are members of. Contains a link to open the conversation and a summary of the messages.
Collaboration Offline Message Bundle	Notifies offline users when there are new messages in direct chats. Contains a link to open the conversation and a summary of the messages.

Using

Using Collaboration

Overview

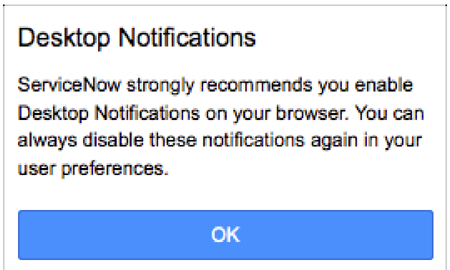
All users have access to collaboration, a convenient way to stay updated on all the people and documents you work with in a familiar chat interface. You can start using collaboration right away with virtually no setup. There are a few initial tasks recommended to get started. Familiarize yourself with the collaboration interface, which is intuitive and easy to use. Collaboration supports a few different types of conversations so you can use it as a social tool or a quick way to follow specific records.

Getting Started

The first time you use collaboration, decide whether you want to enable desktop notifications and upload a profile picture.

Enabling Desktop Notifications

Enable desktop notifications for collaboration if you want to receive collaboration alerts, such as new messages, even if ServiceNow is minimized or running in the background. Each time you sign in or refresh your instance, a dialog box prompts you to enable desktop notifications. Click **OK** to dismiss the prompt.



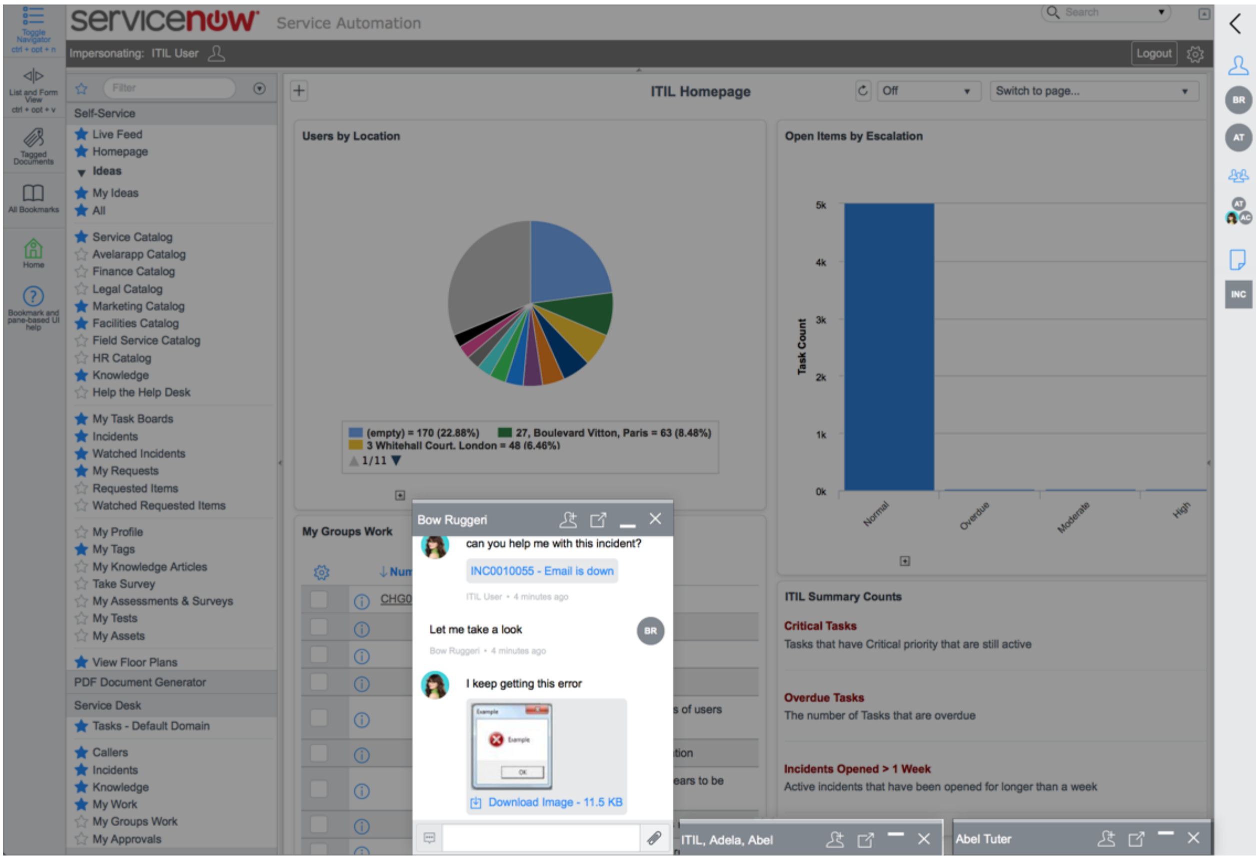
Your browser then prompts you to show notifications for the session. If you change your mind later, you can opt out of desktop notifications.

Uploading a Profile Picture

You can upload a profile picture in live feed to use as an avatar in conversations. Users who do not have profile pictures are represented by their initials. For instructions on updating your profile picture, see Updating Your Profile.

Using the Collaboration Overlay

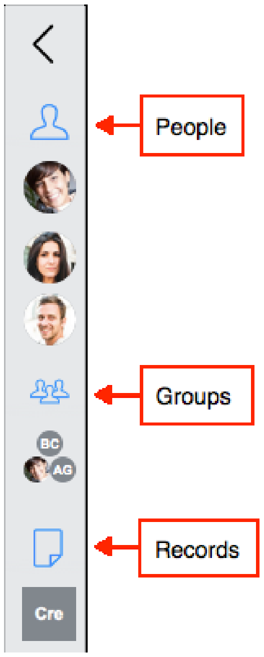
When collaboration is enabled, the *collaboration overlay* appears over the standard user interface. The overlay consists of a collaboration sidebar and any chat windows that are open.



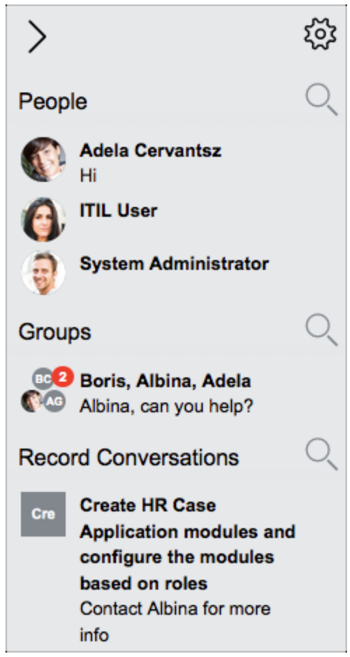
Note: *An administrator can disable the collaboration overlay so users can only use the collaboration workspace, a full-screen interface with additional collaboration tools.*

Collaboration Sidebar

The collaboration sidebar is the primary interface for collaboration. The sidebar is collapsed by default and is located on the right edge of the user interface. Click the arrow icon ( ) to expand the sidebar. Recent conversations with people, groups, and records appear under the respective sections of the sidebar.



Collapsed view of the collaboration sidebar



Expanded view of the collaboration sidebar

If you have unread messages in a conversation, a number appears on the avatar for the conversation. Click an avatar to open the conversation. Point to an avatar and click the X icon to remove the conversation from the sidebar.

Setting Collaboration Options

In the expanded view of the collaboration sidebar, click the gear icon ( ). The following options are available:

- **Enable Stream View:** All types of conversations are listed chronologically in a continuous stream rather than under their respective sections when this option is enabled.
- **Allow Web Notifications:** You receive desktop notifications when this option is enabled.
- **Default Email Permission:** You receive email notifications when this option is enabled. For more information, see Collaboration Email Notifications.

Chat Windows

Each chat window contains a header, a conversation area, and a text entry field. The following icons appear in the chat window.

Icon	Name	Description
	Add user	Add a user to the conversation.
	View document	View the record associated with the conversation. This icon is visible for record conversations only.
	New window	Open the conversation in the collaboration workspace, a full-screen window with additional collaboration tools.
	Collapse/Expand conversation	Hide or show the conversation. Alternatively, click the space between the conversation name and the upper row of icons.
	Close conversation	Close the chat window. The conversation history is preserved and appears if you reopen the conversation.
	Chat	Open a menu so you can select the **New VTB Task** option. This icon is available only when there is a valid visual task board associated with the conversation.
	Attach file	Attach and send a file. Select one or more files and click **Open**. You can also add an attachment by dragging and dropping it directly in the conversation.

Drag and Drop

Collaboration supports drag and drop functionality as a quick and easy way to share ServiceNow records or visual task boards, attachments, and links. Simply drag and drop an item anywhere in the conversation or text entry area. To drag and drop a ServiceNow record from a list, drag the reference icon (ⓘ), the record number, or a reference column value.

Conversation Types

Collaboration supports:

- Individual conversations
- Group conversations
- Record conversations

Individual Conversations

To start an individual conversation from the collaboration sidebar, click the people icon ( ) or the word **People**. A user selection menu appears and displays users from the User [sys_user] table. Enter the name of the user you want to chat with or scroll through the list and select a user. Use the **Escape** key or click outside the list to cancel. When you select a user, the user's avatar appears in the sidebar and a chat window opens.

Group Conversations

To start a group conversation from a chat window, click the add user icon ( ). To start a group conversation from the collaboration workspace, click the add member icon ( ) in the **Members** section of the conversation detail pane. A user selection menu appears. Enter the name of the user you want to add or scroll through the list and select a user. Use the **Escape** key or click outside the list to cancel. When you add a user to an individual conversation, a new group conversation opens. When you add a user to a group or record conversation, the user simply joins the current conversation. To search for an existing group conversation from the collaboration sidebar, click the groups icon ( ) or the word **Groups**. A group selection menu appears and displays existing group conversations of which you are a member. Note that the group selection menu displays only existing group conversations you belong to. You cannot search for other groups, such as user groups on the Group [sys_user_group] table.

For information about removing users from group conversations, see **Members** in the Conversation Detail Pane section.

Record Conversations

Record conversations allow you to track comments and work notes on a record in real time. Any record conversation you create in collaboration becomes a record feed in live feed and vice versa. Unlike other types of conversations, all messages in record conversations are comments or work notes.

Note: *Record conversations are enabled for all tables that extend Task [task] by default. Administrators can configure record conversations for additional tables or disable them if desired.*

Working with Record Conversations

To start a record conversation, navigate to a record and click the show in collaboration icon ( ) in the form header. A new record chat window opens.

By default, record conversation messages are added as comments. To add messages as work notes instead, click the word **Comment** by the text entry field and select **Work Note**. Any comments or work notes added to the record appear in the record conversation. Likewise, comments and work notes you add to the conversation appear on the record, prefaced with the hashtag #LiveFeed. Note that if you add an attachment to a record conversation, it is *not* attached to the record. The file name appears in the comment or work note on the record.

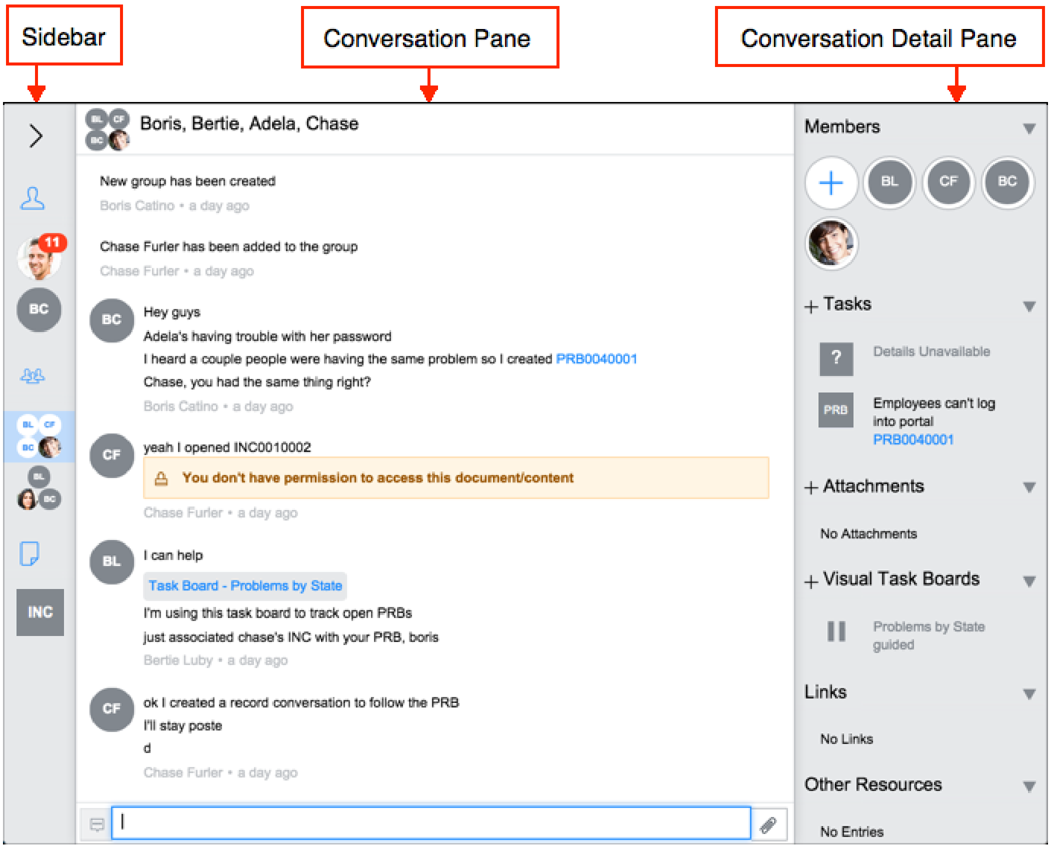
If you belong to any record feeds in live feed, you can open them as record conversations in collaboration. In the collaboration sidebar, click the record conversation icon ( ) or the label **Record Conversations**. A selection menu appears and displays any record feeds you have access to. Note that the record conversation selection menu only displays records for which a record feed or conversation has been created. You cannot search for other records in the selection menu.

Using the Collaboration Workspace

The collaboration workspace provides a full-screen view of all your conversations in one place, plus additional tools to help keep track of important information in conversations. To open the collaboration workspace, navigate to **Collaboration > Collaborate** or click the new window icon ( ) in a chat window. If you do not have any recent conversations, a screen appears with quick links to start a conversation.

The collaboration workspace is composed of the following elements:

- **Sidebar:** provides access to collaboration options and conversations. The collaboration sidebar is the same in the workspace as it is in the collaboration overlay. The only difference is that the sidebar appears on the left edge of the collaboration workspace. For more information about using the sidebar, see Collaboration Sidebar.
- **Conversation pane:** displays the currently selected conversation.
- **Conversation detail pane:** provides quick access to key information about the currently selected conversation.



Conversation Pane

The conversation pane displays the name of the conversation and an expanded version of the chat window. You can rename a group conversation in the conversation pane:

1. Click the conversation name.
2. Enter a new name.
3. Press the **Enter** key or click outside the text entry area.

Conversation Detail Pane

The conversation detail pane contains several sections. You can collapse (▼) or expand (▲) each section.

Section	Description
Members	Lists all members of the open conversation. Click the add member icon (+) to add a user to the conversation. Point to a user's avatar and click the X to remove the user from the conversation.
Record	Contains details about the associated record, such as record number, state, assignee, and short description. The fields displayed in the **Record** section vary by the type of record. This section is available only for record conversations.
Tasks	Lists all task records that have been referenced in the conversation, such as incidents, problems, or changes. When you send a record number as a message or drag and drop a record in a conversation, it appears as a link. The list displays the short description and record number for each task. Click the task to open the record in a new tab. Click the plus icon to add a task. Note that only conversation members who have rights to view the tasks can access them.
Attachments	Lists all attachments in the conversation. Click an attachment to open it. Point to an image attachment to preview it.
Visual Task Boards	Lists all visual task boards associated with the conversation. Click the plus icon to add a visual task board. For more information, see Using Visual Task Boards with Collaboration.
Links	Lists all URLs in the conversation. Click a link to open it in a new browser tab or window.

Other Resources	Lists all non-task records that have been referenced in the conversation, such as locations, users, or configuration items. Note that only conversation members who have rights to view the records can access them.

Using Visual Task Boards with Collaboration

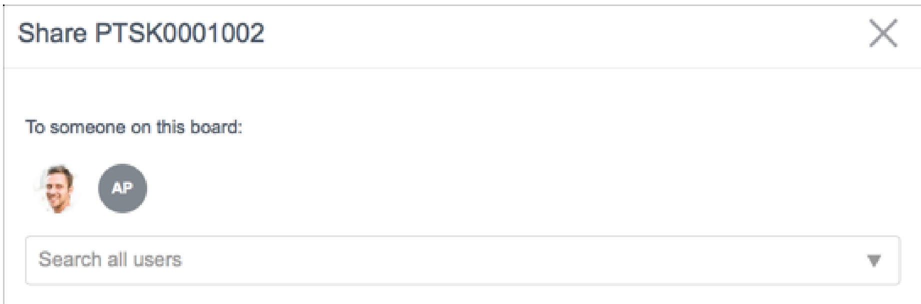
Overview

Visual task boards integrate with collaboration so users can easily share information about tasks in real time. Users can send tasks from task boards to conversations, share task boards in conversations, and create task cards directly from conversations.

Sending Task Cards to Collaboration

You can send a task card directly to a user as a collaboration message.

1. Navigate to **Self-Service > My Task Boards**.
2. Open a task board.
3. Click the send to collaboration icon ( ) on a task card.
4. Select one of the users associated with the board or choose a different user. The user must have access to the record to view it.



A chat window opens and shows that you have sent the task to the user.

Sharing Visual Task Boards in Conversations

You can share a visual task board with the members of a conversation. Only users who are members of the visual task board can access the board.

To share a task board in a conversation, navigate to **Self-Service > My Task Boards**. Simply drag and drop a task board to a chat window to share a link to the board. Alternatively, open a conversation in the collaboration workspace, click the plus icon by the **Visual Task Boards** section of the conversation details pane, and select a task board. When you share a task board in a conversation, the task board is listed in the conversation details pane of the collaboration workspace.

Note: *If you share a task board in a record conversation, it appears in the following format on the record:* ***#LiveFeed: $vtb.do?sysparm_board=<task board sys_id>***

Creating Task Cards from Conversations

When you share a freeform visual task board in a conversation, conversation members who are also members of the board gain the ability to create task cards directly from the conversation. You can create a task card based on one or more messages in the conversation or completely independently of the messages.

Creating Task Cards Based on Messages

1. Point to a message.
2. Click the new task icon that appears.

If there are multiple messages from the same person, a check box appears by each message.

3. [Optional] Select the check box by each message you want to include in the task name.
4. Enter a description for the task card in the text entry field or use the automatically generated description from the message.
5. Select the task board and lane where you want to add the task card.
6. Click **Create Task**.

   The system adds a personal task card to the board and links to the task in the conversation.

Creating Task Cards Unrelated to Messages

1. In the text entry area, click the chat icon ( ).
2. Select **New VTB Task**.
3. Enter a description for the task card in the text entry field.
4. Select the task board and lane to which you want to add the task card.
5. Click **Create Task**.

Administering

Administering Collaboration

Overview

You can configure various performance settings and features of collaboration. You can also disable collaboration, if necessary.

The admin role is required to perform these actions.

Configuring the Polling Interval

The polling interval determines how frequently the system *polls* for new collaboration messages. The default interval is 10 seconds. To change this value:

1. Navigate to **sys_properties.list**.
2. Locate the `collaboration.polling_interval` property.
3. Set the **Value** to a different number of seconds.

   The shorter the polling interval, the more frequently the system checks for new messages and the greater the impact on performance. Setting the polling interval to a value smaller than 2 is likely to tax the system too heavily, while a value greater than 10 is likely to result in a poor user experience.

Configuring the Email Notification Interval

The email notification interval determines how long the system waits before sending a collaboration email notification to an inactive user. The default interval is 3 minutes. To change this value, set the `collaboration.email_interval` property to a different number of minutes.

Configuring Record Conversations

Record conversations are enabled for all tables that extend Task [task] by default. You can configure record conversations for additional tables. You can also disable record conversations.

Enabling Record Conversations for a Table

To create record conversations, users must have access to the show in collaboration icon ( ) in the form header. The following conditions must be true for the icon to be visible on a form.

- The `live_feed` dictionary attribute must be set to **true** for the table.

  By default, `live_feed=true` for all tables that extend Task [task].
- The `glide.live_feed.task_header_button` property must be set to **both** or **collaboration**.

  By default, `glide.live_feed.task_header_button` is set to **both**.

Note: *The `glide.live_feed.task_header_button` property also controls whether the show live feed icon ( ) appears. Use caution if you change the default value of the property.*

Disabling Record Conversations

To remove the show in collaboration icon from all tables, set the `glide.live_feed.task_header_button` property to **live_feed**. To remove the show in collaboration icon from a specific table, set the `live_feed` dictionary attribute to **false** for the table. Note that setting the dictionary attribute to false also removes the show live feed icon for the table.

Disabling the Collaboration Overlay

The collaboration overlay is enabled by default and is integrated with the standard user interface. To disable the collaboration overlay, set the `collaboration.frameset` property to **false**.

Disabling Collaboration

Though it is not possible to truly disable collaboration, you can hide the components so users cannot access the collaboration interface. To do so, disable the collaboration overlay and disable the **Collaboration** application menu.

Article Sources and Contributors

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