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## CHAT

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## 298

## Overview

Galileo supports real-time chat using the ITSM Chat Server. Chats can be initiated at any time from within the context of a ticket or profile, or even outside of those pages. It resides in a global space within the main navigation of the application.

**Active Chats List**

Accessible from the main navigation bar at all times, the Active Chats List shows all chats in which the current user is currently participating with one or more others.

**Share Menu**

There are a few ways to start a new chat. From a ticket or profile view, the user is able to click the Share menu and then "Chat about this Ticket" to start a new chat with the context already loaded to the current ticket or profile entity.

**Person Menu**

When a person's avatar image and name appear on a page, the user is also able to click on it to see a list of actions, including starting a new chat.

The screenshot displays the Project Galileo application interface. At the top is a dark navigation bar with the title "Project Galileo" and user information "Peter Sullivan". Below this is a secondary navigation bar with links: "Dashboard 3", "Ticket Console", "Create New", and "Smart Recorder".

On the right side, the "Active Chats (4)" panel lists four ongoing conversations:

- Jennie (IN C123456)**: Issues with HR? All the time! ;) Oh, HR Insights. Yes, ... (Today 2:32 pm)
- Frank**: Democracy is so overrated. (Today 10:23 am)
- Bob, Ted, Sally (REQ23455)**: I'm not sure. Let me get back to you guys. (Today 8:12 am)
- Kurt, Dwight, Michael, 3 others (INC2345654445)**: Ordinary? I don't think that it's too ordinary when... (3/21/14 4:55 pm)

A red dotted line connects the "Jennie" chat entry to a larger chat window at the bottom right. This window shows a conversation with "Jennie Tennyson". The header indicates "Connected to: INC123456: Unable to load HR Insights service" with a "Disconnect" link. The chat history shows a message from Jennie: "Hi Jennie. You've seen connectivity issues with HR Insights before, right? What ended up being the issue?" (Today 2:30 pm). Below this is a message from Jennie: "Issues with HR? All the time! ;) Oh, HR Insights. Yes, let me find a link to the solution that worked for me last time." (Today 2:32 pm). At the bottom is a "Reply..." input field and a "Post" button.

On the left side, a ticket card for "INC23456" (High priority) shows the status "Unable to connect to HR Insights service". A share menu is open over this ticket, offering options: "Email this Ticket", "Chat about this Ticket", and "Copy Link".

Below the ticket card, a person's profile for "Eugene W." is shown, with a pink hand icon pointing to the profile picture. The profile menu includes options: "View Profile", "Chat with Eugene", "keyser.s@acme.com", and "(555) 555-5555".

**Chat Window**

When a chat is triggered via the Active Chats List or when it is first started, a modeless chat window like this one appears. It is centered in the bottom right corner of the screen.

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# 299 Lifecycle

Chats follow a common lifecycle, as depicted in this example. Active Chats last for the duration of the green bar shown here.

A chat must always involve two or more logged in and online users and cannot be started with an offline user.

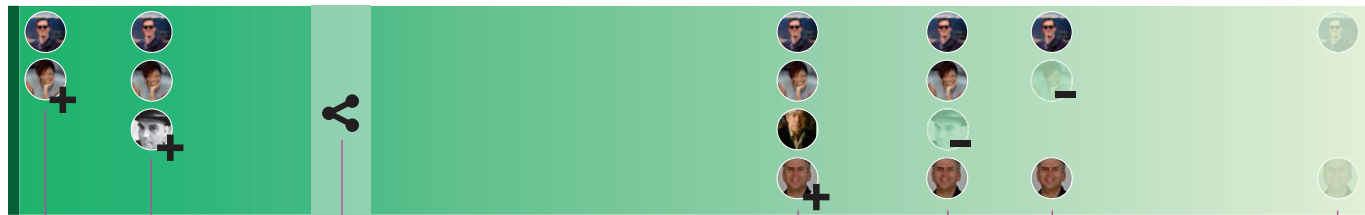
Chats do not always need to be connected to tickets or other entities.

If the owner of the chat session (the person who originally started it) leaves the chat, it ends and the owner is presented with the choice of saving it to the connected entity (if there is one) or just saving it to Chat History.

Chat Starts

Connected to Ticket

Chat Ends



Steve clicks on Jennie's avatar and specifies that he wants to start a new chat with her.

Jennie adds Mory to the chat.

Jennie connects the chat to a ticket (INC123456). Anybody inside the chat can connect it to a ticket or profile, but each chat can only be connected to one entity at a time. The chat can be disconnected and connected later to a different entity.

Mory adds Gustavo to the chat.

Mory leaves.

Jennie leaves.

Steve ends the chat session. Since he is the owner of the chat, he is asked to confirm this action. When he does, both he and Gustavo leave the chat automatically. Steve is presented with the option of saving the completed chat to the ticket to which it is connected.

Ticket is logged to Chat History for all past participants. No new messages can be added to this same chat session from this point forward.

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## Active Chats List

The Active Chats List resides in a global space within the main navigation of the application.

Active Chats are defined as chat sessions in which two or more online users are involved. If the owner of the chat session leaves, the chat is no longer active and has ended.

**Entity ID**

The ID for the ticket or profile appears here if the chat is connected.

**Participants**

Up to three participants have their first names shown. Additional participants are represented by the count.

**Avatar**

Image for the person who most recently put a message in this chat.





**Last Updated Time**

The date and time of the last message is shown here.

Project Galileo

Dashboard **3** Ticket Console Create New ▼ Smart Recorder

Active Chats (4) [Start New](#) | [History](#)

-  **Jennie (IN C123456)**  
Issues with HR? All the time! ;) Oh, HR Insights. Yes, ...  
Today 2:32 pm
-  **Frank**  
Democracy is so overrated.  
Today 10:23 am
-  **Bob, Ted, Sally (REQ23455)**  
I'm not sure. Let me get back to you guys.  
Today 8:12 am
-  **Kurt, Dwight, Michael, 3 others (INC2345654445)**  
Ordinary? I don't think that it's too ordinary when...  
3/21/14 4:55 pm

**Start New**

If the user clicks this action, a new modeless chat window will appear on screen as close to the bottom right corner of the screen as possible without overlapping any other open chat windows.

The chat should not have any ticket/profile connection, nor should it yet be with any other users. The first chat participant is selected in order to start the chat session.

**Chat History**

Clicking this brings up Chat History. See “Chat / Chat History” on page 215 for more details.

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## Modeless Chat Window

When Active Chats are shown on-screen, they appear inside these modeless chat windows. This is the space where users contribute to chats in Galileo.

**Click and Drag**

The user is able to click and drag on the title bar of each chat window in order to move it across the screen. The chat window should never leave the viewport of the browser.

**Chat Avatars**

The avatar image for users who are not the current user are aligned to the left, while the current user's avatar is aligned to the right and the display of the current user's messages are shaded differently.

**Reply Space**

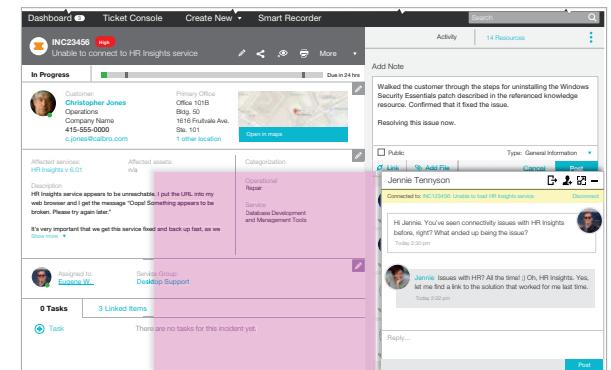
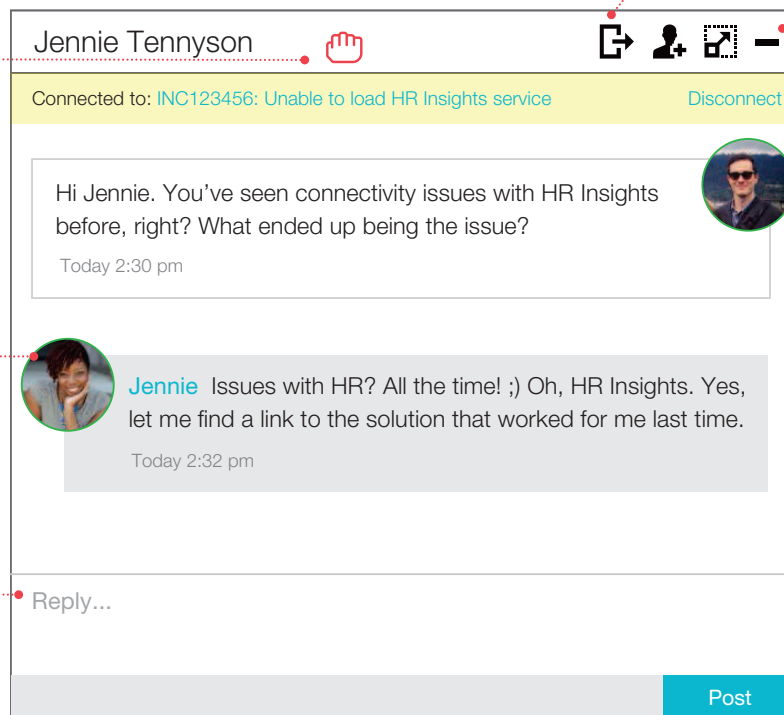
This area should expand upward and have an internal scroll bar if lots of content is entered. It functions as a standard textbox otherwise.

**Leave Chat**

A confirmation message comes up to confirm the user wants to leave the chat. If the user is not the person who started the chat, the chat continues after they leave. If the user is the chat owner, the chat ends.

**Minimize**

Clicking this removes the modeless chat window from the screen, but the chat session has not yet ended and can still be shown again by clicking on the chat in the Active Chat List.

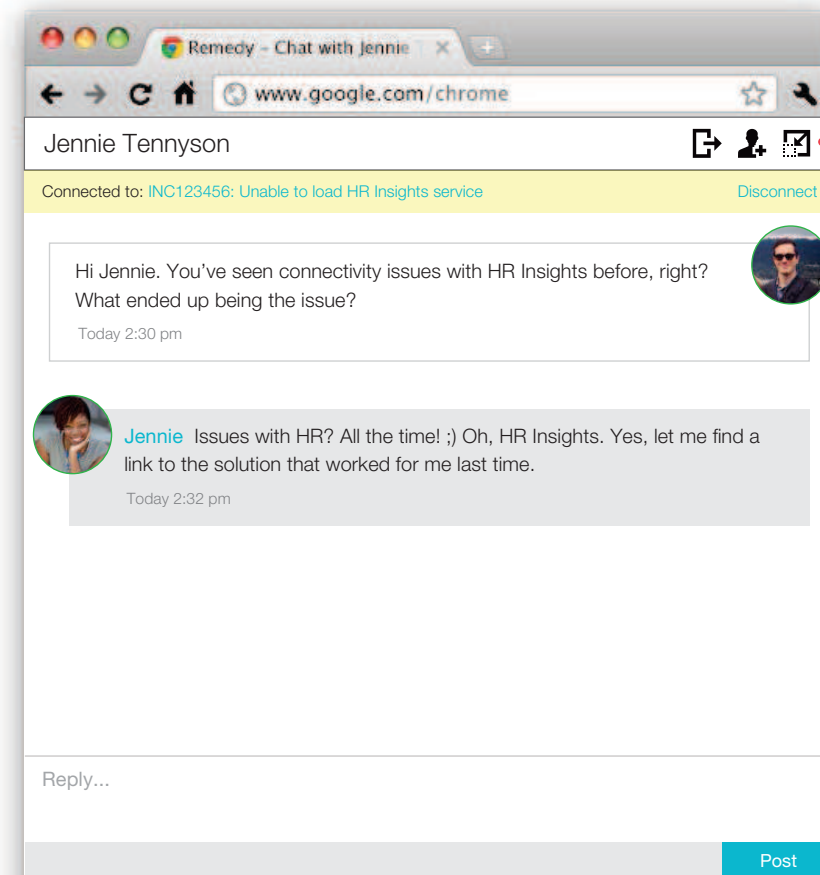
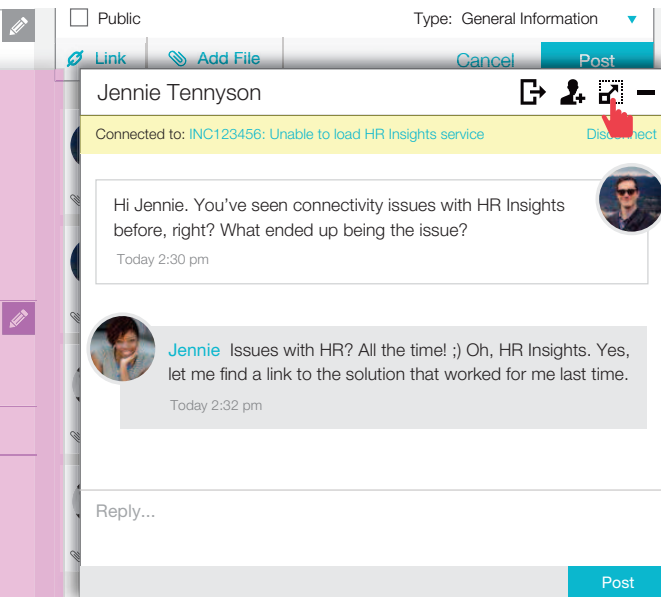
**Window Placement**

When a new chat window is displayed, it tries to fit into the bottom right corner of the screen. No modeless chat window should ever overlap another.

The user can interact with the screen behind the chat window even while it is present on the screen.

## 302 Popping Out Windows (UC Only)

From within the Galileo Universal Client, chat windows can be popped out into their own dedicated browser windows. This allows the agent to have multiple chats going on simultaneously in different windows while they use the Galileo client in a different browser window.



**Pop In**

Clicking this button closes the popout window and shows it again as a modeless window on the main Galileo browser window where the application is already being presented.

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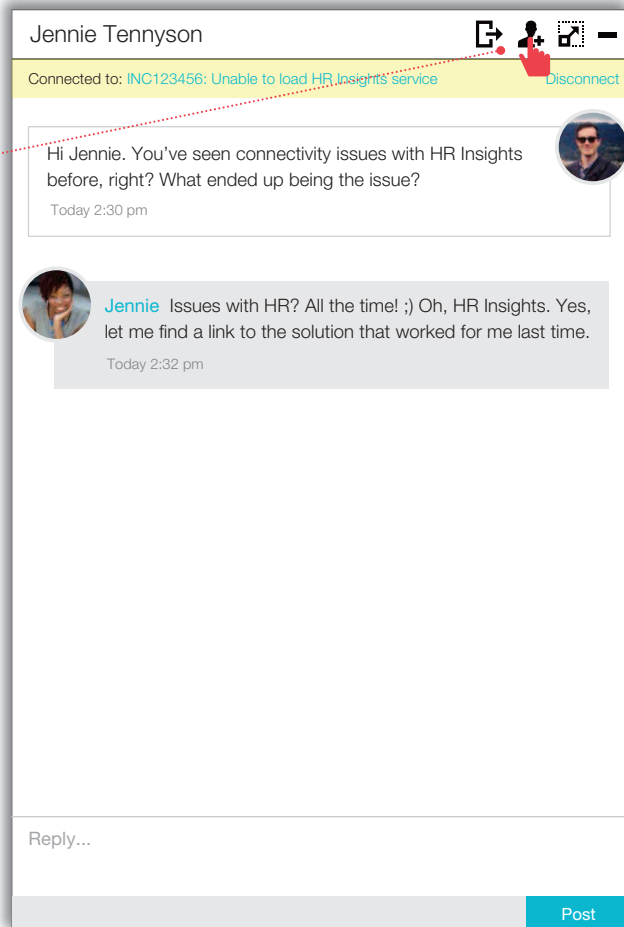
## 303

## Adding People to a Chat

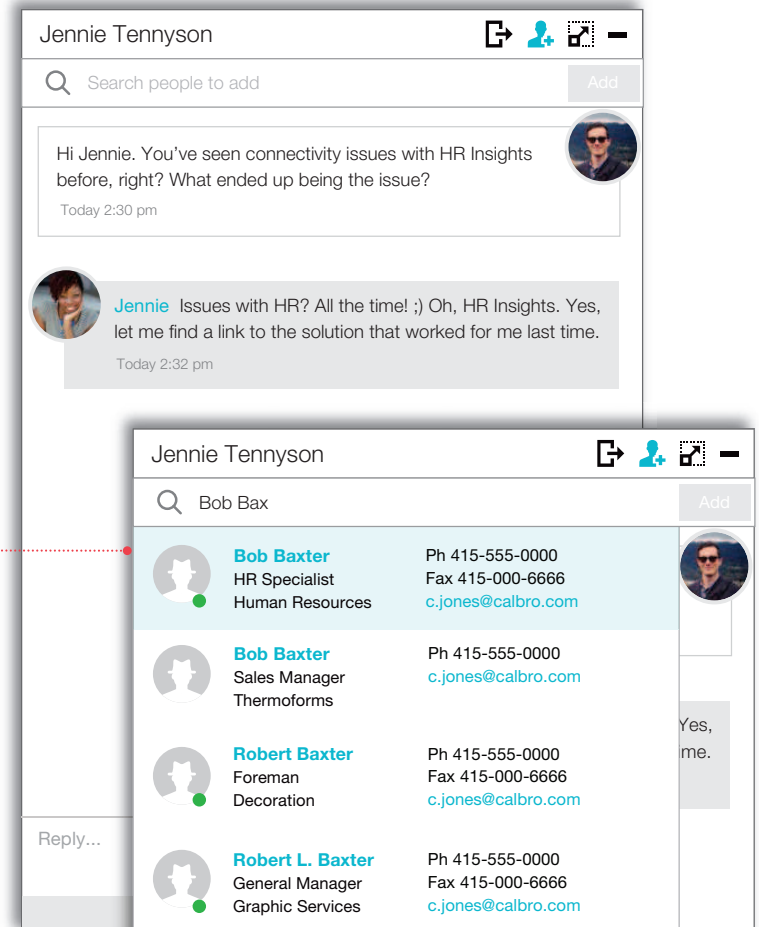
Any participant of an active chat may add invite another participant to the chat. This happens through a person search and autocomplete.

**Add User**

Clicking this will bring up a window to select a user to invite to the chat. If the user does not join, she still gets a notification that they had been invited, but no text from the conversation will be displayed for them.



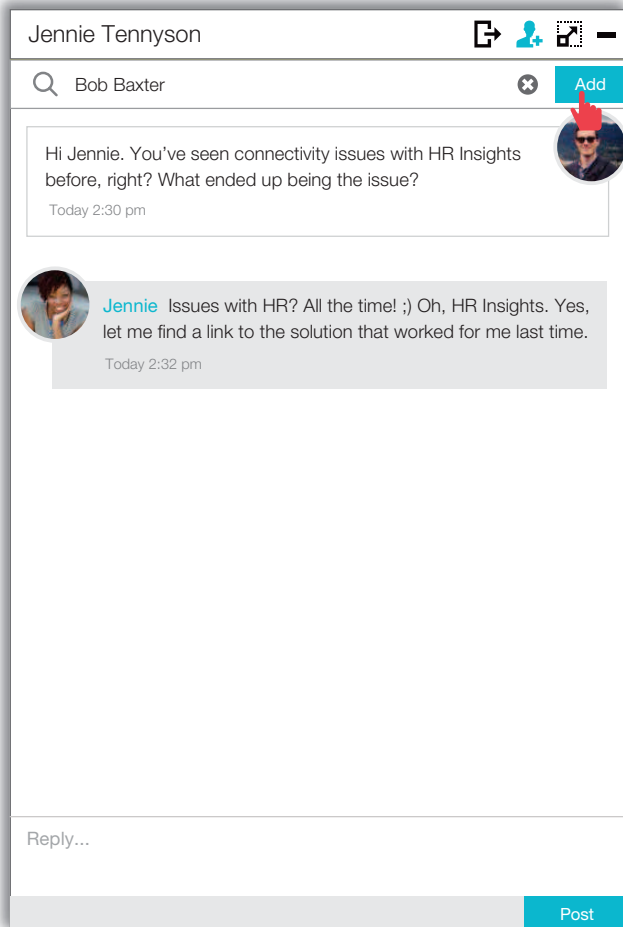
**Autocomplete List**  
Autocomplete results are shown based on the name being typed. In general, the search should work similarly to Smart Recorder and Create Ticket person searches. The availability indicators are shown for each result, but the user will only be able to click Add for a person shown as Online.



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Once people are added to a chat, they cannot be removed. However, they can leave the chat at any time.

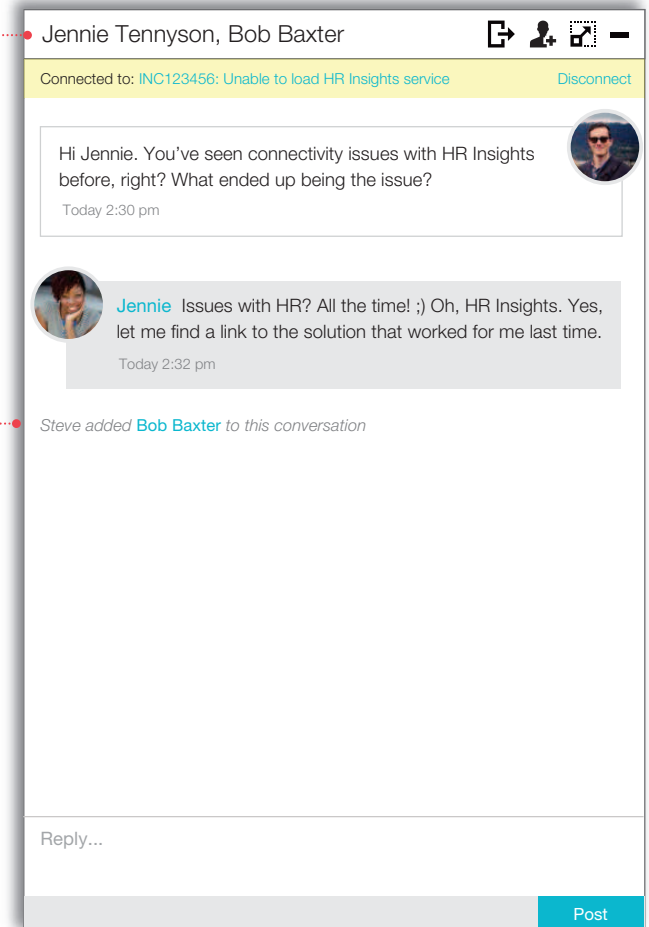
## Adding People to a Chat (2)

**Participants**

The name of the newly added participant now appears in the title bar of the chat window, as well as in the Active Chats List.

**Status Text**

A line of text appears in the chat with the name of the person who was added. It should follow the format "[Name of person who added the new participant] added [Name of new participant] to this chat".





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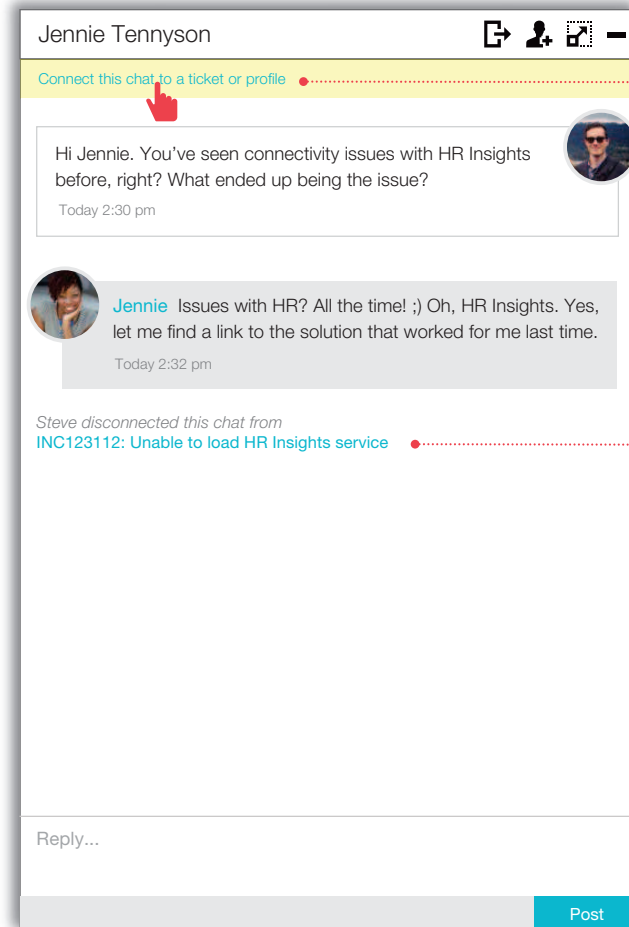
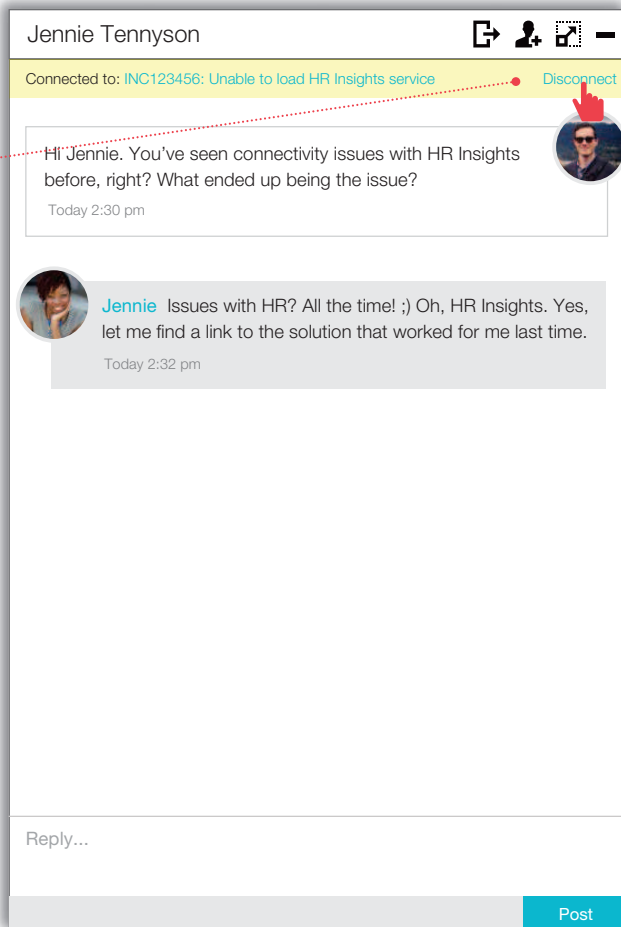
# 305 Connecting Chats to Tickets or Profiles

Each active chat may be connected to one (and only one at a time) ticket or CI profile. This serves as the point where a completed chat can be saved.

## Current Connection

If the chat is connected to a ticket or CI profile, a link to the entity appears here. Clicking on the link should visit the detail view for the connected entity.

The user can click Disconnect at any time while the chat is active in order to disconnect and later reconnect the chat.



## Connect Action

The user can click this at any time to specify a ticket or CI for the chat context.

## Status Message

A message is logged to the ticket when a connection or disconnection occurs.

## 306 Connecting Chats to Tickets or Profiles (2)

### Suggested Connections

When the user clicks to connect, a list of current assigned tickets is shown as suggestions for the chat context. Clicking one of these will load it into the search box. If the user wants to search for a ticket or CI profile, clicking down into the box will allow a search to be conducted.

Jennie Tennyson

Search tickets and profiles Connect

Your Assignments:

- INC14457 **Status: In Progress**  
HR Insights service is down
- INC14939 **Status: In Progress**  
HR Insights web service reporting null status
- INC2345 **Status: In Progress**  
HR Insights web service reporting null status
- INC23345 **Status: In Progress**  
HR Insights web service reporting null status

Reply...

Post

Jennie Tennyson

Search HR Insights Connect

Matched Results:

BUSINESS SERVICE  
HR Insights

- INC14457 **Status: In Progress**  
HR Insights service is down
- INC14939 **Status: In Progress**  
HR Insights web service reporting null status
- INC2345 **Status: In Progress**  
HR Insights web service reporting null status
- INC23345 **Status: In Progress**  
HR Insights web service reporting null status

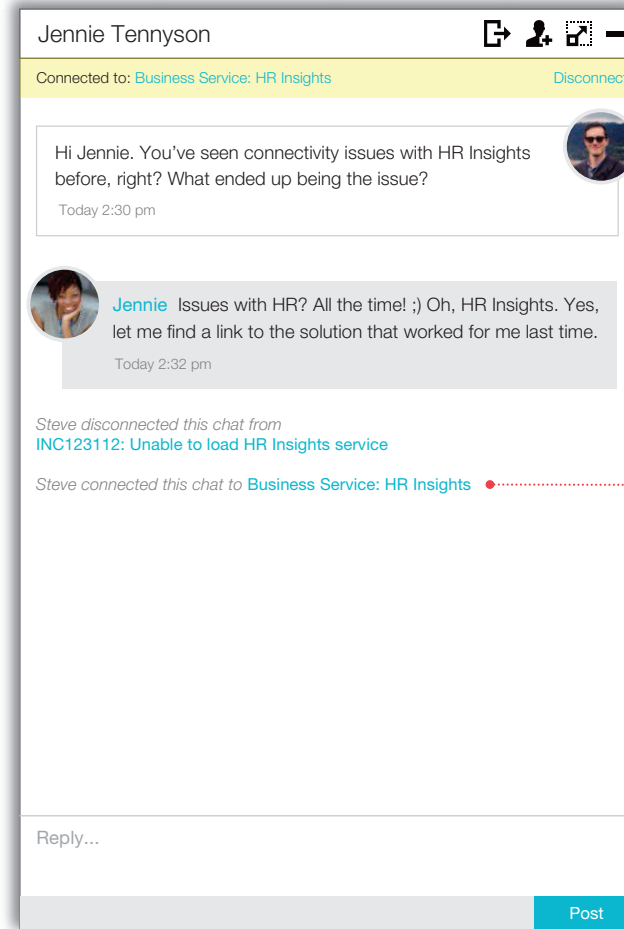
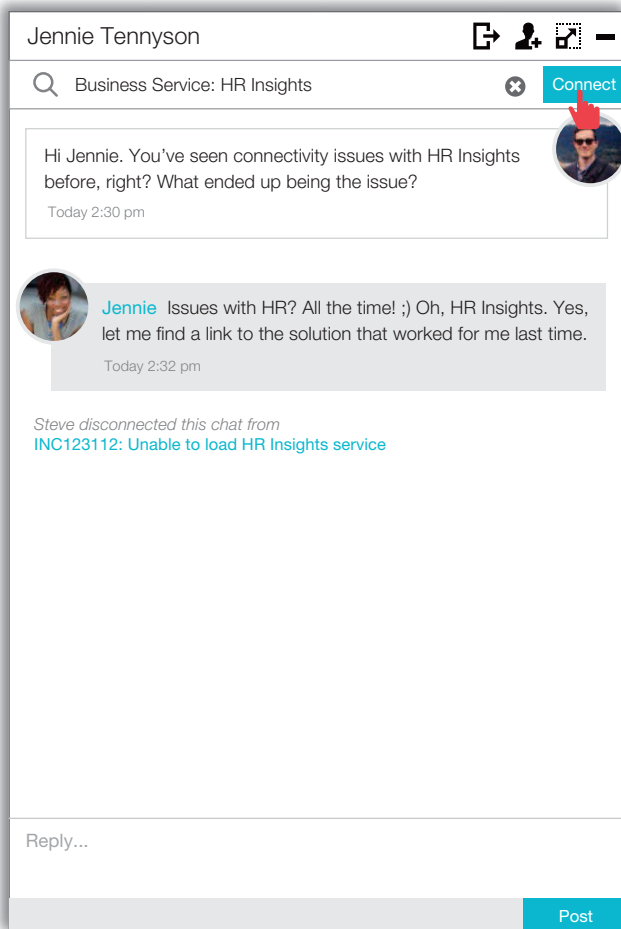
Reply...

Post

### Search

Here the user has searched for "HR Insights" and found results matching the query string, both for tickets and a Business Service CI. The user clicks on the service to select it.

# 307 Connecting Chats to Tickets or Profiles (3)

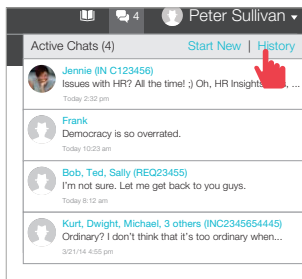


**Status Messages**  
The new connection is also logged in the chat once the connection is established.

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Chat History is a storage place for all chats that have previously occurred and have since ended. It can be accessed at any time through the Active Chats List.

**Searchable List**

This list is sorted chronologically, with the most recently ended chat session on top. The user can scroll through this list of completed chats and click on one to show its contents on the right side of the screen.

The contextual search should allow the user to search by a specific participant's name, the entity ID, or the primary field of the entity (such as the incident title). The list should scroll and load more entries as the user scrolls down.

## Chat History

**Dashboard** **Ticket Console** **Create New** **Smart Recorder** Search

### Chat History

Wilson J., Jennie Tennyson, Al Shroeder, Ellen Willcott, Buster Margot, Leiann Hayward

Connected to: [INC123112: Unable to load HR Insights service](#)

**Jennie Tennyson** [INC123432](#)  
34 messages Started 3/20/14 11:34 am Ended 3/20/14 12:12 pm

**Mory M.** [REQ334453](#)  
12 messages Started 3/19/14 5:34 pm Ended 3/19/14 6:02 pm

**Wilson J., Jennie Tennyson, Al Shroeder, 3 others** [INC123112](#)  
68 messages Started 3/09/14 9:02 am Ended 3/09/14 12:12 pm

**Eugene W.**  
4 messages Started 3/08/14 2:34 pm Ended 3/08/14 2:48 pm

**Wilson J., Al Shroeder** [WO233454](#)  
23 messages Started 3/03/14 11:45 pm Ended 3/04/14 1:08 am

Steve started this conversation with [Wilson J.](#)

Hi Wilson. We're having issues with HR Insights again. Do you have time to chat?  
3/09/14 9:02 am

**Wilson** Sure Steve, what's going on this time?  
3/09/14 9:03 am

Hold on, I'm going to add Jennie to this chat because she is shadowing me today.  
3/09/14 9:04 am

Steve added [Jennie Tennyson](#) to this conversation

Steve connected this chat to [INC123112: Unable to load HR Insights service](#)

**Jennie** Hey Steve  
3/09/14 9:05 am

Hi Jennie. So Wilson is going to help me troubleshoot the HR Insights issues we've been having. Wilson, care to elaborate on what you did the last time the service started posting 500 errors?  
3/09/14 9:05 am

**Wilson** Sure thing...HR Insights runs on a VMWare private cloud and you know how they're always going down and issuing errors :) If only we had used BMC to provision...anyway, here are the steps you need to

**Entity Link**

Clicking this link should take the user to the page for the connected entity. If no entity is connected to the chat, this line should not appear in the header.

**Status Messages**

In general, the following key events in the chat lifecycle should be represented by status messages:

- New person added
- Person leaves chat
- Connection
- Disconnection
- Chat ends

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# 309 Starting a Chat from a Ticket Detail View Avatar

Dashboard 3 Ticket Console Create New Smart Recorder Search

**INC23456** High  
Unable to connect to HR Insights service

**In Progress** Due in 24 hrs

**Customer:**  
**Christopher Jones**  
Operations  
Company Name  
415-555-0000  
c.jones@calbro.com

**Primary Office**  
Office 101B  
Bldg. 50  
1616 Fruitvale Ave.  
Ste. 101  
1 other location  
Open in maps

**Affected services:**  
HR Insights v 6.01

**Affected assets:**  
n/a

**Description**  
HR Insights service appears to be unreachable. I put the URL into my web browser and I get the message "Oops! Something appears to be broken. Please try again later."  
It's very important that we get this service fixed and back up fast, as we  
Show more

**Categorization**  
Operational Repair  
Service Database Development and Management Tools

**Assigned to:**  
Eugene W.

**Service Group:**  
Desktop Support

**Avatar Menu**  
View Profile  
Chat with Eugene  
Email Eugene W. (e.jones.w@acme.com)  
Phone (555) 555-5555

**Add Note**  
Walked the customer through the steps for uninstalling the Windows Security Essentials patch described in the referenced knowledge resource. Confirmed that it fixed the issue.  
Resolving this issue now.

☐ Public Type: General Information  
Link Add File Cancel Post

**Activity**  
Marked 'In Progress' by Eugene W. 10 min ago  
Eugene W. created 2 tasks 15 min ago  
Mory M. assigned this to Eugene W. 20 min ago  
Mory M. created this incident via Smart Record 30 min ago

There are no tasks for this incident yet.

## Avatar Menu

A person's avatar or name can be clicked to trigger a dropdown menu that shows several options for contacting them. Chat is one of the options presented here, if the current user is marked as online.

# 310 New Chat Window within Ticket Context

The screenshot displays the BMC Galileo ticket console interface. The top navigation bar includes 'Dashboard' (3), 'Ticket Console', 'Create New', and 'Smart Recorder'. A search bar is located on the right. The main content area shows ticket details for 'INC23456' with a 'High' priority status and the message 'Unable to connect to HR Insights service'. A progress bar indicates the ticket is 'In Progress' and 'Due in 24 hrs'. The customer information section lists Christopher Jones, Operations, with contact details and a map of the primary office location. The affected services section shows 'HR Insights v 6.01' and a description of the issue. The categorization section lists 'Operational Repair' and 'Service Database Development and Management Tools'. The assigned to section shows Eugene W. and the service group 'Desktop Support'. The bottom section shows '0 Tasks' and '3 Linked Items'. A new chat window is open on the right, titled 'Eugene W.', showing a connection to the ticket and a 'Post' button.

Dashboard 3 Ticket Console Create New Smart Recorder Search

INC23456 High  
Unable to connect to HR Insights service

In Progress Due in 24 hrs

Customer: Christopher Jones  
Operations  
Company Name  
415-555-0000  
c.jones@calbro.com

Primary Office  
Office 101B  
Bldg. 50  
1616 Fruitvale Ave.  
Ste. 101  
1 other location  
Open in maps

Affected services: HR Insights v 6.01  
Affected assets: n/a  
Description  
HR Insights service appears to be unreachable. I put the URL into my web browser and I get the message "Oops! Something appears to be broken. Please try again later."  
It's very important that we get this service fixed and back up fast, as we  
Show more

Categorization  
Operational Repair  
Service Database Development and Management Tools

Assigned to: Eugene W.  
Service Group: Desktop Support

0 Tasks 3 Linked Items

Task There are no tasks for this incident yet.

Add Note

Walked the customer through the steps for uninstalling the Windows Security Essentials patch described in the referenced knowledge resource. Confirmed that it fixed the issue.

Resolving this issue now.

Public Type: General Information

Link Add File Cancel Post

Eugene W.

Connected to: INC23456: Unable to load HR Insights service Disconnect

Reply...

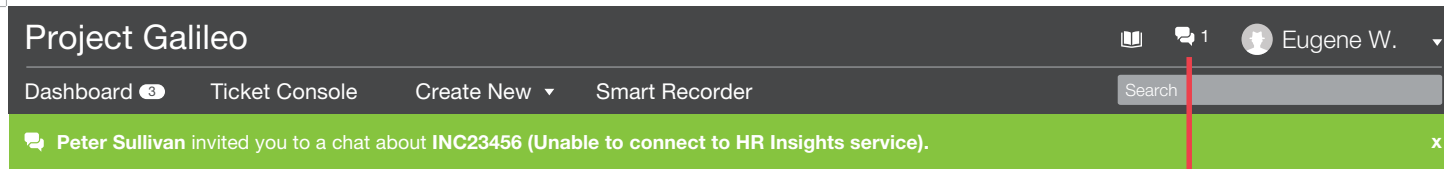
Post

**New Chat Window**  
The chat is already connected to the ticket that represents the current view.

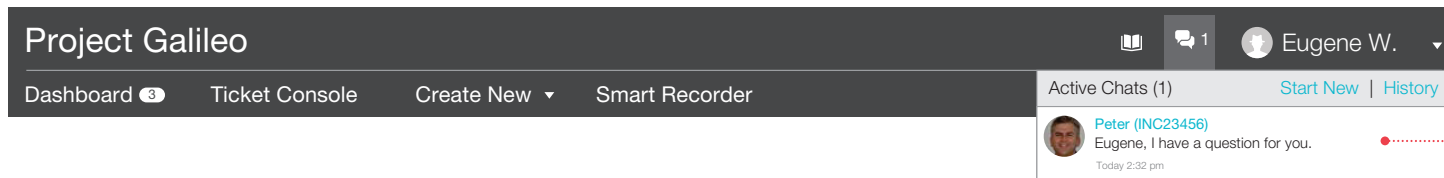
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This is what the screen shows for the recipient of the new chat request. A banner message is used to alert the user to the new chat, the Active Chats List has the new chat added, and the user also gets the notification on the Updates of their Dashboard.

## The View from the Other Side

**New Chat Alert**

Once the new chat is initiated with this user, a banner alert appears on their screen as a notification. It will disappear after a few seconds, but the Active Chats List will be incremented by one to show the newly requested chat. In addition, this notification should appear inside the user's Updates on the Dashboard.

**New Active Chat**

If the recipient clicks on this new active chat, the chat window will show up on his or her screen as shown on previous pages.

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