# HP Service Manager

Software Version: 9.41

For the supported Windows® and UNIX® operating systems

## Collaboration Guide

Document Release Date: September 2015
Software Release Date: September 2015

## Legal Notices

### Warranty

The only warranties for HP products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. HP shall not be liable for technical or editorial errors or omissions contained herein.

The information contained herein is subject to change without notice.

### Restricted Rights Legend

Confidential computer software. Valid license from HP required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor's standard commercial license.

### Copyright Notice

© 1994-2015 Hewlett-Packard Development Company, L.P.

### Trademark Notices

Adobe® is a trademark of Adobe Systems Incorporated.

Microsoft® and Windows® are U.S. registered trademarks of Microsoft Corporation.

Oracle and Java are registered trademarks of Oracle and/or its affiliates.

UNIX® is a registered trademark of The Open Group.

Linux® is the registered trademark of Linus Torvalds in the U.S. and other countries.

For a complete list of open source and third party acknowledgements, visit the HP Software Support Online web site and search for the product manual called HP Service Manager Open Source and Third Party License Agreements.

## Documentation Updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

To check for recent updates or to verify that you are using the most recent edition of a document, go to: https://softwaresupport.hp.com/.

This site requires that you register for an HP Passport and to sign in. To register for an HP Passport ID, click **Register** on the HP Support site or click **Create an Account** on the HP Passport login page.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

## Support

Visit the HP Software Support site at: https://softwaresupport.hp.com.

This website provides contact information and details about the products, services, and support that HP Software offers.

HP Software online support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the support website to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Download software patches
- Manage support contracts
- Look up HP support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require that you register as an HP Passport user and to sign in. Many also require a support contract. To register for an HP Passport ID, click **Register** on the HP Support site or click **Create an Account** on the HP Passport login page.

To find more information about access levels, go to: https://softwaresupport.hp.com/web/softwaresupport/access-levels.

**HPSW Solutions Catalog** accesses the HPSW Integrations and Solutions Catalog portal website. This site enables you to explore HP Product Solutions to meet your business needs, includes a full list of Integrations between HP Products, as well as a listing of ITIL Processes. The URL for this website is https://softwaresupport.hp.com/group/softwaresupport/search-result/-/facetsearch/document/KM01702710.

# Contents

# Chapter 1: Service Manager Collaboration overview

As of version 9.41, HP Service Manager Collaboration supersedes the previous HP Enterprise Collaboration (EC) based instant messaging solution. As an instant messaging tool embedded in Service Manager, Service Manager Collaboration enables Service Manager IT operators to collaborate in real time (or anytime) when handling an Interaction, Incident, Incident Task, Request, Request Task, Problem, Problem Task, Change, or Change Task by default. Service Manager users who do not log on to Service Manager but are available on Microsoft Office Lync can also be invited to a Collaboration conversation. In addition to the Service Manager Collaboration suggested participants that can be invited to a conversation, you can also search for users by email address or user name, and invite them to the conversation. The conversation is stored as a permanent part of the corresponding record.

**Note:** Service Manager Collaboration is available on the Service Manager web client only.

Topics in this chapter include:

- "Audiences" below

- "Deployment scenario" on the next page

## Audiences

This document is intended for the following audiences:

- System Administrators (for Service Manager Collaboration deployment and initial configuration)

- Incident Analysts (and others involved in Incident Management, such as Incident Coordinators)

- Change Analysts (and others involved in Change Management, such as Change Coordinators)

- Problem Analysts (and others involved in Problem Management, such as Problem Coordinators)

- Request Analysts (and others involved in Request Fulfillment, such as Request Coordinators)

- Service Desk Agents

- Service/Configuration Item Owners

- Business users

# Deployment scenario

The following diagram illustrates a typical HP Service Manager Collaboration (SMC) deployment scenario:
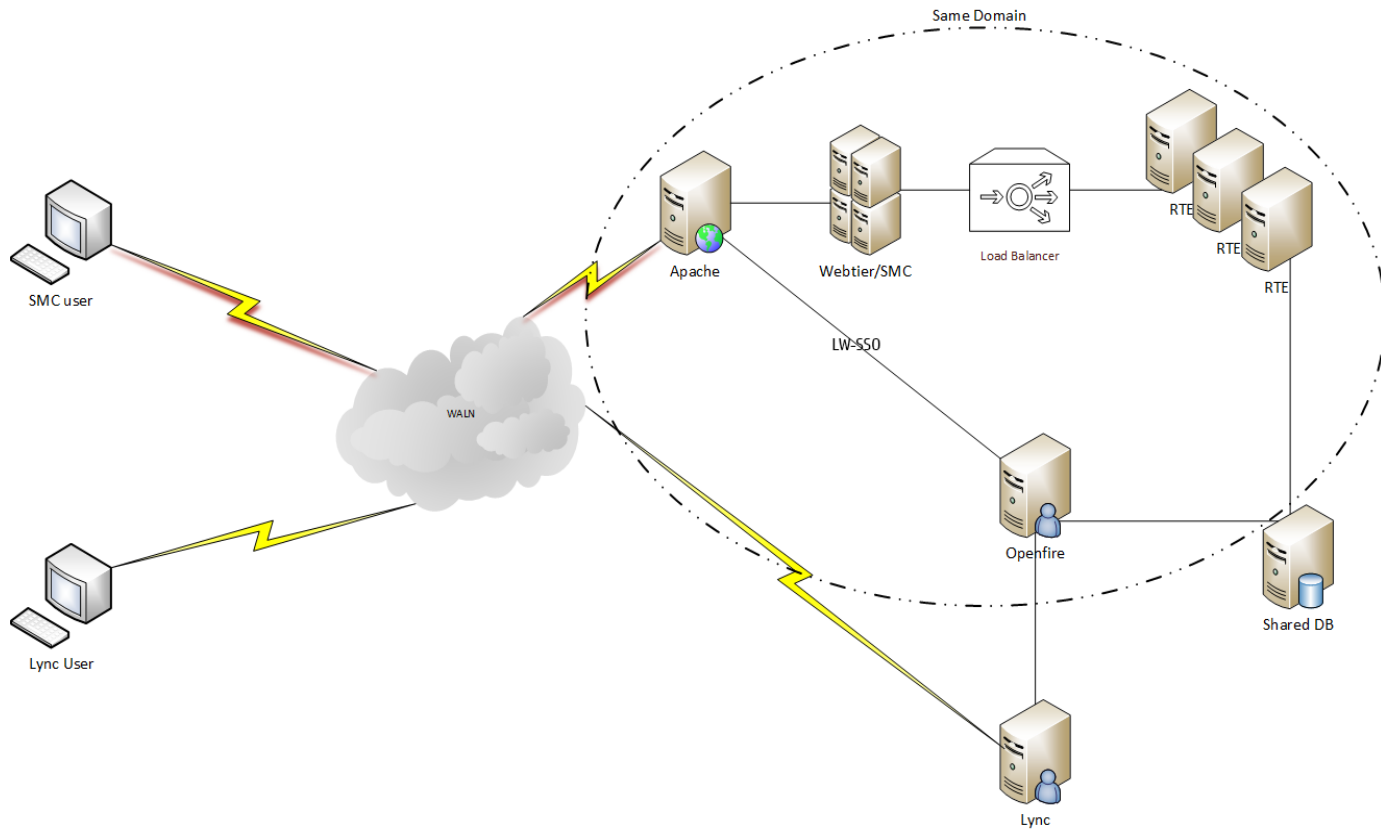
Service Manager Collaboration cooperates with the following essential factors and Service Manager components:

- Openfire server:

  Openfire is a real time collaboration (RTC) server licensed under the Open Source Apache License. Service Manager Collaboration communicates with Openfire by using the widely adopted open protocol XMPP to approach all the operations, such as set up conversations, post messages, presence management, notification management and so on. The Openfire server also links Service Manager and other messaging applications, such as Microsoft Office Lync 2013.

- Apache:

The Openfire server must be deployed behind the Apache HTTP server (or a Windows Internet Information Services (IIS) web server) and use it as a reverse-proxy to protect the sensitive information of Openfire, such as the IP address, ports, and so on.

- Service Manager web tier:

  Service Manager Collaboration is embedded in Service Manager web tier to access the Openfire server through Apache for instant messaging.

Besides, Service Manager Collaboration also needs the following prerequisites and configurations:

- Light-Weight Single Sign-On (LW-SSO):

  Service Manager Collaboration uses LW-SSO to access and authenticate users. Service Manager Collaboration requires that you configure LW-SSO for the Service Manager web tier and the Openfire chat server.

For more information about how to install and configure Service Manager Collaboration, see *HP Service Manager Interactive Installation Guide.*

# Chapter 2: Basic concepts in Service Manager Collaboration conversations

This section describes the basic concepts in HP Service Manager Collaboration conversations.

Topics in this chapter include:

- "Conversation Roles" below

- "Conversations" on the next page

- "Notifications" on the next page

## Conversation Roles

HP Service Manager Collaboration defines the following conversation roles.

- **Participants:**
  A participant is defined as a user who has posted at least one message to a conversation, or a user who has been added to a conversation.

  Any participant can add other Service Manager Collaboration users and external users to a conversation, as well as remove themselves and other participants. A maximum of 200 participants can participate in a conversation.

- **Service Manager Collaboration users:**

  All valid Service Manager users are defined as Service Manager Collaboration users. When Service Manager Collaboration users do not log on to Service Manager but is available on Microsoft Office Lync 2013, they can be invited to a Collaboration conversation by using Lync after the Lync integration is set up.

- **Lync users:**

  The Service Manager users who do not log on to Service Manager but are available on Microsoft Office Lync 2013.

Collaboration Guide

# Conversations

Conversations are a series of messages that are saved in the Service Manager database. By default, the title of a conversation consists of the record ID and the record title. For example, *IM10001 Printer malfunction*. To access a conversation, you need to locate the corresponding Service Manager record, and then click the **Start Conversation** button.

# Notifications

With HP Service Manager Collaborations notifications, you are always up-to-date with real-time incoming messages and new conversation invitations. The Collaborations notifications are rendered as red badges (for example, ❶), which are displayed in different places, depending on whether the conversation window is minimized or not.

- When the conversation window is minimized, the following behavior occurs:

  - A red notification badge appears on the Collaboration notification button showing the sum of the message number of all unread messages in all updated conversations.

- When the conversation window is not minimized and there are multiple conversation tabs open, the following behaviors occur:

  - A red notification badge appears on the Collaboration notification button showing the sum of incoming messages in all conversations that are minimized. The incoming message numbers on all active/inactive conversation tabs in the conversation window are not included in the sum.

  - New messages and new conversation invitations are displayed in the Conversation area of the currently active conversation immediately, without showing a red notification badge on the conversation tab.

  - Red notification badges appear on the inactive conversation tabs showing the incoming message number of updated conversations, respectively.

Service Manager Collaborations recounts the numbers on the notification badges every time when you log in.

> **Note:** You will no longer receive messages or notifications from a conversation after clicking **Quit Conversation**. See "Quit a conversation" on page 18 for more information.

# Chapter 3: Navigating the UI

This section introduces the UI of HP Service Manager Collaboration.
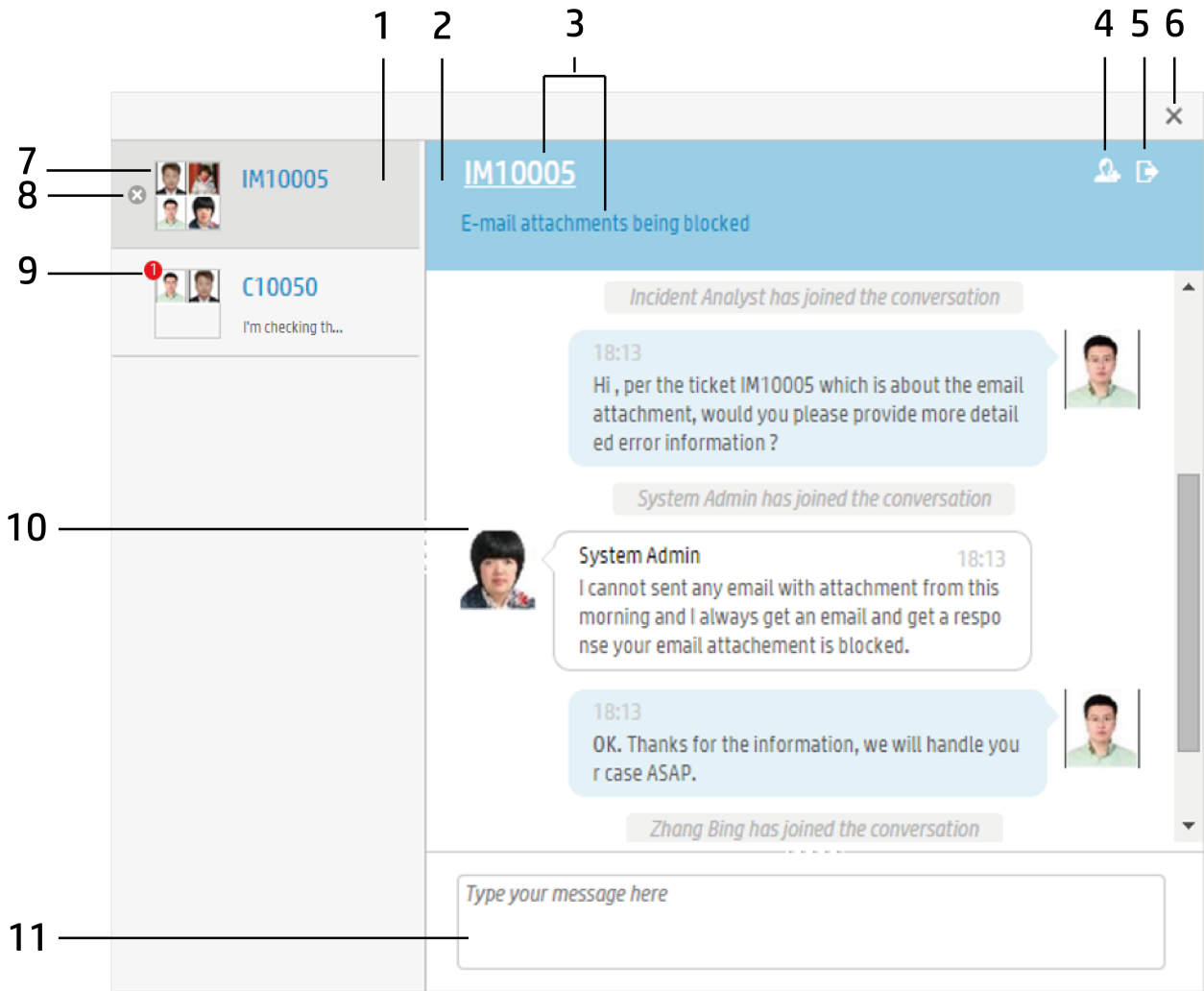
## Collaboration buttons in the Service Manager UI

The Collaboration buttons embedded in the Service Manager UI are illustrated in the following screenshot:



| Callouts | Button | Description |
|---|---|---|
| 1 | Collaboration notifications | Click to display or hide the notification list for new conversation invitations and incoming messages. This icon is gray when there is no open conversation. See "Check updated conversations" on page 18 for more information. |
| 2 | Notification badge | Displays the number of new conversation invitations and incoming messages in the updated conversations. If the count exceeds 99, the number is displayed as N. See "Notifications" on page 8 for more information. |
| 3 | User Information | Click to display or hide the User Basic Information Card. See "Display user information" on page 13 for more information. |

## Conversation window

The Service Manager Collaboration conversation window is illustrated in the following screenshot:
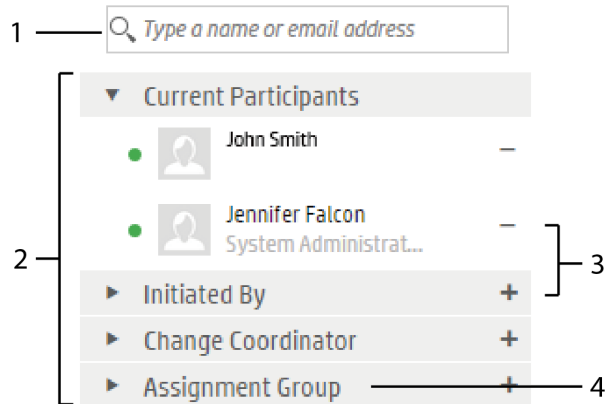
| Callouts | Component | Description |
|---|---|---|
| 1 | Conversation tab | Click to switch between multiple conversations that are currently open. The active conversation appears in dark gray and inactive conversations appear in light gray. The corresponding record ID is also displayed on this tab.<br><br>**Note:** Service Manager Collaboration displays the last received message on the Conversation tab of the inactive conversations. Long messages are displayed as an ellipsis on the Conversation tab. |
| 2 | Conversation window header | Header of the conversation window. |
| 3 | Record ID and title | ID and title of the record that the conversation belongs to. Click the record ID to open the record. |

| Callouts | Component | Description |
|---|---|---|
| | | **Note:** The record can only be opened by the users with the corresponding authorization to view these types of records. |
| 4 | Add Participant | Click to open the Participant window so as to add one or more participants to the conversation. See "Invite Participants" on page 16 for more information. |
| 5 | Quit Conversation | Click to leave a conversation. You will no longer receive messages or notifications from this conversation. See "Quit a conversation" on page 18 for more information. |
| 6 | Minimize conversation window | Click to minimize the conversation window. When a conversation window is minimized, the incoming messages and new conversation invitations are displayed as notifications. |
| 7 | Thumbnails of participants' photos | Thumbnails of the participants' photos in the current conversation. If there are more than four participants, only the photos of the first four participants are displayed. When hovering your mouse over the photo thumbnails, the participants name list is shown. |
| 8 | Close conversation tab | Click to close the conversation tab. When a conversation tab is closed, the incoming messages and new conversation invitations are displayed as notifications. <br><br> **Note:** <br> • This button is visible for mouse-over only. <br><br> • If there is only one conversation in the conversation window, click this button to minimize the conversation window. |
| 9 | Notification badge | Displays the number of new conversation invitations and incoming messages in the updated conversations. If the count exceeds 99, the number is displayed as N... . See "Notifications" on page 8 for more information. |
| 10 | Conversation area | Displays all the conversation activities. |
| 11 | Text input area | Type your input in this area. |

# Participant window

The Participant window is illustrated in the following screenshot:



| Callouts | Component | Description |
|---|---|---|
| 1 | Search participant | Type a user's email address or a user name in this field to automatically display the search result. See "Invite Participants" on page 16 for more information. |
| 2 | Suggested participant list | Displays the suggested participants. Service Manager Collaboration retrieves participants based on the Suggested User Fields configuration that is associated with the record type. See "Invite Participants" on page 16 and "Add supported record types" on page 19 for more information. |
| 3 | Add/Remove button | Click to add/remove the selected participants. See "Invite Participants" on page 16 and "Remove Participants" on page 17 for more information. |
| 4 | Suggested participant group title | Displays the title of the suggested participants group. To customize this title, see step 9 in "Add supported record types" on page 19. |

# Chapter 4: Working with Service Manager Collaboration

This chapter describes the most typical actions you will perform to collaborate with other users.

**Note:** HP Service Manager Collaboration is available on the Service Manager web client only.

## Display user information

After you have logged on to HP Service Manager, click **User Information** on the top-right corner of the Service Manager UI to show your User Basic Information Card. The User Basic Information Card displays your photo, presence status, name, title, email address, and telephone number, and also provides a logout button to log out of Service Manager.

**Note:** The system retrieves the user information from the Service Manager contacts table. If your system uses LDAP authentication only, the contacts table is not synchronized automatically from LDAP. Therefore, some user information is not correctly displayed on the User Basic Information Card. In this case, you need to manually synchronize the contacts table.

## Edit user profile

You can change your photo that is displayed on the User Basic Information Card and update other profile information as well.

To change your photo that is displayed on the User Basic Information Card, follow these steps:

1. Click your current photo on the User Basic Information Card.

2. Browse for another photo that is saved on your computer.

   **Note:** The supported image types are *.png, *. jpg, *.bmp, and *.jpeg.

3. Select your new photo and then click **Open**. Alternatively, double-click the new photo.

   Your photo that is displayed on the User Basic Information Card is updated automatically.

To update other profile information such as name, title, email address, and telephone number, you must log on to HP Service Manager as a system administrator and then follow the instructions as described in Update an operator record.

> **Note:** The system retrieves the user information from the Service Manager contacts table. If your system uses LDAP authentication only, the contacts table is not synchronized automatically from LDAP. Therefore, some user information is not correctly displayed on the User Basic Information Card and you cannot change your photo.

## Change the presence status

The statuses provided by Service Manager Collaboration are: **Online** 🟢, **Busy** 🔴, **Away** 🟡, and **Offline** ⚪. These presence statuses are pre-defined and you cannot create a custom status in HP Service Manager Collaboration. Your presence status is set to **Online** 🟢 once you have logged on to Service Manager. To change your presence status, click the status menu below your photo and then click another status.

> **Note:** These statuses are the aggregated presence statuses of Service Manager Collaboration and Microsoft Office Lync 2013. When you integrates Service Manager Collaboration with Office Lync 2013, the following user presence status behaviors occur:
>
> - If you log on to Service Manager and Lync at the same time, your presence status in Service Manager Collaboration is independent from that in Lync. Changing your presence status in Lync will not affect your status in Service Manager Collaboration.
>
> - If you log on to Lync only and someone is searching for you from Service Manager Collaboration, your Lync presence status is shown beside your name in the participant search result list.

## Send an email message

To send an email message to an IT operator, follow these steps:

1. Click the IT operator's photo in a conversation.

2. When the User Basic Information Card is displayed, click the email address. Your default email program (for example, Microsoft Outlook) opens a blank email message addressed to the IT operator.

# Start a conversation

Conversations can only be started in the detailed view of the records supported by HP Service Manager Collaboration, including Interaction, Incident, Incident Task, Request, Request Task, Problem, Problem Task, Change, and Change Task. By default, the **Start Conversation** button floats on the upper-right corner of the detailed view of these records after you enable Service Manager Collaboration. You can drag this button to any place on the form. However, this button will restore to its default position once the detail view is refreshed.

> **Note:** Lync users cannot start a Collaboration conversation. Instead, they can be invited to Collaboration conversations by using Microsoft Office Lync 2013.

> **Tip:**
> To display the **Start Conversation** button on the detailed view of other types of records that is supported by Service Manager Collaboration, refer to "Add supported record types" on page 19.

To start a conversation, follow these steps:

1. Open a record in Service Manager.

2. Click **Start Conversation** to open the conversation window, and then click **OK** in the system confirmation dialog. A conversation starts with the record's ID and title displayed on the header of the conversation window.

   > **Note:** The **Start Conversation** button has a different icon if the record has an existing conversation.

   > **Tip:** You can also press **Alt** + **Ctrl** + **C** to open or close the conversation window.

3. Refer to "Invite Participants" on the next page to add one or more participants to the conversation. On the contrary, refer to "Remove Participants" on page 17 to remove participants from the conversation as necessary.

4. Type your message in the text input area at bottom of the conversation window. Collaboration

conversation supports plain text only.

> **Tip:** Press **Shift** + **Enter** to start a new line.

5. Press **Enter** to post the message. This message appears in the conversation window with your photo and the current time.

   Posting a message makes the current IT operator a participant automatically.

> **Tip:** Click the message sender's photo to view his/her User Basic Information Card.

> **Tip:** A **Resend Message** button ⟳ appears beside your message when your message is not posted successfully. Click the **Resend Message** button to post your message again.

Only the activity of starting a conversation is stored in the journal update of a record if this record has an activity log. To view the conversation history, you can slide up the scroll bar in a conversation window. See for more information.

## Participate in multiple conversations

You can participate in multiple conversations at the same time, and click the conversation tabs to switch from one to another.

To participate in multiple conversations, follow these steps:

1. Initiate a conversation as instructed in .

2. Open another record in HP Service Manager.

3. Click **Start Conversation**. The new conversation starts in another tab in the conversation window.

## Invite Participants

To invite participants to contribute to a conversation, follow these steps:

1. Open a conversation directly or open a record that has a conversation.

2. Click **Add Participant** [icon] on the header of the conversation window to open the Participants window. HP Service Manager Collaboration retrieves participants based on the Suggested User Fields configuration in Service Manager.

   > **Tip:** For more information about how to customize the Suggested User Fields, see step 7 in "Add supported record types" on page 19.

3. Add a new participant by performing either of the following tasks:

   - Select a user name or a group from the suggested participant list, and then click the **Add** button.

   - Enter a user's email address or a user name in the Search Participant field, select the participant from the search result, and then click the **Add** button.

   After you invite a participant to the current conversation, the system broadcasts a message to all the other participants to identify who is invited. Meanwhile, the invited participant receives a system message that shows the members in the current conversation.

> **Tip:**
> - After you integrated Service Manager Collaboration with Microsoft Office Lync, the Lync users who are currently available on Lync become searchable. You can select a Lync user from the search result and then invite him/her to a conversation.
>
> - You can view participants' presence statuses that are shown beside the user names in the suggested participant list, the participant list, and the participant search result list.
>
> - To close the Participants window, press **ESC** or click anywhere outside of the participants list.

# Remove Participants

Participants can be removed from conversations if they no longer need to contribute. Participants can remove themselves or the other participants. When being removed, participants will not receive any incoming message notifications through HP Service Manager Collaboration.

To remove participants, follow these steps:

1. Click **Add Participant** to display the participants list.

2. Select the person in the participant list, and then click the **Remove** button.

3. The system prompts you to confirm the operation, click **OK**.

# Quit a conversation

To quit a conversation, click **Quit Conversation** on the header of the conversation window, and then click **Yes** in the system prompt.

You will no longer receive messages or notifications from this conversation. After you quit the current conversation, the system broadcasts a message to all the other participants to identify that you have left the conversation.

The conversation is automatically saved in the Service Manager database. Quitting the conversation does not close the record in the main workspace.

> **Note:** Leaving the conversation does not delete the conversation. Conversations cannot be deleted.

# Check updated conversations

To view the updated conversations, follow these steps:

1. Click **Notifications** to open the notifications panel.

   > **Tip:** You can also press **Alt** + **Ctrl** + **V** to open or close the notifications panel. When there is no notification, this shortcut opens a conversation window.

2. Click a notification to view its context in the corresponding conversation. Alternatively, press the **Up/Down Arrow** keys to highlight a notification in the panel, and then press **Enter**.

   ○ If the conversation window is not minimized and there are multiple conversation tabs open, the conversation that relates to your selected notification is pushed to the last tab, and the notification context is displayed in the Conversation area.

- If the conversation window is minimized, Service Manager Collaborations first launches the conversation window, and then pushes the conversation that relates to your selected notification to the last tab.

> **Note:** When you open an updated conversation, the record that the conversation belongs to does not automatically open. To open the corresponding record, click the record ID on the conversation window header.

## View conversation history

HP Service Manager Collaboration conversations are saved in the Service Manager database. You can slide up the scroll bar in a conversation window to view the conversation history.

> **Note:** If you previously slide up the scroll bar to display conversation history and there are new messages appear in the conversation area in real-time, a New Message pop-up ![New Message] is displayed on the bottom of the conversation area. You can return to the initial view (with only several latest messages) by clicking the **New Message** pop-up.

## Add supported record types

By default, HP Service Manager Collaboration supports the following types of records in this release:

- Interaction

- Request and Request Task

- Incident and Incident Task

- Change and Change Task

- Problem and Problem Task

In addition to the above record types, you can add a new record type that is supported by Service Manager Collaboration. After certain configurations, the **Start Conversation** button becomes available on the detailed view of the new record type and you can initiate a conversation.

> **Note:** Service Manager Collaboration does not support the Knowledge Management module.

To add a new record type that is supported by Service Manager Collaboration, follow these steps:

1. Log on to Service Manager as a system administrator.

2. Click **System Administration** > **Ongoing Maintenance** > **Collaboration** > **Support List** to open the Service Manager Collaboration Configuration form.

3. Type the name of the reference table of a new record type in the File Name field. For example, type `probsummary` for Incidents.

4. Select the **Service Manager Collaboration Enabled** check box to enable Service Manager Collaboration for the new record type.

5. Type the key that represents the record ID in the ID Field. This is the record ID that is displayed on the Conversation window header. For example, `number`.

6. Type the key that represents the record description in the Display Field. This is the record description that is displayed on the Conversation window header. For example, `brief.description`.

7. Customize the suggested participant list for the new record type in the Suggested User Fields section.

   a. Type the key that represents the field to be listed as a suggested group in the Source Field column, and then type its associated file name in the Target File column. For example, to add the Opened By group to the suggested participant list for Interactions, type `opened.by` in the Source Field column, and then type `operator` in the Target File column.

   b. Refer to the existing configurations to add more suggested groups that are listed in the suggested participant list.

   > **Note:** Only character fields and array character fields are supported.

8. Click **Add** and **OK**.

9. (Optional) Customize the suggested participant group title.

   Every suggested participant group has a default group title. However, you can customize the existing group titles or add new group titles.

a. Click **Tailoring** > **Database manager**.

b. Type `scmessage` in the Table field, and then click **Search**.

c. Click **Message.edit** to open the HP Service Manager Message form.

- To edit an existing suggested participant group title, follow these steps:

    A. Type `smcconfig` in the Class field.

    B. Type the reference table name, a semicolon (;), and the key that represents the field to be listed as a suggested group in the Message Number field. These two values must be delimited by a semicolon with no spaces between them. For example, to edit the title of the Contact group for Incidents, type `probsummary;contact.name`.

    C. Click **Search**.

    D. Update the suggested participant group title in the Text field.

    E. Click **Save** and **OK**.

- To add a new suggested participant group title, follow these steps:

    A. Type the language code in the Language Code field. For example, `en`.

    B. Type `smcconfig` in the Class field.

    C. Type the reference table name, a semicolon (;), and the key that represents the field be listed as a suggested group in the Message Number field. These two values must be delimited by a semicolon with no spaces between them. For example, type `probsummary;vendor`.

    D. Type the suggested participant group title in the Text field.

    E. Click **Add**.

10. Log out and then log on to Service Manager again.

Now you can start a Service Manager Collaboration conversion by clicking the **Start Conversation** button in the detailed view of the new record type.

# Send Documentation Feedback

If you have comments about this document, you can contact the documentation team by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

**Feedback on Collaboration Guide (Service Manager 9.41)**

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to ovdoc-itsm@hp.com.

We appreciate your feedback!