HP OpenView Service Desk Integration with Service Information Portal

Version: 3.2

Windows®, HP-UX, and Solaris

Manufacturing Part Number: None
September 2004

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Support

Please visit the HP OpenView web site at:

`http://www.managementsoftware.hp.com/`

This web site provides contact information and details about the products, services, and support that HP OpenView offers.

You can also go directly to the support web site at:

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HP OpenView online software 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 valuable support customer, you can benefit by using the support site to:

- Search for knowledge documents of interest
- Submit and track progress on support cases
- Manage a support contract
- Look up HP support contacts
- Review information about available services
- Enter 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 log in. Throughout the site, access levels are indicated by the following icons:


HP Passport


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1 How OVSD Works with SIP

HP OpenView Service Desk and SIP

HP OpenView Service Desk automates IT infrastructure management processes to control the quality and delivery of business critical IT services. The supported IT management processes can be managed against agreed-upon service levels. The service level is negotiated and agreed upon by the customers of the service.

Service Desk helps you:

- Increase the quality and quantity of delivered services.
- Decrease the time required to resolve incidents.
- Prevent incidents from occurring or reoccurring.
- Reduce the risk associated with an evolving IT infrastructure.
- Manage processes involved in delivering high-quality services.

Service Desk is a structured, process-oriented application that supplies tools for managing, reporting, and improving all IT management processes. It can be modified to fit into the procedures of any IT department. It can also be integrated with a variety of tools that will extend the capabilities of your IT department.

For more information about configuring OpenView Service Desk, itself, see the documentation set that comes with OpenView Service Desk (or access the manuals online at the web site: `http://ovweb.external.hp.com/lpe/doc_serv`).

You can display Service Desk 4.0 and 4.5 data from Service Desk's web interface (Service Pages) through SIP's Service Desk modules. Two modules are provided:

- **Service Desk module**
  In Service Desk, end users are generally given only the ability to submit, view, or modify service calls. This module is designed to meet the needs of end users.
- **Service Desk for Specialists module**
  In Service Desk, operators ("specialists" in Service Desk terminology) are given the ability to view or modify incidents, problems, changes, and work orders. In addition, specialists can submit, view, or modify service calls. This module is designed to meet the needs of specialists.

The person viewing a Service Desk module need not enter Service Page login information. Login is handled through the SIP single sign-on. And SIP proxies the data from the Service Pages, so the person viewing a Service Desk module need not be given direct access to your Service Pages server.

The Service Desk Module for SIP

HP OpenView Service Desk (OVSD) provides users the ability to submit, view, or modify service calls.

Access to the following are provided in SIP's Service Desk module:

- **New Service Call**

  The first button accesses the window where new service calls are entered into the Service Desk database. The user can submit a new service call.

- **Service Calls (Full)**

  The second button displays all service calls that the user is permitted to see in the full view (as defined by the Service Desk system administrator). Clicking on a service call ID number displays detailed information about that service call. Users can modify the detail information (provided their Service Desk user configuration permits them to do so).

- **Service Calls (Restricted)**

  The second button displays all service calls that the user is permitted to see in the restricted view (as defined by the Service Desk system administrator). Clicking on a service call ID number displays detailed information about that service call. Users can modify the detail information (provided their Service Desk user configuration permits them to do so).

See Chapter 3, "The Service Desk Module," on page 25 for more information.

The Service Desk for Specialists Module for SIP

HP OpenView Service Desk (OVSD) provides specialists the ability to view or modify incidents, problems, changes, and work orders. Specialists can also submit, view, or modify service calls. Clicking on any ID number displays more detailed information. Specialists can modify the detail information (if their Service Desk user configuration permits).

Access to the following are provided in SIP's Service Desk for Specialists module:

- **New Service Call**

  The first button accesses the window where new service calls are entered into the Service Desk database. The user can submit a new service call.

- **Service Calls**

  The second button displays all service calls that the user is permitted to see in the full view (as defined by the Service Desk system administrator). Clicking on a service call ID number displays detailed information about that service call. Users can modify the detail information (provided their Service Desk user configuration permits them to do so).

- **Incidents**

  The third button displays the Incidents list. Incidents are created with information coming from specialists, network management tools, or system management tools. Incidents transfer information among specialists. Incidents are based upon information about the status of a service or configuration item.

- **Problems**

  The fourth button displays the Problem list. If the problem is identified, without finding a solution, the problem is a known error. The problem remains as a known error until a resolution to the problem is found. If the resolution requires a hardware or software change to prevent the problem from reoccurring, this problem advances to a Change.

- **Changes**

  The fifth button displays a list of Changes. Changes track the activities required to resolve a problem, incident, or service call, and the impact of those changes.

- **Work Orders**

  The sixth button displays the list of Work Orders.

  Service calls, incidents, problems, and changes often result in a vast amount of work to be done. Work orders are a tool for employees to plan, assign, and follow-up on that resulting work.

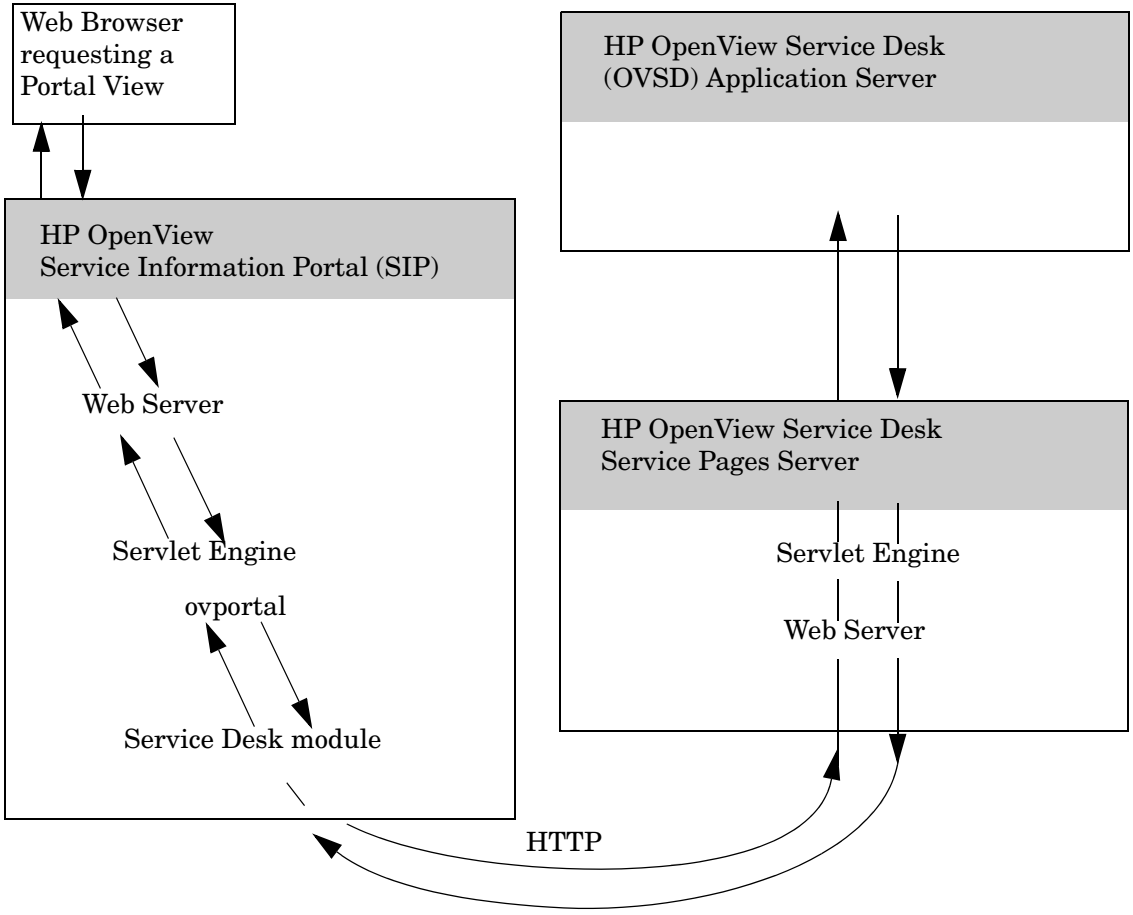
  Work orders provide an audit trail of completed work or work still in progress. The Service Desk application automatically creates history lines whenever a work order status is changed. The history lines record who changed the work order and when the work order was changed. By viewing the history lines you can determine when a work order is completed, overdue, or not progressing.

See Chapter 4, “The Service Desk for Specialists Module,” on page 37 for more information.

Communication Paths Between OVSD and SIP

The following diagram illustrates the processes involved in communicating data from SIP to OpenView Service Desk and visa versa:

Figure 1-1 Communication Process for the Service Desk Modules



Installation of the Modules

SIP can run on Windows, HP-UX, or Solaris and can communicate with multiple OVSD Service Pages servers running on any combination of Windows NT, Windows 2000, Windows 2003, and UNIX. You must configure each SIP role to communicate with one of your OVSD Service Pages servers.

The HP OpenView Service Desk modules are automatically installed with the Service Information Portal software. If you have not already installed SIP, see the SIP *Installation Guide* (`SIP_Install_Guide.pdf`) for SIP installation instructions, and OVSD version and patch requirements.

Before using the modules, you must configure SIP and Service Desk to communicate with each other. See, “Establishing Communication Between OVSD and SIP” on page 18.

2 Configuration Steps

Establishing Communication Between OVSD and SIP

To establish communication between SIP and your OVSD Service Pages servers, you need to take the following steps.

SIP can run on Windows, HP-UX, or Solaris and can communicate with multiple OVSD Service Pages servers running on any combination of Windows NT, Windows 2000, Windows 2003, and UNIX.

On Each Service Desk Application Server

NOTE Verify that you are using a version of HP OpenView Service Desk that is supported by SIP, see the SIP *Installation Guide* (`SIP_Install_Guide.pdf`) for the list of supported product versions.

If you have not already done so, create a user account (Service Pages account) for each user that will access any SIP Service Desk module.

Make a list of the login names and passwords. You must enter these exact values into Role Properties on the SIP server in a later step in “On the SIP Server” on page 18.

On the SIP Server

To enable communication between SIP and Service Pages, you need to associate properties with Roles:

1. On the SIP server, open the SIP Configuration Editor:

   Windows: `Start:Programs:HP OpenView->Service Information Portal->Configuration Editor`

   UNIX: `/opt/OV/SIP/bin/SIP_Config`

2. Navigate to your Role definition (other than `SIP Administrator`).
3. Right-click the role name and select `Properties`.

4. Move to the `Properties` tab and enter the following three properties. Only one set of the Service Desk properties are allowed per SIP role.

Table 2-1

Name	Value
`ServiceDesk.SSPserver`	Enter the fully-qualified hostname of the OVSD Service Pages server (may be different from the computer running the Service Desk application server). If Service Desk has been configured on a port other than port 80, you must enter the port number as part of the server name; for example, *hostname:port*.
`ServiceDesk.userName`	Enter the user's login name exactly as it is entered within Service Desk.
`ServiceDesk.password`	Enter the user's password exactly as it is entered within Service Desk.
`ServiceDesk.virtualDirectory`	Enter a different value depending upon the version of Service Desk: For SD 4.0, you must enter `sd-sp4` For SD 4.5, you must enter `sd-sp45`

5. Save your changes and exit the SIP Configuration Editor.
6. You can now add the Service Desk module or the Service Desk for Specialists module to the desired portal tab (one per tab).
7. Repeat for each Role that is allowed to view the Service Desk module.

NOTE You do *not* need to add an entry under `Management Stations` configuration.

SIP Distribution Model

SIP can be configured in a tiered distribution model. For example:

- Web Browser Tier
- Web Server Tier
- SIP Server Tier
- Management Server Tier

For more information about the tiered distribution model, see the "Distribution Model" section of the *SIP Deployment and Integration Guide* (`SIP_Deployment_Integration.pdf`).

The web browser to SIP server communication can go through a firewall and only requires HTTP or HTTPS.

The SIP server to the OVSD Service Pages server communication can also go through a firewall, if desired. The port that needs to be opened through the firewall to gather data for the Service Desk modules is determined in the OVSD Service Pages server configuration settings (default, port 80). See also "Establishing Communication Between OVSD and SIP" on page 18.

Table 2-2 Port Requirements for SIP to OVSD Communication

Protocol	Default Port	Configuration Location
http	80	On the SIP server, use the SIP Configuration Editor to configure the OVSD Service Pages server through SIP Role Properties: `ServiceDesk.SSPserver` The OVSD Service Pages server port can be configured in the module default XML file or each module instance.

Running in Languages Other Than English

For information about configuring SIP and your web browser for non-English language mode, see the *SIP Deployment and Integration Guide* (`SIP_Deployment_Integration.pdf`), "Running SIP in Non-English Language Mode" section.

Any language that can be displayed within the UTF-8 codeset can be displayed through SIP.

Configuring SIP to Access UTF-8 Data From OVSD

Assuming that you have already completed the steps in the previous sections of this chapter, displaying non-English data through the Service Desk modules is easy.

To access non-ASCII data from OpenView Service Desk, follow these directions to select another language:

- "Using the Service Desk - Edit Page" on page 28
- "Using the Service Desk for Specialists - Edit Page" on page 41.

Secure Socket Layer (SSL) Support

The SIP server to OVSD Service Pages server communication cannot be configured to use Secure Socket Layer (SSL) at this time.

Running the OV Service Desk Module in a Wireless Environment

Only browsers supporting full HTML and JavaScript can display the SIP Service Desk modules.

3 The Service Desk Module

Using the Service Desk Module

The Service Desk module displays a list of Service Desk's current service calls. To quickly locate and display a particular service call or to enter a new service call, click one of the buttons at the bottom of the Service Desk module:

- **New Service Call**

  The first button brings up the page for entering new service call requests.

- **Service Calls (Full)** and **Service Calls (Restricted)**

  The remaining buttons display all service calls that the you are permitted to see in the view (as defined by the Service Desk system administrator). Clicking on a service call ID number displays detailed information about that service call. You can modify the detail information (provided your Service Desk user configuration permits you to do so).

Adding the Service Desk Module

NOTE You can insert *either* the Service Desk module *or* the Service Desk for Specialists module on any tab (one per tab).

To insert the Service Desk module into a portal view:

1. Access the portal view by logging on to SIP as a user with access to the appropriate role. If this user has access to multiple roles, switch to the appropriate role.

   Your currently assigned SIP role must have `ViewAdmin` editing permissions.

2. Navigate to the appropriate tab.
3. At the bottom of any wide column, either:

   - Select `Service Desk` from the `Select Module to Add` list box, and click `[Add]`, or

- Click [Edit] to access the Edit Column page. Insert the Service Desk module and place it into the desired location among other modules in the column. Click [OK] to save the changes and return to the main portal page.

A copy of the default Service Desk module is inserted into your *PortalView*.xml file.

- If you want to modify this module instance, turn to "Editing the Service Desk Module" on page 28.
- If you want to change the default module, see "Relevant Files" on page 34.

TIP

If you want to add a module to the list of available modules, see "Relevant Files" on page 34. You can create and add another instance of any module.

Editing the Service Desk Module

Using the Service Desk - Edit Page

You can easily modify the Service Desk module in your portal view:

1. Access the portal view by logging on to SIP as a user with access to the appropriate role. If this user has access to multiple roles, switch to the appropriate role.

   Your currently assigned SIP role must have `ViewAdmin` editing permissions.

2. Navigate to the appropriate tab.
3. In the title bar of the Service Desk module, click the edit button: 
4. Make any desired changes. Click `[Help]` for specific instructions:
   - Specify the desired `Language`. This language must be currently configured on the Service Desk application server.
   - Specify the desired `Time Zone`.
5. To save the changes and return to the main portal page, click `[OK]`.
6. Log off of the SIP portal (you must log off before the changes take effect).
7. Log into the SIP portal as the appropriate user to ensure that you have the desired results.

Directly Editing the PortalView.XML File

TIP

For the following adjustments, you must edit the XML file. It is recommended that you use the `Service Desk - Edit` page for all other editing changes.

- Change the displayed title for this module instance.
- Add your own online help to the `[?]` button for this module.

- Remove, reorder, or rename [New Service Call], [Service Calls (Full)], or [Service Calls (Restricted)].
- Change the initial view setting.

To directly modify the XML code for a Service Desk module:

1. Make a backup of XML files before you make changes. If you edit the XML file and get incorrect XML syntax, you may want the ability to revert to the previous version of the file.
2. Open your *PortalView*.xml file with an ASCII or XML editor. Portal view files are stored in the following directory or subdirectories below this directory:

   Windows: %SIP_HOME%\conf\share\views

   UNIX: /opt/OV/SIP/conf/share/views

   If a portal view file does not yet exist, see the "Customizing Portal Views" section of the *SIP Deployment and Integration Guide* (SIP_Deployment_Integration.pdf) and follow the procedure for creating a portal view.
3. Search for the following string to find your existing module to edit:

   classid="ServiceDesk4"

   Module instances are wrapped in the ModuleInstance element. The ModuleInstance id must be unique among all module instances in the portal view file. For information about the ModuleInstance element, see the *SIP Deployment and Integration Guide* (SIP_Deployment_Integration.pdf), "PortalView DTD" section.

   For example:

   ```
   <ModuleInstance
      classid="ServiceDesk4"
      display="yes"
      help="/OvSipDocs/C/help/OVSD/OVSDView.html"
      id="module10"
      rollupState="down"
      title="Service Desk">
   ......
   </ModuleInstance>
   ```
4. You may find the following text between the ModuleInstance starting and closing tags:

```
 <Generic>
   <Submodule>
        <Url anchorText="Service Desk"
auth="vLogin=$OVROLE[ServiceDesk.userName]&amp;vPasswd=$OVROLE[ServiceDesk.password]&
amp;vHaveAccount=yes&amp;vTimezone=$Timezone&amp;vLanguage=$Language"
handshake="no" displayMethod="inline"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ListServiceCalls.jsp?type=full"
ifNoIFramesMsg=" " inlineHeight="250"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
proxy="yes" showAsButton="no" windowName="results">
                     <OptionParm name="Language" prompt="Language:" value="English">
                       <Option name="English" value="1033"/>
                       <Option name="French" value="1036"/>
                       <Option name="German" value="1031"/>
                       <Option name="Japanese" value="1041"/>
                       <Option name="Korean" value="1042"/>
                       <Option name="Spanish" value="1034"/>
                     </OptionParm>
            <OptionParm name="Timezone" prompt="TimeZone:" value="Mountain Standard
Time (Denver)">
               <Option name="Central Standard Time (Chicago)" value="CST"/>
               <Option name="Coordinated Universal Time" value="GMT"/>
               <Option name="Eastern Standard Time (New York)" value="EST"/>
               <Option name="European Central Standard Time (Amsterdam)" value="ECT"/>
               <Option name="Pacific Standard Time (San Francisco)" value="PST"/>
               <Option name="Japan Standard Time (Tokyo)" value="JST"/>
               <Option name="Mountain Standard Time (Denver)" value="MST"/>
          </OptionParm>
        </Url>
   </Submodule>
   <Submodule>
        <Url anchorText="New Service Call"
auth="vLogin=$OVROLE[ServiceDesk.userName]&amp;vPasswd=$OVROLE[ServiceDesk.password]&
amp;vHaveAccount=yes&amp;vTimezone=$Timezone&amp;vLanguage=$Language"
handshake="no" displayMethod="anchor"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/CreateServiceCall.jsp"
inlineHeight="220"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
proxy="yes" showAsButton="yes" windowName="results"/>
   </Submodule>
<Submodule>
  <Url anchorText="Service Calls (Full)"
auth="vLogin=$OVROLE[ServiceDesk.userName]&vPasswd=$OVROLE[ServiceDesk.password]&vHav
eAccount=yes&vTimezone=$Timezone&vLanguage=$Language" displayMethod="anchor"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ListServiceCalls.jsp?type=full"
inlineHeight="250" handshake="no"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
proxy="yes" showAsButton="yes" windowName="results" />
</Submodule>
<Submodule>
  <Url anchorText="Service Calls (Restricted)"
```

```
auth="vLogin=$OVROLE[ServiceDesk.userName]&vPasswd=$OVROLE[ServiceDesk.password]&vHav
eAccount=yes&vTimezone=$Timezone&vLanguage=$Language" displayMethod="anchor"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ListServiceCalls.jsp?type=restrict
ed" inlineHeight="200" handshake="no"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
proxy="yes" showAsButton="yes" windowName="results" />
  </Submodule>
</Generic>
```

See the comments in the `OVGeneric.dtd` file for more information about the correct XML syntax:

- *Windows:* `%SIP_HOME%\conf\share\views\OVGeneric.dtd`
- *UNIX:* `/opt/OV/SIP/conf/share/views/OVGeneric.dtd`

5. To change the title of this Service Desk module instance, change the `title` attribute: `<ModuleInstance title="new title">`

   To change the title of all Service Desk modules, change the `title` attribute in the registration file, see “Relevant Files” on page 34.

6. To launch your own help topic from the module’s `[?]` button, insert the `help` attribute into the `<ModuleInstance>`:

   `help="/OVSipDocs/C/help/OVSD/`*`topic`*`.html"`

   Replace *`topic`*`.html` with the name of your help file. The `help` attribute allows you to override the default help URL defined in the module registration file. See the *SIP Deployment and Integration Guide* (`SIP_Deployment_Integration.pdf`), “Adding and Customizing Module Help Topics” for more information about writing your own online help.

7. To specify the desired default `Language` on the first line of this block (“English” in the example). This language must be currently configured on the Service Desk application server.

```
<OptionParm name="Language" prompt="Language:" value="English">
                  <Option name="English" value="1033"/>
                  <Option name="French" value="1036"/>
                  <Option name="German" value="1031"/>
                  <Option name="Japanese" value="1041"/>
                  <Option name="Korean" value="1042"/>
                  <Option name="Spanish" value="1034"/>
   </OptionParm>
```

8. To specify the desired default `Time Zone` on the first line of this block (“Mountain Standard Time (Denver)” in the example).

```
<OptionParm name="Timezone"
            prompt="TimeZone:"
            value="Mountain Standard Time (Denver)">
              <Option name="Central Standard Time (Chicago)" value="CST"/>
              <Option name="Coordinated Universal Time" value="GMT"/>
              <Option name="Eastern Standard Time (New York)" value="EST"/>
              <Option name="European Central Standard Time (Amsterdam)" value="ECT"/>
              <Option name="Pacific Standard Time (San Francisco)" value="PST"/>
              <Option name="Japan Standard Time (Tokyo)" value="JST"/>
              <Option name="Mountain Standard Time (Denver)" value="MST"/>
 </OptionParm>
```

9. To delete or reorder buttons:

   There are four `<Submodule>` blocks.

   - `<Submodule>`
     `<Url anchorText="Service Desk" ...`
   - `<Submodule>`
     `<Url anchorText="New Service Call" ...`
   - `<Submodule>`
     `<Url anchorText="Service Calls (Full)"...`
   - `<Submodule>`
     `<Url anchorText="Service Calls (Restricted)"...`

   The `submodule with anchorText="Service Desk"` controls the Edit page settings for this module. Do not delete this block.

   Place the remaining `<Submodule>` blocks in the order in which you want the buttons to appear at the bottom of the Service Desk module.

   Delete any `<Submodule>` blocks for buttons that you don't want to include in this module instance.

   Change the `anchorText=" "` value to rename a button.

10. To change the size of the Service Desk module, in the submodule with `anchorText="Service Desk"`, change the number of pixels for the `inlineHeight="xx"` attribute.

11. To change the initial display default (set to `[Service Calls]` in the above example), in the submodule with `anchorText="Service Desk",` locate the `href=" "` line.

    Near the end of the string, you will find an `xxx.jsp` entry. Modify this entry to designate the desired default display:

    - `CreateServiceCall.jsp`

- `ListServiceCalls.jsp`

12. Save the XML file.
13. After you make modifications to XML files, validate the syntax. See “Validating XML Files” on page 57 for more information.
14. Log into the SIP portal as the appropriate user to ensure that you have the desired results.

Relevant Files

The Service Desk modules must follow the rules defined in the following DTD files. See the comments in the DTD files for an explanation of each element used in the XML files:

`UserRole.dtd & package.xml`

Three property values (entered for each SIP role) configure communication between OVSD Service Pages servers and Service Information Portal servers. See the “Establishing Communication Between OVSD and SIP” on page 18.

- `OVModuleRegistraton.dtd & OVRegServiceDesk4.xml`

  This XML file grants access to the Service Desk module through the SIP framework so that it is available for your use. To add another instance of the Service Desk module to the SIP module selection list, you copy and rename the `OVRegServiceDesk4.xml` and the `OVDefaultServiceDesk4.xml` files. Then update the `description`, `title`, `classid`, `help`, and `defaultConfigXML` attribute values in the new registration file.

  If you make any changes to a registration file, you must follow the directions in “Restarting the Servlet Engine” on page 60.

- `OVGeneric.dtd & OVDefaultServiceDesk4.xml`

  This DTD defines the rules for configuring the Service Desk module. The XML file contains the *default* Service Desk module. The contents of the default file are inserted into your portal each time you use the `[Add]` button to insert the Service Desk module.

  You can modify the `OVDefaultServiceDesk4.xml` file to meet your needs. Either:

  — Directly edit the XML code in the `OVDefaultServiceDesk4.xml` file, or

  — Insert a Service Desk module into any portal. Modify the module to meet your needs. Then, copy the modified XML code for the module from your portal view file, and paste it into the `OVDefaultServiceDesk4.xml` file.

  See “Directly Editing the PortalView.XML File” on page 28 for more information

PortalView.dtd & *PortalView*.xml

This DTD provides the rules for formatting the XML code in your portal view files. See the *SIP Deployment and Integration Guide* (SIP_Deployment_Integration.pdf), "Customizing Portal Views" section for more information about creating portal view files.

- /htdocs/C/help/OVSD/*.html

  This directory contains help topics for Service Desk modules. The Help topics are accessed by clicking [?] on the module title bar. If you want to supply your own customized help files, see the *SIP Deployment and Integration Guide* (SIP_Deployment_Integration.pdf), "Adding and Customizing Module Help Topics" section.

Table 3-1 Service Desk Module Files on the SIP Server

File Name	Windows Location %SIP_HOME%\....	UNIX Location /opt/OV/SIP/....
UserRole.dtd	conf\share\roles\	conf/share/roles/
package.xml	conf\share\roles\	conf/share/roles/
OVModuleRegistration.dtd	registration\	registration/
OVRegServiceDesk4.xml	registration\	registration/
OVGeneric.dtd	conf\share\views\	conf/share/views/
OVDefaultServiceDesk4.xml	registration\defaults\	registration/defaults/
PortalView.dtd	conf\share\views\	conf/share/views/
PortalView.xml	conf\share\views\	conf/share/views/
*.html	htdocs\C\help\OVSD\	htdocs/C/help/OVSD/

4 The Service Desk for Specialists Module

Using the Service Desk for Specialists Module

The Service Desk for Specialists module displays a list of Service Desk's current service calls, incidents, problems, changes, or work orders. To quickly locate and display a particular service call or to enter a new service call, click one of the buttons at the bottom of the Service Desk module.

- **New Service Call**

  The first button brings up the page for entering new service call requests.

- **Service Calls**

  The second button displays all service calls that you are permitted to see. Clicking on a service call ID number displays detailed information about that service call. You can modify the detail information (provided your Service Desk user configuration permits you to do so).

- **Incidents**

  The third button displays the Incidents list. Incidents are created with information coming from specialists, network management tools, or system management tools. Incidents transfer information among specialists. Incidents are based upon information about the status of a service or configuration item.

- **Problems**

  The fourth button displays the Problem list. If the problem is identified, without finding a solution, the problem is a known error. The problem remains as a known error until a resolution to the problem is found. If the resolution requires a hardware or software change to prevent the problem from reoccurring, this problem advances to a Change.

- **Changes**

  The fifth button displays a list of Changes. Changes track the activities required to resolve a problem, incident, or service call, and the impact of those changes.

- **Work Orders**

The sixth button displays the list of Work Orders.

Service calls, incidents, problems, and changes often result in a vast amount of work to be done. Work orders are a tool for employees to plan, assign, and follow-up on that resulting work.

Work orders provide an audit trail of completed work or work still in progress. The Service Desk application automatically creates history lines whenever a work order status is changed. The history lines record who changed the work order and when the work order was changed. By viewing the history lines you can determine when a work order is completed, overdue, or not progressing.

Adding the Service Desk for Specialists Module

NOTE You can insert *either* the Service Desk module *or* the Service Desk for Specialists module on any tab (one per tab).

To insert the Service Desk for Specialists module into a portal view:

1. Access the portal view by logging on to SIP as a user with access to the appropriate role. If this user has access to multiple roles, switch to the appropriate role.

   Your currently assigned SIP role must have `ViewAdmin` editing permissions.

2. Navigate to the appropriate tab.
3. At the bottom of any wide column, either:

   - Select `Service Desk for Specialists` from the `Select Module to Add` list box, and click `[Add]`, or
   - Click `[Edit]` to access the `Edit Column` page. Insert the Service Desk for Specialists module and place it into the desired location among other modules in the column. Click `[OK]` to save the changes and return to the main portal page.

A copy of the default Service Desk for Specialists module is inserted into your *`PortalView`*`.xml` file.

- If you want to modify this module instance, turn to “Editing the Service Desk for Specialists Module” on page 41.

- If you want to change the default module, see “Relevant Files” on page 48.

TIP

If you want to add a module to the list of available modules, see “Relevant Files” on page 48. You can create and add another instance of any module.

Editing the Service Desk for Specialists Module

Using the Service Desk for Specialists - Edit Page

You can easily modify the Service Desk for Specialists module in your portal view:

1. Access the portal view by logging on to SIP as a user with access to the appropriate role. If this user has access to multiple roles, switch to the appropriate role.

   Your currently assigned SIP role must have `ViewAdmin` editing permissions.

2. Navigate to the appropriate tab.
3. In the title bar of the Service Desk for Specialists module, click the edit button: 
4. Make any desired changes. Click `[Help]` for specific instructions:
   - Specify the desired `Language`. This language must be currently configured on the Service Desk application server.
   - Specify the desired `Time Zone`.
5. To save the changes and return to the main portal page, click `[OK]`.
6. Log off of the SIP portal (you must log off before the changes take effect).
7. Log into the SIP portal as the appropriate user to ensure that you have the desired results.

Directly Editing the PortalView.XML File

TIP

For the following adjustments, you must edit the XML file. It is recommended that you use the `Service Desk for Specialists - Edit` page for all other editing changes.

- Change the displayed title for this module instance.

- Add your own online help to the [?] button for this module.
- Remove, reorder, or rename the six buttons.
- Change the initial view setting.

To directly modify the XML code for a Service Desk for Specialists module:

1. Make a backup of XML files before you make changes. If you edit the XML file and get incorrect XML syntax, you may want the ability to revert to the previous version of the file.
2. Open your *PortalView*.xml file with an ASCII or XML editor. Portal view files are stored in the following directory or subdirectories below this directory:

   Windows: %SIP_HOME%\conf\share\views

   UNIX: /opt/OV/SIP/conf/share/views

   If a portal view file does not yet exist, see the "Customizing Portal Views" section of the *SIP Deployment and Integration Guide* (SIP_Deployment_Integration.pdf) and follow the procedure for creating a portal view
3. Search for the following string to find your existing module to edit:

   classid="ServiceDesk4Spec"

   Module instances are wrapped in the ModuleInstance element. The ModuleInstance id must be unique among all module instances in the portal view file. For information about the ModuleInstance element, see the *SIP Deployment and Integration Guide* (SIP_Deployment_Integration.pdf), "PortalView DTD" section.

   For example:

```
<ModuleInstance
   classid="ServiceDesk4Spec"
   display="yes"
   help="/OvSipDocs/C/help/OVSD/OVSDspecView.html"
   id="module11"
   rollupState="down"
   title="Service Desk for Specialists">
........
</ModuleInstance>
```

4. You may find the following text between the `ModuleInstance` starting and closing tags:

```
 <Generic>
   <Submodule>
        <Url anchorText="Service Desk"
auth="vLogin=$OVROLE[ServiceDesk.userName]&amp;vPasswd=$OVROLE[ServiceDesk.password]&
amp;vHaveAccount=yes&amp;vTimezone=$Timezone&amp;vLanguage=$Language"
handshake="no" displayMethod="inline"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ListServiceCalls.jsp?type=full"
ifNoIFramesMsg=" " inlineHeight="250"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
proxy="yes" showAsButton="no" windowName="results">
                      <OptionParm name="Language" prompt="Language:" value="English">
                        <Option name="English" value="1033"/>
                        <Option name="French" value="1036"/>
                        <Option name="German" value="1031"/>
                        <Option name="Japanese" value="1041"/>
                        <Option name="Korean" value="1042"/>
                        <Option name="Spanish" value="1034"/>
                      </OptionParm>
         <OptionParm name="Timezone" prompt="TimeZone:" value="Mountain Standard Time
(Denver)">
                <Option name="Central Standard Time (Chicago)" value="CST"/>
                <Option name="Coordinated Universal Time" value="GMT"/>
                <Option name="Eastern Standard Time (New York)" value="EST"/>
                <Option name="European Central Standard Time (Amsterdam)" value="ECT"/>
                <Option name="Pacific Standard Time (San Francisco)" value="PST"/>
                <Option name="Japan Standard Time (Tokyo)" value="JST"/>
                <Option name="Mountain Standard Time (Denver)" value="MST"/>
         </OptionParm>
        </Url>
   </Submodule>
   <Submodule>
        <Url anchorText="New Service Call"
auth="vLogin=$OVROLE[ServiceDesk.userName]&amp;vPasswd=$OVROLE[ServiceDesk.password]&
amp;vHaveAccount=yes&amp;vTimezone=$Timezone&amp;vLanguage=$Language"
handshake="no" displayMethod="anchor"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/CreateServiceCall.jsp"
inlineHeight="220"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
proxy="yes" showAsButton="yes" windowName="results"/>
   </Submodule>
   <Submodule>
        <Url anchorText="Service Calls"
auth="vLogin=$OVROLE[ServiceDesk.userName]&amp;vPasswd=$OVROLE[ServiceDesk.password]&
amp;vHaveAccount=yes&amp;vTimezone=$Timezone&amp;vLanguage=$Language"
handshake="no" displayMethod="anchor"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ListServiceCalls.jsp?type=full"
inlineHeight="250"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
```

```
proxy="yes" showAsButton="yes" windowName="results"/>
   </Submodule>
   <Submodule>
        <Url anchorText="Incidents"
auth="vLogin=$OVROLE[ServiceDesk.userName]&amp;vPasswd=$OVROLE[ServiceDesk.password]&
amp;vHaveAccount=yes&amp;vTimezone=$Timezone&amp;vLanguage=$Language"
handshake="no" displayMethod="anchor"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ListIncidents.jsp?type=full"
inlineHeight="200"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
proxy="yes" showAsButton="yes" windowName="results"/>
   </Submodule>
   <Submodule>
        <Url anchorText="Problems"
auth="vLogin=$OVROLE[ServiceDesk.userName]&amp;vPasswd=$OVROLE[ServiceDesk.password]&
amp;vHaveAccount=yes&amp;vTimezone=$Timezone&amp;vLanguage=$Language"
handshake="no" displayMethod="anchor"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ListProblems.jsp?type=full"
inlineHeight="200"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
proxy="yes" showAsButton="yes" windowName="results"/>
   </Submodule>
   <Submodule>
        <Url anchorText="Changes"
auth="vLogin=$OVROLE[ServiceDesk.userName]&amp;vPasswd=$OVROLE[ServiceDesk.password]&
amp;vHaveAccount=yes&amp;vTimezone=$Timezone&amp;vLanguage=$Language"
handshake="no" displayMethod="anchor"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ListChanges.jsp?type=full"
inlineHeight="200"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
proxy="yes" showAsButton="yes" windowName="results"/>
   </Submodule>
   <Submodule>
        <Url anchorText="Work Orders"
auth="vLogin=$OVROLE[ServiceDesk.userName]&amp;vPasswd=$OVROLE[ServiceDesk.password]&
amp;vHaveAccount=yes&amp;vTimezone=$Timezone&amp;vLanguage=$Language"
handshake="no" displayMethod="anchor"
href="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ListWorkOrders.jsp?type=full"
inlineHeight="200"
loginUrl="http://$OVROLE[ServiceDesk.SSPserver]/sd-sp4/ServicePagesNoLogin.jsp"
proxy="yes" showAsButton="yes" windowName="results"/>
   </Submodule>
</Generic>
```

See the comments in the OVGeneric.dtd file for more information about the correct XML syntax:

- *Windows:* `%SIP_HOME%\conf\share\views\OVGeneric.dtd`
- *UNIX:* `/opt/OV/SIP/conf/share/views/OVGeneric.dtd`

5. To change the title of this Service Desk for Specialists module instance, change the `title` attribute:
   `<ModuleInstance title="new title">`

   To change the title of all Service Desk for Specialists modules, change the `title` attribute in the registration file, see “Relevant Files” on page 48.

6. To launch your own help topic from the module’s `[?]` button, insert the `help` attribute into the `<ModuleInstance>`:

   `help="/OVSipDocs/C/help/OVSD/`*`topic`*`.html"`

   Replace *`topic`*`.html` with the name of your help file. The `help` attribute allows you to override the default help URL defined in the module registration file. See the *SIP Deployment and Integration Guide* (`SIP_Deployment_Integration.pdf`), “Adding and Customizing Module Help Topics” for more information about writing your own online help.

7. To specify the desired default `Language` on the first line of this block (“English” in the example). This language must be currently configured on the Service Desk application server.

```
<OptionParm name="Language" prompt="Language:"
value="English">
                    <Option name="English" value="1033"/>
                    <Option name="French" value="1036"/>
                    <Option name="German" value="1031"/>
                    <Option name="Japanese" value="1041"/>
                    <Option name="Korean" value="1042"/>
                    <Option name="Spanish" value="1034"/>
   </OptionParm>
```

8. To specify the desired default `Time Zone` on the first line of this block (“Mountain Standard Time (Denver)” in the example).

```
<OptionParm name="Timezone" prompt="TimeZone:" value="Mountain Standard Time
(Denver)">
              <Option name="Central Standard Time (Chicago)" value="CST"/>
              <Option name="Coordinated Universal Time" value="GMT"/>
              <Option name="Eastern Standard Time (New York)" value="EST"/>
              <Option name="European Central Standard Time (Amsterdam)" value="ECT"/>
              <Option name="Pacific Standard Time (San Francisco)" value="PST"/>
              <Option name="Japan Standard Time (Tokyo)" value="JST"/>
              <Option name="Mountain Standard Time (Denver)" value="MST"/>
 </OptionParm>
```

9. To delete or reorder buttons:

There are seven <Submodule> blocks.

- <Submodule> <Url anchorText="Service Desk" ...
- <Submodule> <Url anchorText="New Service Call" ...
- <Submodule> <Url anchorText="Service Calls" ...
- <Submodule> <Url anchorText="Incidents" ...
- <Submodule> <Url anchorText="Problems" ...
- <Submodule> <Url anchorText="Changes" ...
- <Submodule> <Url anchorText="Work Orders" ...

The anchorText="Service Desk" submodule controls the Edit page settings for this module. Do not delete this block.

Place the remaining <Submodule> blocks in the order in which you want the buttons to appear at the bottom of the Service Desk for Specialists module.

Delete any <Submodule> blocks for buttons that you don't want to include in this module instance.

Change the anchorText=" " value to rename a button.

10. To change the size of the Service Desk module, in the submodule with anchorText="Service Desk", change the number of pixels for the inlineHeight="xx" attribute.
11. To change the initial display default (set to [Service Calls] in the above example), in the submodule with anchorText="Service Desk", locate the href=" " line.

    Near the end of the string, you will find an xxx.jsp entry. Modify this entry to designate the desired default display:

    - CreateServiceCall.jsp
    - ListServiceCalls.jsp
    - ListIncidents.jsp
    - ListProblems.jsp
    - ListChanges.jsp
    - ListWorkOrders.jsp
12. Save the XML file. In a browser.

13. After you make modifications to XML files, validate the syntax. See “Validating XML Files” on page 57 for more information.
14. Log into the SIP portal as the appropriate user to ensure that you have the desired results.

Relevant Files

The Service Desk for Specialists modules must follow the rules defined in the following DTD files. See the comments in the DTD files for an explanation of each element used in the XML files:

`UserRole.dtd & package.xml`

Three property values (entered for each SIP role) configure communication between OVSD Service Pages servers and Service Information Portal servers. See the “Establishing Communication Between OVSD and SIP” on page 18.

- `OVModuleRegistraton.dtd & OVRegServiceDesk4Spec.xml`

  This XML file grants access to the Service Desk for Specialists module through the SIP framework so that it is available for your use. To add another instance of the Service Desk for Specialists module to the SIP module selection list, you copy and rename the `OVRegServiceDesk4Spec.xml` and the `OVDefaultServiceDesk4Spec.xml` files. Then update the `description`, `title`, `classid`, `help`, and `defaultConfigXML` attribute values in the new registration file.

  If you make any changes to a registration file, you must follow the directions in “Restarting the Servlet Engine” on page 60.

- `OVGeneric.dtd & OVDefaultServiceDesk4Spec.xml`

  This DTD defines the rules for configuring the Service Desk for Specialists module. The XML file contains the *default* Service Desk for Specialists module. The contents of the default file are inserted into your portal each time you use the `[Add]` button to insert the Service Desk for Specialists module.

  You can modify the `OVDefaultServiceDesk4Spec.xml` file to meet your needs. Either:

  — Directly edit the XML code in the `OVDefaultServiceDesk4Spec.xml` file, or

  — Insert a Service Desk for Specialists module into any portal. Modify the module to meet your needs. Then, copy the modified XML code for the module from your portal view file, and paste it into the `OVDefaultServiceDesk4Spec.xml` file.

See “Directly Editing the PortalView.XML File” on page 41 for more information

`PortalView.dtd & PortalView.xml`

This DTD provides the rules for formatting the XML code in your portal view files. See the *SIP Deployment and Integration Guide* (`SIP_Deployment_Integration.pdf`), “Customizing Portal Views” section for more information about creating portal view files.

- `/htdocs/C/help/OVSD/*.html`

  This directory contains help topics for Service Desk modules. The Help topics are accessed by clicking `[?]` on the module title bar. If you want to supply your own customized help files, see the *SIP Deployment and Integration Guide* (`SIP_Deployment_Integration.pdf`), “Adding and Customizing Module Help Topics” section.

Table 4-1 Service Desk for Specialists Module Files on the SIP Server

File Name	Windows Location %SIP_HOME%\....	UNIX Location /opt/OV/SIP/....
UserRole.dtd	conf\share\roles\	conf/share/roles/
package.xml	conf\share\roles\	conf/share/roles/
OVModuleRegistration.dtd	registration\	registration/
OVRegServiceDesk4Spec.xml	registration\	registration/
OVGeneric.dtd	conf\share\views\	conf/share/views/
OVDefaultServiceDesk4Spec.xml	registration\defaults\	registration/defaults/
PortalView.dtd	conf\share\views\	conf/share/views/
PortalView.xml	conf\share\views\	conf/share/views/
*.html	htdocs\C\help\OVSD\	htdocs/C/help/OVSD/

5 Segmenting OVSD Data by Customer

Creating a Customer Model Source

SIP allows you to associate resources with customers so that data is automatically filtered appropriately when a user displays the Service Desk modules.

The Service Desk modules depend upon SIP Role Properties to accomplish this. See “Establishing Communication Between OVSD and SIP” on page 18.

The SIP Service Desk modules’ filtering is accomplished by setting up user accounts (Service Pages accounts) on the Service Desk application server.

6 Display Filtering for OVSD

Introduction to Display Filtering

Whereas the role properties determines what is *possible* to see in some of the SIP modules (Chapter 5, “Segmenting OVSD Data by Customer,” on page 51), display filters can control what is actually visible in particular module instances.

The Service Desk modules do not use display filtering. The filtering is accomplished by setting up user accounts (Service Pages accounts) on the Service Desk application server.

For more information about configuring OpenView Service Desk, itself, see the documentation set that comes with OpenView Service Desk. Or, access the manuals online at the web site:
`http://ovweb.external.hp.com/lpe/doc_serv`

A Working with XML

Rules for Direct Editing of XML Files

- Make a backup before modifying XML files.
- Understand editing permissions on XML files.
- Validate the XML after you modify it.
- Be careful not to lose changes made through the GUI. This can happen when you edit through the XML file and edit through the GUI at the same time.

Backing Up XML Files

Make a backup of XML configuration files before you customize them. If you edit the file and get incorrect XML syntax, you may want the ability to revert to the previous version of the file.

Understanding Editing Permission on XML Files

When using the editing windows within the SIP portal, the web server needs to have read/write permissions to the underlying files in order to save your changes. By default, the apache web server and SIP run as:

Solaris: user `"nobody"`

HP-UX: user `"www"`

The default user names for Solaris and HP-UX can be changed during installation.

At runtime, `umask` is set by tomcat to 022, so files are created mode 0644 and directories created mode 0755.

Therefore, at install time, SIP sets permissions and ownership for files to `mode 0644` and directories to `mode 0755`. If you add or change anything, make sure directories are owned by the appropriate user specified above, files set to `mode 0644`, and directories set to `mode 0755`.

For `tomcat` to operate properly, the following directories and all files underneath them need to have the correct permissions set (user as specified above, files set to mode 0644, and directories are set to mode 0755):

- `/opt/OV/SIP/tomcat`
  (directory only, so tomcat can create the work directory when needed)
- `/opt/OV/SIP/tomcat/conf`
  (directory only)
- `/opt/OV/SIP/tomcat/logs`
  (directory, all subdirectories, and all files)
- `/opt/OV/SIP/tomcat/webapps`
  (directory, all subdirectories, and all files)
- `/opt/OV/SIP/tomcat/work`
  (directory, all subdirectories, and all files)

For SIP to operate properly, these directories and all `.xml` files (not `.dtd` files) underneath them need to have the correct permissions set (`user` set to anyone with editing permissions, files set to mode 0644, and directories are set to mode 0755):

- `/opt/OV/SIP/conf/share/organizations`
  (directory, all subdirectories, and all .xml files)
- `/opt/OV/SIP/conf/share/users`
  (directory, all subdirectories, and all .xml files)
- `/opt/OV/SIP/conf/share/modules`
  (directory, all subdirectories, and all .xml files)
- `/opt/OV/SIP/conf/share/roles`
  (directory, all subdirectories, and all .xml files)
- `/opt/OV/SIP/conf/share/views`
  (directory, all subdirectories, and all .xml files)

Validating XML Files

The Service Information Portal will detect and report an invalid XML configuration file. However, after you make modifications to XML files, you may want to validate your XML syntax.

Provided with SIP is the command `xmlvalidate`, which checks whether the XML file is both well-formed and valid. This command uses the same XML parser as SIP, so if the file passes `xmlvalidate`, it will work with SIP.

For the command to work from outside the `bin` directory, add the following to your PATH variable:

Windows: `%SIP_HOME\bin`
UNIX: `/opt/OV/SIP/bin`

The correct usage of the `xmlvalidate` command is:

`xmlvalidate -v <xml filename>`

An XML file is “well-formed” if it conforms to a minimal set of rules defined for all XML documents. It is “valid” if it conforms to the DTD listed at the beginning of the XML file.

Sometimes an error reported by xmlvalidate may not clearly indicate how to fix the problem. For example, a message like “Attribute ‘name’ must be declared for element type ‘XYZ’, is an indication that the attribute ‘name’ may have been misspelled.

As an alternative to xmlvalidate, you can find an XML validation tool for Windows NT at `www.xmlspy.com`.

Avoiding Loss of Changes

If you are using the portal interface to change a configuration and directly editing the XML configuration file at the same time, be careful not to lose the changes made through the interface by writing out the file over the interface changes.

B Restarting Tomcat

Restarting the Servlet Engine

After making certain configuration changes, you must restart the servlet engine before changes take effect:

- After adding or changing a module registration file.
- After making changes to the authentication provider configuration.
- In other situations where you are specifically instructed to do so.

To Restart the Servlet Engine from the SIP Administration Pages

Be aware that you and all other SIP users will be logged out when you restart the servlet engine.

1. Log in as a user who has access to a special SIP Administrator role. For more information, see "Understanding Special SIP Administrator Roles" in the *SIP Deployment and Integration Guide* (`SIP_Deployment_Integration.pdf`).
2. Switch to the `SIP Administrator` role, if it is not already displayed.
3. Click the `SIP General Admin` tab.
4. In the `Servlet Engine Control` segment, click `[Restart]`.

To Restart the Servlet Engine from Outside of SIP

Windows:
From the `Control Panel`, select `Services`. Stop and then restart `Tomcat`. Alternatively, you can use the command line: **`net stop tomcat`** and **`net start tomcat`** or use the batch command **`%SIP_HOME/bin/restart_tomcat.bat`**.

UNIX:
As `root`, stop and restart the web server and servlet engine by running the following. (The `DISPLAY` variable must be configured prior to restarting the web server and servlet engine, unless `DISPLAY` is set in `/etc/rc.config.d/ovsip`.)

Stop on HP-UX: `/sbin/init.d/ovsip stop`
Start on HP-UX: `/sbin/init.d/ovsip start`

Stop on Solaris: `/etc/init.d/ovsip stop`
Start on Solaris: `/etc/init.d/ovsip start`

C Troubleshooting

The browser shows HTTP 404 Status Error: Resource not available

Cause: The Service Desk system with which the module is trying to communicate may not have the Service Desk Services Pages Server and tomcat installed and running.

Solution: Ensure the system indicated by the `ServiceDesk.SSPserver` property has Services Pages Server and its tomcat service running. Also make sure the port number is correct. You can append the port number to the server name as in `hostname:8080`.

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