

# HP Business Service Management

For the Windows<sup>®</sup> and Linux operating systems

Software Version: 09.23

## Operations Manager i User Engagement Installation Guide

Document Release Date: December 2013

Software Release Date: December 2013



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# Chapter 1: Introduction to User Engagement

The innovative User Engagement feature applies game dynamics to add extra stimulation to Operations Management users by providing business-enhancing challenges, accelerating operations bridge efficiency and user know-how. Successful progress through the various activities is rewarded with Achievements and real-time notifications of great performance, helping to provide extra motivation to better engage with Operations Management which improves users' performance in their daily work. Timelines are available to record each user's progress and collection of Achievements. Almost everyone is motivated by at least one of the types of challenges that game dynamics includes, for example, achievement, competition, status, and closure, and this makes User Engagement such a powerful feature.

By setting business-orientated achievements that Operations Management users work towards, and rewarding them for accomplishing the desired tasks, the most appropriate skills are being learned and the most important tasks are being completed while a level of engagement and excitement is being added to daily tasks. Users can watch as their efforts fill their achievement progress bars, and map their progress through their tasks and challenges in their dashboard. Completion of every new achievement can be accompanied with a popup notification providing immediate feedback of good performance.

User Engagement employs extrinsic and intrinsic motivations to help drive Operations Management users to achieve their set goals without the need to provide external benefits, which are generally accepted to only provide transient value. People naturally want to be successful and be seen to be successful. User Engagement provides the framework to help users learn how to use Operations Management and perform their daily tasks to a higher standard, being noticed for their accomplishments, so increasing the enjoyment and involvement in their work.

User Engagement administrators can select, configure, and enable built-in achievements tailored to the needs of their various Operations Management users. Users can work their way through their first-level achievements and after these have been successfully completed, they are invited to attempt the next level of achievements, increasing their perception of achievement and progress. Individual's progress in comparison with their peers can also be tracked using the Expert Boards. The User Engagement experts page displays the highest scoring overall individuals and the highest scorers for a selected category. You can drill down into each category and see the complete list of participants taking part in the Experts Boards.

For more information about User Engagement, see the *User Engagement for HP Operations Manager i User Guide* or the following section in the BSM online help:

## **Application Administration > Operations Management > User Engagement**

For more information about Business Service Management and Operations Manager i, see the following documents:

- *Operations Manager i Concepts Guide*
- *BSM User Guide*

- *BSM Application Administration Guide*
- *Platform Administration Guide*

# Chapter 2: Installing User Engagement

This chapter describes how to install User Engagement.

## Installation Prerequisites

The following section lists the hardware, software and licensing requirements for installing User Engagement on the Business Service Management (BSM) platform.

Component	Requirements for User Engagement 09.23
Hardware	No requirements over and above the requirements for BSM. For detailed information about hardware requirements for BSM, see the <i>BSM Installation Guide</i> and the <i>BSM Hardening Guide</i> .
BSM Host	BSM is installed and running correctly. User Engagement has no requirements over and above the requirements for BSM. BSM can be installed on Windows® and Linux Operating Systems.
Licenses	BSM version 9.23. A license for User Engagement is included in the BSM Foundation License.
Database	200 MB of free disk space for User Engagement table spaces.

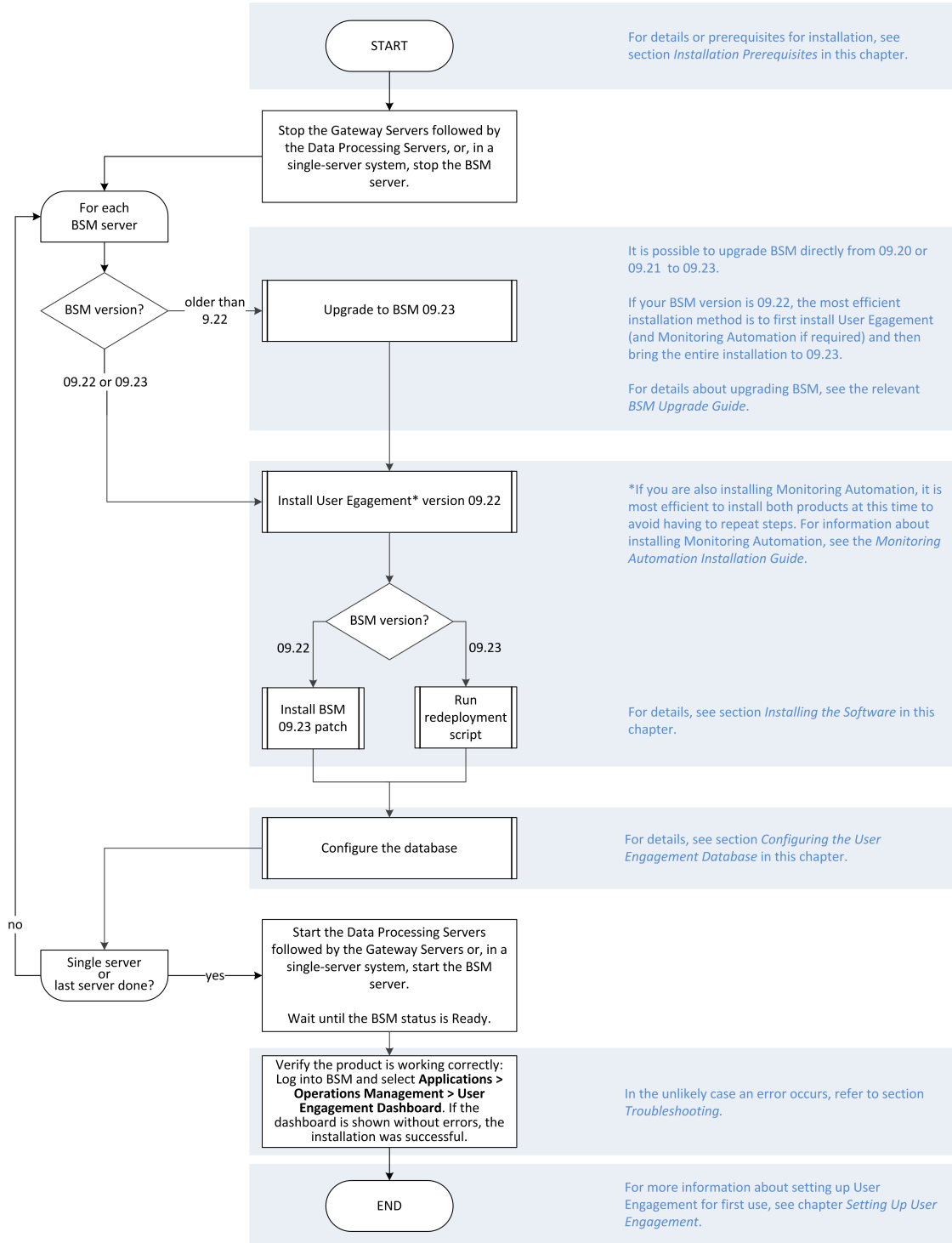
## Installation Workflow

The diagram shows the User Engagement installation workflow. To install the product, follow the flow chart and refer to the details in the referenced sections as you encounter them.

The remaining sections of this chapter provide the details for certain procedures, as indicated by the references to the right of the flow chart.

### Note:

- When executing the steps in a certain section in isolation, make sure that all the preparatory steps as indicated by the flow chart have been performed.
- The flow chart suggests the most efficient way to install the product. Although it is recommended to follow the flow chart, other methods resulting in the same starting conditions for each procedure may be equally valid.
- You can install User Engagement and Monitoring Automation in parallel. References to Monitoring Automation indicate the most efficient way to install both. Note that Monitoring Automation is not a prerequisite for User Engagement, and if you are only installing User Engagement, you can safely ignore all references to Monitoring Automation.
- It is possible to install User Engagement in silent mode. For details, see ["Silent Mode" on page 17](#).



## Installing the Software

**Note:**

Installing User Engagement 9.23 is a two step process. You must first install version 09.20 and upgrade it to version 09.23.

The workflow depends on the version of BSM you are starting from. Pointers are given in the flow chart and in the instructions below. Summarizing:

- **Starting from BSM < 09.22:** Upgrade to 09.23, install User Engagement 09.20, and run the redeployment script.
- **Starting from BSM 09.23:** Install User Engagement 09.20, and run the redeployment script.
- **Starting from BSM 09.22:** Install User Engagement 09.20, and upgrade BSM and User Engagement together using the 09.23 patch install.

**Tip:** You can install the software in silent mode as described in the Appendix ["Silent Mode" on page 17](#)

To install the User Engagement software:

1. Run the User Engagement installation utility from the *OMi Extensions DVD* (included in the BSM media kit) with the following command:

**Windows:** \UserEngagement\Windows\HPOprUserEngmt\_setup.exe

**Linux:** /UserEngagement/Linux/HPOprUserEngmt\_setup.bin

**Note:** On Linux systems, X-Server must be running on the host system, unless you install the product in silent mode.

The installation wizard opens. Follow the instructions included in the installation wizard. When prompted, choose the server type as follows:

- In a single server environment, choose Typical Installation.
- In a distributed environment, choose Gateway Server or Data Processing Server, as appropriate.

Links to the installation log files and any warnings or errors are displayed in their own tabs on the final screen of the wizard. The log files report whether the installation was successful or



not. The log files, which are available in both .txt and .html format, are named using the following pattern:

**Windows:** <TEMP>\HPOvInstaller\HPOprUserEngmt\_<version>\HPOprUserEngmt\_<version>\_<date>\_HPOvInstallerLog.[txt][html]

**Linux:** /tmp/HPOvInstaller/HPOprUserEngmt\_<version>/HPOprUserEngmt\_<version>\_<date>\_HPOvInstallerLog.[txt][html]

In these paths, <TEMP> is the value of the environment variable TEMP, <version> is the BSM version, and <date> is the date the log file was created.

2. If you are also installing Monitoring Automation, it is most efficient to install it now to avoid having to repeat steps.
3. After installing the software, update User Engagement to version 09.23:
  - If your BSM system is on version 09.22, execute the following steps:
    - i. Download the BSM 09.23 patch installation package.
    - ii. Install the patch.

For details, see the relevant *BSM Upgrade Guide*.

All installed components, including User Engagement and Monitoring Automation, have now been upgraded to version 09.23.

- If your BSM system is already on version 09.23, execute the steps below.

**Note:** If you are installing Monitoring Automation as well as User Engagement, skip the redeployment step and run the redeployMaSP script after installing both products, as described in the *Monitoring Automation Installation guide*.

- i. Open a command prompt on the BSM server.
- ii. Issue the following command:

**Windows:** <BSM root directory>\installation\HPBsm923\bin\redeploy.bat

**Linux:** <BSM root directory>/installation/HPBsm923/bin/redeploy.sh

<BSM root directory> is the BSM installation directory, default:

**Windows:** \HPBSM

**Linux:** /opt/HP/BSM

The 09.23 patch is redeployed to any User Engagement and Monitoring Automation components that were installed after the patch was installed.

The redeployment script log file is named as follows:

```
<BSM root directory>/installation/HPBsm923/log/HPBsm923-<time>.log
```

In these paths, *<BSM root directory>* is the BSM installation directory, and *<time>* is a time stamp for the time the script was executed (for example: Thu\_10\_24\_02\_57.log if the script was executed on October 24 at 2:57).

The software is now installed on the server.

**Note:** *Distributed systems only:* As indicated in the flowchart, the software must be installed on each server.

Before you can use the software, you must configure and enable User Engagement as described in ["Configuring the User Engagement Database" below](#).

## Configuring the User Engagement Database

**Tip:** You can configure the software in silent mode as described in the Appendix ["Silent Mode" on page 17](#)

Before you can use the software, configure the User Engagement Schema in the database and enable the software, as follows:

1. Run the BSM **Setup and Database Configuration** utility:

**Windows:** `<BSMroot>\bin\config-server-wizard.bat`

**Linux:**

```
./opt/HP/BSM/scripts/topaz_env.sh  
/opt/HP/BSM/bin/config-server-wizard.sh
```

2. Advance through the configuration pages by clicking **Next** until you arrive at the User Engagement Schema page.

In the User Engagement Database Settings dialog, select one of the following options:

- If a User Engagement database schema is not yet configured and you want to do it here, select the option **Create a new database or user schema**.
- If you upgraded a previous version of User Engagement and want to connect to the existing database, select the option **Connect to an existing database or user schema**.

- *(Distributed environment only)* If you already configured the User Engagement database schema on another server in a distributed BSM system, select the option **Connect to an existing database or user schema**.

Click **Next**. If you selected the create option, select the User Engagement data base type (Oracle Database or Microsoft SQL Server) and click **Next** to go to the Database Settings dialog.

Provide the information described in the table below as appropriate for your BSM database management system:

SQL Server Database	Oracle Database
<b>Host name:</b> Host name of the database server.	<b>Host name:</b> Host name of the database server.
<b>Port:</b> Database port.	<b>Port:</b> Database port.
<b>Database Name:</b> Name you want to use for the User Engagement database.	<b>SID:</b> SID of the BSM database.
<b>Connect to the Microsoft SQL Database Using:</b> Authentication method used to access the database. Default: SQL Server Authentication.	
<b>User Name and Password:</b> Credentials for a user with the permissions to modify the database.	<b>Admin User Name and Admin User Password:</b> Credentials for a user with the permissions to modify the database.
	Click <b>Next</b> and provide the following information:
	<b>New Schema Name:</b> Name you want to use for the User Engagement database.
	<b>New Schema Password:</b> Password for the User Engagement database.
	<b>Default tablespace:</b> Default tablespace for the User Engagement database.
	<b>Temporary tablespace:</b> Temporary tablespace for the User Engagement database.

3. Advance through the configuration pages by clicking **Next** until you arrive at the Server Deployment page. Make sure that the check box in the User Engagement row is checked, the **Capacity Level** is ON, and the **Status** is valid.

4. Advance through the configuration pages by clicking **Next** until the **Finish** button is activated.
5. Click **Finish** to exit the utility.

The configuration is now complete.

# Chapter 3: Setting Up User Engagement

The sections below describes how to set up User Engagement for first use after completing installation and configuration.

For detailed information about the functionality of User Engagement, see the *User Engagement for HP Operations Manager i User Guide* or the *User Engagement* section in the *BSM online help (Help > Application Administration > Operations Management > Additional Configuration > User Engagement)*.

## Configuring Administrator Privileges

### Note:

- BSM administrators are not automatically granted administrator privileges for User Engagement. You must grant administrator privileges to those accounts that require them manually as described below.
- After initial installation, the only user account with administrator privileges for User Engagement is the built-in BSM administrator account. It is not possible to delete or rename this account. (You can, however, change its User Engagement participant details.) For more information about the built-in BSM administrator account, see the *BSM Installation Guide*.
- Users logging on to the User Engagement stand-alone user interface with the built-in BSM administrator account `admin` receive administrator privileges. The default password for this account is `admin`. HP recommends to change the default password to a more secure value as part of setting up User Engagement for first use. To change the password, follow the procedure below for the participant `admin`.

To grant User Engagement administration privileges to selected participants:


1. Log on to BSM as administrator and select **Admin > Operations Management**. In the **Setup** tab, select **User Engagement**. In the User Engagement screen, select **Participants**. The Participants dialog opens.
2. Click **Edit Participant** for the participant to which you want to grant User Engagement administrator privileges. The Edit Participant dialog opens.
  - a. Under **Roles**, select **Administrator**.
  - b. *Optional*: If necessary, change the participant's password.
  - c. Click **OK** to close the dialog.
3. Repeat the previous step for all participants to be granted User Engagement administrator privileges.

## About New Participants

New participants in User Engagement are created automatically whenever they perform an action in Operations Management which is associated with an achievement or if they open the User Engagement interface from within BSM. There is usually no need to create them manually.


## Changing Your Settings as a Participant

To change the User Engagement settings for your account:

1. Log on to BSM and select **Applications > Operations Management**.
2. Select User Engagement Dashboard in the drop-down list box in the main toolbar saying Select Page. The User Engagement dashboard opens.
3. Click  **Operations Manager i User Engagement Configuration**. The configuration dialog opens.
4. Check the **Participate** check box if you wish to participate or clear it to exclude your account from participation. You can also choose to participate in expert boards and have your email address displayed.
5. Click **OK** to save your changes and close the dialog.

## Enabling and Disabling User Engagement

By default, User Engagement is enabled. After installation, it is not necessary to enable it. If required, however, you can change whether User Engagement is enabled or disabled using the *Infrastructure Settings Manager*.

1. Select **Admin > Platform > Setup and Maintenance > Infrastructure Settings**. The *Infrastructure Settings Manager* opens. Select **Applications** and in the list, select **Operations Management**. A number of sections with settings for Operations Management, listed in alphabetical order, appear.
2. Find the section Operations Management - User Engagement.
3. Click  **Edit Setting** for the entry Enable User Engagement, and enter the value false to disable User Engagement, or true to enable it.

## Enabling and Disabling Achievements

Achievements can be enabled or disabled. When disabled, achievements are not visible to users.

Achievements are enabled according to the following rules:

- After installing User Engagement for the first time, a default set of achievements is enabled. For details, see the *User Engagement for HP Operations Manager i User Guide* or the *User Engagement* section in the *BSM online help (Help > Application Administration > Operations Management > User Engagement)*.
- After installing the 09.23 patch, the same achievements that were enabled before the patch was

installed are enabled.

- Achievements can be enabled or disabled manually by an administrator, as follows:
  - a. Log on to BSM as administrator and select **Admin > Operations Management**. In the **Operations Console** tab, select **Achievements**. The *Achievements* page opens.
  - b. In the *Achievements* page, click **Run Achievement** for an achievement to be enabled, or **Disable and Revert Achievement** for an achievement to be disabled and its threshold value to be reset to its default. An enabled achievement is visible to all participants.

## Chapter 4: Troubleshooting

This section recommends solutions to problems you may encounter when installing User Engagement.

### **The User Engagement components in the BSM user interface show an error 404 instead of content.**

This may be a result of not upgrading the User Engagement database schema to version 09.23.

#### **Recommended Solution:**

Manually upgrade the database by running the following script:

#### **Oracle:**

```
<BSM root directory>/AppServer/webapps/site.war/DataBases/ORA_DB_Utils/exc_ora_dbobjects_update_923.sql
```

#### **SQL Server:**

```
/AppServer/webapps/site.war/DataBases/SQL_Svr_DB_Utils/exc_sql_dbobjects_update_923.sql
```

### **The User Engagement administration user interfaces shows the following error message: Sorry, you're not authorized to view this page.**

The BSM user account you used to log on does not have administrative privileges for User Engagement.

#### **Recommended Solution:**

Grant administrative privileges to the account as described in ["Setting Up User Engagement" on page 13](#).



## Chapter 5: Silent Mode

The following tasks can be executed in silent mode:

1. Installing the software.
2. Configuring the software.

Each of these tasks is detailed in the sections below.

### Installing User Engagement in Silent Mode

To install User Engagement in silent mode:

1. Run the installer with the option `-i silent`:

**Windows:** `/UserEngagement/Windows/HPOprUserEngmt_setup.exe -i silent`

**Linux:** `/UserEngagement/Linux/HPOprUserEngmt_setup.bin -i silent`

2. Upgrade User Engagement to version 09.23:

- a. If your BSM system is on version 09.22, upgrade to version 09.23 as described in the relevant upgrade guide.
- b. If your BSM is already on version 09.23, call the redeploy script as described in ["Installing the Software" on page 8](#):

**Windows:** `<BSM root directory>\installation\HPBsm923\redeploy.bat`

**Linux:** `<BSM root directory>/installation/HPBsm923/redeploy.sh`

### Configuring User Engagement in Silent Mode

To prepare a response file for configuring User Engagement in silent mode:

1. Locate the response file.

After a new installation, use the following file:

`<BSM root directory>/Temp/emptyRspFile.xml`

To use the current configuration settings on a previously configured installation, use the most recent response file in the set of files named as follows:

`<BSM root directory>/Temp/rsp<timestamp>.xml`

*<timestamp>* represents the file creation time (for example: rsp201309091556.xml for a file created on September 9th 2013 at 3:56 PM).

2. Rename the response file and open it in a text editor.
3. Define the User Engagement database, as follows:
  - a. In the response file, find the section defining the opr database settings. The section can be recognized by the following line:

```
<database name="opr">
```

- a.
  - b. Add the following lines directly after the database end tag `</database>` of the opr database definition:

#### Microsoft SQL Server Database

```
<!--Database definition for User Engagement-->  
<database name="exc">  
  <property key="operation" value="<Connection Mode>"/>  
  <property key="dbType" value="SQL Server"/>  
  <property key="hostName" value="<Host Name>"/>  
  <property key="port" value="<Port>"/>  
  <property key="dbName" value="<Database Name>"/>  
  <property key="UserName" value="<User Name>"/>  
  <property isEncrypted="true" key="password" value="<Password>"/>  
</database>
```

#### Oracle Database

```
<!--Database definition for User Engagement-->  
<database name="exc">  
  <property key="operation" value="<Connection Mode>"/>  
  <property key="dbType" value="Oracle Server"/>  
  <property key="hostName" value="<Host Name>"/>  
  <property key="port" value="<Port>"/>  
  <property key="sid" value="<SID>"/>  
  <property key="UserName" value="<User Name>"/>  
  <property isEncrypted="true" key="password" value="<Password>"/>  
  <property key="new schema name"> value="<Schema>"/>  
  <property key="new schema password"> value="<Schema Password>"/>  
  <property key="default tablespace"> value="<Default Tablespace>"/>  
  <property key="temporary tablespace"> value="<Temporary Tablespace>"/>  
</database>
```

Make sure to replace the placeholders shown in bold italic type in the lines above with the following information:

**<Connection Mode>**: create to create a new database, or connect if the connection parameters are for an existing database.

**<Host Name>**: Database server host name.

**<Port>**: Database port.

**<User Name>**: User name of a user with the permissions to modify the database.

**<Password>**: Password for the specified user name.

*SQL Server Only* **<Database Name>**: Name to be used for the User Engagement database.

*Oracle Only* **<SID>**: SID of the BSM database.

*Oracle Only* **<Schema>**: Oracle schema name of the User Engagement database.

*Oracle Only* **<Schema Password>**: Password for the User Engagement schema.

*Oracle Only* **<Default Tablespace>**: Default Oracle tablespace to be used by the User Engagement database.

*Oracle Only* **<Temporary Tablespace>**: Temporary Oracle tablespace to be used by the User Engagement database.

4. Include User Engagement in the BSM deployment section, as follows:

- a. In the same file, find the <deployment> section.
- b. Add a new property to activate User Engagement by inserting the following line:

```
<property key="UserEngagement" value="ON"/>
```

The following example shows a sample <deployment> section after the property, shown in bold type, was inserted:

```
<deployment>  
  <!--Configure your HP Business Service Management server deployment-->  
  <property key="OMiCore" value="ON"/>  
  ...  
  <property key="UserEngagement" value="ON"/>  
  ...  
  <property key="OMI" value="Small"/>  
</deployment>
```

- c. Save and close the file.

5. Add the database definition to the BSM database, as follows:

- a. Open following file in a text editor:

```
<BSM root directory>/conf/configserver/silent/silentUserFile.xsd
```

- b. Find the section defining the BSM database, recognizable by the following line:

```
<xs:element name="database">
```

- c. Find the element defining the opr database, recognizable by the following line:

- d. <xs:enumeration value="opr"/>

- e. After the line with the opr database definition, insert the following line:

```
<xs:enumeration value="exc"/>
```

The following example shows a sample BSM database definition section after the element for User Engagement, shown in bold type, was inserted:

```
<xs:element name="database">  
  ...  
  <xs:enumeration value="opr"/>  
  <xs:enumeration value="exc"/>  
  ...  
</xs:element>
```

- f. Save and close the file.

After configuring the response file, denoted as <Response File Path>, issue the following commands:

**Windows:**

```
<BSM root directory>\bin\silentConfigureBSM <Response File Path>.xml configserver
```

**Linux:**

```
cd /opt/HP/BSM/bin
```

```
./silentConfigureBSM.sh <Response File Path>.xml configserver
```

For additional details about silent installation and configuration, see *Appendix 4: Installing BSM Silently* in the *BSM 9.23 Installation Guide*.

# Chapter 6: Uninstalling User Engagement

To uninstall User Engagement:

1. Disable User Engagement:
  - a. Select **Admin > Platform > Setup and Maintenance > Server Deployment**. The *Server Deployment Manager* opens.
  - b. Uncheck the checkbox for the User Engagement application. The capacity level is set to OFF.
  - c. If you are uninstalling User Engagement as part of a roll-back from BSM 09.23 to a previous version, also disable the Monitoring Automation application at this point.
2. Stop the Gateway Servers followed by the Data Processing Servers or, in a single-server system, stop the BSM server. Wait until all BSM services have stopped.
3. *Optional:* If you are uninstalling User Engagement as part of a roll-back from BSM 09.23 to a previous version, uninstall the BSM 09.23 patch with one of the commands below.

**Note:** If you are uninstalling Monitoring Automation as well as User Engagement, skip the patch uninstall step and run the `uninstallMaSP` script after uninstalling both products, as described in the Monitoring Automation Installation guide.

**Caution:** If you installed BSM 09.23 on top of BSM version 09.21 or 09.20 and are uninstalling User Engagement as part of a roll-back to that version, you must also completely uninstall Monitoring Automation as described in the *Monitoring Automation Installation Guide*. If you installed BSM 09.23 on top of BSM 09.22, this is optional.

To uninstall the 09.23 patch from a system with User Engagement only:

**Windows:** `<BSM root directory>\installation\HPBsm923\bin\uninstall.bat`

**Linux:** `<BSM root directory>/installation/HPBsm923/bin/uninstall.sh`

You are now ready to uninstall the User Engagement software.

4. To uninstall the User Engagement software:

**Windows:**

- a. Select **Start > Control Panel > Programs > Uninstall a Program**.
- b. Right-click **HP Operations Manager i User Engagement** and select **Uninstall/Change**. Follow the instructions provided by the uninstallation wizard.

**Linux:**

- a. Launch the uninstallation wizard with the following command:

```
/opt/HP/BSM/Uninstall/HPOprUserEngmt/setup.bin
```

- b. Follow the instructions provided in the uninstallation wizard.
5. Repeat the previous uninstallation step on all other BSM servers.
6. *Optional:* Uninstalling the software does not remove the User Engagement schema. If the schema is no longer needed, delete it manually.
7. Start the Data Processing Servers followed by the Gateway Servers, or, in a single-server system, start the BSM server.

User Engagement is now removed from all BSM servers.

**Note:** After uninstalling User Engagement, the User Engagement components are still visible in the Component Gallery, but cannot be used. An error message informs you that the content is not available.

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