

# HP Business Service Management

For the Windows® and Linux operating systems

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## User Engagement for HP Operations Manager i User Guide

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## Chapter 1: 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.

## Chapter 2: Using User Engagement

Using gaming technology, User Engagement adds fascination to your work and recognizes your achievements as you learn to use HP Operations Manager i and become progressively more knowledgeable.

All normal User Engagement participants (Operations Management users without User Engagement administration rights) can access their Timeline, Experts, and Achievements pages from the User Engagement Dashboard page in the Operations Management application area.

User Engagement is divided into the following main administration areas (User Engagement administration rights required):

- **Global Settings:**

Admin > Operations Management > Setup > User Engagement > Configuration

- **Participant Accounts:**

Admin > Operations Management > Setup > User Engagement > Participants

- **Achievements:**

Admin > Operations Management > Operations Console > Achievements

- **Experts Scoring:**

Admin > Operations Management > Operations Console > Experts Scoring

**Tip:** If you are logged onto BSM, you can use stand-alone User Engagement UIs, for example using the URL:

```
http://<BSMhost:port>/excite
```

The home page (🏠) icon provides you with an alternative entry point to the main User Engagement areas.

If you are not logged onto BSM, you need user credentials for User Engagement.

The following UIs are available to an administrator in the stand-alone User Engagement UI.

- **My Dashboard**

Lists your achievements, running and completed, and displays the Expert Boards.

- **Engage Your Users**

Gives you access to the Achievements and Expert Scoring pages. The Achievements page displays the available achievements to activate and tune. The Experts Scoring page displays

the scoring information for each task or automated system activity and balancing controls for categories or objectives of achievements.

- **Administration**

User Engagement administrators configure the basic behavior for your organization, set up and manage participants.

## Timeline

The Timeline page displays a diary of your User Engagement achievements.

## Learn More

The Timeline page is used to show the history of your achievements. What you achieved today, last week, and so on. This is a personal timeline that only the owner has access to. It is not shared with anyone else.

**Note:** You can also see your still-to-be-completed assignments in ["Achievements" on page 10](#).

The diary is divided into the following views (if appropriate):

- **Today**

Shows your latest achievements.

- **Yesterday**

Shows the summary of your achievements for the previous day.

- **Last Week**

Shows the summary of your achievements and progress for the 7 day period up to the day before yesterday.

- **Last Month**

Shows the summary of your achievements and progress for the previous calendar month.

- **This Year**

Shows the summary of your achievements and progress for the current calendar year.

- **Last Year**

Shows the summary of your achievements and progress for the previous calendar year.

**To access:**



Select **Timeline** from the User Engagement Dashboard page or the User Engagement Timeline component.

## Searching for Achievements

To search for achievements, enter a text string that is contained in the title of the achievement in the Search field.

All achievements awarded containing the specified string are found. If the timeline item is selected, the filtered achievements are displayed.

## UI Reference

UI Element	Description
	<b>Participant Settings:</b> Opens the Participant Details page for the current participant.
	<b>User Engagement Configuration:</b> Opens the Privacy and Notifications page for the current participant.
<b>Search</b>	Entering a text string will filter the achievements to only display achievements which include the specified string in the achievement name.  Click ✕ clears the filter.

## Experts

The experts boards make it easy for you to identify and contact the individuals in your organization with the most experience of the various Operations Manager i domains. 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.

- **Overall Experts**

Displays the top overall scorers by combining the points earned across all activities.

**Note:** Activities may be included in more than one category but points earned for an activity are only counted once for the Overall Experts board.

The top three overall experts are displayed and the ranking of the current user is added to the list. If you are in the top five, all top-five participants are displayed in the list. You can drill down into the Overall Expert Board and view the complete list of participants and the points that they have



collected. Participants may share their email addresses, making it easier for other participants to contact experts and increase collaboration between peers.

For details on how to participate in User Engagement, Expert Boards and share your email address, see "[Privacy and Notifications](#)" on page 13.

- **Category Experts**

Displays the top scorers for each category.

Each expert board highlights the top three experts in each category and also displays the ranking of the current user. If you are in the top five, all top-five participants are displayed in the list. You can drill down into each expert board and view the complete list of participants and the points that they have collected. Participants may share their email addresses, making it easier for other participants to contact experts in the various categories and increase collaboration between peers.

## Display the Complete Experts List



To display the complete list of experts (overall or for a category), click the **More** link associated with the category that you are interested in.

The complete list of experts is displayed in a popup window, including individual scores and email addresses (where available).

### To access:

Select **Experts** from the User Engagement Dashboard page or the User Engagement Experts component.

## UI Reference

UI Element	Description
	<b>Participant Settings:</b> Opens the Participant Details page for the current participant.
	<b>User Engagement Configuration:</b> Opens the Privacy and Notifications page for the current participant.
<b>More</b>	Displays the complete list of experts in a popup window (overall or for a category), including individual scores and email addresses (where available).

## Achievements

The Achievements page displays an overview of all running achievements grouped by categories. Disabled and paused achievements are not shown. Each category is displayed with a progress bar.

The assigned achievements help you to focus on and explore the Operations Management features that are most relevant to you at the moment in more detail. This is a personal achievements list that only the owner has access to. It is not shared with anyone else.

**Note:** You can also see your completed assignment history in ["Timeline" on page 7](#).

### To access:

Select **Achievements** from the User Engagement Dashboard page or from the User Engagement Achievements component.

## Tasks

### Viewing Achievements for a Category

To view all running achievements for a category, click the category title for which you want to view all available achievements.



Your currently active achievements associated with the category are displayed, including achievements that you have completed, in a dropdown box.

### Searching Achievements

To search for achievements, enter a text string that is contained in the title of the achievement in the Search field.

All achievements containing the specified string are found. If the category is selected, the filtered achievements are displayed.

## UI Reference


UI Element	Description
	<b>Participant Settings:</b> Opens the Participant Details page for the current participant.
	<b>User Engagement Configuration:</b> Opens the Privacy and Notifications page for the current participant.
<b>Search</b>	Entering a text string will filter the achievements to only display achievements which include the specified string in the achievement name.  Clicking <b>x</b> clears the search filter.

## Managing My User Engagement User Account

The Participant Details page specifies your login name, avatar name, and email address.

You can change your avatar from this page. You can also change the password if you are directly logged on to User Engagement (not through BSM).

### To access:

Click the  button or your avatar image.

## Tasks

### Changing Your Password

**Note:** The Change Password dialog box is displayed when the user is logged on to User Engagement not using BSM's lightweight single sign-on. It is also not displayed in the User Engagement integrated into BSM UIs. The password that you can change is the one for User Engagement and not BSM.

To change your User Engagement account password, complete the following steps:

1. Click **Change Password**.
2. Enter your existing password.
3. Enter a new password and confirm.
4. Click **OK**.

### Uploading an Avatar

To upload an avatar image file for your User Engagement account, complete the following steps:



1. Click **Upload Image**.
2. Browse to the location of the avatar file that you want to upload and select the file.

**Note:** Supported image formats are JPG, PNG or GIF. Your image will be cropped to a square.

Optimal image size: 150 x 150 pixels.

3. Click **OK**.

## UI Reference

UI Element	Description
	<b>Participant Settings:</b> Opens the Participant Details page for the current participant.
	<b>User Engagement Configuration:</b> Opens the Privacy and Notifications page for the current participant.
<b>Change Password</b>	Displays the Change Password dialog box where you can change your user account password if the user account was created in User Engagement.  The Change Password dialog box is displayed when the user is logged on to User Engagement not using BSM's lightweight single sign-on. It is also not displayed in the User Engagement integrated into BSM UIs. The password that you can change is the one for User Engagement and not BSM.
<b>Upload Image</b>	Displays the Upload Image dialog box where you can change your avatar image.
<b>Remove Avatar</b>	Displays the Confirmation dialog box where you can delete your avatar image. Only displayed if an avatar image is uploaded for the participant.
<b>Login</b>	Your unique account name used to log on to the User Engagement user interface. This the same login as for BSM and cannot be edited.
<b>Avatar Name</b>	Your avatar name, displayed in User Engagement and used to represent you.
<b>Email</b>	Your email address is helpful for administration information, for example, to help reset forgotten passwords, and is also used in the Expert Boards if you choose to make it visible.

## Privacy and Notifications

The Privacy and Notifications configuration page includes the basic User Engagement controls for your participant account.

### To access:

Click the  button.

## Learn More

You can at anytime choose to participate in User Engagement achievements and Experts Boards and configure your account appropriately. If you do not want to participate or do not want to make your email address visible to other participants, you can disable any of these options from the Privacy and Notifications page. For detailed information about Experts Boards, see ["Experts" on page 8](#) and ["Expert Scoring" on page 26](#).

Notifications are used to give you timely, positive feedback of your achievement, for example, after creating your first tool. As you become more experienced and your achievements are from a higher level, becoming progressively more involved, notifications will be received less often, but will display your greater achievements.

## Privacy

Enable User Engagement participation and notifications:

- **Participate**

Enable this setting to record your running achievement progress and awarded achievements. If disabled, User Engagement does not track any data and `Participate in expert boards` and `Display my email address to others` are also disabled.

- **Participate in expert boards**

Enable this setting to be included in expert boards. You will be able to see your position in comparison with all of your peers who have also selected to participate in the various expert boards .

If disabled, you are not visible in the expert listings and you are not awarded points towards activities. However, you are able to access the Expert Boards, which can help you to identify peers who may be able to help you with problem solving.

- **Display my email address**

Enable this setting to display your email address to other participants, for example in the Expert Boards.

- **Delete History**

Resets your User Engagement collected product usage data. This deletes all earned achievements, and achievement progress data for your account. This action is not reversible.



## Notifications

Enable User Engagement notification options:

### Use popups to notify me

Enable this setting to receive notification of gaining a new achievement using non-blocking popups. Popups have a link to your Timeline page and User Engagement Configuration.

## UI Reference

UI Element	Description
	<b>Participant Settings:</b> Opens the Participant Details page for the current participant.
	<b>User Engagement Configuration:</b> Opens the Privacy and Notifications page for the current participant.

## Chapter 3: Tuning Achievements

The Achievements page displays an overview of available achievements grouped by business objectives or categories.

**Note:** Only users with User Engagement administration rights can access this page.

- **By Business Objective**

Displays the objective title for each activity belonging to the selected objective. Selecting an objective displays the achievements associated with the objective. The business objectives are available only to administrators. Regular participants only see the achievement categories.

- **By Category**

Displays the title for each activity belonging to the selected category. Selecting a category displays the achievements associated with the category.

Some Achievements are active by default when you install User Engagement. For details, see ["Default Active Achievements" on page 23](#).

**Note:** If you are upgrading from a previous version, the existing settings are maintained and new achievements are not active by default.

The difficulty of any achievement can be configured by setting appropriate thresholds. Some achievements are designed for tasks that Operations Management users often need to do, for example, the Problem Solver achievements, looks at solving problems and closing the associated events within the current month. You can configure this challenge to close 1000 events a month. Achieving this will raise a positive notification of becoming a Cool Problem Solver this month. You can enter the participant for the next level of achievement; Distinguished Problem Solver, requiring 4000 closed events in the current month. Other achievements may be configured to reward Operations Manager administrators for creating effective rules or tools. For example, an administrator that created the tool that is used very often to help solve problems can be rewarded with an achievement and notified immediately, for example, when the tool is used 100 times.

**To access:**


Select **Admin > Operations Management > Operations Console > Achievements**


or **Engage Your Users** from the User Engagement home page.

## Tasks

### Showing and Hiding Achievements

To show only running, paused, or disabled achievements, select the appropriate filter:

 — Show/Hide running achievements

 — Show/Hide paused achievements

 — Show/Hide disabled achievements

You can apply any combination of filters. A filter is active if its background is gray and can be cleared by re-clicking the filter button.

### Controlling All Achievements in a Category or Objective

You can see the number of running, paused, and disabled achievements in the header buttons of each category or objective.

Use the dropdown menu to change the state of all achievements in the associated category or objective with one click.

**Note:** These operations are designed to apply to all achievements within a category or objective. If you have applied a filter, the operation will apply to both visible and hidden achievements.

#### ▶ Run all disabled achievements

Activity collection is started. Participants can take part in these achievements.

#### ▶ Resume all paused achievements

Activity collection is resumed. Participants can take part in these achievements again.

#### || Pause all running achievements

Pausing achievements halts collection of data for these achievements and freezes the current values. Running an achievement again continues the collection of data for this achievement from the point it was paused. Paused achievements are no longer displayed in the participants' timelines.

You might want to pause achievements for the following reasons:

- Before content pack uploads (as this might add many artifacts that will be counted for the user that uploaded the content pack).
- Before exceptional mass operations (like closing thousands of events after an event storm).
- When a large proportion of participants are away, to avoid unfair conditions.



### **Restart all running achievements**

Progress of all participants for the running achievements is reset to zero.

### **Restart and resume all paused achievements**

Progress of all participants for the running achievements is reset to zero. Data collection is resumed.

### **Disable and revert all achievements**

Disabling an achievement results in all participants who have been assigned this achievement to lose it and all activities associated with this achievement are reset.

Disable achievements only if you want to delete all achievement data. Disabled achievements no longer appear, for example, in participants' Timelines.

## **Configuring an Achievement**

To open the Status dialog box and configure an achievement, complete the following steps:

1. Click the  button for the achievement that you want to configure.

The Configuration dialog box for the selected achievement opens.

2. Change the state of the selected achievement by selecting the appropriate entry from the status menu.

**Tip:** If the only need to change the status of an achievement, the controls described in this step are also available directly from the achievements overview page.

### **Run Achievement**

Activity collection is started. Participants can take part in this achievement.

### **Resume Achievement**

Activity collection is resumed from the point it was paused. Participants can continue to take part in this achievement.

### **Pause Achievement**

Pausing an achievement halts collection of data for this achievement and freezes the current values. Running the achievement again continues the collection of data for this achievement from the point it was paused. Paused achievements are no longer displayed in the participants' timelines.

You might want to pause achievements for the following reasons:

- Before content pack uploads (as this might add many artifacts that will be counted for the user that uploaded the content pack).
- Before exceptional mass operations (like closing thousands of events after an event storm).
- When a large proportion of participants are away, to avoid unfair conditions.

### **Restart Achievement**

Progress of all participants for the running achievement is reset to zero.

### **Restart and Resume Achievement**

Progress of all participants for the running achievement is reset to zero. Data collection is resumed.

### **Disable and Revert Achievements**

Disabling an achievement results in all participants who have been assigned this achievement to lose it and all activities associated with this achievement are reset.

Disable achievements only if you want your users to no longer pursue an achievement and to delete all achievement data. Disabled achievements no longer appear, for example, in participants' Timelines.

3. *Optional:* Adjust the Tune Threshold to alter the number of times the task or automated system activity associated with the achievement must be completed for the achievement to be awarded.

Achievements are related if they are based on the same activity. Tuning the highest threshold of the activity in a group of related achievements, for example, the threshold value for Tool Master for the group of achievements Tool Apprentice, Tool Professional, and Tool Master, has an impact on the number of points scored for expert boards. If you increase the threshold, the number of points awarded for the associated activity is proportionally reduced. The default threshold for the Tool Master achievement is 50, and 8000 points are awarded per completed activity (per created tool). If you change the threshold for the Tool Master achievement to 100, 4000 points are awarded per created tool.

You can change the Tune Threshold for running or paused achievements.

**Note:** Changing values of thresholds does not affect completed achievements.

4. Click **OK** to accept the changes and close the Configuration dialog box.

## Manually Granting an Achievement

You can manually grant an achievement to a participant, for example, for the following reasons:

- If data collection was accidentally disabled.
- If an experienced employee joined the team and does not need to start with low-level achievements.


**Note:** Manually awarding an achievement does not set the counters to the threshold value of the awarded achievement. For the more advanced achievements, the user still starts at zero.


To manually grant an achievement to a participant, complete the following steps.

**Note:** To be able to manually grant an achievement, it must be running (or paused) for the participant list to be available in the Configure window.

1. Click the  button for the achievement that you want to award to a participant.

The Configuration dialog box for the selected achievement opens.

2. Add participant to the Participants list as appropriate for the selected achievement by entering a valid name and click .







**Note:** Remove unwanted participants using the associated  button.


3. Click **OK** to accept the changes and close the Configuration dialog box.

## UI Reference

### Achievements Page




The Achievements page enables you to maintain an overview of your configured achievements and control which achievements are active and running, and assigned to which participants.

UI Element	Description
	<b>Participant Settings:</b> Opens the Participant Details page for the current participant.
	<b>User Engagement Configuration:</b> Opens the User Engagement configuration area.
	<b>Show/Hide Running:</b> Filter to show or hide only the running achievements.
	<b>Show/Hide Paused:</b> Filter to show or hide only the paused achievements.
	<b>Show/Hide Disabled:</b> Filter to show or hide only the disabled achievements.
<b>Search</b>	Entering a text string will filter the achievements to only display achievements which include the specified string in the achievement name.  Click <b>x</b> clears the filter.
<b>Group by</b>	<p><b>By Business Objective</b></p> <p>Displays the objective title for each activity belonging to the selected objective. Selecting an objective displays the achievements associated with the objective.</p> <p><b>By Category</b></p> <p>Displays the objective title for each activity belonging to the selected category. Selecting a category displays the achievements associated with the category.</p>
	Displays a value for the state of achievements within each category or business objective. You can get an overview of how many achievements are running, paused, and disabled.

UI Element	Description
	<p>For each business objective or category, you can globally enable, pause or reset and disable all associated achievements using the dropdown menu items in the title bar of the business objective or category:</p> <ul style="list-style-type: none"><li>▶ — <b>Run all disabled achievements:</b> Activity collection is started. Participants can take part in these achievements.</li><li>   — <b>Pause all running achievements:</b> Pausing achievements halts collection of data for these achievements and freezes the current values. Running an achievement again continues the collection of data for this achievement from the point it was paused. Paused achievements are no longer displayed in the participants' timelines.</li><li>▶ — <b>Resume all paused achievements:</b> Activity collection is resumed. Participants can take part in these achievements again</li><li>⦿ — <b>Restart all running achievements:</b> Progress of all participants for the running achievements is reset to zero.</li><li>⦿ — <b>Restart and resume all paused achievements:</b> Progress of all participants for the running achievements is reset to zero. Data collection is resumed.</li><li>⦿ — <b>Disable and revert all achievements:</b> Disabling an achievement results in all participants who have been assigned this achievement to lose it and all activities associated with this achievement are reset.</li></ul> <p>Disable achievements only if you want to delete all achievement data. Disabled achievements no longer appear, for example, in participants' Timelines.</p>


## Achievement Panel

The Achievement panels enables you to maintain an overview of the status of individual achievements and control whether they are active and running, and assigned to how many participants.

UI Element	Description
	<b>Participant:</b> Indicates the number of participants that have been awarded the achievement.
	Opens the Configure page for the selected achievement.
 <p><b>Indicators and menu items</b></p>	<p><b>Running/Paused/Disabled Indicators:</b>Indicates the achievement status. You can enable, pause, or reset and disable an achievement using the menu elements included in the achievement:</p> <ul style="list-style-type: none"> <li>▶ <b>Run Achievement</b> — Enables the selected achievement.</li> <li>   <b>Pause Achievement</b> — Pauses the selected achievement. Activity collection is paused. Resume achievement to continue from paused state. Paused achievements are no longer displayed in the participants' timelines.</li> <li>▶ <b>Resume Achievement</b> — Activity collection for a paused achievement .</li> <li>⌂ <b>Restart Achievement</b> — Enables the selected paused achievement and progress of all participants for the running achievements is reset to zero.</li> <li>⌂ <b>Restart and Resume Achievement</b> — Enables the selected achievement and progress of all participants for the running achievements is reset to zero. Data collection is resumed.</li> <li>⊖ <b>Disable and Revert Achievement</b>— Disables the selected achievement. Progress data is reset and he Achievement threshold is reverted to the default value.</li> </ul>

## Configure: Achievement Dialog Box

The Configure: <achievement name> dialog box enables you to activate and tune achievements.

UI Element	Description
<b>Status</b>	<p><b>▶ Running:</b> Running achievements can be restarted, paused, or disabled and reverted. Running achievements are visible to the associated participants as identified in the Participants list. Participant contribution towards this achievement is tracked.</p> <p><b>   Paused:</b> Paused achievements can be resumed, restarted and resumed, or disabled and reverted. Pausing an achievement halts collection of activity data for this achievement and freezes the current values. Resuming the achievement continues the collection of data for this achievement from the point it was paused. Paused achievements are no longer displayed in the participants' timelines.</p> <p><b>⌂ Restart:</b> Running or paused achievements that are selected to be restarted display the Restart state. Clicking OK, restarts the achievement.</p> <p><b>⊖ Disabled:</b> Disabled achievements can be . Disabling an achievement removes it from the list of participants' achievements. If you disable an achievement, you also delete all records of participants' progress on this achievement.</p>
<b>Tune</b>	<p><b>Activity:</b> The task to be completed to complete the achievement.</p> <p><b>Threshold:</b> Target for the achievement to be met. Adjust the associated threshold of the activity used to award this achievement.</p> <p>Achievements are related if they are based on the same activity. Tuning the highest threshold of the activity in a group of related achievements, for example, the threshold value for Tool Master for the group of achievements Tool Apprentice, Tool Professional, and Tool Master, has an impact on the number of points scored for expert boards. If you increase the threshold, the number of points awarded for the associated activity is proportionally reduced. The default threshold for the Tool Master achievement is 50, and 8000 points are awarded per completed activity (per created tool). If you change the threshold for the Tool Master achievement to 100, 4000 points are awarded per created tool.</p>
<b>Participants</b>	<p>Displays the list of participants assigned to the selected achievement.</p> <p><b>✖ Remove participants :</b> Removes the associated participant from the achievement.</p> <p><b>Add participants :</b> Adds participant to the Participants list for the selected achievement by entering a valid participant name and clicking  to accept.</p> <p><b>Note:</b> Only visible if achievement is enabled.</p>

## Default Active Achievements

The following Achievements are active by default when you install User Engagement.

**Note:** If you are upgrading from a previous version, the existing settings are maintained and new achievements are not activated by default.

Achievement	Description	Default Activity Threshold
<b>A lot of Events Automatically Assigned</b>	Your User Group Assignments must assign $\${threshold}$ events to user groups.	10000
<b>Cool Problem Solver in the current Month</b>	Set $\${threshold}$ events to 'resolved' or 'closed' this month.	1000
<b>Cool Stream Correlator</b>	Your Stream-Based Event Correlation Rules must correlate events for $\${threshold}$ times.	100
<b>Cool TBEC Rule Designer</b>	Your Topology-Based Event Correlation rules must correlate events for $\${threshold}$ times.	100
<b>Cool Tool Provider</b>	Tools you created must be executed $\${threshold}$ times.	100
<b>Dashboard Designer Apprentice</b>	Create your first event dashboard using Admin > Operations Management > Operations Console > Dashboard Designer.	1
<b>Distinguished Problem Solver in the current Month</b>	Set $\${threshold}$ events to 'resolved' or 'closed' this month.	4000
<b>Distinguished TBEC Rule Designer</b>	Your Topology-Based Event Correlation rules must correlate events for $\${threshold}$ times.	1000
<b>Distinguished Tool Provider</b>	Tools you created must be executed $\${threshold}$ times.	500
<b>Event Combination Apprentice</b>	Create your first Combination rule using Admin > Operations Management > Event Correlation > Stream-Based Event Correlation.	1
<b>Event Filter Apprentice</b>	Create your first Event Filter. Event Filters are used in various places across HP Operations Manager i.	1



Achievement	Description	Default Activity Threshold
<b>Event Filter Professional</b>	Create $\{threshold\}$ Event Filters. Event Filters are used in various places across HP Operations Manager i.	10
<b>Event Recurrence Apprentice</b>	Create your first Missing Recurrence rule using Admin > Operations Management > Event Correlation > Stream-Based Event Correlation.	1
<b>Event Repetition Apprentice</b>	Create your first Repetition rule using Admin > Operations Management > Event Correlation > Stream-Based Event Correlation.	1
<b>Event Resolver Apprentice</b>	Do your job and resolve $\{threshold\}$ events using the Operations Manager i Event Browser.	15000
<b>Event Resolver Master</b>	Only the best can become a true master. Solve $\{threshold\}$ events to reach this status.	100000
<b>Event Resolver Professional</b>	Work like a pro and resolve $\{threshold\}$ events using the Operations Manager i Event Browser.	50000
<b>First Events Automatically Assigned</b>	Your User Group Assignments must assign $\{threshold\}$ events to user groups.	100
<b>Star Problem Solver in the current Month</b>	True Set $\{threshold\}$ events to 'resolved' or 'closed' this month.	6000
<b>TBEC Apprentice</b>	Create your first Topology-Based Event Correlation Rule using Admin > Operations Management > Event Correlation > Topology-Based Event Automation.	1
<b>Tool Apprentice</b>	Create your first Tool using Admin > Operations Management > Operations Console > Tools.	1
<b>Tool Professional</b>	Create $\{threshold\}$ Tools using Admin > Operations Management > Operations Console > Tools.	5
<b>User Group Assignment Apprentice</b>	Create your first User Group Assignment using Admin > Operations Management > Event Automation > User Group Assignment	1

## Chapter 4: Expert Scoring

Participants are awarded points for activities (achievement progress) in which they take part. If participants have opted out of being visible in the experts boards, scoring is also paused. If participants subsequently decide to take part in the Experts Boards again, any previously collected points are used to calculate their position in the various expert boards.

Points are based on completed tasks or automated system activity. For example, a task a participant must execute could be the creation of a TBEC rule. The recording of automated system activity could be the use of a TBEC rule to close an event, for which points are awarded to the creator of the rule. The various tasks may be assigned different values. For example, closing an event is typically done very often and is intrinsically a comparatively easy task. Conversely, creating a new TBEC rule is a complex task that is done infrequently. To balance the relative values of each completed task or system action, the points per completed task values have been selected to reflect the relative complexity of the associated task. The result being that the points awarded are generally in line with the expected effort required to complete each task. As standard, achievements of the same level are awarded a similar number of points, making it easier to compare participants relative progress even if they are concentrating on different aspects of Operations Management.

### To access:

Select **Admin > Operations Management > Operations Console > Experts Scoring**

or

**Engage Your Users** from the User Engagement home page and select the **Experts Scoring** tab.

## Tasks

### Balancing Achievements by Changing the Weighting

Achievements of the same level are usually awarded a similar number of points. However, you might want to adjust the normal preset values and give certain achievements more or less weighting, awarding more points to certain tasks or automated system activity and less points to others. The easiest way to achieve balancing is to use the weighting control, located at the top of each objective or category. The default value (center position) applies the default number of points associated with the completed tasks or automated system activity being tracked for the selected objective or category.

To change the weighting of a task or automated system activity required to contribute to an achievement or group of achievements, complete the following steps:

1. From the Experts Scoring page, select and open the category or objective for which you want to change the weighting applied to the normal points score awarded for completing the associated tasks or automated system activity.
2. Drag the weighting control to increase or decrease the weighting applied to the points awarded per tasks or automated system activity. The weighting of points awarded for completing a task or automated system activity within each type of challenge can be adjusted either side of the

normal value as follows:

**-50%** - Each task or automated system activity is awarded half the normal amount of points.

**-25%** - Each task or automated system activity is awarded three-quarters of the normal amount of points.

**+50%** - Each task or automated system activity is awarded one and a half times the normal amount of points.

**+100%** - Each task or automated system activity is awarded double the normal amount of points.

Points awarded as a result of task completion or automated system activity are always evaluated using the currently applied weightings. Changing weightings does not change the points previously awarded.


As you change the weighting, you can see how the value of the points awarded for each task or automated system activity associated with the category or objective is increased or decreased. Based on the **Average Activity Count**, you can see the simulated score indicating the points that would have been awarded if the current configuration was selected from the start of running the category of achievements.

### **Advanced Achievement Balancing by Changing the Activity Threshold**

Achievements are awarded as a result of meeting the Activity Threshold for the achievement. For example, to become an EPI Master, a participant must create 30 EPI scripts. If you feel that it is too easy or too difficult to accomplish an achievement, you can change the value of the Activity Threshold. Points are awarded each time the a Activity value is incremented, and continue to be awarded even after an achievement is awarded.

Activities that are associated with high volume tasks or automatic actions (closing an event, or triggering a TBEC rule) are awarded fewer points than activities associated with low volume tasks (creating a content pack).

To balance the weighting of a task or automated system activity required to contribute to an achievement or group of achievements by changing the Activity Threshold, complete the following steps:

1. From the Achievements page, select the achievement for which you want to change the Activity Threshold, click the  button to open the Configuration dialog box.
2. Make sure the state of the selected achievement is set to **Running** or **Paused** by selecting the appropriate button.
3. Adjust the Tune Threshold to alter the number of times the task or automated system activity associated with the achievement must be completed for the achievement to be awarded.



You can change the Tune Threshold for running or paused achievements.

**Note:** Changing values of thresholds does not affect completed achievements.

4. Click **OK** to accept the changes and close the Configuration dialog box.

## UI Reference

The Experts Scoring page provides you with normalizing controls for each achievement category, helping you to easily balance the amount of points awarded per activity.

UI Element	Description
	<b>Participant Settings:</b> Opens the Participant Details page for the current participant.
	<b>User Engagement Configuration:</b> Opens the User Engagement configuration area.
<b>Category</b>	<p>Selecting a category or objective displays the activities, associated with the category or objective. Opening an activity displays the related achievements, the associated controls for balancing how points are awarded, and the Score Calculation Details, illustrating how the category is allocating points.</p> <p><b>Objectives</b></p> <ul style="list-style-type: none"><li>• <b>All Objectives:</b> Displays the objective title for each configured activity belonging to the selected objective.</li><li>• <b>&lt;Objective&gt;</b>: Displays the objective title for each activity belonging to the selected objective.</li></ul> <p><b>Categories</b></p> <ul style="list-style-type: none"><li>• <b>All Categories:</b> Displays the category for each configured activity belonging to the selected category.</li><li>• <b>&lt;Category&gt;</b>: Displays the category for each activity belonging to the selected category.</li></ul>

UI Element	Description
<p><b>Score Calculation Details</b></p>	<p><b>Average Activity Count:</b> Average number of completed tasks associated with the selected category or objective. To qualify for inclusion, each user must have completed the associated task at least once.</p> <p><b>Points per Activity:</b> Number of points awarded per completion of the associated task required by an achievement or group of achievements.</p> <p><b>Average Points:</b> Simulated score indicating the points that would have been awarded if the current configuration was selected from the start of running the category of achievements. It does not reflect the points currently awarded if subsequent changes to the weighting have been made.</p>
<p><b>Score Calculation Weighting</b></p>	<p>Weight of points awarded for completing a task within each type of challenge can be adjusted either side of the normal value as follows:</p> <ul style="list-style-type: none"> <li>-50% - Each completed task is awarded half the normal amount of points.</li> <li>-25% - Each completed task is awarded three-quarters of the normal amount of points.</li> <li>+50% - Each completed task is awarded one and a half times the normal amount of points.</li> <li>+100% - Each completed task is awarded double the normal amount of points.</li> </ul> <p>Points awarded as a result of task completion are always evaluated using the currently applied weightings. Changing weightings does not change the points previously awarded.</p>

## Chapter 5: Administrating User Engagement

**Note:** The administration pages are available only to users with User Engagement administration rights.

A User Engagement administrator is responsible for setting up the participants who are to take part in achievements and configure the default behavior of User Engagement.

User Engagement Administration is divided into the following areas:

- ["Configuring User Engagement" below](#)
- ["Participant Administration" on page 32](#)

The MyBSM Component Gallery includes the following User Engagement components, which you can combine as required to create a User Engagement custom page:

- User Engagement Achievements
- User Engagement Dashboard (also available from the Page Gallery)
- User Engagement Experts
- User Engagement Timetable

For information on creating custom pages, see the MyBSM online help.

For information on the User Engagement Infrastructure Settings, see ["Infrastructure Settings for User Engagement" on page 36](#).

### Configuring User Engagement

The Configuration page includes the basic User Engagement controls.

**To access:**

Select **Admin > Operations Management > Setup > User Engagement > Configuration**

or

**Administration** from the User Engagement home page and select the **Configuration** tab

## Features

### Enable Experts Boards

Expert boards can be used by participants to find experts of any category and compare their own rank with the rank of their peers. The use of expert boards can boost User Engagement effects.

Select to enable Expert Boards in User Engagement. When this option is disabled, the Experts UI is not visible to the end users.

**Note:** The use of expert boards may require approval by the appropriate works council in certain geographies. It is advisable to check whether any approval is required before enabling.

## Participant Defaults

Enable User Engagement participant options:

**Note:** The following settings are enabled by default and only apply to new participants. The settings already being used by existing participants override these settings.

- **Participate by default**

Select to automatically include all participants in User Engagement. Each participant is able to actively choose whether to participate or not and override this default. For details, see "[Privacy and Notifications](#)" on page 13.

- **Use popups to notify participants by default**

Select to automatically send popup notifications of achievements to all participants. Each participant is able to actively override this default. If the default is not selected, each participant must individually request notifications. For details, see "[Privacy and Notifications](#)" on page 13.

- **Participate in Experts Board by default**

Select to automatically include all participants in User Engagement Expert Boards. Each participant is able to actively choose whether to participate or not and override this default. For details, see "[Privacy and Notifications](#)" on page 13.

### Reset Data

- **Reset Participant Data**

Resets collected product usage data. This deletes all earned achievements and activity data for all participants. This action is not reversible.

- **Reset Expert Scores**

Resets the expert scores for all participants. This action is not reversible.

## Participant Administration

The Participants page displays all configured User Engagement 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. However, this page is useful for granting administration rights to existing users, or for creating dedicated administrative users that do not exist in BSM.

**Note:** The built-in administrator account cannot be deleted and the administrative rights cannot be removed. However, the password can be changed and it is recommended that the default password for the user `admin` is changed immediately.

Initially, the built-in administrator (`admin`) is the only user with User Engagement administration rights. Log on to BSM with this user and configure other participants as User Engagement administrators.

### To access:

Select **Admin > Operations Management > Setup > User Engagement > Participants**

or

**Administration** from the User Engagement home page and select the **Participants** tab

## Participant Accounts

Participant accounts are composed of the following components and these are displayed on the Participants page for each participant:

### Avatar Name

Name displayed in User Engagement for the selected participant. If not specified, the login name is used.

### Login

Name used to access the associated account in User Engagement for the selected participant.

### Email

Email address of the selected participant.

### Administrator (if applicable)

If the Administrator role is assigned to the participant, **Administrator** is displayed for that participant.



## Tasks

### Manually Creating a Participant

**Note:** There is usually no need to create participants manually in User Engagement. However, you might want to create dedicated administrative users that do not exist in BSM.

To create a new User Engagement participant, complete the following steps:

1. Click **Add new participant**.

2. Enter a unique login name.

A valid login name consists of 1-40 letters, digits or the following the special characters:

!, @, \_, and .

3. Enter a password and confirm.

4. *(Optional)* Enter an avatar name for the participant which is the name visible from within User Engagement for this participant.

5. *(Optional)* Enter the email address for the participant.

User Engagement administrators can use this information for communication purposes.


6. Select any additional roles that the participant requires:

**Administrator** - Can change global settings and administrate participants.

7. Click **OK**.

### Editing a Participant

To edit the properties of an existing User Engagement participant, complete the following steps:

1. Click  **Edit participant** for the participant that you want to modify.

2. Make the required modifications.

3. Click **OK**.

## Deleting a Participant

**Note:** It is not possible to delete the participant under which you are currently logged on, nor is it possible to delete the account of the built-in administrator (`admin`).

To delete an existing User Engagement participant, complete the following steps:

1. Click **✖ Delete participant** for the participant that you want to delete.
2. Click **Delete** to confirm.

## Configuring User Engagement for LDAP

To configure User Engagement for LDAP, complete the following steps:

1. Log out of BSM.
2. Open the User Engagement stand-alone UI using the following URL:

`http(s)://<bsmserver>/excite`

3. Login as the default admin account:

Account name: `admin`

Password name: `admin`

**Note:** It is recommended that you change the default password.





You should now have administration access to all User Engagement features and should be able to configure User Engagement.

In addition, from the **Administration > Participants** page, check the following:

1. Are users from LDAP being created in User Engagement after they have performed a User Engagement activity, for example, after they have closed their first event.
2. For a User Engagement participant automatically generated from a user in LDAP, try to edit the user configuration on this screen and assign administrative rights to that user. You should now be able to use this LDAP user as administrator.

## UI Reference

The Participants page enables you to maintain an overview of your configured participants.

UI Element	Description
	<b>Participant Settings:</b> Opens the Participant Details page for the current participant.
	<b>User Engagement Configuration:</b> Opens the Privacy and Notifications page for the current participant.
<b>Add new participant</b>	Opens the Add Participant dialog box.
	<b>Edit participant:</b> Opens the Edit Participant dialog box.
	<b>Delete participant:</b> Deletes the selected participant.
<b>Login</b>	Name used to access the associated participant account in User Engagement for the associated participant.
<b>Password</b>	Password for the User Engagement participant account.
<b>Confirm</b>	Confirm password field for the User Engagement participant account when changing the participant account password.
<b>Avatar Name</b>	Name displayed in User Engagement for the associated participant.
<b>Email</b>	Email address of the associated participant used for notifications.
<b>Remove Avatar</b>	<i>Edit dialog:</i> Delete the avatar image, if one is associated with the account. For details about uploading an avatar image file, see <a href="#">"Uploading an Avatar" on page 11.</a>

## Infrastructure Settings for User Engagement

The Infrastructure Settings Manager page for User Engagement page enables you to view and modify the default configuration for User Engagement. The settings displayed on this page determine how User Engagement behaves and performs. Changing settings can affect the performance of both the application itself and the underlying platform. Only users with both the required background knowledge and access permission should attempt to change these settings.

**Note:** Modified values are displayed in **bold** text. In some cases, the changes you make are not effective immediately. You might have to restart the browser session or a server process.

### To Access:

1. Select **Admin > Platform > Setup and Maintenance > Infrastructure Settings**
2. Select **Applications** and use the list to set the administration context to **Operations Management** or **User Engagement**.

**Note:** To change an existing or default setting, click the  button behind the setting.

### User Engagement - UI Settings

The UI Settings under User Engagement contain the available configurations used to specify how to configure set the Notification Polling Interval in User Engagement.

The following elements are included in the User Engagement Settings pane.

UI Element (A-Z)	Description
<b>Polling Interval</b>	Waiting time between checking for achievements.  The notification polling interval controls how often the system checks for pending notifications of completed achievements. The lower the polling interval, the sooner participants are notified of completed achievements. However, frequent polling increases the load on the Gateway Server. By default, a request is sent every 10 seconds to check for new notifications.

### Operations Management - User Engagement

The User Engagement Settings contain the available configurations used to specify how to configure User Engagement.

The following elements are included in the User Engagement Settings pane.

<b>UI Element (A-Z)</b>	<b>Description</b>
<b>Alias</b>	Alias of the certificate to use in the key store ( <i>Internal setting - cannot be changed</i> ).
<b>Enable User Engagement</b>	Enables User engagement. Events information is sent to User Engagement server. By default, User Engagement is enabled on installation. If you upgrade User Engagement to a later version, the existing setting is not changed.
<b>Key Store File Name</b>	Path to the key store in the file system ( <i>Internal setting - cannot be changed</i> ).
<b>Key Store Password</b>	Password to read the key store file ( <i>Internal setting - cannot be changed</i> ).
<b>Trust Store File Name</b>	Path to the trust store in the file system ( <i>Internal setting - cannot be changed</i> ).
<b>Trust Store Password</b>	Password to read the trust store file ( <i>Internal setting - cannot be changed</i> ).
<b>URL</b>	Link to the User Engagement Server ( <i>Internal setting - cannot be changed</i> ).

## Chapter 6: Status Reports

The `opr-ue-statusreport` tool enables you to generate User Engagement reports in HTML format. The following reports are available:

- **Achievement Status and Thresholds** - Lists the status of all achievements, number of participants that have been awarded each achievement, default and currently applied thresholds.
- **Activity Values** - Lists the values of the activities that contributes towards achievement that are in progress by the various participants.
- **Awarded Achievements** - Lists all awarded achievements, when they were awarded, and to which participants.
- **Participants** - Lists all participants, along with their currently applied User Engagement Configuration and number of awarded achievements.

### To access:

```
<BSM root directory>/opr/support/opr-ue-statusreport
```

## Generating User Engagement Reports

To generate the User Engagement reports, including user information, and save them to a directory of your choice, run the command:

```
<BSM root directory>/opr/support/opr-ue-statusreport -noanon -o <output directory path>
```

For example, on Windows, you can use the following command to generate the reports and place them in the `temp` directory:

```
<BSM root directory>\opr\support\opr-ue-statusreport -noanon -o c:\temp
```

## Tool Options and Report Descriptions

### opr-ue-statusreport Command Line Tool

The opr-ue-statusreport Command Line Tool options are described in the following table:.

UI Element	Description
<b>-debug</b>	Shows debug messages in the report output.
<b>-h, --help</b>	Displays the online command line help text.
<b>-noanon</b>	If specified, user anonymization is not performed. The participant names are included in the report.
<b>-o, --output &lt;arg&gt;</b>	Path to the output directory to which report files are written. If no directory is specified, the report HTML files are written to:  <b>Windows:</b> <HPBSM_Install_Dir>\Temp <b>Linux:</b> /opt/HP/BSM/Temp
<b>-version</b>	Displays the User Engagement version information .
<b>-what</b>	Displays detailed User Engagement component information.

## User Engagement Reports

The User Engagement reports available are described in the following table:

Report	Description
<p><b>Achievement Status and Thresholds</b></p>	<p><b>File Name:</b> ue_achievement_status_thresholds.html</p> <p>The following information is available for each achievement:</p> <ul style="list-style-type: none"> <li>• <b>Title:</b> Name of the achievement.</li> <li>• <b>Description:</b> Description of the achievement.</li> <li>• <b>State:</b> Stopped, Active, or Paused.</li> <li>• <b>Owning Participants:</b> Number of participants taking part in the achievement.</li> <li>• <b>Default Threshold:</b> Default value specifying the number of times that the associated task or automated system activity must be completed for the achievement to be awarded.</li> <li>• <b>Instance Threshold:</b> Selected value specifying the number of times that the associated task or automated system activity must be completed for active achievement to be awarded. Inactive achievements do not have an Instance Threshold value.</li> <li>• <b>Modified:</b> Indicates whether the Template Threshold has been changed for an active or paused achievement.</li> </ul>
<p><b>Counter Values</b></p>	<p><b>File Name:</b> ue_counter_values.html</p> <p>The Activity Values report lists the values of the activities that contributes towards achievement that are in progress by the various participants.</p> <p>The following information is available for each activity :</p> <ul style="list-style-type: none"> <li>• <b>Activity Label:</b> Display name used in the user interface of the activity tracking the progress of the associated achievements.</li> <li>• <b>Activity Name:</b> The internal activity name being used to track the progress of the associated achievements.</li> <li>• <b>Assigned to Participant:</b>User name of the participant taking part in the achievement being tracked.</li> <li>• <b>Value:</b> Number of times that the activity has been triggered by the associated user.</li> </ul>



Report	Description
<b>Awarded Achievements</b>	<p><b>File Name:</b> ue_awarded_achievements.html</p> <p>The following information is available for each awarded achievement:</p> <ul style="list-style-type: none"><li>• <b>Awarded to Participant:</b> Name of participant who has been awarded an achievement.</li><li>• <b>Achievement Name:</b> Name of the achievement awarded.</li><li>• <b>Date Awarded:</b> Full date when the associated achievement was awarded.</li><li>• <b>Date Awarded Long:</b> Date when the associated achievement was awarded in long format.</li></ul>
<b>Participants</b>	<p><b>File Name:</b> ue_participants.html</p> <p>The following information is available for each user/participant:</p> <ul style="list-style-type: none"><li>• <b>Participant's User Name:</b> Name of User Engagement participant.</li><li>• <b>Participate:</b> Identifies whether the participant is actively taking part in User Engagement achievements.</li><li>• <b>Show Popup Notifications:</b> Identifies whether the participant receives popup notifications when achievement are awarded.</li><li>• <b>Number of Awarded Achievements:</b> Indicates how many achievements have been awarded to the associated participants.</li></ul>

## We appreciate your 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 User Engagement for HP Operations Manager i User Guide (Business Service Management 9.24)**

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-asm@hp.com](mailto:ovdoc-asm@hp.com).