

# HP Service Manager

Software Version: 1.10

For the supported Windows® and UNIX® operating systems

## Collaboration Guide

Document Release Date: July 2014

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# Introduction

By integrating with HP Enterprise Collaboration (EC), HP Service Manager Collaboration (SM Collaboration) enables SM and non-SM users to collaborate in real time (or anytime) in the context of an Incident, Service Desk Interaction, Change, or Change Task. Non-SM users can participate in the conversation using the EC stand-alone web interface or using Microsoft Office Communicator/Lync. SM Collaboration suggests participants to be invited to the conversation based on the context of a record, such as contact, configuration item (CI), service, or assignment group. You can also search users by email address or user name, and invite them to the conversation. The conversation is stored as a permanent part of the corresponding record.

## Audiences

This document is intended for the following audiences:

- Incident Analysts (and others involved in Incident Management, such as Incident Coordinators)
- Service Desk Agents
- Service/Configuration Item Owners
- Change Analysts (and others involved in Change Management, such as Change Coordinators)
- Business users
- System Administrators (for installation and initial configuration)

## Supported Record Types

SM Collaboration in this release supports the following types of records:

- Service Desk Interaction
- Incident
- Change
- Change Task

## Prerequisites

See the *Service Manager 9.34 Compatibility Matrix*. SM Collaboration requires the following prerequisites:

### Core components

- HP Service Manager 9.34 Web tier
- HP Service Manager 9.34 applications
- HP Enterprise Collaboration 1.1 (EC)

**Note:** See EC documentation for prerequisites required for installing EC.

### Light-Weight Single Sign-On

SM Collaboration requires that you configure Light-Weight Single Sign-On (LW-SSO) for the SM Web tier.

### Lightweight Directory Access Protocol (LDAP) directory

An LDAP directory is required. Your Service Manager server and EC server must use the same LDAP directory for account management, and all SM Collaboration users must also be users of EC.

For more information, refer to HP Enterprise Collaboration documentation.

### Service Manager English version

It is recommended that you run the English version of Service Manager. SM Collaboration does not provide localized user interfaces for non-English SM environments.

### Out-of-box Service Manager applications

Tailoring to certain applications may prevent SM Collaboration from working.

### Service Manager operator email

It is recommended that each SM Collaboration user has an email address assigned in their operator record. In this case, this email should be the same email address that the EC user uses in the LDAP directory. Service Manager users without a valid email field will not be listed in the suggested participants list. See "[Conversation Roles](#)" on page 14.

# Enabling SM Collaboration

This section will guide you through these steps to enable SM Collaboration:

1. Install HP Enterprise Collaboration.
2. Run a configuration script.
3. Modify the `web.xml` file.
4. Configure LW-SSO.

## Install HP Enterprise Collaboration

Before you can use SM Collaboration, you must have HP Enterprise Collaboration installed. See the Enterprise Collaboration Installation and Configuration Guide for details.

**Note:** To achieve better performance, it is recommended to deploy SM (server and Web tier) and EC in the same domain. In addition, SM and EC must be in the same security level. That is, they must both use `http`, or both use `https`.

The *HP Enterprise Collaboration Installation and Configuration Guide* and *HP Enterprise Collaboration Support Matrix* are available on the HP Software Product Manuals site:

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## Run the `set-EmailAndOCS.bat` Script

For the best user experience, the `set-EmailAndOCS.bat` script disables email notifications and disables Office Communicator/Lync notifications for participants that are already logged on to Service Manager or EC.

Run the following script file on your EC server **before** starting the EC server:

```
<EC_install_folder>\diamond-deploy\set-EmailAndOCS.bat
```

**Note:** If you do not run this script before you start your EC server, you must use the JMX console to manually set the required parameters. See "[Disabling Email and Office Communicator/Lync Notifications](#)" on page 25.



## Modify the web.xml File

By default, the SM Collaboration feature is disabled after applying Service Manager 9.34 Web tier. You need to modify the `web.xml` file to enable and configure SM Collaboration.

Modify the following parameters in the `web.xml` file, which locates in the `WEB-INF` folder of your application server installation.

### SM Collaboration parameters in web.xml

Parameter	Description	New value
<code>isRightPanelUsed</code>	Enable the SM Collaboration panel, which will appear to the right of the main workspace.  <b>Default:</b> <code>false</code>	<code>true</code>
<code>collaboration Server</code>	Change the Service Manager server name and port number to the fully qualified domain name (FQDN) of the EC server and port number.	<code>[SMECserverhost]:[port]</code> <b>Example:</b> <code>exampleec.domain.com:8080</code>
<code>collaboration MessageSize</code>	This refers to the number of messages that appear in the message panel before the “More” divider appears.  <b>Default:</b> <code>20</code>	<code>5</code>  (or any value)
<code>ECSMNameSpace</code>	Change this value to the name space that you assigned in EC for the current Service Manager server. The SM adapter on the EC server identifies integrated SM servers by their name spaces.	<code>[name_space_on_EC]</code> (the name space defined on the EC server)  <b>Example:</b> <code>SM1</code>
<code>ECUrl</code>	Add the URL of the HP Enterprise Collaboration server.	<code>http://[SMECserverhost]:[port]/diamond</code> Or (if EC uses https): <code>https://[SMECserverhost]:[port]/diamond</code>  <b>Example:</b> <code>http://exampleec.domain.com:8080/diamond</code>

**SM Collaboration parameters in web.xml, continued**

Parameter	Description	New value
collabNotificationInterval	Change the interval (in milliseconds) that Service Manager polls the EC server.  <b>Default:</b> 3000	3000
collabUserSearchLeastChar	This refers to the minimum number of characters that you need to type in the participant search box to trigger a search.  <b>Default:</b> 4	5 (or any value no less than 4)
collabUserSearchResultLimitation	This refers to the maximum number of possible search results that appear in the participant search result list.  <b>Default:</b> 30	10 (or any value larger than 0)

These parameters, along with other parameters that work for SM Collaboration, are enclosed between comment tags (<!-- and -->). You must uncomment the required configurations by removing the comment tags.

Uncomment the following text to enable SM Collaboration required parameters:

```
<!--<context-param>
    <param-name>collaborationServer</param-name>
    <param-value>[servername]:[port]</param-value>
</context-param>
<context-param>
    <param-name>collaborationMessageSize</param-name>
    <param-value>20</param-value>
</context-param>
<context-param>
    <param-name>ECSMNameSpace</param-name>
    <param-value>SM1</param-value>
</context-param>
<context-param>
    <param-name>ECUrl</param-name>
    <param-value>http://[servername]:[port]/diamond</param-value>
</context-param>
<context-param>
    <param-name>ECConversationUrlPattern</param-name>
    <param-value>/#openConversation?conversationIds={0}
</param-value>
</context-param>
<context-param>
```

```
        <param-name>collabNotificationInterval</param-name>
        <param-value>3000</param-value>
    </context-param>
    <context-param>
        <param-name>collabUserSearchLeastChar</param-name>
        <param-value>4</param-value>
    </context-param>
    <context-param>
        <param-name>collabUserSearchResultLimitation</param-name>
        <param-value>30</param-value>
    </context-param>
-->
```

Uncomment the following text to enable SM Collaboration required servlets:

```
<!-- Servlets for SM Collaboration. Uncomment to enable SM Collaboration.
    <servlet>
        <description>Collaboration Rest application
    </description>
    <servlet-name>CollaRestApplication</servlet-name>
    <servlet-class>org.apache.wink.server.internal.servlet.RestServlet
</servlet-class>
    <init-param>
        <param-name>javax.ws.rs.Application
</param-name>
        <param-value>com.hp.ov.sm.client.webtier.
colla.ithive.IThiveCollaborationApplication</param-value>
    </init-param>
    <load-on-startup>1</load-on-startup>
    </servlet>
    <servlet>
        <description>Colla I18N</description>
        <servlet-name>collai18n</servlet-name>
        <jsp-file>/collaboration/i18n.jsp</jsp-file>
    </servlet>
-->
```

Uncomment the following text to enable SM Collaboration required servlet mappings:

```
<!-- Servlet Mappings for SM Collaboration. Uncomment to enable SM
Collaboration.
    <servlet-mapping>
        <servlet-name>CollaRestApplication</servlet-name>
        <url-pattern>/colla/api/*</url-pattern>
    </servlet-mapping>
    <servlet-mapping>
        <servlet-name>collai18n</servlet-name>
        <url-pattern>/collaboration/i18n/*</url-pattern>
-->
```

```
</servlet-mapping>  
-->
```

## LW-SSO Configuration

Lightweight Single Sign-On (LW-SSO) must be enabled on Service Manger Web tier so that SM users can use SM Collaboration without logging into EC server separately. To enable LW-SSO on the Service Manger Web tier, see the Service Manger online help topic “*Configure LW-SSO on the Service Manager Web tier*”. If LW-SSO is not correctly configured, the users will be prompted to re-log in when launching EC from the Collaboration panel in Service Manager.

In addition, as of 9.33, Service Manager is using LWSSO 2.5 in which a new attribute `secureHTTPCookie` is introduced in the `lwssofmconf.xml` file. To enable the integration with EC1.1 and avoid login issue, you need to manually change the value of `secureHTTPCookie` to `false` (default is `true`). The `lwssofmconf.xml` file is in the `WEB-INF\classes` folder of your application server installation.

**Note:** If you use SM adapter in EC, you also need to configure LW-SSO on the Service Manger server to enable SM adapter. See the Service Manger online help topic “Configure LW-SSO in the Service Manager server” for how to enable LW-SSO on the Service Manger server. For more information about SM adapter, see SM adapter configuration guidelines available on HP Live Network (HPLN): <https://hpln.hp.com/group/sm-adapter-enterprise-collaboration>.

# How SM Collaboration Works

This section describes the components of the SM Collaboration solution and how they work with each other.

## **For administrators:**

- ["Components of the SM Collaboration Solution" below](#)

## **For all other users:**

- ["Conversation Roles" on the next page](#)
- ["Conversations" on page 15](#)
- ["Notifications" on page 15](#)

# Components of the SM Collaboration Solution

SM Collaboration uses the following components:

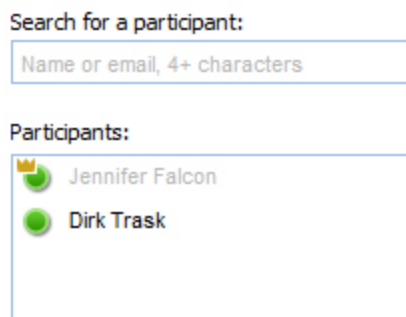
- **HP Enterprise Collaboration (EC) Server:** the server that links Service Manager and other messaging applications, such as Office Communicator/Lync, or other HP applications and solutions with collaboration functionality.
- **Service Manager Web Tier:** the interface through which users will post messages to conversations associated with records such as Incidents. Conversations appear in a pane to the right of the Service Manger workspace.
- **Office Communicator/Lync:** to receive notifications for updated conversations

## **User account management**

This collaboration solution uses LDAP and Light-Weight Single Sign-On (LW-SSO) to access and authenticate users. In this solution, LW-SSO allows users to access both the EC server and the Service Manager Web tier without logging in separately.

## Conversation Roles

- **Owner:**  
The owner of a conversation is the person who started the conversation. You can identify the owner by the crown icon 👑 in the participants list.



The owner can add or remove participants as needed. Conversation owners cannot be removed from a conversation.

The owner can post messages, invite both EC users and external users, and remove participants except the owner themselves. SM Collaboration defines EC users and external users as below:

- **EC users:** Since Service Manager recommends using LDAP directory as the source of EC users, the users in the LDAP directory are considered as EC users even they are not granted the permission to log into EC.
  - **External users:** An email address that does not belong to any EC user.
- **Participants:**  
A participant is defined as a user who has posted at least one message to a conversation, or a user who has been added to a conversation.

Any Service Manager user that can access the SM Collaboration panel, if necessary, can participate in a conversation. Any participant can add other EC users to a conversation, even though the EC users are not Service Manager users. A maximum of 100 participants can participate in a conversation.

A participant can post messages and invite EC users, but cannot invite external users. Participants can be removed from the conversation by themselves and by the participants who invited them.

- **Non-participants:**  
Even if a SM Collaboration user is not a participant of a conversation, they can still view the Suggested Participants list, but cannot invite participants. They can post a message and automatically join the conversation.


## Conversations


Conversations are a series of messages that are saved with a record, such as an Incident or a Service Desk Interaction. The title of a conversation consists of the record ID and the record title. For example, *IM10001 Printer malfunction*.

**Note:** All conversations opened in Service Manager are also accessible in EC.

## Notifications

When new messages have been posted to a conversation, participants can be notified in different ways, depending on whether they are logged on to Service Manager.

- When logged on to Service Manager, the participant receives a notification on the Service Manager Collaboration panel. A green notification badge appears in the Collaboration panel showing the number of updated conversations (for example, ). New messages posted to the currently active conversation are displayed immediately, without updating the number of updated conversations.
- When not logged on to Service Manager, the participant receives the posted messages in Office Communicator/Lync if it is being used by the participant. The participant can reply to the new message in Office Communicator/Lync.

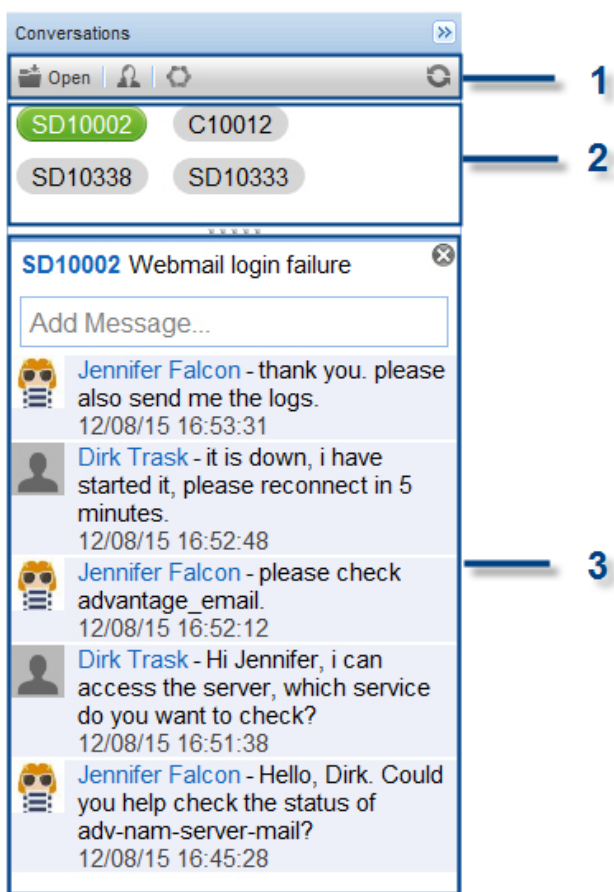
**Note:** If new messages are posted to a conversation while the participant is not logged on to Service Manager, this participant will not be notified the next time they log on to Service Manager. To view all the conversations with missing messages during offline, participants can log on to EC via the EC launch button  from the SM Collaboration panel.

# Navigating the UI






This section introduces the UI of SM Collaboration.

## Collaboration Panel

The Collaboration panel is illustrated in the following screenshot:

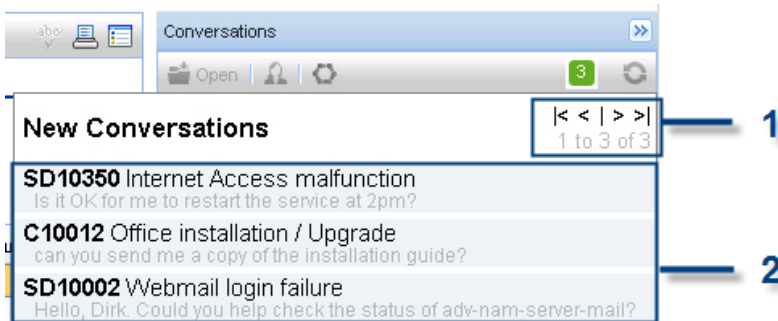




Callouts	Description
1	Tool bar <ul style="list-style-type: none"> <li>•  Open button</li> <li>•  Participant button</li> <li>•  EC launch button</li> <li>•  Notification badge</li> <li>•  Refresh button</li> </ul>
2	Conversation ID panel
3	Conversation panel

## Notification Panel

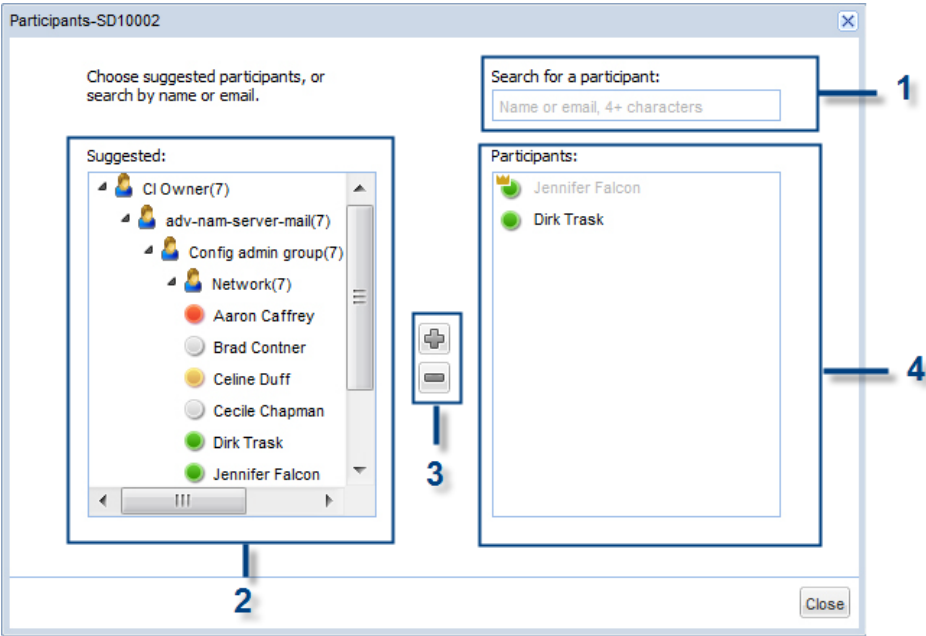
The Notification panel is illustrated in the following screenshot:



Callouts	Description
1	Paging bar
2	New conversation list

## Participant Window

The Participant window is illustrated in the following screenshot:



Callouts	Description
1	Participant search box
2	Suggested participant panel
3	Add/Remove button
4	Participant panel

# Using SM Collaboration


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

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

## Start a Conversation

Conversations can only be started in the detailed view of the records supported by SM Collaboration, including Interaction, Incident, Change, and Change Task. The **Open** button is not available for other types of records that are currently not supported by SM Collaboration.

To start a conversation:

1. Open a record in Service Manager.
2. On the Collaboration panel, click **Open** () and confirm that you want to start a conversation. Then a conversation starts.

## Post a Message to a Conversation


To post a message to a conversation:

1. Open a conversation if it is not open.
2. Add comments in the text field.
3. Click **Post**. (Or press **TAB + SPACE** or **TAB + ENTER**.)

Posting a message makes the user a participant automatically.

## Open an Existing Conversation

To open an existing conversation:

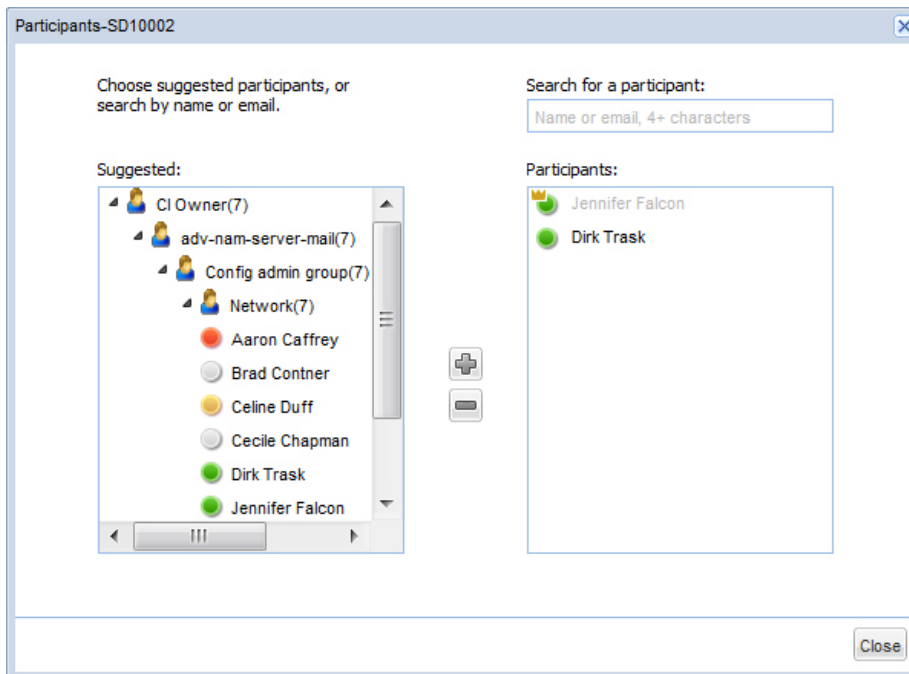
1. Open a record.
2. Click **Open** ()

**Note:** You can also open an existing conversation using the conversation buttons (record ID) in the conversation ID panel or the green notification badge in the Collaboration panel. See "[Switch between Open Conversations](#)" on page 22 and "[Check Updated Conversations](#)" on page 22.

## Invite Participants

To invite participants to contribute to a conversation:

1. Open a conversation directly or open a record that has a conversation. Click the Participant button (👤). The Participant window opens. The Participant button is active only when a conversation is open.



2. Add new participants by:
  - Selecting a user name or a group from suggested participant panel and then clicking the **Add** button (⊕). Or, double-clicking a user item or a group item also adds this user or this group of users to the conversation. Service Manager suggests participants based on the context of the record.
  - Entering user's email address or user name in the participant search box, and then selecting the participant from the search result list.

**Note:** Only the owner can add external users to a conversation.

In the Participant window, you can also view participants' presence statuses as shown beside the user names in the suggested participant panel, the participant panel, and the participant search result list:

- Online: 
- Busy: 
- Away: 
- Offline: 



**Note:** These statuses are the aggregated presence statuses of EC and Office Communicator/Lync. For the details about they are aggregated, see the EC documentation.

## Remove Participants

Participants can be removed from conversations if they no longer need to contribute. Participants will not be sent any notifications through Service Manager when they are removed.


Conversation owners can remove any participant, but conversation owners can never be removed. Participants can remove themselves or the participants they invited.

To remove participants:

1. Click the Participant button ()
2. Select the person in the participant panel on the right of the participant window.
3. Click the Remove button () or double-click the participant that you want to remove.

You can also remove participants in HP Enterprise Collaboration. See the HP Enterprise Collaboration documentation for details.

## Leave a Conversation

To leave a conversation, click the Conversation Close button  on the conversation panel. The conversation is automatically saved. Leaving the conversation does not close the record in the main workspace.

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

## Switch between Open Conversations

Conversations that are currently open appear on the top of the Collaboration panel. The active conversation appears in green and inactive conversations appear grayed out.

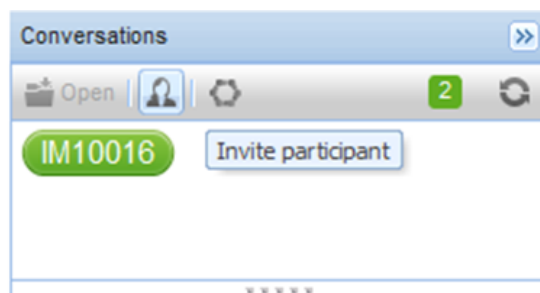


1. You can switch between open conversations by clicking the grayed-out record ID.
2. If you close a conversation, the record ID will not appear in the Collaboration panel.

**Note:** When you switch to a conversation, the record that it belongs to does not automatically open. If you want to open the corresponding record, click the record ID in the conversation title.

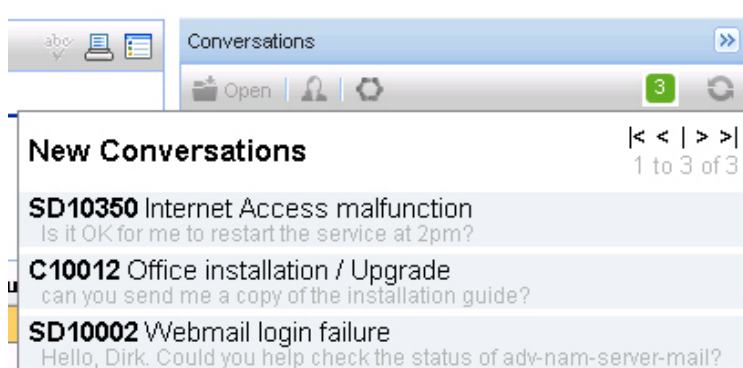
## Check Updated Conversations

A green notification badge (for example, <sup>3</sup>) tells you how many conversations were updated since you logged on to Service Manager.



To view the updated conversations:

1. Click the green notification badge.  
The list of updated conversations appears below.



2. Click the conversation to open it in the Conversation panel.
3. If the conversation has lots of messages posted, the message list displays only part of the messages. You must click **More** to display additional messages.

**Note:** When you open an updated conversation, the record that the conversation belongs to does not automatically open. If you want to open the corresponding record, click the record ID on the conversation title.

## Open the Corresponding Record

To open the record that your conversation belongs to, click the record ID in the conversation title.

**Note:** The record can only be opened by the users with corresponding authorization of viewing these types of records.

## Launch HP Enterprise Collaboration


To launch HP Enterprise Collaboration from the Service Manager Web client, click the HP EC launch button (⚙️). A new window opens in your browser showing your default home screen in HP Enterprise Collaboration. Or, if a conversation was open in Service Manager, the new window shows the same conversation in EC.

**Note:** The supported browsers for EC may be different from the ones for SM. For the supported browsers for EC, see the [HP Enterprise Collaboration Support Matrix](#).

## Update Participant Information

Service Manager uses the same user information, such as the user profile picture and name, as the EC server. To change how these items appear in Service Manager conversations, you must change the details in the EC server. For more information, see the *Enterprise Collaboration Installation and Configuration Guide*.

## Refresh a Conversation

Normally, any new messages that are posted to a conversation will automatically appear in the Conversation panel in real-time. However, to be sure you are seeing the most up-to-date messages, you can click the Refresh button ()

**Note:** If you previously clicked **More** to display additional messages, you will return to the initial view (with only several messages) after you click the **Refresh** button. You have to click **More** again to display additional messages.



## Appendix

### Disabling Email and Office Communicator/Lync Notifications

If you do not run the `set-EmailAndOCS.bat` script before you start your EC server, you can use the JMX console to set the required parameters.

1. Open the JMX console URL of your EC server in a web browser.

**Example:** `http://[HPECserverhost]:[port]/diamond/jmx-console`

2. In the Diamond section, click **Diamond settings jmx service**.
3. Find the following parameters:
  - `setEmailPublishEnable`
  - `setPublishOcsToUrgentOnline`
4. For each of these parameters, set the Value to `false`, and then click **Invoke**.

### SM Collaboration Limitations

The following table lists the limitations of HP Enterprise Collaboration that affect SM Collaboration:

Limitation	Value	Configurable
Maximum number of posts in a conversation	10,000	Yes
Maximum number of participants in a conversation	100	Yes
Maximum subject length	255 characters	No
Maximum post length	4,000 characters (depending on the language)	No

**Note:** The Configurable column indicates whether this limitation can be configured in the `factory_settings.xml` file on the EC server.

# Troubleshooting

This section lists common issues you may experience, their possible causes, and solutions.

## Issue 1: No Collaboration panel

### Symptoms:

The Collaboration panel is not displayed when a user logs in to Service Manager.

### Possible causes and solutions:

Cause	Solution
The Service Manager user is not an EC user.	Make the Service Manager user an EC user as well, and then let the user try logging in again.
LW-SSO is not correctly configured between Service Manager and EC.	Check the LW-SSO configuration, and make sure that a user logged in to Service Manager can access EC directly in the same browser window without re-logging in.
The EC server is not running.	Start the EC server and let the user try logging in again.
The web.xml file is not correctly configured.	Check the configurations in the web.xml file and restart the Service Manager web-tier server.
The web client that the user is using is an Employee Self-Service (ESS) client.	Use the standard Service Manager Web Client (index.do) instead of the ESS Client (ess.do).
The user account in EC does not have the privilege to view the conversation.	Grant the user sufficient privilege in EC's user management.

## Issue 2: Collaboration service unavailable

### Symptoms:

Users receive a warning message when opening a conversation: "collaboration service is currently unavailable."

### Possible causes and solutions:

Cause	Solution
The EC server is not running.	Start the EC server.
The server address of the EC server was changed, but dirty data remains in the conversation Service Manager file.	Purge the data in the conversation file.

Cause	Solution
The conversation visibility is changed from Public to Participant-Only in EC.	SM Collaboration does not recommend that users update or change conversations in the EC client.
The conversation record is inconsistent between Service Manager and EC. The conversation record with the specified ID in Service Manager no longer exists in EC.	Make sure that you do not lose any conversation data during database migration.

**Issue 3: Message too long**

**Symptoms:**

Users receive a warning message when posting a message to a conversation: "The message exceeds the maximum character number."

**Possible causes and solutions:**

Cause	Solution
Usually a post longer than 3,000 English characters causes this issue. If the post includes characters in other languages, such as Chinese, the maximum characters will be fewer.	Shorten the message and post it again, or divide the message into several parts and post them one by one.

**Issue 4: Unable to select any item in the Suggested Participant panel**

**Symptoms:**

When a user opens a conversation and tries to invite a participant, the user cannot select any items in the Suggested Participant list.

**Possible causes and solutions:**

Cause	Solution
The user is not a participant of the conversation.	Post a message to join the conversation, and then try adding a participant again.

**Issue 5: No permission to add a participant**

**Symptoms:**

When a user invites a participant, either by specifying an email address or by selecting from the Suggested Participant list, the user receives a warning message: "You do not have permission to add the user."

**Possible causes and solutions:**

Cause	Solution
The user is not the owner of the conversation, and the invited user is not an EC user.	Only the owner of the conversation can invite external users.

**Issue 6: Unable to change profile image**

**Symptoms:**

SM Collaboration does not provide an option for users to change their profile images in the Service Manager Web Client.

**Possible causes and solutions:**

Cause	Solution
SM Collaboration does not support changing EC profile images in the Service Manager Web Client.	Change the profile image in EC instead.

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