

HP Enterprise Collaboration

For the Windows® operating system

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Concepts Guide

Document Release Date: February 2012

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- Submit and track support cases and enhancement requests
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http://h20230.www2.hp.com/new_access_levels.jsp

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Chapter 1

Introduction to HP Enterprise Collaboration

This chapter includes:

- ["Overview" \(on page 7\)](#)
- ["Context-Based Conversation Flow" \(on page 8\)](#)
- ["HP Enterprise Collaboration Documentation Library" \(on page 10\)](#)

Overview

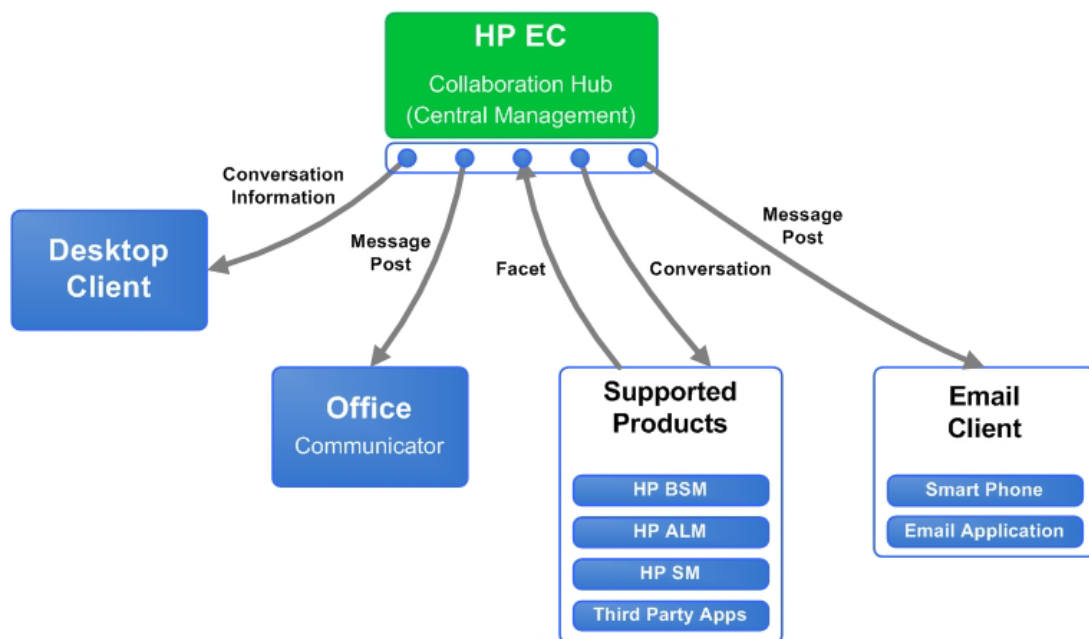
HP Enterprise Collaboration (HP EC) is a comprehensive solution that affiliates unstructured collaboration with structured IT processes. HP EC is a communication tool that enables you to add system data to a conversation in real time, providing an exact context for the conversation.

HP EC can be deployed as a standalone application, as well as a plugin that is directly integrated into an enterprise product or solution.

HP EC transforms the way that IT professionals interact by providing the necessary capabilities for communication in the context of the relevant workflows. This streamlined process results in increased efficiency and improved productivity.

HP EC is built on an open platform that allows it to seamlessly integrate with both HP and non-HP products, allowing HP customers to unify their IT environments. HP EC integrates its collaboration capabilities into the existing solution workflows.

The diagram provides an overview of HP EC and its interaction with products and communication tools.



Context-Based Conversation Flow

The following diagram shows a conversation flow that utilizes the HP EC framework.

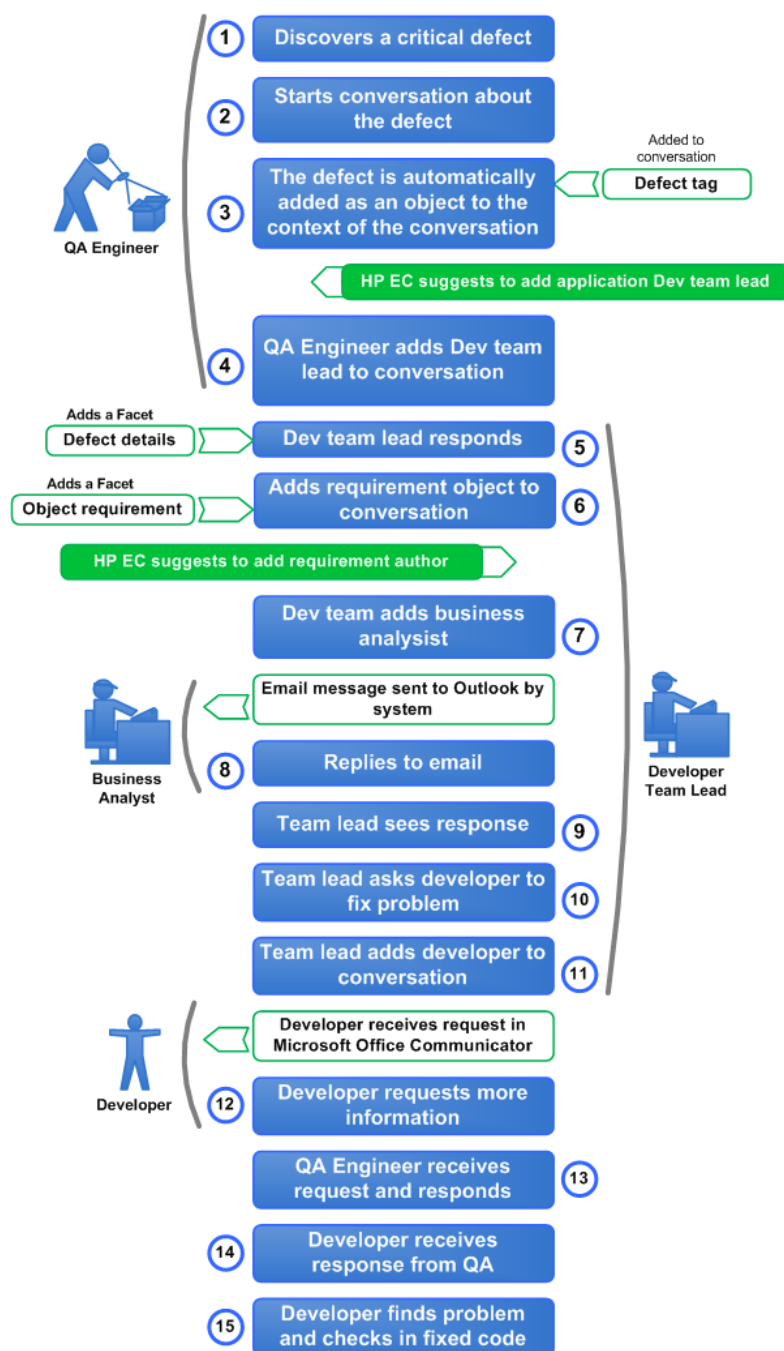


Diagram Number	Description
1	A QA engineer discovers a new critical defect in the Online Bookstore application while running it in a Chrome browser.
2	The QA engineer starts a new conversation about this defect in HP EC.
3	The defect is automatically added as an object to the conversation and the conversation is automatically tagged with OBS_Defect by HP EC.
HP EC System	Automatically suggests to add the application developer team lead to the conversation.
4	The QA engineer adds the development team lead to the conversation.
5	The development team lead responds, and adds a facet displaying the defect's details.
6	The development team lead adds the requirement object to the conversation and selects a simple facet to display the requirement.
HP EC System	The HP EC system suggests adding the requirement's author to the conversation.
7	The development team lead adds the business analyst to the conversation.
HP EC System	The business analyst, working from Microsoft Outlook, receives an email from ALM Collaboration with the conversation appearing as an email thread.
8	The business analyst replies to the email.
9	The team lead sees the response in the application.
10	The team lead asks the developer to fix the defect.
11	The development team lead adds the developer to the conversation.
HP EC System	The developer receives a request from the team in Microsoft Office Communicator.
12	The developer accepts the task, and makes a request for more information from the QA engineer.
13	The QA engineer receives the request from the developer and responds to the request.
14	The developer receives the request response from the QA engineer.
15	The developer finds and corrects the problem, then checks in the corrected code into SCM, producing an SCM change set facet which is then added to the conversation.

Diagram Number	Description
HP EC System	The conversation together with the contacts, objects, and tags are all stored in a central repository. The conversation can be accessed and searched; from within an application that is part of the HP EC System.

HP Enterprise Collaboration Documentation Library

HP Enterprise Collaboration includes the following guides and references available in PDF format. For the latest copies of the HP Enterprise Collaboration documentation, go the HP Software Manuals website: <http://h20230.www2.hp.com/selfsolve/manuals>. This site requires that you register for an HP Passport and sign in.

Guide	Description
<i>HP Enterprise Collaboration Installation and Configuration Guide</i>	Describes how to install and configure HP Enterprise Collaboration.
<i>HP Enterprise Collaboration Concepts Guide</i>	Provides a detailed overview of HP Enterprise Collaboration concepts, components, and the conversation workflow.
<i>HP Enterprise Collaboration Integration Guide</i>	Describes how to develop adapters for adding home-grown application content and how to integrate Enterprise Collaboration into third-party applications.
<i>HP Enterprise Collaboration Developers Guide</i>	Describes how to integrate HP Enterprise Collaboration into individual customer applications.
<i>HP Enterprise Collaboration Release Notes</i>	Provides last-minute news and information about HP Enterprise Collaboration.
<i>HP Enterprise Collaboration Support Matrix</i>	Details the HP Enterprise Collaboration system requirements and lists the HP products and versions which currently work with Enterprise Collaboration.
<i>HP Enterprise Collaboration Open Sources and Third-Party Software Agreements</i>	Lists the licenses for open source and third-party components included in HP Enterprise Collaboration.

In addition, you can access the HP Enterprise Collaboration movie from the following location on the DVD:

Documentation\Movies\HPEC_1.wmv

Chapter 2

HP Enterprise Collaboration Components

This chapter provides a basic understanding of the building blocks that comprise HP Enterprise Collaboration and their functional integration.

Overview of HP Enterprise Collaboration Components

Enterprise and IT applications are complex and cumbersome. They require a great amount of training and the learning curve for users to extract relevant information or perform specific actions required in workflows is steep.

As conversations about applications are centralized, persistent, and contextual, you can refer to existing conversations owned by a different team on the same or related topic. For example, when a developer is investigating a defect, that developer can utilize not only the structured data that is found in a defect, but also all the collaboration that took place when the defect was discovered.

The following topics are described:

- ["Conversations" \(on page 11\)](#)
- ["Conversation Context" \(on page 11\)](#)
- ["Participants" \(on page 12\)](#)
- ["Facets" \(on page 12\)](#)
- ["Attachments" \(on page 12\)](#)
- ["Visibility" \(on page 12\)](#)
- ["Participants Control" \(on page 12\)](#)
- ["Conversation Inbox" \(on page 13\)](#)
- ["Search" \(on page 13\)](#)
- ["Distributed Collaboration" \(on page 13\)](#)
- ["Product Integration" \(on page 13\)](#)

Conversations

The most basic entity in HP EC is a **conversation**. A conversation is a centralized and persistent entity that facilitates both offline and online collaboration. A conversation is a mixture between an email, a chat and even a Wiki page, if users accumulate enough information while collaborating. As a result, these conversations can become a source of knowledge for future reference. As collaboration progresses, HP EC becomes a knowledge base of unstructured collaboration data.

Conversation Context

The most important characteristic of a conversation is that it can have a formal **context**. The context is not just a textual subject describing what the conversation is about, but can also comprise one or more managed IT objects that are attached to the conversation (for example, incidents, defects, or KPIs).

These IT objects are managed in different applications in the IT environment, comprising the context of the conversation itself and ensuring the affiliation of the conversations and the managed processes within the same applications.

The conversation can include **facets** that present information on the objects in the context from the source applications themselves.

Participants

As conversations are managed from a central location, the conversations are shared with **participants** who can be added or removed from the conversation at any point in time. All of the conversation's participants can contribute to the conversation.

Conversation participants can be either people from within the organization or external participants.

The participant that initiated the conversation is considered to be the conversation owner, and has extended permissions within the conversation compared to regular participants.

Suggested Participants

HP EC contains an intelligent mechanism that suggests relevant people to participate in the conversation, based on the formal context of the conversation. This is specifically important in large organizations where the user is not always aware of all individuals required, but may know their roles within the organization. For example, if the context of a conversation is comprised of a defect, HP EC suggests adding the development owner, the QA owner, and even the linked requirement analyst to the conversation. The information about these suggestions is extracted from the formal context of the conversation and is integration-specific (content-based).

Facets

Facets allow users to consume various specialized pieces of information (on the object or objects within the context of the conversation) from the source applications that manage them from within the conversation. Facets, being simple and specialized, eliminate the need for deep knowledge and skills in the source applications; the required information is consumed directly inside the conversation. The facet framework is open, allowing customers and partners to develop their own facets for third-party applications.

Attachments

Conversation participants can upload a file or attach a URL to the conversation, enabling conversation consumers to access this content.

Visibility

The **visibility** level of the conversation defines who can access the conversation. The default visibility of the conversation is set to public, meaning that the conversation can be accessed by all HP EC users even though they are not direct participants of the specific conversation. If desired, the owner of the conversation can set the visibility to private meaning that the conversation can be accessed only by participants.

Participants Control

The **control** level of the conversation defines who can add new participants to the conversation. There are three available participant control levels: everyone, participant, and owner:

- **Everyone** (default) - The everyone control level means that everyone who has access to the conversation can add themselves and others as participants to the conversation.
- **Participant** - The participant control level limits the rights to add new participants to existing participants only.
- **Owner** - The owner control level limits the rights to add new participants to the owner of the conversation.

Note: The control level of the conversation can only be changed by the conversation's owner.

Conversation Inbox

You can participate in conversations contained in the **inbox**. A new conversation or a new activity in an existing conversation is immediately updated in the inbox. You can archive conversations, which automatically removes them from the inbox until the conversation is updated. You can drill down to any conversation in the inbox.

High-level information about the conversation such as conversation subject, visibility, and the last three posts are displayed in the inbox.

Search

HP EC provides a free text search mechanism that enables you to easily locate conversations according to predefined criteria. The search results are sorted according to their relevance of the search criteria, and include hints about why the related results were provided.

Distributed Collaboration

HP EC has built-in integration with email and Microsoft Office Communicator, enabling participation in HP EC conversations directly from these communication channels. HP EC is a collaboration hub that manages conversations centrally while being consumed from within different tools and applications. Each end user is provided with their own individual collaboration experience.

Product Integration

HP EC is easily integrated with any HP or third-party product. New conversations can be created in the context of entities managed within those applications.

Chapter 3

HP Enterprise Collaboration User Interface

This chapter includes:

- ["Add a Context Object Dialog Box" \(on page 15\)](#)
- ["User Chooser" \(on page 16\)](#)
- ["Add File/URL Dialog Box" \(on page 18\)](#)
- ["Context Object/Facet Dialog Box" \(on page 18\)](#)
- ["Conversation Inbox" \(on page 19\)](#)
- ["Email Notification" \(on page 22\)](#)
- ["Conversation Window" \(on page 21\)](#)
- ["Snooze Conversation Dialog Box" \(on page 24\)](#)

Add a Context Object Dialog Box

This dialog box enables you to search for a selected object according to type and application instance. It can be customized to perform searches according to preconfigured adapter search criteria.

Add a Context Object

Select a Context Object type, then choose the relevant application instance.

Object Type:

Application Instance:

Enter the application instance object search criteria.
You must populate at least one input field.

Search Fields:

ID:

Incident title:

Incident description:

Context Object/s (Displaying 8 of 8):

- 🔍 Printer keeps giving message: out of order
- 🔍 Error installing printer
- 🔍 Printer malfunction
- 🔍 Printer out of order
- 🔍 Printjob is not printed
- 🔍 Printer draw fault
- 🔍 Printer keeps reporting "printer out of paper", while it's not
- 🔍 Printer prints blanc papers

UI Element (A-Z)	Description
Application Instance	Specifies the application where the object is managed.
Object Type	Specifies the object type.

User Chooser

The User Chooser allows you to easily find specific users that you want to add to the current conversation.

You can add a single user or multiple users.

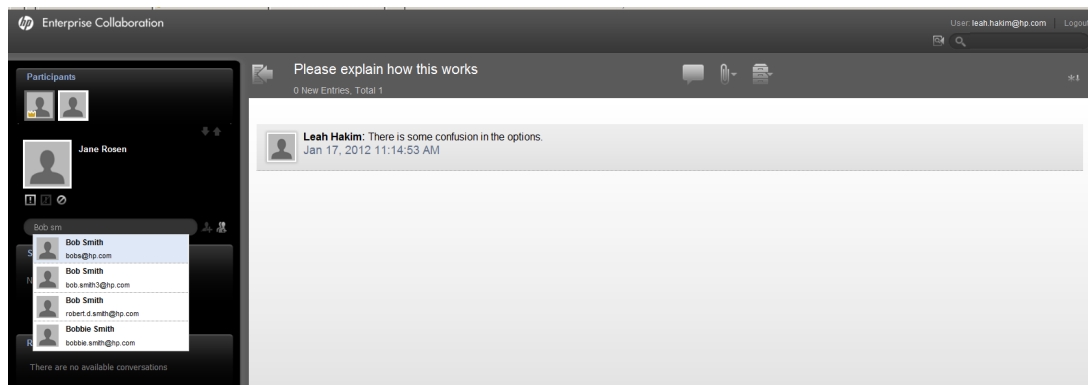
Add a User


In the **Add User** field, you can search for a user in the following ways:

- Type in the first letters
- Type in an email address

The users may be from within the organization or external users.

1. For users within the organization, type in the first 4 (or more) letters of the user's name. You can also use spaces in the name as shown in the example below. Enterprise Collaboration automatically finds names that match these letters and presents them in a list. Each name is presented with its email address and picture (if one exists). For example:



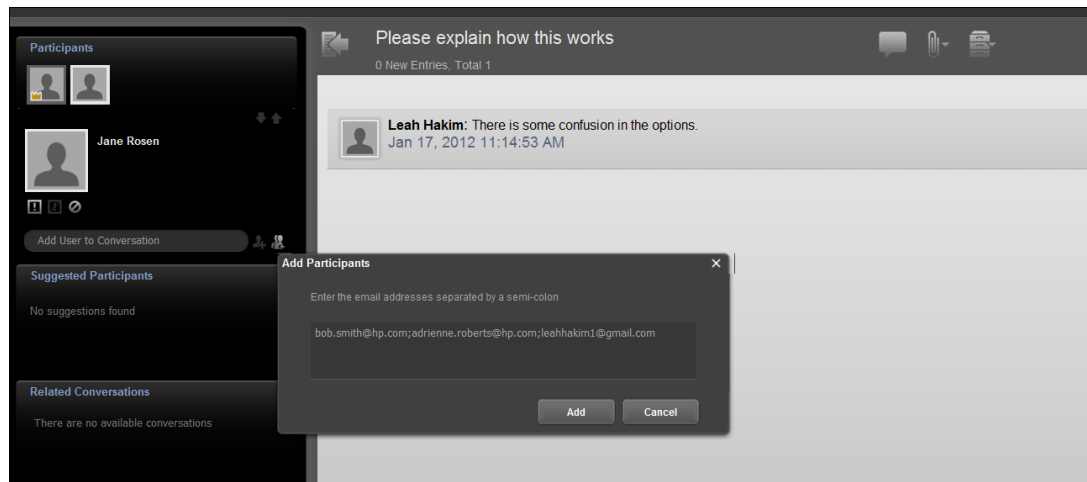
2. Scroll down and select a name from the list and press **Enter** or click on the name. The name is added to the **Add User** field.
3. For external users, type in an email address in the **Add User** field.
4. Click the  icon or press **Enter** to add the user as a participant in the conversation.

Note:

Add Multiple Users

To add more than one user to a conversation:

1. Click **Add Multiple**. The Add Participant window opens.
2. Type in the users email addresses separated by semi-colons. The users may be from within the organization or external users. For example:



3. Click **Add** to add these users to the conversation.

Note: If you add more than one user, and one of the email addresses is not valid, none of the users will be added to the conversation.

Add Participant via Email

Enterprise Collaboration provides functionality to add new participants to an EC conversation by sending them an email.

Note: By default, this feature is disabled. You can enable the feature using the JMX console. See the **Enterprise Collaboration Installation and Configuration Guide** for details.

To add new participants:

1. Reply to an existing EC email related to the specific conversation and add the new participant(s) by typing their email in the Cc: field.

Note: Conversation owners can also add users who are external to the organization.

2. In the email message body, write your comments/post and send the email.
3. The user(s) is added automatically as a participant in the conversation, and the comments are added as a new post in the conversation.

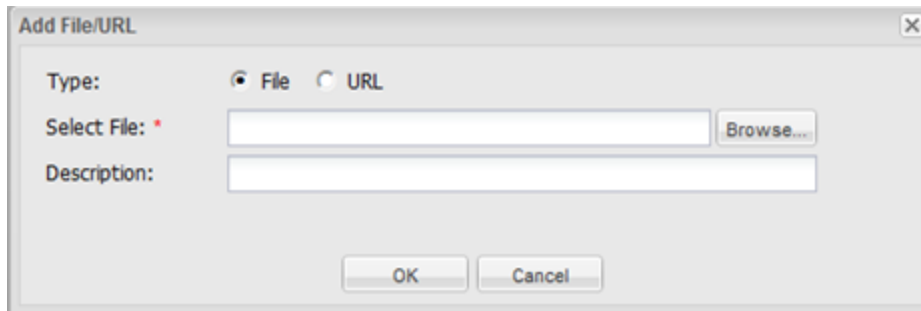
4. **Note:** If the conversation is defined in EC as Private and the you are not the owner of the conversation, the user will not be added and you will receive an email with the relevant details. However, the contents of the email will be added as a new post in the conversation.

5. The new participants receive an email that they have been added to the conversation.
6. The new participants can then enter the conversation via the link in the email, or reply to the email as for a standard email.

Note: If you add more than one user to the email, and one of the users is not valid, none of the users will be added to the conversation. However, the contents of the email will be added as a new post in the conversation.

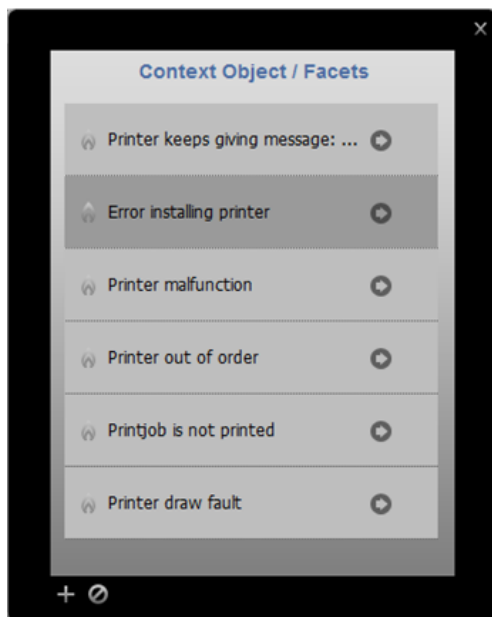
Add File/URL Dialog Box

This dialog box enables you to add a file or URL to a conversation

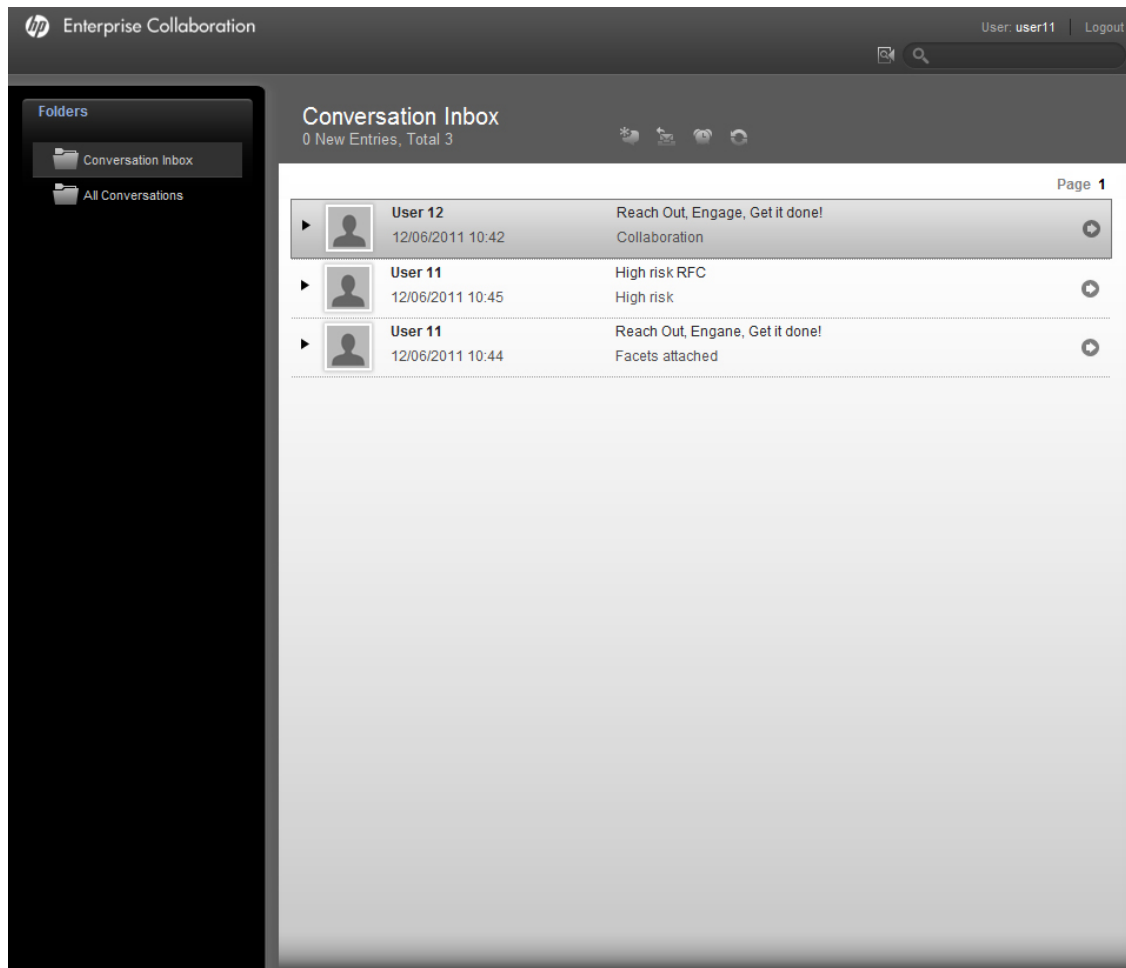








Context Object/Facet Dialog Box




The Context/Facet dialog box displays the conversation context objects associated with the selected conversation.









Conversation Inbox



UI Element	Description
	Click New Conversation to begin a conversation in HP EC.
	Click Archive Conversation to move the conversation from the inbox to the archive.
	Click Restore the Conversation to the Inbox to move the conversation from the archive to the inbox.
	Click Snooze Conversation to move the conversation to the archive for a specified amount of time.
	Click Refresh Conversation List to update the list of conversations..
	Click Back to Search Results to return to the window containing the search results.

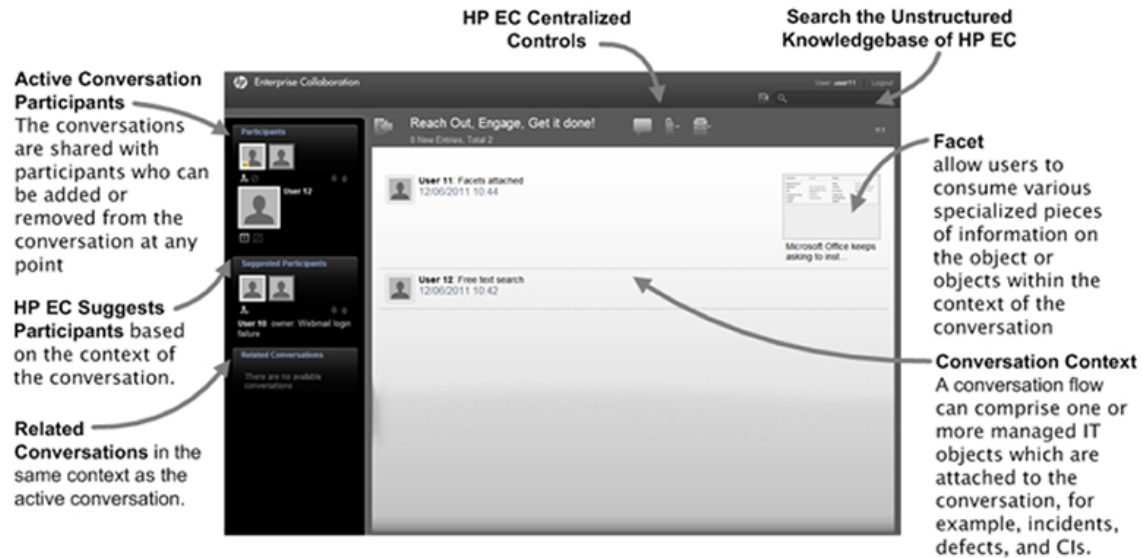
UI Element	Description
	Click Attach to display one or more URLs that are attached to a specific conversation.
	Click File Attach to display one or more files that are attached to a specific conversation.
	Click Add to add an object to a specific conversation.







Conversation Status Indicators

UI Element (A-Z)	Description
	Snooze on
	Reawaken conversation
	Urgent request
	Private Conversation
	Open conversation
	Expand conversation

Conversation Window

This window enables you to perform a wide range of functions and conversation options, including adding participants, faces, and suggesting participants for a conversation.

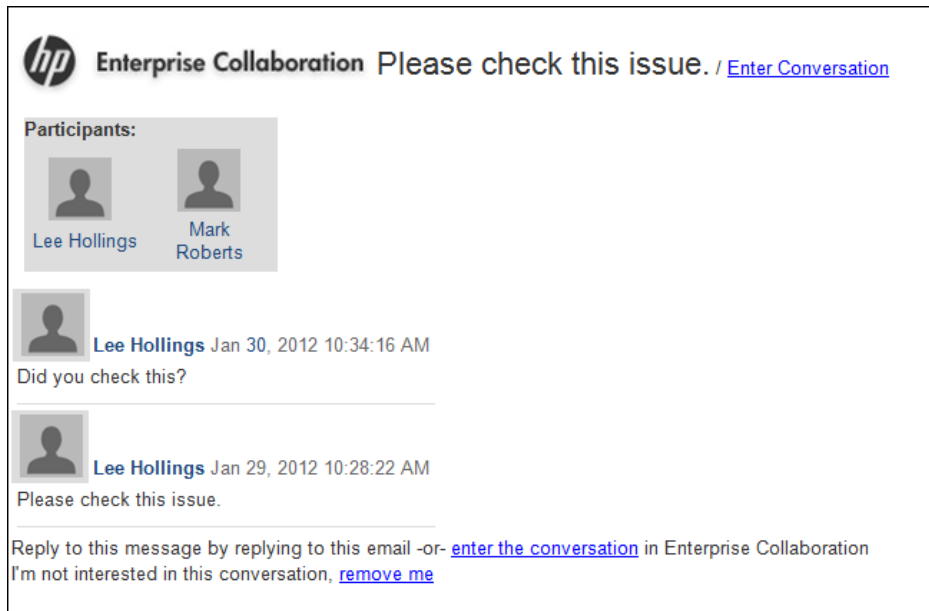


UI Element (A-Z)	Description
	Click Back to List to return to the last folder or to the URL launch results.
	Click Add Post to add a post to the conversation.
	Click Add to Conversation to add objects, facets, files, or URLs to a conversation.
	Click Tools to access the HP EC conversation settings, usability options, and controls.
	Click Add a New Participant to add a participant to the conversation.
	Click Select Participant as Required to set the selected participant as required and automatically send an Office Communicator notification and an email notification to the participant.

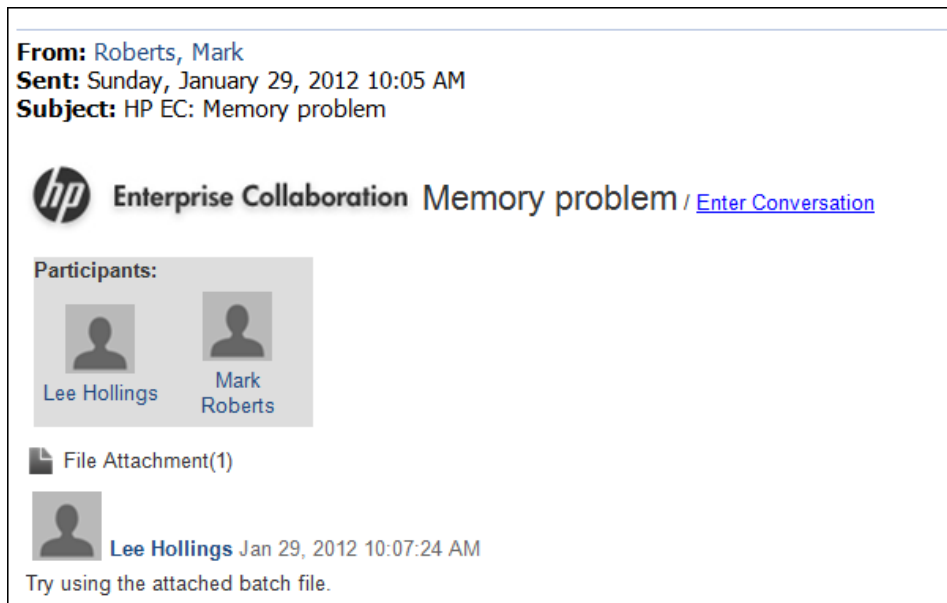
Email Notification

If a participant is offline (i.e. not logged into Enterprise Collaboration), they receive an email notification containing the conversation contents.

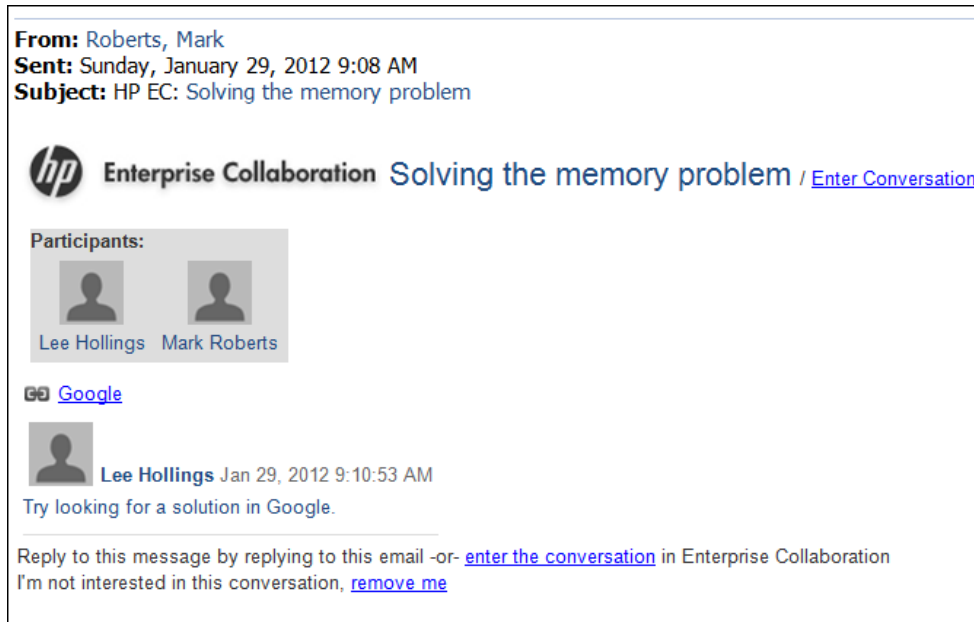
In order to prevent spam mails, Enterprise Collaboration does not send an email after each post, but sends a summary email every few minutes. For example:



If a file is attached to the conversation, the file attachment is shown in the email received by the participants. For example:



If a URL is attached to the conversation, the URL attachment is shown in the email received by the participants. For example:



Summary Email Parameters

The administrator can define when summary emails are sent by setting the following parameters in the JMX console.

Parameter	Description
default.email.publish.regular.min	The time interval (in minutes) from the last post after which the summary email is sent. To send an email after each post, set this parameter to zero.
default.email.publish.regular.max	The time interval (in minutes) after which a summary email is sent when a conversation is currently running (there are new posts every few minutes, less than set in default.email.publish.regular.min).
default.email.publish.urgent.min	The time interval (in minutes) from the last post after which the summary email is be sent for a required participant. To send an email after each post, set this parameter to zero.
default.email.publish.urgent.max	The time interval (in minutes) after which a summary email is sent to a required participant when a conversation is currently running (there are new posts every few minutes, less than set in default.email.publish.regular.min).

Define the Conversation Visibility

The Visibility option allows you to define who will be able to see the current conversation.

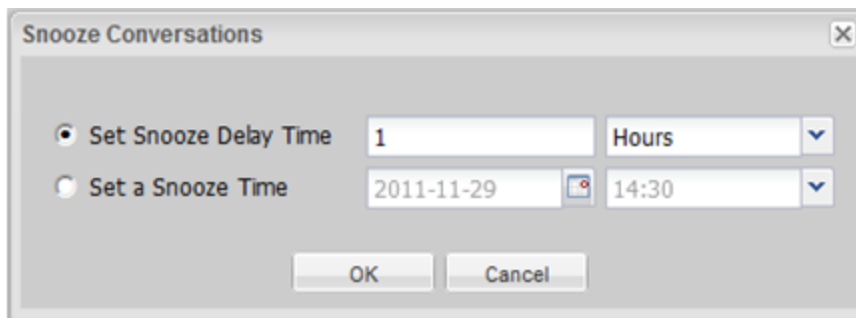
Select one of the following Visibility options from the **Tools > Conversation Visibility** option:

- **Public** - Any EC user can view this conversation.
- **Participants Only** - Only users who are participants in the current conversation can view it.

Note: Only the conversation owner (the participant who initiated the conversation) can change the visibility status.

Snooze Conversation Dialog Box

This dialog box enables you to snooze a conversation, which removes it from the inbox until a specified time.



UI Element (A-Z)	Description
Set Snooze Delay Time	Enables you to specify the specific time for which the conversation will be snoozed.
Set a Snooze Time	Enables you to specify a date and time until which the conversation will be snoozed.

Chapter 4

Desktop Client

The Desktop Client application is an additional tool for viewing notifications about changes made in EC conversations.

It provides information about current conversations in Enterprise Collaboration in which you are a participant.

The Desktop Client informs you immediately when events takes place in your conversations. For example, when:

- You have a new unread conversation
- You have been added to a conversation
- You have been removed from a conversation
- You have been marked as a required participant in a conversation
- You have been marked as a non-required participant in a conversation
- There are changes in the status of the Desktop Client

The Desktop Client runs in the background, and continues to run even if the Enterprise Collaboration Web Application is closed.

After installation, the Desktop Client icon is added to the status bar.

When you hover over the icon in the status bar, you can see the current status of the Desktop Client and the number of unread and unread and required conversations you currently have. For example:







Desktop Client Icons and Alerts

This section presents the icons and alerts that can appear in the status bar when working with the Desktop Client. It contains the following topics:

- ["Desktop Client Icons" \(on page 25\)](#)
- ["Desktop Client Alerts" \(on page 26\)](#)

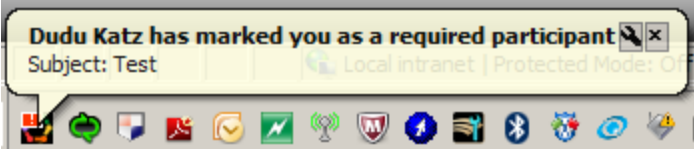
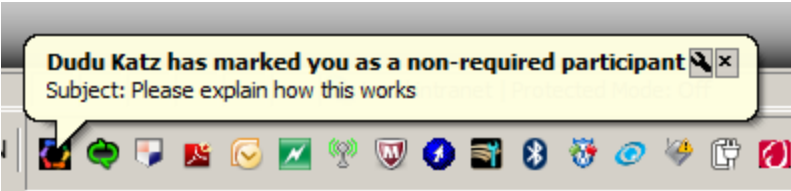
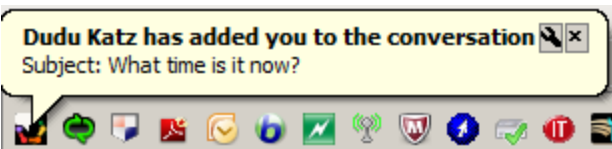
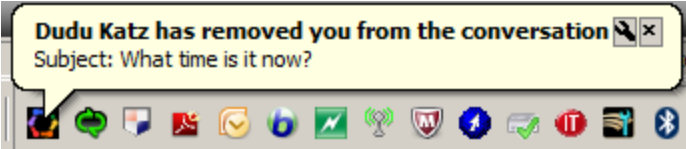
Desktop Client Icons

This section presents the Desktop Client icons that can appear in the status bar and their meanings. Above the icon, the number of unread conversations and unread and required conversations is shown.

Desktop Client Icons	Description
	You have no unread conversations.
	You have unread conversations.
	You have unread conversations in which you are a required participant.
	This icon appears in one of the following cases: <ul style="list-style-type: none"> The Desktop Client is not connected to the Enterprise Collaboration server. One of the settings entered during the installation is incorrect. A wrong username or password has been entered.

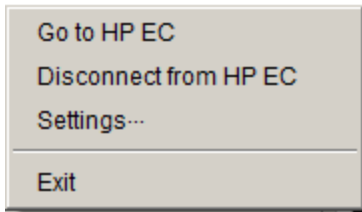
Desktop Client Alerts

This section presents the Desktop Client alerts that appear after a participant performs different operations in a conversation in which you are a participant.

Desktop Client Alerts	Description
	You have been marked as a required participant in the specified conversation.
	Your required participant status has been removed in the specified conversation.
	You have been added to the specified conversation.
	You have been removed from the specified conversation.

Desktop Client Shortcut Menu

From the Desktop Client icon, right click to access the Shortcut Menu.



From this menu, you can perform additional operations such as connecting/disconnecting to HP Enterprise Collaboration, changing the Desktop Client settings and exiting the Desktop Client.

Go to HP EC

To connect to/enter the HP EC Server:

1. Select **Go to HP EC**.

You are automatically logged into the Enterprise Collaboration server and you can see how many unread and required conversations you have.


2. If you are already connected to the server, Enterprise Collaboration is opened on the last page that you visited.

Note: Due to Enterprise Collaboration's LWSSO configuration, you are logged in with the name of the user who last accessed the system from your computer.

Disconnect from HP EC

To disconnect from the HP EC Server:

- Select **Disconnect from HP EC**.

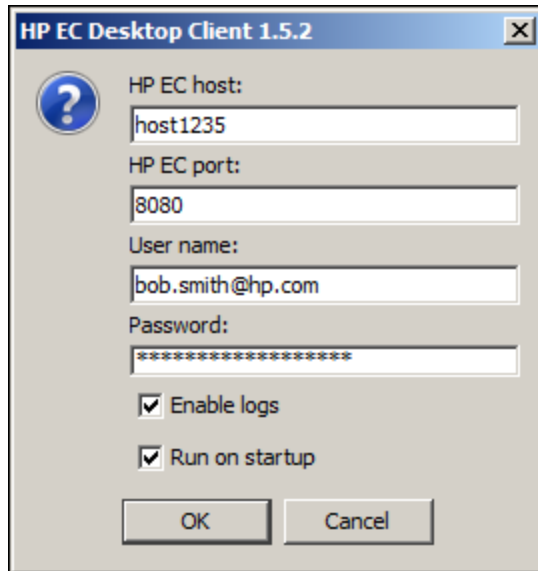
The Desktop Client icon changes to .

Change Desktop Client Settings

To change your current Desktop Client connection settings:

1. Select **Settings**.

The Desktop Client Settings window opens showing the current connection settings:



2. Update the fields as described below:

Field	Description
HP EC host	The name of the HP EC server.
HP EC port	The port used to access the HP EC server.
User name	The name the user uses to log into HP EC.
Password	The password the user uses to log into HP EC.
Run on startup	Select this box to run the Desktop Client automatically when the computer is started/rebooted.
Enable logs	Select this box to produce a log file of Desktop Client activity for debugging purposes. By default the log file is named desktop-client.log and is stored under: C:\<installation_dir>\HP EC Desktop Client\logs

3. Click OK.