

# HP Cloud Service Automation

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

Software Version: 4.10

## Marketplace Portal Help

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The title page of this document contains the following identifying information:

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## About this PDF Version of Online Help

This document is a PDF version of the online help. This PDF file is provided so you can easily print multiple topics from the help information or read the online help in PDF format. Because this content was originally created to be viewed as online help in a web browser, some topics may not be formatted properly. Some interactive topics may not be present in this PDF version. Those topics can be successfully printed from within the online help.

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# Welcome to the Marketplace Portal!

Welcome to the Marketplace Portal—a one-stop shop for all of your IT service needs—where you can order, track, and manage your IT services!

The Marketplace Portal is a self-service web interface that retrieves service offerings for IT applications from the Cloud Service Automation (CSA) server and displays them in an intuitive view. Authorized users can subscribe to service offerings, manage service subscriptions, and perform actions on service instances.

The Marketplace Portal is a self-service web interface that retrieves service offerings for IT applications from the HP Propel server and displays them in an intuitive view. Authorized users can subscribe to service offerings, manage service subscriptions, and perform actions on service instances.

Service offerings in the Marketplace Portal can be filtered, sorted, and searched. This view grants users services configured in the administration area.

In the Marketplace Portal, the service offering workflow consists of:

Configuration ▶ Checkout and Delivery ▶ Request Confirmation

This workflow includes subscription requests, a scheduling process for service offering deployment, and a notification process for subscribers and approvers.

The Marketplace Portal provides a user interface that adapts and scales views to optimize the display within the available screen size.

For information about terminology used in the Marketplace Portal, see the glossary in the *Cloud Service Automation (CSA) Concepts Guide*.

For more information about the Marketplace Portal, CSA, and other HP products, visit the HP web site at [www.hp.com](http://www.hp.com).

For more information about the Marketplace Portal, Propel, and other HP products, visit the HP web site at [www.hp.com](http://www.hp.com).

Related Topics

["Get Started" below](#)

## Get Started

If you are new to the Marketplace Portal, start here!

- ["Prerequisites" below](#)
- ["User Interface Customization" below](#)
- ["Adaptive Content" on the next page](#)
- ["Language Display" on the next page](#)
- ["Log In" on page 13](#)
- ["Log Out" on page 14](#)
- ["Sidebar Menu" on page 14](#)
- ["Keyboard Navigation" on page 15](#)
- ["Online Help " on page 16](#)

## Prerequisites

To use the Marketplace Portal, review the following requirements:

- The Marketplace Portal uses https and runs on port 8089, which is the default. If you customize the Marketplace Portal, contact your CSA administrator to determine whether the port or protocol has changed.
- You must use a browser that supports the Marketplace Portal. A minimum screen resolution of 1024x768 is supported. As a best practice, HP recommends a screen resolution of 1280x1024. For information about supported browsers, see the HP Cloud Service Automation System and Software Support Matrix.
- Use the following default Marketplace Portal URL: [https://<CSA\\_HOST>:8089/org/<ORG\\_ID>](https://<CSA_HOST>:8089/org/<ORG_ID>)

## User Interface Customization

As an end user, you might want to see your organization's branding in the Marketplace Portal user interface.






To support your organization's branding styles and standards, your Cloud Service Automation (CSA) administrator can customize certain user interface elements in the Marketplace Portal, such as the portal icon, the portal title, the portal welcome message, and the portal footer message. Contact your CSA administrator to customize these user interface elements.

# Adaptive Content

The Marketplace Portal user interface layout is designed to adapt to various screen sizes, where the content adjusts to the size, and where all functionality persists. As a service consumer, you can use the Marketplace Portal on your desktop, tablet, or other mobile devices. Across these device screens, the Marketplace Portal displays an intuitive user interface that includes all functionality. For screen resolution requirements and best practices, see "[Prerequisites](#)" on the previous page.


## Language Display

By default, the Marketplace Portal user interface displays in a left-to-right direction. For certain languages, such as Arabic and Hebrew, you can configure supported browser for a right-to-left user interface display. Right-to-left language display supports all out-of-the box Marketplace Portal organization themes: HP Simplified, HP Enterprise, and HP Playful. Right-to-left language display does not support custom themes.

- Several navigation components in the Dashboard, such as the organization logo, sidebar menu , shopping cart , user name , and the [Need Help?](#) link, display on the right or left side, depending on the language you configure in your browser.
- In the input fields, you can also enter text in a right-to-left direction.
- In the Pick Date fields, the back arrow  advances the calendar and the forward arrow  moves the calendar backwards.

### Setting the Language Display in Google Chrome

To configure the language setting in your Chrome browser:

1. From the Chrome drop-down menu , select **Settings**.
2. In the Settings window, select "Show advanced settings".
3. In the Languages section, click **Language and input settings**.
4. In the Languages pane, click **Add**.
5. In the Add Language window, select Arabic or Hebrew from the drop-down list.
6. Click **OK**.
7. In the Languages window, click **Done**.

8. Log out and then log back in to the Marketplace Portal for the selected language display. This language setting persists in your browser until you change it.

### Setting the Language Display in Mozilla Firefox


To configure the language setting in your Firefox browser:

1. From the Firefox drop-down menu, select **Options**.
2. In the Options window, select the Content tab.
3. In the Languages section, click **Choose** to select your preferred language for displaying views in the Marketplace Portal.
4. In the Languages window, in the "Select a language to add" drop-down list, select a language, such as Arabic or Hebrew, and then click **Add**.
5. For the language that you want the views displayed in, select it and then click Move Up to move that selection to the top of the list.
6. Click **OK** to save your changes.
7. Log out and then log back in to the Marketplace Portal for the selected language display. This language setting persists in your browser until you change it.

## Log In

To log in to the Marketplace Portal:

1. Open a browser window.
2. Enter the URL for the Marketplace Portal. The Cloud Service Automation (CSA) Marketplace Portal landing page displays.
3. Click **Log In**. The Marketplace Portal login page displays.
4. Enter your **Username** and **Password** to display the Marketplace Portal Dashboard.
  - If the login request token is invalid or has expired, you will see the following warning. You will then be returned to the landing page that is explained in step 2.

 The request token for this page is invalid. It may have already been used, or expired because it is too old. Please go back to the site or application that sent you here and try again.

- The Marketplace Portal supports single sign-on and multi-factor authentication, which might change the login experience that is based on your organization's settings. Contact your CSA administrator for additional information.
- For portal customization, security classification is configured in the Cloud Service Management Console. Contact your CSA administrator for more information.

## Log Out

To log out of the Marketplace Portal:

- In the Marketplace Portal Dashboard, upper right corner, in the account username drop-down list, select **Log Out**.

## Sidebar Menu

For quick and direct navigation to and from any view in the Marketplace Portal, use the Sidebar Menu. You can show or hide this menu in the views. By default, the Sidebar Menu is hidden.

Excluding the top selection in the menu (Dashboard), the navigation selections are the same as the widgets in the Dashboard.


To show the Sidebar Menu, in the upper left sub-heading, select the  icon.

To hide the Sidebar Menu, click Dashboard in the sub-heading.

## Back Navigation

In any view in the Marketplace Portal, click the  icon in the sub-heading to go back to the previous view.

## Search

In each Marketplace Portal view, use the Search filter  to locate a certain object by a text search. In individual views, you can search for text found in the following objects:

<b>Object</b>	<b>Text</b>
Browse Catalog	Names and descriptions of service offerings.
Notifications	Notification names and notification messages.
Review Requests	Names and descriptions of all approval requests, including requests that require approval, denied requests, and approved requests.
Requests	Names and descriptions that you assigned to subscription requests.
Subscriptions	Names and descriptions assigned to subscriptions, when the subscriptions were created.
My Services	Names and descriptions assigned to the service instances. This is the actual service behind a subscription—the realized service instance. This is the actionable part of the service in the subscription management.
New Releases	Names and descriptions assigned to new services in the catalog that were created within the last seven days in your organization.
Popular Services	Names and descriptions assigned to popular services in the catalog that your organization is currently promoting.
Featured Services	Names and descriptions assigned to services in the catalog that your organization is currently promoting. This is configured in the Cloud Service Management Console. Contact your CSA administrator for more information.
Services Expiring Soon	Names and descriptions assigned to services that will expire in 30 days.
(Status) Requests	Requests that have a certain status, such as Submitted, Pending, Rejected, Approved, In Progress, Completed, and Canceled.
(Status) Subscriptions	Subscriptions that have a certain status, such as Pending, Active, Expired, Canceled, Terminated, and Paused.
(Status) My Services	My Services that have a certain status, such as Online, Offline, Transitioning, Reserved, Deploying, Modifying, Modification Failed, Failed, Canceling, Cancellation Failed, Expiring, and Expiration Failed.

## Keyboard Navigation

The following hotkeys to allow you to use your keyboard to easily navigate within the Marketplace Portal:

Hotkey	Marketplace Portal View	Usage
Ctrl+Shift+1	Dashboard	From any view in the Marketplace Portal, use this hotkey to go back to the Dashboard. Make sure your cursor is not in the Search box. Press the Tab key to exit the Search box, and then press Ctrl+Shift+1.
Ctrl+Shift+2	Cart	From any view in the Marketplace Portal, use this hotkey to go to your shopping cart.
Ctrl+Shift+3	Browse Catalog	From the Dashboard, use this hotkey to go to the Browse Catalog view.
Ctrl+Shift+4	Notifications	From the Dashboard, use this hotkey to go to the Notifications view.
Ctrl+Shift+5	Review Requests	From the Dashboard, use this hotkey to go to the Review Requests view.
Ctrl+Shift+6	Requests	From the Dashboard, use this hotkey to go to the Requests view.
Ctrl+Shift+7	Subscriptions	From the Dashboard, use this hotkey to go to the Subscriptions view.
Ctrl+Shift+8	My Services	From the Dashboard, use this hotkey to go to the My Services view.

**Note:** When you are in a Marketplace Portal view and want to navigate to a different view, you must always go back to the Dashboard first and then use the hotkey to go directly to another view. Make sure your cursor is not in the Search box. Press the Tab key to exit the Search box, and then press Ctrl+Shift+1 to return to the Dashboard.



## Online Help

You can access the online Help from any view in the Marketplace Portal.

Review the context-sensitive online Help for instructions on how to perform tasks, such as how to browse and filter the service catalog, how to request a subscription to a service offering, how to approve subscription requests, and how to run actions on service instances.

To access the online Help:



1. From any view, click [Need Help?](#) or, in the user  drop-down list, select **Help** to open the online Help .
2. In the left navigation pane, select the **Welcome** topic to expand the table of contents. Select sub-folders to further expand the table of contents.
3. Near the bottom of the left navigation pane, select  **Search** to look for topics by keyword. Within the topics found, the keyword displays in yellow highlights.
4. (Optional) Use your browser to save Favorites or Bookmarks for topics. In the left navigation pane, select **Favorites** to find or search your saved favorites or bookmarks.
5. (Optional) At the bottom of a topic, click the [Send documentation feedback to HP](#) link to help us improve the information you need!




#### Related Topics

" [The Dashboard](#)" below

## ∴ The Dashboard

The Dashboard is the hub of the Marketplace Portal. The look and feel of the Dashboard allows you to quickly start shopping and place orders for service offerings. The Dashboard layout is designed to help you easily and intuitively navigate within the Marketplace Portal.

From anywhere in the Marketplace Portal:

- Click the organization logo to return to the Dashboard.
- Click the sidebar menu icon  to display a list of all navigation links within the Marketplace Portal.
- Click the shopping cart  to review the service offerings you added to your cart.
- Click the user name  to display a drop-down list of navigation options to open online Help or log out. You can also click the [Need Help?](#) link below the user name to open the online Help.



**Note:** These navigation components display on either the right or left side of the Dashboard, depending on the language configured in your browser. See "Language Display" in "[Get Started](#)" on page 10.

To learn more about ways to use the Dashboard, go to:

- ["Start Shopping" below](#)
- ["Shop Dashboard View" on the next page](#)
- ["Shop for Services" on the next page](#)
- ["Manage Subscriptions" on page 20](#)
- ["Most Requested" on page 20](#)
- ["More Actions" on page 20](#)
- ["Express Checkout" on page 21](#)
- ["Discover More" on page 21](#)

## Start Shopping

The Dashboard home page provides a variety of ways you can shop for service offerings and manage your requests and subscriptions:

- In the Dashboard banner, click **Start Shopping** to open the Shop Dashboard view. In this view you can browse the catalog of available service offerings and then place your order. See ["Shop Dashboard View" on the next page](#).
- If you do not want to go directly to the Shop Dashboard view and want to collapse the Dashboard banner, click the  icon. To expand the Dashboard banner, click the  icon.
- Scroll up and down the rows of widgets to select service offerings by a category, such as ["Shop for Services" on the next page](#), ["Most Requested" on page 20](#), ["More Actions" on page 20](#), and ["Discover More" on page 21](#).
- Use your keyboard to navigate sections and widgets in the Dashboard. See the hotkeys described in "Keyboard Navigation" in ["Get Started" on page 10](#).

## Shop Dashboard View

Use the Shop Dashboard view to browse and order services by certain categories, by keyword search, and by quick links to service offering filters.

You can browse services by categories, such as:

- **New Releases:** These are services that have been recently added to the service catalog within the last 30 days. If you want to add or remove services in this category, contact your CSA administrator.
- **Most Requested:** These are services that are based on the number of subscriptions. Typically, these are service offerings that are popular with other members of your organization.



To shop and place your order, click the service offering image or name to open the Browse Catalog Details view. See "Browse Catalog Details" in "[Service Offerings](#)" on page 28

### Search

Enter text in the Search filter  to locate a certain service offering by a keyword.



### Quick Links



Use these links to filter the service catalog, such as [Offerings for Review](#) and [Categories](#).

**Tip:** Click  to show services or Quick Links. Click  to hide services or Quick Links that filter the service catalog.

## Shop for Services

In the Dashboard, you can shop for service offerings by browsing the following categories:



-  **All Services:** These are all available service offerings in the catalog.
-  **New Releases:** These are services that have been recently added to the service catalog within the last 30 days. If you want to change the default, contact your CSA administrator.

-  **Featured Services:** These are services that your organization is currently promoting. In the Management Console during organization creation, any category can be set as a featured service. Service offerings published under that category are treated as featured service offerings and will be populated in the Featured Services view.
-  **Popular Services:** These are services that are based on the number of subscriptions. These are typically service offerings that are popular with other members of your organization. Click the [See More](#) link to open the Popular Services view.

**Tip:** Click  to show service categories. Click  to hide service categories.

## Manage Subscriptions

Use this row of Dashboard widgets to go directly to views that help you manage your subscriptions.



-  **All Subscriptions:** Manage service contracts you requested and view a detailed change history. The number in the upper right corner is the total number of subscriptions for all statuses.
-  **Expiring Soon:** View a list of subscriptions that are scheduled to end 30 days after the subscription started.



## Most Requested

These are services that are based on the highest number of subscriptions. These are service offerings that have been requested the most by other members of your organization. Click the [See More](#) link to open the Popular Services view.

## More Actions

Use this row of Dashboard widgets to go directly to views that help you perform other actions.

-  **Notifications:** View a list of your subscriptions and requests that are active and expired, including the date and time they became active or expired. If you are an approver of requests, you receive notifications about requests that require your approval. The number in the upper right corner is the total count of notifications.
-  **My Services:** Access, monitor, and perform actions on services you own. The number in the upper right corner is the total number of services you own.

-  **My Orders:** View a detailed list of all orders you submitted and their associations. The number in the upper right corner is the total number of orders for all statuses.
-  **Review Requests:** Approve requests for users you manage in your organization. The number in the upper right corner is the total count of requests. Requests for new subscriptions and for modifications to existing subscriptions might require your approval before they can be deployed. If you are designated as an approver of requests, you are responsible for approving or denying requests made for a predetermined set of service offerings.

## Express Checkout

Use this row of Dashboard widgets to place an order using the Virtual Machine Express Checkout Wizard.

- **Express Checkout:** This widget launches a wizard that walks you through the steps required to request an express service subscription. This checkout wizard applies only to service offerings and service designs that have been configured as express services in the CSA Service Catalog and the CSA Service Designer.

## Discover More

Use this row of Dashboard widgets for hyperlinks to URLs customized for your organization by your CSA administrator.

Pre-configured content will be visible in this widget, as specified for your organization by your CSA administrator. This content can include your own custom code (HTML, CSS, or JavaScript) or an iframe.

### Related Topics

["Service Catalog" on the next page](#)

[" Review Requests" on page 46](#)

[" Requests" on page 33](#)


[" Subscriptions" on page 54](#)

[" Notifications" on page 68](#)

[" Shopping Cart" on page 30](#)

[" Express Checkout Wizard" on page 32](#)

# Service Catalog

The service catalog is located in the  **All Services** widget in the Marketplace Portal Dashboard **Shop for Services** section. Use this catalog to view service offerings that are available and to subscribe to service offerings you need.


## Service Offerings

Offerings listed in the Browse Catalog view are derived from multiple catalogs. In this view, the name of the catalog from which the service offering originated is displayed.

**Note:** If the same service offering is available from more than one catalog, the cost of the service offering is the same, regardless of the catalog it came from. However, the requirement for management approval might be different.

Service offerings are presented in a unified view that is configured in Cloud Service Automation (CSA). This view also displays the total number of service offerings in the catalog.

You can view the service catalog by a list of offerings and by a grid of offerings. By default, the Browse Catalog view initially displays all available offerings in a list view, alphabetically.

 A list display that includes information about the service, such as the name of the service, the service image, a brief description, the published date, pricing, and whether it requires approval.

 A grid display that includes the name of the service, the service image, pricing, and indicates whether it requires approval.

In both types of displays:

- In the upper left part of the Browse Catalog view, the number in parenthesis is the total count of all available offerings.
- You can scroll down to browse all available services, search by keyword, and set filters to customize the display.

**Note:** For each service offering, pricing precision displays up to five digits.

Related Topics


["Browse the Service Catalog" on the next page](#)

["Filter the Service Catalog" on page 24](#)

["Search the Service Catalog" on page 26](#)

## Browse the Service Catalog




In the Marketplace Portal, you can browse the service catalog in the Browse Catalog view by a list display or by a grid display.

 A list display that includes information about the service, such as the name of the service, the service icon, a brief description, the published date, pricing, and whether it requires approval.

 A grid display that includes the name of the service, the service icon, pricing, and indicates whether it requires approval.

**Note:** For each service offering, pricing precision displays up to five digits.

To browse the service catalog:

1. In the Dashboard, in the **Shop for Services** section, select the  **All Services** widget to open the Browse Catalog view. By default, this view displays an alphabetical list  of all available services in the catalog. If you prefer a grid display, click the grid icon .
2. Scroll up or down the list to browse available offerings in the service catalog. In Cloud Service Automation (CSA), documents, such as service level agreements and terms and conditions, can be attached to service offerings. Per each document, the file size must not exceed 15 MB. The total size of all attached documents must not exceed 100 MB.

**Note:** You must use Internet Explorer 10.0 or higher to attach documents to a service offering.

3. When you find a service offering that you are interested in, select its icon or name to display the Browse Catalog Details view.

### Related Topics

["Service Catalog" on the previous page](#)

["Filter the Service Catalog" on the next page](#)

["Service Offerings" on page 28](#)

["Requests" on page 33](#)

## Filter the Service Catalog

In the Marketplace Portal Browse Catalog view, you can change the order in which service offerings are displayed. By default, service offerings are sorted alphabetically, by all categories, and by all service types. Use the following filters to display certain service offerings:

- ["All Categories" below](#)
- ["All Service Types" below](#)
- ["Alphabetical" on the next page](#)

### *All Categories*

By default, service offerings are sorted by all categories. To meet the needs of your organization, category types are customizable.

The following, out-of-the-box, sample categories are provided: Accessory, Application Servers, Application Services, backup Services, Database Servers, Hardware, Infrastructure Services, Platform Services, Simple System, and Software.

**Note:** Excluding All Categories, these categories depend on the configuration of the current Cloud Service Automation (CSA) installation. Only categories with active service offerings will display. New categories can be added to the current CSA instance.

To sort the service catalog by a certain category:

- From the **All Categories** drop-down list, select a category that you want to sort by.

### *All Service Types*

By default, service offerings are displayed by all service types. You can also display service offerings that require approval or that do not require approval.

To sort the service catalog by a certain service type:



- From the **All Service Types** drop-down list, select one of the following sort values:

Sort Value	Description
All Service Types	Includes all service types described in this table. This is the default.
Approval Required	Service offerings that require approval.
No Approval Required	Service offerings that do not require approval.

## ***Alphabetical***

By default, service offerings are sorted alphabetically. You can also sort offerings by newest, oldest, most expensive, least expensive, or reverse alphabetical.

To sort the service catalog by a certain order:


- From the drop-down list, select one of the following sort values:

Sort Value	Description
Newest First	The service offering that has the most recent published date.
Oldest First	The service offering that has the oldest published date.
Most Expensive	The service offering that has the highest initial price. The cost of the service offering that is used to sort this list excludes the periodic fee.
Least Expensive	The service offering that has the lowest initial price. The cost of the service offering that is used to sort this list excludes the periodic fee.
Alphabetical	Service offerings are sorted alphabetically, from A to Z. This is the default.
Reverse Alphabetical	Service offerings are listed by reverse alphabetical order, from Z to A.


Related Topics

["Search the Service Catalog" on the next page](#)

# Search the Service Catalog

In the Browse Catalog view, use the Search filter  to locate a certain service offering by a text search. Enter text that represents what you are looking for so that the user interface filters out these specific items.

To search the service offering catalog:


1. In the Search text box , enter text.
2. Press **Enter**.

Related Topics

["Browse the Service Catalog" on page 23](#)

["Filter the Service Catalog" on page 24](#)


## Featured Services

From the Dashboard, you can view services in the catalog that your organization is currently promoting in the  **Featured Services** widget in the **Shop for Services** section.

Your CSA administrator can assign one of the categories as a Featured Services category in the service catalog. This is configured in the Cloud Service Management Console. Contact your CSA administrator for more information.

**Note:** During organization creation and configuration, any category can be set as a featured category in the Management Console. Service offerings published under that category are treated as featured service offerings and will be included in the Featured Services widget.

To view services that your organization is promoting:

1. In the Dashboard, in the **Shop for Services** section, select the  **Featured Services** widget to display a list of service offerings your organization is currently promoting.
2. In the Featured Services view, select a service offering to review its detailed information.

Related Topics

[" New Releases" below](#)

[" Popular Services" below](#)

[" Subscriptions Expiring Soon" on the next page](#)

## ★ **New Releases**

From the Dashboard, you can view service offerings that were most recently added to the service catalog in the ★ **New Releases** widget in the **Shop for Services** section.

To view service offerings that were most recently added:

1. In the Dashboard, in the **Shop for Services** section, select the ★ **New Releases** widget to display a list of service offerings that were recently added by an administrative user. This list displays all service offerings sorted by the published date, beginning with the most recent date.
2. In the New Releases view, select a service offering to review its detailed information.

Related Topics

[" Popular Services" below](#)


[" Featured Services" on the previous page](#)

[" Subscriptions Expiring Soon" on the next page](#)

## ♥ **Popular Services**

From the Dashboard, you can view service offerings that are most frequently requested by members of your organization in the ♥ **Popular Services** widget. These are service offerings that you are authorized to access.

To view services that are most frequently requested:

1. In the Dashboard, in the **Shop for Services** section, select the  **Popular Services** widget to display a list of service offerings that are being tracked as most frequently requested.
2. In the Popular Services view, select a service offering to review its detailed information.

#### Related Topics

[" New Releases" on the previous page](#)


[" Featured Services" on page 26](#)

[" Subscriptions Expiring Soon" below](#)

## **Subscriptions Expiring Soon**

From the Dashboard, you can view subscriptions that are scheduled to end 30 days after the subscription started.

To view services that subscriptions that are scheduled to expire soon:

1. In the Dashboard, in the **Manage Subscriptions** section, select the  **Expiring Soon** widget display a list of your subscriptions that are scheduled to end 30 days after the subscription started.
2. In the Subscriptions Expiring Soon view, select a subscription to review its detailed information.

#### Related Topics

[" Popular Services" on the previous page](#)


[" New Releases" on the previous page](#)

[" Featured Services" on page 26](#)

## **Service Offerings**

There are three basic steps in the Marketplace Portal workflow:

1. Service offering configuration.
2. Service checkout and delivery.
3. Request confirmation.

**Note:** Service offerings are located in the  **All Services** widget in the Marketplace Portal Dashboard **Shop for Services** section.





## Browse Catalog Details

In the Browse Catalog Details view, the following information about a selected service offering displays:

- The name of the service offering and its icon.
  - A brief description of the service offering. This description is visible when you view all categories, except Featured Services.
    - A service offering typically has two prices: the initial price of the subscription and the recurring fee of the subscription.
      - For example, a subscription with an initial price of \$1000 might also have a periodic fee of \$200 a month for the duration of the subscription.
      - If you change the options associated with the subscription (such as increasing the size of the hard drive or the amount of memory), the initial price, recurring fee, or both, change to reflect the additional costs.
      - The recurring fee can be hourly, daily, weekly, monthly or yearly (/yr).
      - The number format for pricing is based on your browser's locale.

**Note:** For each service offering, pricing precision displays up to five digits.

- **Published on:** The date the service offering was published. The date format is based on your browser's locale. This date is visible when you view all categories, except Featured Services.

-  **Show More Details is On/Off:** This slider button allows you to hide or display information. The default is **On**. To change this toggle by using your keyboard, tab through the Browse Catalog Details view and stop tabbing when the toggle is lassoed by a blue rectangle. Use the directional arrows on your keyboard to slide the toggle to **Off**.
- **Options and Profiles:** This information includes the available option sets (if any) and the cost of the different options.
  - If you want to subscribe to the service offering you are viewing, configure your subscription request in this section. For example, if the service offering includes a server, the server might include options you select to configure the number of CPUs and the amount of RAM for the server.
  - For sequenced-based offerings, select options to configure your offering request.
  - For topology-based offerings, select profiles to make changes.
- **Total Initial Price:** The initial price of the subscription. The periodic fee of the subscription.
- **Total Recurring Price:** The periodic fee of the subscription.
-  Click **Cart** when you want to place a single order for more than one item.
-  Click **Checkout** to open the Service Checkout view.
-  **Requires Approval:** Indicates whether your request for the service offering must be approved. When **Requires Approval** is displayed in the service offering description, it means that a subscription to the service offering requires management approval before it can be finalized. When you request a service offering that requires approval, the person who is the designated approver is automatically notified by email.

#### Related Topics

["View Request Details" on page 37](#)

["View Checkout Details" on page 42](#)

["Approved and Rejected Requests" on page 40](#)

[" Shopping Cart" below](#)

## **Shopping Cart**

In the Marketplace Portal, you can browse for service offerings in the catalog and then add them to the shopping cart for a single checkout transaction. This transaction is recorded as one order confirmation number.

The total number of offerings (items) that you add to the shopping cart is displayed at the top of each view. All items are based on their service designs. Shopping cart contents persistent only for the current Marketplace Portal session. When you log out, the shopping cart will be emptied.\


**Note:** For each service offering in your shopping cart, pricing precision displays up to five digits. This pricing is based on the original service offering configuration.

During the shopping cart checkout process, you can:

- **Add Subscription Names**—Enter meaningful, custom names for each item in your shopping cart. As a best practice, create names that easily identify them as services in your organization. If you do not want to customize the subscription names, accept the default subscription names.
- **Provide Order Information**—Configure the subscription period for all items in your shopping cart. Attach documents that provide more information for the approval process, such as a purchase order.

**Note:** You must use Internet Explorer 10.0 or higher to attach documents to a service offering.

To complete a shopping cart checkout:

1. In the Dashboard, in the **Shop for Services** section, select the  **All Services** widget .
2. Select an offering, review its details, and then click **Cart**.
3. (Optional) Click **Edit Configuration** to change information about an offering. Click **Update** to save your changes.
4. (Optional) Change the **Quantity** number. Click Update to save your changes.
5. (Optional) Click **Remove Item** if you want to remove this offering from your shopping cart. In the Remove Item dialog, click **Yes**.
6. Click **Continue Shopping** to browse the catalog and add more offerings to your shopping cart.
7. Click **Checkout** to display the Add Subscription Names view. Accept the default names or enter meaningful names for items in your shopping cart.

8. Click **Continue** to display the Provide Order Information view:
  - a. Accept the subscription period or make changes.
  - b. Attach documents that provide more information for the approval process.
  - c. Review the terms and conditions and then check the check box to confirm your agreement.
9. Click **Submit Cart**. The Shopping Cart Confirmation view displays detailed request information, including the total cost of all items in your cart and the order number. This order number also displays in the Requests view.

#### Related Topics

["View Request Details" on page 37](#)

["View Checkout Details" on page 42](#)


["Approved and Rejected Requests" on page 40](#)

## **Express Checkout Wizard**

Use the Virtual Machine Express Checkout Wizard to easily and quickly order services for your organization. This wizard walks you through the steps required to create an express service subscription. These are subscriptions that apply only to service offerings and service designs that have been configured as express services in the CSA Service Catalog and CSA Service Designer.

**Note:** You can enable or disable the Virtual Machine Express Checkout Wizard for each organization.

To place your order using the Virtual Machine Express Checkout Wizard:

1. In the Dashboard, in the **Express Checkout** section, select the  **Express Checkout** widget to open the Virtual Machine Express Checkout Wizard.
2. In **Images**, select the associated icon for an operating system. In CSA, the Special Option Mode includes an OS Platform option set. These are the platforms that are configured in the CSA Express Checkout Offerings view. Prices are also derived from CSA service offerings and designs



3. In **Flavors**, select the service size for CPU, memory, and storage: Small, Medium, Large, and Extra Large. These are the sizes that are configured in the CSA Express Checkout Offerings view. Prices are derived from CSA service offerings and designs
4. In **Network Settings**, select a public external network, which is required. Optionally, select additional network segments. Click **Next Step**.
5. In **Security Group**, select security group properties for network segment, instance name prefix, and key name. Click **Next Step**.
6. In **Make It Yours**, enter a meaningful subscription name and the number of servers in this server group. Click **Next Step**.
7. Click **Request**. Wait for the confirmation page that confirms the request number, date requested, and recipient.

## Requests


A new request is created when you:

- Submit an order for a subscription to a service offering.
- Make a change to an existing service offering subscription.
- Request that a service offering subscription be canceled.
- Request a service instance action.
- Cancel an active request.
- Cancel an active subscription.
- Delete an active subscription.


Before you create a request, be aware of the following approval requirements:

- Requests for new subscriptions and for modifications to existing subscriptions might require management approval.
- Requests for service instance actions and requests for the cancellation of subscriptions do not require approval.

**Note:** Depending on the approval policy for the service offering you are requesting, approval might be required from more than one approver.

To manage your requests, select the  **My Orders** widget in the Marketplace Portal Dashboard **More Actions** section to see a list of all requests submitted. By default, the list of Requests displays All Request Types, Newest First, and All Request States.

**Note:** For each service request, pricing precision can display up to five digits. This pricing is based on the original service offering configuration.

When you select the  **My Orders** widget, the Requests view displays a scrollable list of your requests submitted during the last month. This is the default list order. To customize your view, you can sort and filter the list of requests. You can also view only the requests for service offerings from a specific category by using the **All Request Types** drop-down filter.

In the **Requests** view, you can perform the following tasks:

- View detailed request information. In the Request Details view, you can perform actions, such as reorder a service.
- Cancel requests, one at a time or all at the same time. When you cancel requests all at the same time, only requests that are currently loaded in the Requests list view will be canceled.
- Delete requests, one at a time or all at the same time. When you delete requests all at the same time, only requests that are currently loaded in the Requests list view will be deleted.

#### Related Topics

["Browse Requests" on the next page](#)

["Filter Requests" on page 36](#)

["View Request Details" on page 37](#)


["View Checkout Details" on page 42](#)

["Approved and Rejected Requests" on page 40](#)

["Cancel a Request" on page 42](#)

["Delete a Request" on page 44](#)

# Browse Requests

You can browse requests in the Requests view. In the Dashboard, select the  **My Orders** widget in the **More Actions** section to browse requests in the Requests view.

To browse requests:

1. In the Dashboard, in the **More Actions** section, select the  **My Orders** widget to open the Requests view.

By default, all requests are displayed in date order, with the newest request listed first.

**Note:** If you are an approver of requests, by default, all requests that require approval are displayed.

2. Scroll up or down the list to browse requests.

**Note:** For each service request, pricing precision displays up to five digits. This pricing is based on the original service offering configuration.

3. When you find a request that you are interested in, select its icon or name to display the Request Details view.
4. (Optional) If the request you are looking for is not displayed, select a status in the All States drop-down filter. A list of requests with the selected status is displayed.

## Related Topics

["Filter Requests" on the next page](#)

["View Request Details" on page 37](#)

["View Checkout Details" on page 42](#)

["Approved and Rejected Requests" on page 40](#)


["Cancel a Request" on page 42](#)

["Delete a Request" on page 44](#)

## Filter Requests

By default, the Requests view displays all request types, the newest requests first, and all request states. Use the following filters to display certain requests:

- ["All Request Types" below](#)
- ["All Request States" below](#)
- ["Newest First" on the next page](#)

**Tip:** In the Requests view, use the Search filter  to locate a certain request by keywords. Enter text that represents what you are looking for so that the user interface filters out these specific items.

## All Request Types

From the **All Request Types** drop-down list, select one of the following filter values: All Request Types (default), Service Action, Service Request, Modify Subscription, or Cancel Subscription.

## All Request States

From the **All Request States** drop-down list, select one of the following filter values:

Request State	Description
All Request States	Includes all request states described in this table.
Pending	Requests that require approval.
Canceled	Requests that have been canceled.
Approved	Requests that have been approved.
Rejected	Requests that have been rejected.
Cancelable	Requests that can be canceled.
Deletable	Requests that can be deleted.

## Newest First

From the **Newest First** drop-down list, select one of the following filter values:

Option	Description
Newest First	The most recent request, based on the date the request was submitted, is the first request in the list. This is the default.
Oldest First	The oldest request, based on the date the request was submitted, is the first request in the list.
Most Expensive	The most expensive request.
Least Expensive	The least expensive request.
Alphabetical	The list is ordered alphabetically, from A to Z.
Reverse Alphabetical	The list is ordered in reverse alphabetical order, from Z to A.

### Related Topics

["Browse Requests" on page 35](#)

["View Request Details" below](#)

["View Checkout Details" on page 42](#)

["Approved and Rejected Requests" on page 40](#)

["Cancel a Request" on page 42](#)



["Delete a Request" on page 44](#)

## View Request Details

The Request Details view displays the following information about the request you selected:

- The image represents the service offering for which the request was created.
- The name of the subscription for which the request was created. If the request is for a modification to a subscription and the modification includes a change to the subscription name, this is the new name of the subscription.
- The initial price and the recurring price of the subscription.
- Below the name of the subscription is the name of the service offering.
- Below the name of the service offering is the status that indicates and whether it has been approved.

To view request details:

1. In the Dashboard, in the **More Actions** section, select the  **My Orders** widget to open the Requests view.  
By default, all requests are displayed by date order, with the newest requests listed first. This list includes subscription names.
2. Scroll up or down the list to browse requests.
3. When you find a request that you are interested in, select the name of the request to display the Request Details view. This view displays the service request name and a brief description, group ownership, the subscription term, attached documents, and a cost breakdown of configuration selections.
4. (Optional) If you want to delete this service request, select the trashcan icon .
5. (Optional) If you want to place another order for this service, click **Reorder Service**.

#### Related Topics

["Browse Requests" on page 35](#)

["Filter Requests" on page 36](#)

["View Checkout Details" on page 42](#)

["Approved and Rejected Requests" on page 40](#)

["Cancel a Request" on page 42](#)


["Delete a Request" on page 44](#)

["Reorder a Service" below](#)

## Reorder a Service

You can reorder the service offering that originated this request. The Request Details view will be populated with the values you provided for the initial request.

To reorder a service:

1. In the Dashboard, in the **More Actions** section, select the  **My Orders** widget to open the Requests view.  
By default, all requests are displayed by date order, with the newest requests listed first. This list includes subscription names.
2. Scroll up or down the list to browse requests.
3. When you find a request that you are interested in, select the name of the request to display the Request Details view. This view displays the service request name and a brief description, group ownership, the subscription term, attached documents, and a cost breakdown of configuration selections.
4. Click **Reorder Service** to open the Reorder Service view.
5. Click **Checkout** to open the Service Checkout view.
6. Enter a subscription name and description.
7. Specify the subscription period (recurring or term, and start and end dates).
8. (Optional) Click **Make Changes** to modify the option sets. The original option models persist unless you change them.
9. (Optional) Click **Attach File** to attach documents that provide more information for the approver, such as a purchase order.  
**Note:** You must use Internet Explorer 10.0 or higher to attach documents to a service offering.
10. Click **Submit Request**.
11. Wait for the Request Confirmation view to see the order details, including the request number. Your request is subject to an approval process before it can be fulfilled and delivered.
12. (Optional) In the Request Confirmation view, click **View Request** to open the Request Details view for detailed information.

13. (Optional) In the Request Confirmation view, click **Shop More** to open the Service Offerings view to continue shopping.
14. (Optional) In the Request Confirmation view, click **Reorder Service** to open the Service Offerings view and reorder again.

#### Related Topics

["View Request Details" on page 37](#)

["View Checkout Details" on page 42](#)

## Approved and Rejected Requests

When your request for a new subscription or a modification to a subscription is approved or rejected, its status changes and other events occur as described in the following sections:

- ["When Your Request is Approved" below](#)
- ["When Your Request is Rejected" on the next page](#)

**Tip:** You might need to refresh the browser to see the status changes.

### *When Your Request is Approved*

Within a short period of time after your request is approved, the following occurs:

- The status of the request changes in the **Requests** view:
  - If the start date is today or earlier, the status is changed to **Approved**.
  - If the start date is a future date, the status remains as **Pending** until the start date arrives, at which time the status changes to **Approved**.
  - When a request is automatically approved, it briefly has the status of **Pending**. The status then changes to **Approved**.
- A notification that indicates the status of your request is displayed in the Notifications view.
- An email message is sent to you with the new status of the request.



- The requested subscription is added to the **Subscriptions** view, with one of the following statuses:
  - The status is **Active** if the start date is today or earlier, and the subscription has been deployed.
  - The status is **Pending** if the subscription is waiting to be deployed or if the start date is in the future.

**Note:** If the request is for the modification of a subscription, the original subscription is replaced with the modified subscription in the **Subscriptions** view when the request for the modification is approved.

The subscription starts as follows:

- If the start date is today and the request is approved today (manually or automatically), the subscription starts within several minutes of the final approval.
- If the start date is today and the request is approved on a future date, the subscription starts within several minutes of the final approval.
- If the start date is a future date and the request is approved before the start date, the subscription starts several minutes after midnight on the start date.

### ***When Your Request is Rejected***

When your request is rejected, the following occurs:

- The status of the request changes to **Rejected** in the **Requests** view.
- A notification giving the status of your request is displayed on the dashboard.

#### Related Topics

["Browse Requests" on page 35](#)

["Filter Requests" on page 36](#)

["View Request Details" on page 37](#)


["View Checkout Details" on the next page](#)

["Cancel a Request" on the next page](#)

["Delete a Request" on page 44](#)

## View Checkout Details

To review checkout details for a request:

1. In the Dashboard, in the **More Actions** section, select the  **My Orders** widget.
2. In the Requests view, select a request to display the Request Details view.
3. Scroll down to the Checkout Details section to review information about the request, such as the subscription name and a brief description, group ownership, the subscription term, attached documents, a cost breakdown of configuration selections, the initial base cost, and the recurring base cost.
4. (Optional) If you want to reorder this service, click **Reorder Service**.

### Related Topics

["Reorder a Service" on page 39](#)

["Browse Requests" on page 35](#)

["Filter Requests" on page 36](#)

["View Request Details" on page 37](#)

["Approved and Rejected Requests" on page 40](#)

["Cancel a Request" below](#)

["Delete a Request" on page 44](#)

## Cancel a Request

You can cancel a request only if the status of the request is **Cancelable**.



In the Requests list view, you can:

- Cancel a single request, one at a time.
- Cancel all requests, all at the same time. This action cancels only the requests that are currently loaded in the Requests view.


Before you cancel a request, be aware of the following requirements and conditions:


- Requests must be canceled first before they can be deleted. Canceling a request might take some time to complete. Refresh the view several times until it does not show the requests as still being **Cancelable**.
- Cancelable and deletable requests cannot be concurrently acted on. Cancelable requests take precedence.
- When you cancel a request for a pending subscription modification, only the request for the modification is canceled. The subscription is not changed.
- If the request for a subscription has already been approved, you cannot cancel the request. However, you can cancel the subscription in the Subscriptions view.
- If you need to make a change to a request, you must first cancel the original request and then submit a new request with the correct configuration.

To cancel a single request in the list view:

1. In the Dashboard, in the **More Actions** section, select the  **My Orders** widget to display the Requests view.
2. In the All Requests States filter, select **Cancelable Requests**.
3. In the Requests view, scroll up or down the list to find the request you want to cancel.
4. Click the cancel icon  next to the request you want to cancel.
5. In the confirmation dialog, click **Yes** to confirm that you want to cancel the selected request. A message displays, confirming that your selected request was canceled.

To cancel all requests in the list view:

1. In the Dashboard, in the **More Actions** section, select the  **My Orders** widget to display the Requests view.
2. In the All Requests States filter, select **Cancelable Requests**.
3. Select **List Actions**.
4. In the List Actions dialog, click **Cancel All** to cancel all items that are visible in the list. **Caution:** This action cannot be undone.

5. (Optional) If you decide you do not want to cancel all items, click the close icon  to close the List Actions dialog.
6. In the confirmation dialog, click **Yes** to confirm that you want to cancel all requests in the list. A message displays, confirming that all requests were canceled.

#### Related Topics

["Browse Requests" on page 35](#)

["Filter Requests" on page 36](#)


["View Request Details" on page 37](#)

["View Checkout Details" on page 42](#)

["Approved and Rejected Requests" on page 40](#)

["Delete a Request" below](#)

## Delete a Request

When you no longer need to maintain a record of a request, you can remove it from the Requests view. In the Requests view, the trashcan icon  indicates a deletable request.

**Caution:** When you delete a request, it will no longer be visible to you.

In the Requests list view, you can:



- Delete a request if it has been approved, denied, or canceled.
- Delete a single request, one at a time.
- Delete all requests, all at the same time.

Before you delete a request, be aware of the following requirements and conditions:



- Requests must be canceled first before they can be deleted.
- Deletable and cancelable requests cannot be concurrently acted on.

- Cancelable requests take precedence.

To delete a single request from the list view:

1. In the Dashboard, in the **More Actions** section, select the  **My Orders** widget to display the Requests view.
2. In the **All Requests States** filter, select Deletable Requests.
3. In the Requests view, scroll up or down the list to find the request you want to delete.
4. Select the trashcan icon  for the request.
5. In the Delete Request dialog, click **Yes** to confirm that you want to delete the selected request.
6. (Optional) In the Delete Request dialog, click **No** if you decide you do not want to delete the selected request.
7. Go back to the Requests view to confirm that the request is excluded from the list.

To delete all requests from the list view:

1. In the Dashboard, in the **More Actions** section, select the  **My Orders** widget to display the Requests view.
2. In the **All Request States** filter, select Deletable Requests.
3. Select **List Actions**.
4. In the List Actions dialog, click **Delete All** to delete all items that are visible in the list. **Caution:** This action cannot be undone.
5. (Optional) If you decide you do not want to delete all requests, click the close icon  to close the List Actions dialog.
5. In the confirmation dialog, click **Yes** to confirm that you want to delete all requests in the list. A message displays, confirming that all requests were deleted.

Related Topics

["Browse Requests" on page 35](#)

["Filter Requests" on page 36](#)

["View Request Details" on page 37](#)

["View Checkout Details" on page 42](#)

["Approved and Rejected Requests" on page 40](#)

["Cancel a Request" on page 42](#)

## **Review Requests**

Requests for new subscriptions and for modifications to existing subscriptions might require your approval before they can be deployed. If you are designated as an approver of requests, you are responsible for approving or denying requests made for a predetermined set of service offerings.

**Note:** More than one approver might be required to approve a request for a subscription to a service offering. This depends on the approval policy for the service offering.

As a service consumer (approver), select the  **Review Requests** widget in the Marketplace Portal Dashboard **More Actions** section to display the Approvals view. You must have valid approver credentials to access the Approvals view.


When a user submits a request for a new subscription or a modification to a subscription for which you are the approver, the following occurs:

- A request for your approval is added to the Approvals list as **Pending**. Select the **Review Requests** widget in the Dashboard to open the Approvals list view.
- You are sent an email message that notifies you that the request needs your approval.
- A notification indicating that a request needs your approval is displayed in the Notifications view. Select the Notifications widget in the Dashboard to open the Notifications list.

The status of the request changes, based on the action you take:

- If you approve the request, the status of the request changes to **Approved**.
- If you reject the request, the status of the request changes to **Rejected**.

**Note:** Requests for subscriptions to some service offerings might be automatically approved or denied after a certain number of days, if the approver has not approved or denied the request. This is based on the approval policy for the service offering and how it is configured for catalog publishing in the Management Console.

To manage your approvals, select the  **Review Requests** widget in the Dashboard to see a list of all approvals. By default, the list in the Approvals view displays All Request Types, Newest First, and All Approval Statuses.

**Note:** For each service request, pricing precision can display up to five digits. This pricing is based on the original service offering configuration.

In the **Approvals** view, you can perform the following tasks:

- View detailed approval information.
- Approve requests. Requests that require approval are marked **approval needed**.
- Deny requests.

#### Related Topics

["Browse Approvals" below](#)

["Filter Approvals" on the next page](#)

["View Approval Details" on page 50](#)

["Approve a Request" on page 51](#)

["Reject a Request" on page 52](#)


["Approved and Rejected Requests" on page 40](#)

## Browse Approvals

As a service consumer (approver), you can view a list of all pending requests and then browse and sort by the approval status, request date, requested action, and price. From this list, you can directly approve or reject requests.

**Note:** For each service request, pricing precision displays up to five digits. This pricing is based on the original service offering configuration.

To browse approvals:

1. In the Dashboard, in the **More Actions** section, select the  **Review Requests** widget to open the Approvals view.  
By default, all requests are displayed by date, with the newest request listed first.

**Note:** If you are an approver of requests, by default, all requests that require approval are displayed.

2. Scroll up or down the list to browse for requests marked **approval needed**.
3. When you find a request that you are interested in, select its icon or name to display the Approval Details view.

#### Related Topics

["View Approval Details" on page 50](#)


["Approve a Request" on page 51](#)

["Reject a Request" on page 52](#)

## Filter Approvals

By default, the Review Requests view displays all request types, the newest requests first, and all request states. Use the following filters to display certain requests:

- ["All Request Types" below](#)
- ["Newest First" on the next page](#)
- ["All Approval Statuses" on the next page](#)

**Tip:** In the Review Requests view, use the Search filter  to locate a certain request by keywords. Enter text that represents what you are looking for so that the user interface filters out these specific items.

## All Request Types

From the **All Request Types** drop-down list, select one of the following filter values: All Request Types (default), Service Action, Service Request, Modify Subscription, or Cancel Subscription.



## ***Newest First***

From the **Newest First** drop-down list, select one of the following filter values:

<b>Option</b>	<b>Description</b>
Newest First	The most recent request, based on the date the request was submitted, is the first request in the list. This is the default.
Oldest First	The oldest request, based on the date the request was submitted, is the first request in the list.
Most Expensive	The most expensive request.
Least Expensive	The least expensive request.
Alphabetical	The list is ordered alphabetically, from A to Z.
Reverse Alphabetical	The list is ordered in reverse alphabetical order, from Z to A.

## ***All Approval Statuses***

From the **All Approval Statuses** drop-down list, select one of the following filter values:

<b>Request State</b>	<b>Description</b>
All Approval Statuses	Includes all request states described in this table.
Approved	Requests that have been approved.
Pending	Requests that require approval.
Rejected	Requests that have been rejected.

Related Topics

["Browse Approvals" on page 47](#)

["View Approval Details" on the next page](#)

["Approve a Request" on page 51](#)


["Reject a Request" on page 52](#)

## View Approval Details

The Approval Details view displays the following information about the request order you selected, including a summary of checkout and configuration information you provide when the request is made.

- The request name, user, and date the request was made.
- The service request name and a brief description.
- The subscription term.
- Attached documents that provide the approver with more information.
- A cost breakdown of configuration selections.
- The image represents the service offering for which the request was created.

To view approval details:

1. In the Dashboard, in the **More Actions** section, select the  **Review Requests** tile to open the Approvals view.

By default, all requests are displayed by date, with the newest request listed first.

**Note:** If you are an approver of requests, by default, all requests that require approval are displayed.

2. Scroll up or down the list to browse for requests marked **approval needed** or select **Pending** in the **All Approval Statuses** drop-down filter.
3. When you find a request that you are interested in, select its icon or name to display the Approval Details view.

### Related Topics

["Browse Approvals" on page 47](#)

["Filter Approvals" on page 48](#)

["Approve a Request" below](#)

["Reject a Request" on the next page](#)




["Approved and Rejected Requests" on page 40](#)

## Approve a Request

You can approve a request from the list of pending requests. This list includes the following information about the request:

- Approval Status (This includes the personal approver status and the Overall Approval Status.)
- Requester Name
- Request Date
- Requested Action
- Initial and Recurring Prices

To approve a request:

1. In the Dashboard, in the **More Actions** section, select the  **Review Requests** tile to open the Approvals view. By default, all requests are displayed by date, with the newest request listed first. If you are an approver of requests, all requests that require approval are displayed.
2. Scroll up or down the list to browse for requests that show the approve icon .
3. Click the  icon to approve the selected request.
4. In the **Approve this request?** dialog, click **Yes**. This action will start the fulfillment process and generate a service subscription.

**Note:** The subscription you approved might not immediately show the status of Approved to the requester.

## Approved Notifications

**Dashboard:** Select the **Notifications** tile to open the Notifications view and verify the new (**Approved**) status of the request.

**Email:** An email message that provides the new (**Approved**) status of the request is sent to the person who submitted the request.

**Note:** If multiple approvers are required, the notification and email message are not issued until after the approval policy is satisfied.

### Related Topics

["Browse Approvals" on page 47](#)

["Filter Approvals" on page 48](#)

["View Approval Details" on page 50](#)

["Reject a Request" below](#)

["Approved and Rejected Requests" on page 40](#)




[" Notifications" on page 68](#)

## Reject a Request

You can reject a request from the list of pending requests. This list includes the following information about the request:

- Approval Status (This includes the personal approver status and the Overall Approval Status.)
- Requester Name
- Request Date
- Requested Action
- Initial and Recurring Prices

To reject a request:

1. In the Dashboard, in the **More Actions** section, select the  **Review Requests** tile to open the Approvals view. By default, all requests are displayed by date, with the newest request listed first. If you are an approver of requests, all requests that require approval are displayed.
2. Scroll up or down the list to browse for requests that show the reject icon .
3. Click the  icon to reject the selected request.
4. In the **Deny this request?** dialog, enter a brief explanation about why you are rejecting this request. This explanation will be visible to anyone who views this request.
5. Click **Yes**.

**Note:** The subscription you denied might not immediately show the status of **Rejected** to the requester.

## ***Rejected Notifications***

**Dashboard:** Select the **Notifications** tile to open the Notifications view and verify the new (**Rejected**) status of the request.

**Email:** An email message that provides the new (**Rejected**) status of the request is sent to the person who submitted the request.

**Note:** If multiple approvers are required, the notification and email message are not issued until after the approval policy is satisfied.

### Related Topics

["Browse Approvals" on page 47](#)


["Filter Approvals" on page 48](#)


["Approve a Request" on page 51](#)

["Approved and Rejected Requests" on page 40](#)

[" Notifications" on page 68](#)

## Subscriptions



To manage your service offering subscriptions, select the  **All Subscriptions** widget in the Marketplace Portal Dashboard **Manage Subscriptions** section. By default, the list of Subscriptions displays **All Categories**, **All Subscription Statuses**, and **Newest First** .

When you select the  **All Subscriptions** widget, the Subscriptions view lists your subscriptions for the last month. This is the default list order. To customize your view, you can sort and filter the list of subscriptions. You can also view only the subscriptions for service offerings from a specific category by using the **All Categories** drop-down filter.

The **All Subscriptions** widget also displays the total number of subscriptions for each status.

**Note:** For each subscription, pricing precision displays up to five digits. This pricing is based on the original service offering configuration.

In the **Subscriptions** view, you can perform the following tasks:

- Check the state of your subscriptions.
- Set filters to find certain subscriptions. These filters display in the user interface only when your browser resolution is set to more than 992 pixels wide. If your browser resolution is set to 992 pixels or less, these filters do not display and only the Search box displays. This is known as adaptive content in the Marketplace Portal. See "Adaptive Content" in "[Get Started](#)" on page 10
- Monitor a list of subscriptions that are expiring soon.
- View detailed subscription information. In the Subscription Details view, you can run actions on your service instances and, if necessary, modify subscriptions.
-  Cancel subscriptions, one at a time or all at the same time. After you cancel a subscription, you can delete it from the catalog.
-  Delete subscriptions, one at a time or all at the same time. You must cancel a subscription before you can delete it.

### Related Topics

["Browse Subscriptions" on the next page](#)

["Filter Subscriptions" on page 56](#)

["View Subscription Details" on page 58](#)

["Modify a Subscription" on page 59](#)

["Cancel a Subscription" on page 60](#)


["Delete a Subscription" on page 62](#)

## Browse Subscriptions

You can browse and filter subscriptions in the Subscriptions view.

**Note:** For each subscription, pricing precision displays up to five digits. This pricing is based on the original service offering configuration.

To browse subscriptions:

1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** widget to open the Subscriptions view.

By default, all subscriptions are displayed in date order, with the newest subscriptions listed first.

2. Scroll up or down the list to browse subscriptions.
3. When you find a subscription that you are interested in, select its icon or name to display the Subscription Details view.

### Related Topics

["Filter Subscriptions" on the next page](#)

["View Subscription Details" on page 58](#)

["Modify a Subscription" on page 59](#)


["Cancel a Subscription" on page 60](#)


["Delete a Subscription" on page 62](#)

## Filter Subscriptions

By default, the Subscriptions view displays all categories, the newest subscriptions first, and all subscription states. Use the following filters to display certain subscriptions:

- ["All Categories" below](#)
- ["All Subscription Statuses" below](#)
- ["Newest First" on the next page](#)

**Note:** These filters display in the user interface only when your browser is set to more than 992 pixels wide. If your browser is set to 992 pixels or less than 992 pixels wide, these filters do not display and only the Search filter  displays.

**Tip:** In the Subscriptions view, use the Search filter  to locate a certain subscription by keywords. Enter text that represents what you are looking for so that the user interface filters out these specific items.

## All Categories

You can subscribe to a variety of services, such as application servers, email servers, or web hosting services. You can filter by these services, as categories, to easily navigate to and review your subscriptions.

## All Subscription Statuses

From the **All Subscription Statuses** drop-down list, select one of the following filter values:

Subscription State	Description
All Subscription Statuses	Includes all subscription states described in this table.
Active	Subscriptions that are active.
Pending	Subscriptions that are waiting to be approved.
Expired	Subscriptions that have expired.



Subscription State	Description
Canceled	Subscriptions that have been canceled.
Terminated	Subscriptions that have been terminated.
Paused	Subscriptions that failed to deploy and have been paused for troubleshooting.

## ***Newest First***

From the **Newest First** drop-down list, select one of the following filter values:

Option	Description
Newest First	The most recent subscription, based on the date the subscription started, is the first subscription in the list. This is the default.
Oldest First	The oldest subscription, based on the date the subscription started, is the first subscription in the list.
Most Expensive	The most expensive subscription.
Least Expensive	The least expensive subscription.
Alphabetical	The list is ordered alphabetically, from A to Z.
Reverse Alphabetical	The list is ordered in reverse alphabetical order, from Z to A.

### Related Topics

["Browse Subscriptions" on page 55](#)

["View Subscription Details" on the next page](#)

["Modify a Subscription" on page 59](#)

["Cancel a Subscription" on page 60](#)


["Delete a Subscription" on page 62](#)

# View Subscription Details


The Subscriptions Details view displays the following information:

- The image for the service offering to which you subscribed.
- The name you entered for the subscription when you configured it.
- The name of the service offering to which you subscribed.
- The status of the subscription.
- The order number.
- The initial price and recurring price.

To view subscription details:

1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** widget to open the Subscriptions view.

By default, all subscriptions are displayed by date order, with the newest subscriptions listed first.

2. Scroll up or down the list to browse subscriptions.
3. When you find a subscription that you are interested in, select the name of the subscription to display its Subscriptions Details view. This view displays the subscription name and a brief description, subscription history and notifications. Use the filter  to customize the display of history events and notifications.
4. (Optional) If you want to see the original service request, click **View Request**.
5. (Optional) If you want to place another order for this service, click **View Linked Service** to open the My Service Details view.

Related Topics

["Browse Subscriptions" on page 55](#)

["Filter Subscriptions" on page 56](#)

["Modify a Subscription" on the next page](#)

["Cancel a Subscription" on the next page](#)

["Delete a Subscription" on page 62](#)


["View Request Details" on page 37](#)

["View My Service Details" on page 67](#)

## Modify a Subscription

**Note:** You can only modify active subscriptions.

To modify a subscription:

1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** widget to open the Subscriptions view.

By default, all subscriptions are displayed by date order, with the newest subscriptions listed first.

2. Scroll up or down the list to browse subscriptions.
3. When you find a subscription that you want to modify, select the name of the subscription to display its Subscriptions Details view.
4. In the Subscription Details view, click **Modify Subscription** to open the Modify Subscription Details view.
5. In the Modify Subscription Details view, click **Modify Subscription** to open the Modify Subscription Details view. In this view, you can change the subscription name and description, group ownership, option parameters for service configuration, and the End Date of the subscription period. You cannot edit the Start Date of the subscription period.
6. Click **Submit Subscription** to save your changes.
7. Wait for the confirmation view to see the order details, including the request number. Your request is subject to an approval process before it can be fulfilled and delivered.
8. (Optional) If you want to see the original service request, click **View Request** to see detailed information about the original request.

9. (Optional) In the confirmation view, click **View Request** to open the Request Details view for detailed information about the subscription you modified.
10. (Optional) In the confirmation view, click **Your Subscriptions** to open the Subscriptions view.
11. (Optional) In the confirmation view, click **Reorder Service** to open the Service Offering Details view for this subscription and place another order.
12. (Optional) You can also modify a subscription during the checkout process. See ["Reorder a Service" on page 39](#).

#### Related Topics

["Browse Subscriptions" on page 55](#)


["Filter Subscriptions" on page 56](#)

["View Subscription Details" on page 58](#)

["Cancel a Subscription" below](#)

["Delete a Subscription" on page 62](#)


## Cancel a Subscription

You can only cancel subscriptions if the  cancel icon displays. You cannot cancel a subscription if this icon does not display.

In the Subscriptions list view, you can:



- Cancel a single subscription, one at a time, in the Subscription Details view and from the Subscriptions list view.
- Cancel all subscriptions, all at the same time, from the Subscriptions list view.

To cancel a subscription in the Subscription Details view:



1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** widget to display the Subscriptions view.
2. In the Subscriptions view, scroll up or down the list to find and select the subscription you want to cancel.

3. In the Subscription Details view, click **Cancel Subscription**.
4. In the Cancel Subscription dialog, click **Yes** to confirm that you want to cancel the subscription.
5. (Optional) In the Cancel Subscription dialog, click **No** if you decide you do not want to delete the subscription.

To cancel a single subscription in the Subscriptions list view:

1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** widget to display the Subscriptions view.
2. In the All Subscription States filter, select **Active**.
3. In the Subscriptions view, scroll up or down the list to find the subscription you want to cancel.
4. Click the cancel icon  next to the subscription you want to cancel.
5. In the confirmation dialog, click **Yes** to confirm that you want to cancel the selected subscription.
6. (Optional) In the confirmation dialog, click **No** if you decide you do not want to cancel the subscription.

To cancel all subscriptions in the Subscriptions list view:


1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** widget to display the Subscriptions view.
2. In the All Subscription States filter, select **Active**.
3. Select **List Actions**.
4. In the List Actions dialog, click **Cancel All** to cancel all active subscriptions that are visible in the list. **Caution:** This action cannot be undone.
5. (Optional) If you really do not want to cancel all subscriptions, click the close icon  to close the List Actions dialog. Or, press the **Esc** key or click outside the dialog window to dismiss the cancel action.
6. In the confirmation dialog, click **Yes** to confirm that you want to cancel all subscriptions in the list. A message displays, confirming that all subscriptions were canceled.

Related Topics

["Filter Subscriptions" on page 56](#)

["Delete a Subscription" below](#)

## Delete a Subscription

When you no longer need information about subscriptions that have expired, been canceled, or failed, you can remove them from the Subscriptions view. In the Subscriptions view, the trashcan icon  indicates a deletable subscription.

**Caution:** When you delete a subscription, it will no longer be visible to you.



In the Subscriptions list view, you can:

- Delete a single subscription, only if it has already been canceled, one at a time, in the Subscription Details view and in the Subscriptions list view.
- Delete all subscriptions, all at the same time, in the Subscriptions list view.

Before you delete a subscription, be aware of the following requirements and conditions:



- Subscriptions must be canceled first before they can be deleted.
- Deletable and cancelable subscriptions cannot be concurrently acted on.
- Cancelable subscriptions take precedence.

To delete a subscription in the Subscription Details view:



1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** widget to display the Subscriptions view.
2. In the Subscriptions view, scroll up or down the list to find and select the subscription you want to delete. The trashcan icon  indicates a deletable subscription.
3. In the Subscription Details view, click **Delete Subscription**.

4. In the Delete Subscription dialog, click **Yes** to confirm that you want to delete the subscription.
5. (Optional) In the Delete Subscription dialog, click **No** if you decide you do not want to delete the subscription.

To delete a single subscription in the Subscription Detailt view:

1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** widget to display the Subscriptions view.
2. In the All States filter, select **Canceled**.
3. In the Subscriptions view, scroll through the list to find the canceled subscription you want to delete.
4. Select the trashcan icon  for the subscription.
5. In the Delete Subscription dialog, click **Yes** to confirm that you want to delete the selected subscription.
6. (Optional) In the Delete Subscription dialog, click **No** if you decide you do not want to delete the selected subscription.
7. Go back to the Subscriptions view to confirm that the subscription is excluded from the list.

To delete all subscriptions from the list view:


1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** widget to display the Subscriptions view.
2. In the All States filter, select **Canceled**.
3. Select **List Actions**.
4. In the List Actions dialog, click **Delete All** to delete all subscriptions that are visible in the list. **Caution:** This action cannot be undone.
5. (Optional) If you decide you do not want to delete all subscriptions, click the close icon  to close the List Actions dialog.
6. In the confirmation dialog, click **Yes** to confirm that you want to delete all subscriptions in the list. A message displays, confirming that all subscriptions were deleted.

Related Topics

["Cancel a Subscription" on page 60](#)

## **My Services**

When your subscription to a service offering is approved, a service instance is created. The service instance is composed of the service components that you customized when you created the subscription request. It might also include additional components, if they are included as part of the service offering.

To manage your services, select the  **My Services** widget in the Marketplace Portal Dashboard **More Actions** section. By default, the list of My Services displays All Categories, All Service States, and Newest First.

Related Topics

["Browse My Services" below](#)



["Filter My Services" on the next page](#)

["View My Service Details" on page 67](#)

## **Browse My Services**

You can browse services in the My Services view. Use the **My Services** status widget to display a list of services that have a certain status, such as Online, Reserved, Deploying, Transitioning, Modifying, Modify Failed, Failed, Offline, Cancelling, Cancellation Failed, Expiring, Expiration Failed, and Public Action Failed.

To browse your services:

1. In the Dashboard, in the **More Actions** sections, select the  **My Services** widget to open the My Services view.  
By default, all services are displayed in date order, with the newest services listed first.
2. Scroll up or down the list to browse services.
3. (Optional) Use Search  to browse services by keyword or the filters to browse certain types of services.
4. When you find a service that you are interested in, select its icon or name to display the My Service Details view.



Related Topics


["Filter My Services" below](#)

["View My Service Details" on page 67](#)

## Filter My Services

By default, the My Services view displays all categories, your newest services first, and all service states. Use the following filters to display certain services:

- ["All Categories" below](#)
- ["All Service States" below](#)
- ["Newest First" on the next page](#)

**Tip:** In the My Services view, use the Search filter  to locate a certain service by keywords. Enter text that represents what you are looking for so that the user interface filters out these specific items.

## All Categories

You can subscribe to a variety of services, such as application servers, email servers, or web hosting services. You can filter by these services, as categories, to easily navigate to and review your subscriptions.

## All Service States

From the **All States** drop-down list, select one of the following filter values.

**Note:** The following table describes the service instance statuses and their corresponding subscription statuses.

Service Instance Status	Description	Corresponding Subscription Status
Online	The service instance is active.	Active

Service Instance Status	Description	Corresponding Subscription Status
Reserved	The service instance has not started because the start date for the subscription is in the future.	Pending
Deploying	The service instance is being deployed.	Pending
Transitioning	The service instance is being reserved for deployment.	Pending
Modifying	A service instance–affecting modification that was made to the subscription or a service-affecting action that was requested for the service instance has not been completed.	Pending (The subscription returns to the Active state after the modification is completed.)
Modify Failed	A service instance–affecting modification that was made to the subscription or a service-affecting action that was requested for the service instance failed.	Active
Failed	The service instance deployment failed.	Failed
Offline	The service instance is no longer available because the subscription was canceled or expired.	Canceled or Expired
Canceling	The service instance is being canceled.	Pending
Cancellation Failed	The service instance cancellation has failed.	Active
Expiring	The service instance is expiring.	Pending
Expiration Failed	The service instance expiration has failed.	Active
Public Action Failed	The action could not be completed due to a software or hardware issue. Public actions (reboot, start, or stop) only apply if the subscription is Active.	Active (The service might not be available.)

## ***Newest First***

From the **Newest First** drop-down list, select one of the following filter values:

Option	Description
Newest First	Your most recent service, based on the date the subscription started, is the first service in the list. This is the default.

Option	Description
Oldest First	Your oldest service, based on the date the subscription started, is the first service in the list.
Most Expensive	Your most expensive service.
Least Expensive	Your least expensive service.
Alphabetical	The list is ordered alphabetically, from A to Z.
Reverse Alphabetical	The list is ordered in reverse alphabetical order, from Z to A.

#### Related Topics

["Browse My Services" on page 64](#)

["View My Service Details" below](#)

## View My Service Details

In the My Service Details view, you can see information about a service instance and request actions for a service instance.


Information displayed in the My Service Details view varies because it is based on the service offering to which you subscribed. This information might include the IP address, version, and uptime data for the service instance and component information, such as the number of registered and active users on an LDAP server and the date the LDAP server was last backed up, if your service instance includes an LDAP server.

You can execute actions on, or issue commands to, many of the components of a service instance. The actions you can execute on a service instance vary and are based on the service offering to which you subscribed. For example, if your subscription is for a server, you might be able to execute commands that start, stop, reboot, suspend, pause, unpauses, and resume the server.



The My Service Details view provides information in the following sections:

**Manage Subscription**—This link redirects you to detailed information about the subscription, where you can request actions for a subscription.

**Service Details**—This section shows information about the offering that fulfills the service, such as the name of the service offering, the name of the service design, the expiration date and time, and the owner. You can also click **View Service Topology** to see the topology diagram.

**Service Components**—These are the individual services that compromise your overall service delivery. Click the **Refresh** button to reload information about service components. In this section, for a certain service component, select its corresponding settings icon  to request an action on a service, such as reboot, pause, resume, and so on.

To view service details:


1. In the Dashboard, in the **More Actions** section, select the  **My Services** widget to open the My Services view.  
By default, all services are displayed in date order, with the newest services listed first.
2. Scroll up or down the list to browse services.
3. When you find a service that you are interested in, select its icon or name to display the My Service Details view.
4. (Optional) Click **Manage Subscription** to open the Subscriptions Details view for the service. See "[View Subscription Details](#)" on page 58
5. (Optional) Click **View Service Topology** to show a topology diagram of the service instance, including summary information.
6. In the Service Components section, for a certain service component, select its corresponding settings icon  to request an action on a service, such as Clone Pattern, Build Resource Provider List, and Log Messages.
7. In the Service Action dialog, click **Execute**. A service request will be filed and will be subject to approval. After it is approved, your service will show the action performed.
8. Wait for the Success dialog and then click **OK**.

Related Topics

["Browse My Services" on page 64](#)

["Filter My Services" on page 65](#)

## **Notifications**

The **Notifications** widget provides an easy way to monitor your notifications. To manage your subscription notifications, select the  **Notifications** widget in the Marketplace Portal Dashboard **More Actions** section. By default, the list of notifications displays **Newest First**.

Notifications are issued for the following reasons:

Notification Type	Description
Pending approval	If you are an approver of requests, a request needs your approval.
Request approved or rejected	A request you submitted has been approved or rejected. This notification is also created when a subscription request is automatically approved .
Subscription status change	The status of one of your subscriptions has changed: <ul style="list-style-type: none"> <li>• An approved subscription is now active.</li> <li>• A subscription was canceled.</li> <li>• A subscription has expired.</li> <li>• A subscription has failed.</li> </ul>
Custom Notifications	A custom notification created by your system administrator.

In the Notifications view, notifications are displayed with the most recent notification at the top of the list.

Information in a notification includes:

- The reason for the notification.
- The name of the related service offering or subscription.
- The date and time the notification was created.

When a subscription-related event occurs—such as when a request for a subscription is approved or canceled, or a subscription fails or expires—the user who requested the subscription is notified about the change of status. Users who approve requests are notified when subscriptions needing their approval are requested or modified.

Additional notifications can also be generated, depending on the offering you have subscribed to.

#### Related Topics

["Browse Notifications" on the next page](#)


["Filter Notifications" on the next page](#)

["View Notification Details" on page 71](#)

# Browse Notifications

You can view your notifications in the Notifications view and in email messages sent to the email address associated with your login account.

To browse notifications:

1. In the Dashboard, in the **More Actions** section, select the  **Notifications** widget to open the Notifications view.  
By default, all notifications are displayed by date order (Timestamp), with the newest subscriptions listed first. This list includes notification summary information and subscription names.
2. Scroll up or down the list to browse notifications.
3. When you find a notification that you are interested in, select the name of the notification to display the Notification Details view.

Related Topics


["Filter Notifications" below](#)

["View Notification Details" on the next page](#)

# Filter Notifications

By default, the Notifications view displays all notifications, with the most recent notifications listed first. Use the following filters to change the display order of notifications:

- ["Newest First" on the next page](#)
- ["All Notifications" on the next page](#)

**Tip:** In the Notifications view, use the Search filter  to locate a certain notification by keywords. Enter text that represents what you are looking for so that the user interface filters out these specific items.

## Newest First

By default, the Notifications view displays the most recent notifications first. Select **Oldest First** to change the order of notifications in this view.

Option	Description
Newest First	The most recent notification, based on the date the notification was created, is the first notification in the list. This is the default.
Oldest First	The oldest notification, based on the date the notification was created, is the first notification in the list.

## All Notifications

By default, the Notifications view displays all notifications. To change the display order, select one of the following filter values: Past Day Notifications, Past Week Notifications, Past Month Notifications, or Past Year Notifications.

Related Topics


["Browse Notifications" on the previous page](#)

["View Notification Details" below](#)

## View Notification Details

You can view information about notifications in the Notifications view.

To view notification details:

1. In the Dashboard, in the **More Actions** section, select the  **Notifications** tile to open the Notification List view.

By default, all notifications are displayed by date order, with the newest notifications listed first. This list includes notification descriptions and subscription names.

2. Scroll up or down the list to browse notifications.
3. When you find a notification that you are interested in, select the name of the notification to display the Notification Details view. This view displays the date when the notification was created, the subscription name and its expiration date, the subscription status and a brief description of the service subscription, the owner, and the associated offering name.

#### Related Topics

["Browse Notifications" on page 70](#)

["Filter Notifications" on page 70](#)



