



Propel

Software Version: 2.20.p2

HPE Propel Consumer Help

Document Release Date: December 2016

Software Release Date: December 2016



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

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
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To check for recent updates or to verify that you are using the most recent edition of a document, go to: <https://softwaresupport.hpe.com/>.

This site requires that you register for an HPE Passport and to sign in. To register for an HPE Passport ID, click **Register** on the HPE Software Support site or click **Create an Account** on the HPE Passport login page.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HPE sales representative for details.

Support

Visit the HPE Software Support site at: <https://softwaresupport.hpe.com>.

This website provides contact information and details about the products, services, and support that HPE Software offers.

HPE Software online support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the support website to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Download software patches
- Manage support contracts
- Look up HPE support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require that you register as an HPE Passport user and to sign in. Many also require a support contract. To register for an HPE Passport ID, click **Register** on the HPE Support site or click **Create an account** on the HPE Passport login page.

To find more information about access levels, go to: <https://softwaresupport.hpe.com/web/softwaresupport/access-levels>.

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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Launchpad

Welcome to the HPE Propel Launchpad. From here, consumers can order, track, and manage their IT services, access knowledge articles, and more. Administrators can manage catalogs, organizations, catalog items, and perform other administrative tasks.

Launchpad Sections

The Launchpad content is divided into several areas or sections.

Banner - This administrator customizable area of Launchpad typically contains a background image, the *banner*, or a group of images that are displayed one at a time for a specified time interval before rotating to the next image.

You will also find:

- The HPE Propel product logo or your organizations logo
- Possibly one or more buttons to launch applications
- Your user avatar that when clicked displays a drop-down list of additional navigation options. See "[Avatar and Action Drop-Down List](#)" on page 11 for more information.

Tip: Click the arrow in the lower corner of the banner to expand or minimize this content.

My Information (available to consumers and organization administrators)

This section includes:

- HPE Propel Website Link
- Current date and time

My Applications

Launchpad has a **My Applications** section that includes tiles that when clicked on launch an application available to the user. More information on the tasks offered in this section can be found in [Tasks](#).

Tasks

The user's role determines what tasks they will be able to perform. More information on each of the following can be found in either the HPE Propel Consumer or Administrator help.

The following tiles are typically associated with consumer tasks:

- **Knowledge** - Access knowledge articles
- **Request Support** - Request support assistance
- **Services** - Manage service subscriptions
- **Shop** - Shop for catalog items

The following tiles are typically associated with organization administrative tasks:

- **Business Processes** - Create, customize and manage HPE Propel policies and processes
- **Catalogs** - Create and manage catalogs
- **Catalog Items** - Create and manage catalog items
- **Categories** - Create and manage categories used to group items within a catalog
- **Catalog Connect** - Create and manage catalog aggregations, which contain catalog items imported from end-point systems
- **Policies** - Create and manage approval policies
- **Suppliers** - Create and manage end-point fulfillment systems, also known as suppliers

The following tiles are typically associated with administrative tasks:

- **Content Management** - Manage Service Exchange content packs
- **Diagnostics** - View basic monitoring and health check data
- **Identity** - Create and manage organizations and manage licensing

Detailed help is available when you navigate to any of these applications.

Additional Actions

Additional actions are available by clicking on the avatar at the top of HPE Propel views. See "[Avatar and Action Drop-Down List](#)" on page 11 for more information.

Tip: Click [here](#) for the latest English version of the HPE Propel Admin Help, or [here](#) for the latest English version of the HPE Propel Consumer Help, and enter your HPE Passport credentials (user ID and password). Alternatively, go to the HPE Software Support site at <https://softwaresupport.hpe.com/group/softwaresupport>. Enter your HPE Passport credentials and then click **Sign In**. Type **Propel help** into the search text box. In the results section, select the help PDF you are interested in that has the most recent date.

Get Started

Get started here!

- ["Prerequisites" on page 7](#)
- ["User Interface Customization" on page 8](#)
- ["Adaptive Content" on page 8](#)
- ["Language Display" on page 8](#)
- ["Log In" on page 10](#)
- ["Log Out" on page 10](#)
- ["Online Help " on page 11](#)

Prerequisites

Review the following requirements:

- HPE Propel uses https and by default runs on port 9000. If the Launchpad is customized for your organization, contact your Propel administrator to determine whether the port or protocol has changed.
- You must use a supported browser. A minimum screen resolution of 1024x768 is supported. As a best practice, HPE recommends a screen resolution of 1280x1024. For information about supported browsers, refer to the *HPE Propel Support Matrix*.
- The default URL format is: `https://<HOST>:9000/org/<ORG_ID>`

Password Security

A master password is used to encrypt passwords for user accounts, such as `admin`, `consumer`, and `idmTransportUser`. As a best practice for security within your organization, HPE recommends that you change the default master password during the installation process. For password details, refer to the *HPE Propel Administration Guide*.

User Interface Customization

As an end user, you might want to use your organization's branding in the HPE Propel user interface.

To support your organization's branding styles and standards, you can customize certain user interface elements, such as the Launchpad icon, title, welcome message, footer message, widgets, and security classifications. For instructions on how to customize these user interface elements, refer to the *HPE Propel Customizing Launchpad* document or contact your Propel administrator.

Adaptive Content

The user interface layout is designed to adapt to various screen sizes, where the content adjusts to the size, and where all functionality persists. View it on your desktop, tablet, or other mobile devices. Across these device screens, an intuitive user interface displays and includes all functionality. For screen resolution requirements and best practices, see "[Prerequisites](#)" on page 7.


Language Display

By default, the user interface displays in a left-to-right direction. For certain languages, such as Arabic and Hebrew, you can configure supported browsers for a right-to-left user interface display.

- Several navigation components in the Portal, such as the organization logo and user avatar 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.


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 a supported language from the drop-down list.
6. Click **OK**.
7. For the language that you want the views displayed in, select it and then drag to the top of the Languages list.
8. In the Languages window, click **Done**.
9. Log out and then log back in for the selected language to 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.
4. In the Languages window, in the **Select a language to add** drop-down list, select a supported language, 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 for the selected language to display. This language setting persists in your browser until you change it.

Note: Navigation components display on either the right or left side of the user interface, depending on the language configured in your browser.

Log In

To log in:

1. Open a browser window.
2. Enter the URL provided by your Propel administrator. The landing page displays.
3. Click **Login**. The login page displays.
4. Enter your **Username** and **Password**, then click **Log In**.
 - If the login request token is invalid or has expired, you will see a warning, and will be allowed to enter valid credentials.
 - HPE Propel Launchpad supports single sign-on, which might change the login experience that is based on your organization's settings. Contact your Propel administrator for additional information.

Log Out


To log out:

- Click on the user avatar at the top of the view, and select **Logout** from the drop-down list.
Your HPE Propel session will be ended.

Back Navigation

In any view in the Portal, click the application icon in the heading under the banner to return to the top of the current application. Click the Propel or organization icon in the heading to navigate to Launchpad.

Search

In most views, you can use the search tool  to locate an object by a text search. See ["Searches" on page 12](#) for more information.

Online Help

Tip: Click [here](#) for the latest English version of the HPE Propel Admin Help, or [here](#) for the latest English version of the HPE Propel Consumer Help, and enter your HPE Passport credentials (user ID and password). Alternatively, go to the HPE Software Support site at <https://softwaresupport.hpe.com/group/softwaresupport>. Enter your HPE Passport credentials and then click **Sign In**. Type **Propel help** into the search text box. In the results section, select the help PDF you are interested in that has the most recent date.

You can access the online Help from any view in HPE Propel. Review the context-sensitive online Help for instructions on how to perform tasks.

To access the online Help:

1. From any view, in the user avatar drop-down list, select **Help** to open the online Help.
2. Context-sensitive help will be displayed. You can also view other topics by selecting sub-folders in the left navigation pane to expand the table of contents.
3. Use the search box to look for topics by keyword.
4. (Optional) Use your browser to save Favorites or Bookmarks for topics.
5. (Optional) At the bottom of a topic, click the **Send Help Center feedback** link to help us improve the information you need!

Avatar and Action Drop-Down List

The HPE Propel views include an avatar, or graphical representation of the user. It is typically a circle around the first initial of the user name.

The avatar is located at the top of the user interface. Click on the avatar to display a drop-down list of additional navigation options. The options presented in all views include:

- **About** - Displays the product name and version number
- **Help** - Displays context-sensitive online help

- **Logout** - Logs you out, ending your user session
- **My Workstream** - View a list of the five most recent unread workstream feeds, or navigate to the **My Workstream** view where you can view all your feeds.

Consumer focused views might include options such as:

- **Approvals** - Navigates to the **Approval List** view where you can see and manage requests that require approval.
- **Cart** - Navigates to the **Shopping Cart** view where you can modify your cart contents and place your order
- **Orders** - Navigates to the **Orders** view where you can view orders and order details.
- **Support Requests** - Navigates to the **Support Catalog** view where you can browse and manage support requests, and more

Administrative focused views might include options such as:

- **License** - View and manage product license information

Searches

When logged in with a **consumer** or **orgadmin** role, you can search each application's information using its search feature. Additionally you can search HPE Propel more broadly using the **Search Propel** feature available in HPE Propel **Launchpad** and in the **Request Support** application.

Search Shop, Request Support, and Knowledge applications use HPE IDOL (Intelligent Data Operating Layer) for searches. For detailed information on Propel searches with IDOL, see the *HPE Propel Searches with IDOL* white paper.


IDOL Search Quick Tips

Following are several basic IDOL search tips. For detailed information on Propel searches with IDOL, see the *HPE Propel Searches with IDOL* white paper.

- **Wildcard search** - Use wildcards in the search string. A question mark (?) represents a single character; an asterisk (*) represents any number of characters.

- **Exact phrase search** - Enclose the search string in double quotation marks (""). This forces IDOL to search only on the exact string, and not for results that appear relevant even though the exact search string was not found.
- **Boolean Search** - Search on a Boolean expression using operators AND, NOT, OR, and others.

Search Propel

Enter text in the **Search Propel** text box to locate relevant content based on the specified keyword or string, then click on the search icon . Content searched includes that found in the **Shop**, **Knowledge**, and **Request Support** applications. The search results view lists relevant content, as well as a list of what applications the content was found in. Click on a search result to navigate to that specific content, or click on an application to view more detailed search results for that application only.

Sort Search Results

By default, search results are displayed with most relevant first. Use the drop-down list to sort by newest, oldest, price, alphabetical, reverse alphabetical, and so on.

Filter Search Results

Refine the results of the content displayed by selecting a specific application whose content is to be searched. Use the application drop-down list to select all available applications or one specific application. Content searched includes data found in the **Shop**, **Knowledge**, and **Request Support** applications.

Shop

Concepts

The Shop application allows the HPE Propel consumer to shop for catalog items, place orders, and monitor and manage details related to these orders.

Tasks

The following tasks are available:

1. Browse catalog items:
 - To browse Popular and New Services, and if defined by your administrator, Featured Services, click the Shop tile in the HPE Propel Launchpad.
 - To browse all catalog items, click **Browse Catalog** found on:
 - The Shop app banner
 - The Launchpad banner
2. Select a catalog item to view details and place an order. See "[Start Shopping](#)" on page 14.

Start Shopping

Concepts

To start shopping, you must access the Shop application from the HPE Propel Launchpad. In the Shop view you can browse available catalog items and then place your order.

Tasks

- ["To Start Shopping" on page 15](#)
- ["Browse and Search Catalog Items" on page 15](#)

To Start Shopping

1. Click the HPE Propel Launchpad **Shop** tile or **Start Shopping** in the Launchpad banner to navigate to the **Shop** view.
2. Select a catalog item. More information follows on browsing and searching catalog items.
3. Click **Configure** to customize the item. **Bundle Items** content will be displayed if this is a bundle.
4. Click **Order Now** to order this item immediately, or **Add to Cart** then **Continue Shopping** to continue shopping (see ["Shopping Cart" on page 17](#) for more information).

Tip: You can optionally add attachments when ordering a new item. For HPE Service Manager (SM) suppliers, attachments are bi-directional. That is, attachments added in HPE Propel appear in the supplier system and attachments added in the supplier system appear in HPE Propel.

5. (Optional) If you are a manager, you will be able to specify any user you manage as the recipient of this order.
 - a. In the **Service Details** view, the **Recipient** text box will by default contain your user name. Type any portion of a user's name in the **Recipient** text box. A list of names available to you that contain this string will be displayed. Click on a name to select that user.
6. Complete the order information, then click **Submit** to submit your order.

Note: After submitting your order, you can click on the displayed order number in the order confirmation to open the **Order Details** view, where you can view order details and status.

Browse and Search Catalog Items

Use the **Shop** view to browse and order catalog items. Shop by category and by keyword search in this view, or to view all available catalog items, click **Browse Catalog** to navigate to the **Service Catalog**

view.

Click a catalog item to open the **Service Details** view, where you can view additional details and order that item.

Browse by Category

In the **Shop** view you can shop for catalog items by browsing the following:

- **Popular Services:** These are the most subscribed to services, and are typically catalog items popular with other members of your organization.
- **New Services:** These are services recently added to the catalog.
- **Featured Services:** This is an abbreviated list of services your organization is promoting. During organization creation, any category can be set as a featured service category. Catalog items published under that category are treated as featured catalog items and will be populated in the **Featured Services** view. Contact your Propel administrator for more information.

The default display will include up to six items in each of these categories. Click on an item to open the **Service Details** view where you can see additional details and order the selected item. Click **See all** to navigate the category's view and see all items in that category.

Search Catalog Items

Enter text in the search filter to locate catalog items whose name contains the specified keyword or string.

Browse all Catalog Items

To view and shop all available catalog items, click **Browse Catalog** to navigate to the **Service Catalog** view.

More Actions

Click the avatar in the **Shop** view banner to display a drop-down list of additional actions. See the HPE Propel Launchpad Help for more information.

Shopping Cart

Concepts

In the HPE Propel Portal, you can browse for catalog items and add them to the shopping cart for a single checkout transaction. This transaction is recorded as one order. Note that shopping cart contents persistent across Portal sessions. When you log out, the shopping cart will not be emptied.

Tasks

To complete a shopping cart checkout:

1. Access your **Shopping Cart** view by clicking on **Cart** from the avatar drop-down list in any Portal view.
 - Click **Edit** to review and modify configuration details of any item in your cart, and then click **Update** to update the item and return to the **Shopping Cart** view.
 - Click **Remove** to remove an item from your cart. You will be asked to confirm item removal. Click **Continue** to remove the item from your cart, or **Cancel** to keep item in cart.
 - Change the quantity of an item to be ordered. Click **Update** to save your changes.
2. Click ← **Continue Shopping** if you wish to browse the catalog and add more catalog items to your shopping cart.
3. Click **Checkout** to display the **Order Information** view. Complete the following before submitting your order:
 - **(Optional) Specify recipient**—If you are a manager, you will be able to specify any user you manage as the recipient of this order. Type any portion of a user's name in the **Recipient** text box. A list of names available to you that contain this string will be displayed. Click on a name to select that user.
 - **Specify Order Name**—Enter a meaningful custom name for this set of items in your shopping cart. As a best practice, create names that easily identify them as services in your organization.
 - **(Optional) Specify Purpose for Ordering**—Provide an optional description of this order. The description can be up to 2,048 characters in length.
 - **(Optional) Attach File(s) to the Order**—If desired attach one or more files to this order. These would typically be files that provide more information for the order approval process, such as a

purchase order. You can browse for a file on your system by clicking the **Attach File** button, or drag and drop a file to the provided area.

4. Click **Submit** to place your order. The **Order Confirmation** view displays a summary of all items in your order and the order number. You can click the order number to navigate to the **Order Details** view.

Note: Internet Explorer 10 or higher is recommended when attaching documents to an order. See the HPE Propel Support Matrix for more information on supported browsers.

Catalogs

Concepts

Catalogs enable the administrator to group and publish catalog items as desired for an organization. Catalog items listed in the **Service Catalog** view are a compilation of items from all catalogs you have access to, and are presented in a unified view.

Tasks

- ["View and Shop Catalog Items" on page 18](#)
- [" Search Catalog Items" on page 19](#)
- ["Sort Catalog Items" on page 19](#)
- ["Filter Catalog Items" on page 19](#)

View and Shop Catalog Items

1. Navigate to the **Service Catalog** view from the HPE Propel Shop app by clicking **Browse Catalog**. See [Start Shopping](#) for more information.
2. You can scroll up and down to browse available items, search by keyword, and set filters to customize the display.

Search Catalog Items

Enter text in the search text box to locate catalog items whose names contain the specified keyword or string.

Sort Catalog Items

By default, catalog items are displayed with newest first. Use the drop-down list on the right hand side above the catalog items to sort by:

- Relevancy
- Newest
- Oldest
- Most expensive
- Least expensive
- Alphabetical
- Reverse alphabetical

Filter Catalog Items

Refine the results of the catalog items displayed by selecting any number of categories, and any number of price ranges. Categories allow the administrator to classify catalog items for improved filtering and identification. One or more categories can optionally be associated with a catalog item when the item is created.

You can select the categories and/or prices desired under **Category** and **Price** on the left side of the **Service Catalog** view.

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

Catalog Item Details

Concepts

In the **Service Details** view, the following information about the selected catalog item displays:

- The catalog name, item name, and categories assigned to the item
- Catalog item's image
- Description of the catalog item
- Pricing Information
 - A catalog item can have two prices: the default initial price and the recurring fee.
 - For example, a subscription with an initial price of \$1000 might also have a periodic fee of \$200 per month for the duration of the subscription.
 - If you change the options associated with the item (for example, increasing the size of the hard drive or the amount of memory), the initial price, recurring fee, or both, might change to reflect the change in options.
 - The recurring fee can be hourly, daily, weekly, monthly or yearly.
 - The number format for pricing is based on your browser's locale.
- **More Information** This area includes additional information such as when this catalog item was last updated.

Tasks

- ["Configure Item for Ordering" on page 20](#)
- ["Order or Add to Cart" on page 21](#)

Configure Item for Ordering

Click **Configure** to configure this catalog item for ordering. Here you will find:

- **Option Sets:** This information includes the available option sets (if any) and the cost of the different options.

- If you want to subscribe to the catalog item you are viewing, configure your subscription request in this section. For example, if the catalog item includes a server, the server might include options you select to configure the number of CPUs and the amount of RAM.
- Dynamic options are information fields that are related to a catalog item. These fields allow you to specify additional requirements for a catalog item. For example, you might be able to specify delivery and pickup options. Dynamic options are created by using a wizard in HPE Service Manager (SM). Valid field description values include *equals*, *does not equal*, and *starts with*. Contact your Propel administrator for more information.

Each option will include:

- **Initial Price:** The initial price of the item.
- **Recurring Price:** The periodic fee, if any, of the item.

As you select option(s) the price **Subtotal** will be updated to reflect the total initial price and total recurring fee.

- **Requires Approval:** Indicates whether your request for the catalog item must be approved. Your order will not be fulfilled until the designated approver(s) approve your request.

Order or Add to Cart

Click **Order Now** to order just this item, or **Add to Cart** to continue shopping. If you click **Order Now**, complete the order information and then click **Submit**. The **Order Confirmation** view displays the unique order number.

Orders

Concepts

A new order is created when you submit an order for an individual catalog item or item(s) in your shopping cart.

Be aware that requests for new services and modifications to existing services might require approval. Depending on the approval policy for the catalog item(s) you are requesting, more than one approval may be required. Cancellations do not require approval.

Tasks

View Your Orders

1. Select **Orders** from the avatar drop-down list in the HPE Propel Portal. By default, the **Orders** view lists your open orders, with newest first.
2. Scroll up and down to browse orders, search by keyword, and set filters to customize the display.

Search Orders

Enter text in the search filter to locate orders whose names contain the specified keyword or string.

Sort Orders

In the HPE Propel Portal, you can change the sequence in which orders are displayed. Use the drop-down list on the right side above the list to sort by newest, oldest, most expensive, least expensive, alphabetical, or reverse alphabetical.

Filter Orders

You can refine the results of the orders displayed by selecting **Open Orders**, **Recent Orders**, or **All Orders**.


View Order Details

Click on an order to view the order's details. See [Order Details](#) for more information.

View Order Details

To view details for an order:

1. In the HPE Propel Portal, select **Orders** in the avatar drop-down list.
2. In the **Orders** view, select an order to display the **Order Details** view.

3. Order information typically including the following is displayed:
 - a. Date order was created
 - b. Order number
 - c. Cost information
 - d. **Order New** area where you can place a new order for items found in this order
 - e. Order state
 - f. **Resubmit Failed Items** area where, if appropriate, you can resubmit items for this order
 - g. Order name
 - h. Purpose of order
 - i. Submitted by and recipient information if requested on your behalf by someone else
 - j. **Your Items** area listing items included in the order.
A Request is created for each item in an order. Click  then **View Request** to access the **Order Item Detail** view for the associated item.

Requests

Concepts

A new request is created when you:

- Submit an order for one or more catalog items
- Make a change to a catalog item service
- Cancel a service

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


- Requests for new services and for modifications to existing services might require approval.
- Requests for the cancellation or deletion of services do not require approval.

Note: Depending on the approval policy for the catalog item you are requesting, approval might be

required from more than one approver.

Tasks

View detailed request information

1. In the HPE Propel Portal, select **Orders** in the avatar drop-down list.
2. In the **Orders** view, select an order to display the **Order Details** view.
3. Click  then **View Request** to access the **Order Item Detail** view for the associated item.

View Request Details

Concepts


The **Order Item Details** view typically displays the following information about the request you selected:

- Request description
- Quantity ordered
- Total cost and recurring cost information
- **Order New** area where you can place a new order for this item
- Request status
- Request number
- Date request was created
- Submitter information, as well as recipient information if requested by someone else
- Name and link to catalog item from which the request was created
- Item's configurations, if applicable
- **Comments** area where you can view and add comments to this request.

Tasks

- ["View Request Details" on page 25](#)
- ["Order Item in a Request" on page 25](#)
- ["Add Comment to a Request" on page 25](#)
- ["Add Attachments to a Request" on page 25](#)
- ["Continue an OO Request" on page 26](#) (OO suppliers only)
- ["Close a Request" on page 26](#)

View Request Details

1. In the Portal, select **Orders** in the avatar drop-down list.
2. In the **Orders** view, select an order to display the **Order Details** view.
3. Click  next to that item, and then click **View Request** to access the **Order Item Detail** view.

Order Item in a Request

1. Follow the steps to view request details (see ["View Request Details" on page 25](#)).
2. In the **Order New** area, click **Add to Cart**.
3. See ["Shopping Cart" on page 17](#) for information about completing this order, or click **Back to Order Details** to place the order later. The item will remain in your shopping cart.

Add Comment to a Request

1. Follow the steps to view request details (see ["View Request Details" on page 25](#)).
2. In the **Activities** area, type your comment into the text box.
3. Click the **Add Comment** button to add the comment to the request.

Add Attachments to a Request

1. Follow the steps to view request details (see ["View Request Details" on page 25](#)).
2. In the **Attachments** area, either drag and drop the attachment file or click in the area to open a

dialog to select the attachment file.

Note: For HPE Service Manager (SM) suppliers, attachments are bi-directional. That is, attachments added in HPE Propel appear in the supplier system and attachments added in the supplier system appear in HPE Propel.

3. Click the **Confirm Changes** button to add the attachment to the request.

Continue an OO Request

Note: This task is only applicable to requests for HPE Operations Orchestration (OO) suppliers.

After ordering an OO service request, the OO flow can be *paused*. This changes the order to *attention required*. When this happens, a Workstream notification indicating the paused state is created. To change the paused state and continue the order:

1. Follow the steps to view request details (see "[View Request Details](#)" on page 25).
2. In the **Actions** area, click the **Resume** button.
3. In the **Resume** dialog, type the required additional information, and then click the **Resume** button.

Close a Request

A service request can be closed when it is in either a *pending approval* or a *denied* state. For example, a consumer orders an item, and then while waiting for the item to be approved, decides to cancel the request by closing it.

1. Follow the steps to view request details (see "[View Request Details](#)" on page 25).
2. In the **Actions** area, click the **Close** button.
3. In the **Close** dialog, type a reason for closing the service request and then click the **Close** button.

Approvals

Concepts

Requests for new services and for modifications to existing services might require 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 catalog items.

Note: More than one approver might be required to approve a request for a catalog item. This depends on the approval policy for the catalog item.

Tasks

Access approvals:

1. Select **Approvals** from the avatar drop-down menu in the HPE Propel Portal. The **Approval List** view displays. View approvals for orders you've placed, as well as any approvals that require your attention.
2. Scroll up and down to browse approvals, search by keyword, and set filters to customize the display.

Search Approvals

Enter text in the search box to locate approvals with request names or user names that contain the specified keyword or string.

Sort Approvals

Change the order in which approvals are displayed. Use the drop-down list on the right side above the list to sort by newest, oldest, price, or by name (alphabetical or reverse alphabetical).



Filter Approvals

Refine the results of the approvals displayed by selecting the **Open Approvals** or **All Approvals** tab.

View an Approval

Click on an approval to view its details. See "[View Approval Details](#)" on page 28 for more information.

Approve or Deny Approval Requests

1. When you click the approve button  , a confirmation dialog displays. Click **Continue** to approve, or **Cancel** to leave the approval request unchanged.
2. When you click the deny button  , a confirmation dialog displays that contains a field for entering the reasons for denying the request. Click **Continue** to deny, or **Cancel** to leave the approval request unchanged.

View Approval Details

Concepts

The **Approval Details** view displays information about the selected approval. Typical content includes:

- General information including the order name, cost, status, date the order was made, who submitted the order, and more

Note: If you are an approver of this request and have not yet approved nor denied the request, **Approve Request** and **Deny Request** buttons will be displayed to allow you complete the request.

- **Approval Details** area including the number of users who have approved and denied the request, as well as the number of pending approvals.
- **Order Information** area including the order name and purpose of the order
- **Service Details** area

Tasks

View Approval Details:

1. Select **Approvals** from the avatar drop-down menu in the HPE Propel Portal. The **Approval List** view displays.

By default, open approvals are displayed by date, with the newest request listed first.

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

2. Scroll up or down the list to browse approval requests. Sort or filter the list as described in ["Approvals" on page 27](#)
3. Select an approval you are interested in to display the **Approval Details** view.

Approve or Deny a Request

If you are an approver of the displayed request and have not yet approved nor denied the request, **Approve Request** and **Deny Request** buttons will be displayed in the **Approval Details** view to allow you complete the request.

Request On Behalf

Concepts

With appropriate permissions, you can place orders on behalf of others. This is also referred to as *impersonation*. Your HPE Propel administrator defines a group of users who can impersonate others (*impersonation group*), as well as groups of users who can be impersonated (*impersonation target groups*). While in request on behalf mode, you will see the catalog items available to the user you are impersonating. When placing an order, the available recipients will be the user you are impersonating as well as any users this person manages.

See your administrator for information on request on behalf designations in your organizations.

Tasks

Request on Behalf

With appropriate permissions as described under **Concepts**, you can order catalog items on behalf of another user from the items in their **Service Catalog** view.

1. Click the **Shop** tile in the HPE Propel Launchpad.
2. Click the **Request On Behalf** tab.
3. Type any portion of a user's name in the search box presented in the side bar that appears. A list of names containing this string will be displayed. Click on a name to select and *impersonate* that user.

Note that you can only request on behalf of users that you've been given permission to impersonate.

4. Click **Confirm** to continue shopping from the selected user's catalog items, or **Cancel** to leave request on behalf mode.
5. A bar appears below the banner indicating that you are in request on behalf mode, as well as the name of the user you are impersonating.
6. Click **Browse Catalog** to see only catalog items available to the user you selected.
7. After selecting and configuring the catalog item of interest, click **Order Now** to order this item immediately, or **Add to Cart** then **Continue Shopping** to continue shopping (see "[Shopping Cart](#)" on page 17 for more information).
8. (Optional) If the person you are impersonating is a manager, you will be able to specify any user they manage as the recipient of this order.
 - a. In the **Service Details** view, the **Recipient** text box will by default contain the impersonated user's name. Type any portion of a user's name in the **Recipient** text box. A list of user names containing this string, and that this user manages, will be displayed. Click on a name to select that user.
9. Complete the order information, then click **Submit** to submit your order.
10. Exit request on behalf mode by clicking the **X** button on the request on behalf indication bar below the banner.
11. Click **Confirm** to exit this mode, or **Cancel** to stay in request on behalf mode.

Services

Concepts

A catalog contains published catalog items for consumer fulfillment in the HPE Propel Portal. Some items will be identified as *services* by the fulfillment system that provides them. Services often have recurring commitments or costs. For example, a monthly backup of data on your computer or the use of a virtual machine for some period of time, would likely be designated as services. Ordering a computer monitor or a badge for accessing your work facility would probably not be considered as services, and so would not be included in your list of services.

Tasks

- ["View Services" on page 31](#)
- ["Manage Services" on page 33](#)

View Services

To browse and manage your catalog item services, click the **Services** tile in Launchpad.

By default the **Services List** view lists active and pending services showing the most recently modified first. Refine this list by searching for select entries, filtering by state, adding other filters, and changing the order in which entries are listed.

An organization administrator will see services for everyone in their organization. Consumers will see only their own services.

Search Services

Enter text in the search filter to locate services whose name start with the specified keyword or string.

Add Filter

To add a filter:

1. Click **Add Filter**.
2. Use the drop-down to choose one of the offered filters. This typically includes:
 - o State
 - o Catalog Item
 - o Owner
 - o Group
3. If offered, further refine the chosen filter. For example, when filtering by **Owner**, you will be asked to choose from known users.
4. Click **OK** to set your services list filter, or **Cancel** to leave the filter unchanged.


Click the close  icon adjacent to a filter to remove that filter.

Filter by State



The default in the **Services List** view is to include a state filter, filtering for active and pending services. Click the currently selected state to choose a different one for refining the service items displayed.

Choose from:

- Active or Pending
- Pending
- Active
- Canceled
- Expired
- Terminated

Click the delete  icon to remove the **State** filter, thereby selecting all states. See **Add Filter** to resume using a **State** filter.

Group Services

Organize your services list by grouping like items together. Grouped services can be expanded by clicking  or collapsed by clicking . Grouping services is especially beneficial to organization administrators as they might be presented with a long list of services, and will need to organize them to make the content more usable.

1. Click the grouping drop-down list to display grouping choices.
2. Select from:
 - No Grouping
 - Group by Catalog Item and Owner - Groups all services created from the same catalog item together, and within each of these, groups each owner's services together.
 - Group by Owner and Catalog Item - Groups all services for the same owner together, and within each of these, groups services created from the same catalog item together.

Change Ordering of Services List

By default, services are listed with most recently modified shown first. To change the order of the services list:


1. Click **Last Modified** to display the drop-down list of choices.
2. Select to reorder by name, last modified, price, or recurrent price

Manage Services

Click on a service to view service details and to manage that service. See ["View and Manage Service Details" on page 33](#) for more information.


View and Manage Service Details


The **Service Detail** view displays information that typically includes the following. The content varies as appropriate for the service and its current state.

- Catalog item image
- Service name
- Service status
- Action buttons - Click  at the end of the section with the service name for a list of actions available for this service. Common actions include:
 - **Edit** to modify information associated with this service
 - **Cancel** for services with Active status (Confirmation will be requested before the service is canceled.)

- Service period, as well as start and end dates, if applicable
- Owner name
- Catalog item name with link to item in the catalog
- Request number with link to request details

Select a tab in the **Service Detail** view to access the following information:

Components tab - includes information about the components that make up this service. Click  adjacent to a component for actions available for modifying it. For example, if this service is for a virtual machine, an available action might be to modify the amount of memory for to this VM.

Modification tab - includes information about modifications you've made and actions you invoked on this service. Click  adjacent to an action to view more details on that action. This will include:

- Action type
- Action status
- Who requested the action
- Date action was performed
- Action description
- And possibly other information, for example, any costs associated with the action

Support tab - When your administrator created the catalog item associated with this service, they were able to associate support items with the service. This allows you to easily view information that could help you better understand or troubleshoot your service. You will typically be able to open a support request from this tab.

To access the **Service Detail** view:


1. In the HPE Propel Portal Launchpad, click the **Services** tile. The **Services** view is displayed.
2. Browse your services. See "[Services](#)" on page 31 for information on searching and filtering your services.
3. When you find a service you are interested in, click the name of the service to display the **Service Detail** view.

Edit a Service

Some services will be enabled for editing. Change the service name, description, or information relating to the service period such as the end date or whether it is a recurring service.

Note: You can only modify active services, and only services that the administrator has enabled for editing.

To access the **Edit Service** view:

1. Click the **Services** tile in the HPE Propel Launchpad to open the **Services** view.
2. Browse services.
3. When you find a service you want to modify, click on the service name to display its **Service Detail** view.
4. Click  at the end of the section with the service name for a list of actions available for this service.
5. If you are able to edit this service, **Edit** will be included in the list of actions. Click **Edit** to start the editing process. You will be able to modify only the fields enabled for editing.
6. Click **Save Changes** to save your changes.


Note: Your request is subject to an approval process.

Cancel a Service

You can cancel a service only if **Cancel** is displayed in the service's action list in the **Service Detail** view. Once a service is canceled, you will no longer have access to this service. Place a new order for this service if desired.

To access the **Cancel** service dialog:

1. In Launchpad, click the **Services** tile. The **Services** view is displayed.
2. Browse services.

3. When you find a service you are interested in, click the name of the service to display the **Service Detail** view.
4. Click  at the end of the section with the service name for a list of actions available for this service.
5. If you are able to cancel this service, **Cancel** will be included in the list of actions. Click **Cancel** to start the cancellation process.
6. A confirmation box is displayed that explains service cancellation. Click **Submit** in this box to confirm cancellation, or click **Cancel** or the **X** button to close this window without canceling the service.

Request Support

Concepts

You can get HPE Propel support assistance by using the HPE Propel **Request Support** application. Click the **Request Support** tile in the HPE Propel Launchpad to access this app.

Tasks

View Support Knowledge

You can view existing support knowledge including:

- Knowledge articles
- Reported support problems
- Support problems for your services

To search support knowledge:

1. Enter a phrase or question in the search text box.
2. Click **Submit**.
3. Support articles related your entry will be listed under:
 - **Knowledge** (knowledge articles)
 - **Support Catalog** (reported support problems)
 - **My Services** (support problems for your services) tabs.
4. Click on an article under any of these tabs to open it.

Open Support Request

1. Enter a phrase or question in the search text box as described above.
2. If no content listed meets your needs, under **Support Catalog** click on **Create a generic support request** to open a new support request. As a best practice, enter a detailed description in the form. See "[Open a Support Request](#)" on page 39 for more information.

Note: You can open a support request for another user by specifying the appropriate user in the **Requested For** field.

View Support Requests (Tickets)

Concepts

To view your support requests (tickets), select **Support Requests** from the avatar drop-down menu in the HPE Propel Portal.

By default, the **Support Requests** view lists open requests, with newest first. Scroll up and down to browse requests, search by keyword, and set filters to customize the display.

Tasks

View Support Requests

To view support requests, select **Support Requests** from the avatar drop-down menu in the HPE Propel Portal.

Search Support Requests

Enter text in the search filter to locate support requests whose names contain the specified keyword or string.

Sort Support Requests

Change the order in which support requests are displayed using the drop-down list on the right side above the list. Sort by newest, oldest, alphabetical, or reverse alphabetical.

Filter Support Requests

Refine the results of the support requests displayed by selecting **Open Requests**, **Completed Requests**, or **All Requests** to display respectively only support requests that are currently open, only those that have been completed, or all requests.

View Support Request Details

In the **Support Requests** view, select a support request to display the **Support Request Detail** view. See "[View and Update a Support Request](#)" on page 41


Open a Support Request

Concepts

Open a support request to submit a question to customer support. Open a support request when, for example, you need to request a new service or new hardware, or when you are experiencing a service outage.

Tasks

Open a Support Request

1. In the HPE Propel Launchpad, click the **Request Support** tile.
2. Enter a phrase or question in the search text box, and click the search icon . Items related your entry will be listed under the **Knowledge**, **Support Catalog** and **My Services** tabs.
3. If no content listed meets your needs, under **Support Catalog** click on the **Create a generic support request** field to open a new support issue.
4. Enter a detailed description in the form and complete all required fields.

Tip: You can optionally add attachments to a new support request. For HPE Service Manager (SM) suppliers, attachments are bi-directional. That is, attachments added in HPE Propel appear in the supplier system and attachments added in the supplier system appear in HPE Propel.

5. Click **Submit** when ready, or **Cancel** if you do not want to submit this request.

Close a Support Request

Concepts

As a best practice, you should close a support request if the problem no longer exists or if the problem was resolved by other actions.

Tasks

Close Support Request

1. In the Portal, select **Support Requests** in the avatar drop-down list.
2. In the **Support Requests** view, select the request you want to close.

3. In the **Support Request Detail** view, click **Close support request**.
4. Optional: Add a comment.
5. Click **Submit** to close this support request.

View and Update a Support Request

Concepts

In the **Support Request Detail** view, you can view detailed information about a support request, or add comments or attachments.

Tasks

- ["View Support Request Details" on page 41](#)
- ["Add Comment" on page 42](#)
- ["Add Attachment" on page 42](#)

View Support Request Details

To access the **Support Request Detail** view for a support request:

1. Select **Support Requests** from the avatar drop-down menu in the HPE Propel Portal.
2. Select **Open Requests**, **Completed Requests**, or **All Requests** depending on the content you want displayed.
3. Select an entry to display the **Support Request Detail** view (See ["View Support Requests \(Tickets\)" on page 38](#) for more information.)

The following information is typically displayed:

- Support request ID
- Status
- Description

- **Comments** tab lists all comments on this request
- **Attachments** tab lists any files attached to the request.
- Basic Information section with information such as date submitted and last updated, and more
- Contact Information section
- Additional Information section that includes the request's urgency

Add Comment

1. View existing comments by clicking the **Activities** tab in the **Support Request Detail** view.
2. Add a new comment by typing your comment into the text box and clicking **Add Comment**.

Add Attachment

1. View the list of existing attachments by clicking the **Attachments** tab in the **Support Request Detail** view.
2. In the **Attachments** area, either drag and drop the attachment file or click in the area to open a dialog to select the attachment file.

Note: For HPE Service Manager (SM) suppliers, attachments are bi-directional. That is, attachments added in HPE Propel appear in the supplier system and attachments added in the supplier system appear in HPE Propel.

Knowledge Articles

Concepts

You can browse HPE Propel knowledge and support articles. Scroll up and down a list of articles to browse, search by keyword, and sort or set filters to customize the display. When you scroll through the list and reach the bottom, more articles, if available, will be fetched and added to the end of the list.

Tasks

- ["Open a Knowledge Article" on page 43](#)
- ["View Support Articles" on page 43](#)
- [" Search Articles" on page 44](#)
- ["Sort Articles" on page 44](#)
- ["Filter Articles" on page 44](#)

Open a Knowledge Article

1. Access the knowledge article library from the **Knowledge** tile in the HPE PropelLaunchpad. This navigates to the **Knowledge** tab of the **Request Support** view.
2. Scroll up and down to browse knowledge articles, search by keyword, and sort or set filters to customize the display. More information on these actions follow.
3. When you find an article you are interested in, click on it to display the **Article Details** view. In addition to the body of the article, you'll find information such as the document ID, author, creation date, and more. See ["View Article Details" on page 44](#) for more information.

View Support Articles

Because users often search knowledge articles for answers before submitting a support request, knowledge and support articles can both be accessed from the **Request Support** view you are

directed to when you launch the **Knowledge** app. Click on one of the following tabs to navigate to the type of articles you wish to view.

- **Knowledge** - Knowledge articles available to you. This tab is automatically selected when you launch the **Knowledge** app from **Launchpad**.
- **Support Catalog** - Support items found in the HPE Propel support catalog
- **My Services** - Support items related to your services

Search Articles

Enter text in the search filter to locate articles whose names contain the specified keyword or string. See **IDOL Search Quick Tips** under "[Searches](#)" on page 12 for tips to improve your search results.

Sort Articles

To change the order in which articles are displayed, use the drop-down list on the right side above the list to sort by newest, oldest, relevancy, alphabetical, or reverse alphabetical.

Filter Articles

If you've selected the **Support Catalog** tab, refine the results displayed by selecting a **Category**. Expand or collapse a category by clicking the arrow, if present, next to a category name.

Tip: If you do not find a solution in the knowledge articles library, you can open a support request. See "[Open a Support Request](#)" on page 39.

View Article Details

In addition to the article content, the **Article Details** view displays the following information about the knowledge article you selected:

- Document Title: The title of the knowledge article
- Document ID: The KM (Knowledge Management) number
- Creation Date: The date and time the knowledge article was created
- Document Type: The type of knowledge article, such as Error Message/Cause, External, and so on
- Expiration Date: The date and time the knowledge article will expire
- Summary: A brief explanation of the article
- Author: The user name of who created the article
- Attachments: This is the knowledge article that you can open or download
- Article Tags: These are leveled-down (flat) knowledge categories. For example, if there is an article under category a > b and another article under category a > c, b and c will be shown as tags in both the **Knowledge Articles** view list and in the **Article Details** view. If there is a third article under category a, all a, b and c will be listed as tags.

To view article details:

1. Access the knowledge article library from the **Knowledge** tile in the HPE Propel Launchpad.
2. Search, filter, sort, or scroll up or down the list of articles requests.
3. When you find an article that you are interested in, click on it to display the **Article Details** view.

Workstream

Concepts

Your HPE Propel workstream contains a series of feeds on your activities, and allows your administrator to share announcements. You can access this content by clicking on **My Workstream** in the avatar drop-down list in Portal views. A number adjacent to the avatar indicates how many unread feeds you have. Workstream feeds are of the following types:

- User data - information regarding a change to one of your services, orders, approvals, support requests, and so on. These changes include, for example, status updates. This list of feeds is a *stream* of your *work* activities.
- Organization - an announcement from your organization administrator.

Information in a workstream feed includes when appropriate:

- Type of item it is about (e.g., order, approval, organization announcement, and so on)
- Reason for the feed
- Number associated with the item, for example, the order number
- Date and time the feed was created


When a new workstream feed is received, an alert is briefly displayed adjacent to the avatar. You can ignore the alert, close it, or click on it to display more information if available for this feed. With any of these actions, the workstream feed's status will remain *unread* (more on this later).

Tasks

- **Access recent unread workstream feeds:** Click on **My Workstream** from the avatar drop-down list in Portal views. A sidebar list of the most recent unread feeds will be displayed. Click on the check-mark to change a feed's status to *read*.
- **Access all workstream feeds:** Click on **See All** above, or on **My Workstream** below the sidebar list displayed from the avatar to open the **My Workstream** view.

By default, all feeds are displayed with the newest first. Click on the drop-down lists above the feeds for additional display options. You can filter the content displayed by selecting a specific feed source from the list provide under **Feed Context**.

The organization administrator can configure the type of workstream feeds to be included in users' workstreams by clicking on the settings icon next to **Feed Context**.

- **Open a detailed view:** Click on a feed to open a detailed view of the item the workstream feed pertains to by .
- **Change feed's read/unread status:** Click on the check-mark  to change the workstream feed's read/unread status. The check-mark is a darker color when the feed's status is read.

Send Documentation Feedback

If you have comments about this document, you can [contact the documentation team](#) by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on HPE Propel Consumer Help (Propel 2.20.p2)

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to Propel_IE@hpe.com.

We appreciate your feedback!

