



Cloud Service Automation

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For Microsoft Windows and Linux operating systems

Marketplace Portal Help

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Contents

Get Started	6
Prerequisites	6
User Interface Customization	7
Adaptive Content	7
Language Display	7
Log In	8
Log Out	9
Sidebar Menu	9
Back Navigation	10
Contextual Search	10
Global Search	11
Keyboard Navigation	11
Online Help	12
Welcome to the Marketplace Portal!	14
User Roles	14
Workflow	14
The Dashboard	15
Start Shopping	16
Shop for Services	16
Shop Dashboard	17
Manage Subscriptions	18
Most Requested	18
More Actions	18
Administration	19
Discover More	19
Notifications	20
Browse Notifications	21
Filter Notifications	22
Newest First	22
All Notifications	22
View Notification Details	23

Service Catalog	24
Service Offerings	24
Browse the Service Catalog	25
Filter the Service Catalog	27
All Categories	27
All Service Types	27
Alphabetical	28
Search the Service Catalog	29
Featured Services	29
New Releases	30
Popular Services	30
Subscriptions Expiring Soon	31
Service Offerings	31
Browse Catalog Details	32
Shopping Cart	34
My Services	36
Browse My Services	36
Filter My Services	37
All Categories	38
All Service States	38
Newest First	39
View My Service Details	40
Subscriptions	42
Browse Subscriptions	43
Filter Subscriptions	44
All Categories	45
All Subscription Statuses	45
Newest First	46
Health Status	46
Manage User's Subscriptions	47
View Subscription Details	48
Modify a Subscription	49
Cancel a Subscription	51
Delete a Subscription	53

Requests	56
Browse Requests	57
Filter Requests	59
All Request Types	59
All Request States	59
Newest First	60
View Request Details	60
Reorder a Service	62
Approved and Rejected Requests	64
When Your Request is Approved	64
When Your Request is Rejected	65
View Checkout Details	65
Cancel a Request	66
Delete a Request	68
Review Requests	69
Browse Approvals	71
Filter Approvals	72
All Request Types	73
Newest First	73
All Approval Statuses	73
View Approval Details	74
Approve a Request	75
Approved Notifications	75
Reject a Request	76
Rejected Notifications	77
Send documentation feedback	78

Get Started

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

- ["Prerequisites" below](#)
- ["User Interface Customization" on the next page](#)
- ["Adaptive Content" on the next page](#)
- ["Language Display" on the next page](#)
- ["Log In" on page 8](#)
- ["Log Out" on page 9](#)
- ["Sidebar Menu" on page 9](#)
- ["Back Navigation" on page 10](#)
- ["Contextual Search" on page 10](#)
- ["Global Search" on page 11](#)
- ["Keyboard Navigation" on page 11](#)
- ["Online Help " on page 12](#)

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, a screen resolution of 1280x1024 will give the best results. For information about supported browsers, see the Cloud Service Automation System and Software Support Matrix.
- Use the following default Marketplace Portal URL: https://<CSA_HOST>:8089/org/<ORG_ID>

User Interface Customization

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






To support your organization's branding styles and standards, you can customize certain user interface elements in the Marketplace Portal, such as the portal icon, the portal title, the portal welcome message, the portal footer message, themes, tiles, and security classifications. For instructions on how to customize these user interface elements, see the Customizing the Marketplace Portal whitepaper or contact your CSA Administrator.

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: Simplified, Enterprise, and 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 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.
- For portal customization, security classification is configured in the Organization Administration Console. In this console, go to the Customization view for an organization and then modify the securityLevel and themeName values, as needed.

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

Contextual Search


In a Marketplace Portal view, click the magnifying glass  to find a certain object by a meaningful keyword. Search results display in the selected object's view, such as Browse Catalog, Notifications, Review Requests, Requests, Subscriptions, and My Services. This search icon displays in the content area of each Marketplace Portal view.

In individual Marketplace Portal views, you can search for text in the following objects:

Objects	Text or Keyword
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 featured services in the catalog that your organization is currently promoting.
Services Expiring Soon	Names and descriptions assigned to services that will expire in 30 days.

Objects	Text or Keyword
(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.

Global Search

From any view in the Marketplace Portal, click the magnifying glass  to find a certain service offering, service instance, or subscription by a meaningful keyword. This search icon displays in the top header in the Marketplace Portal.

- For service offerings, global search finds the keyword in the name, description, option sets, options, and properties.
- For service instances and subscriptions, global search finds the keyword in the name, description, and instance properties (name and value).

Note: The Search Results view displays the keyword found only in service offerings, service instances, and subscriptions within your organization. In the Search Results view, click on an object for more detailed information about a service offering or subscription.

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.

Hotkey	Marketplace Portal View	Usage
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 subfolders to further expand the table of contents.
3. In the Search text box, enter keywords to search for topics that apply. 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 HPE](#) link to help us improve the information you need!

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 HPE Cloud Service Automation server and displays them in an intuitive view.

User Roles

The Marketplace Portal supports the following user roles:

- **Consumer:** You can subscribe to and manage service offerings, manage service subscriptions, and perform actions on service instances.
- **Consumer Organization Administrator:** In this role, you can:
 - Create, edit, and delete catalogs in your organization.
 - Manage service offerings in your organization's catalogs.
 - Manage a user's subscriptions in a certain organization by performing actions on a subscription *on behalf* of the original subscriber.
 - Use HPE IT Business Analytics to measure and optimize the cost, risk, quality, and value of IT services and processes.

Workflow

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.

In the Marketplace Portal, you can filter, sort, and search service offerings. This view grants users services configured in the administration area.

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

For more information about the Marketplace Portal, CSA, and other HPE products, visit the HPE web site at www.hpe.com.

Related Topics

["Get Started" on page 6](#)





["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 is considered dynamic because you can configure tiles you want displayed to support your organization.

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 magnifying glass to find a certain service offering, service instance, or subscription by a meaningful keyword. The Search Results view displays the keyword found only in service offerings, service instances, and subscriptions within your organization. This search action finds the keyword in the name, description, and properties of service offerings, services instances, and subscriptions. In the Search Results view, click on an object for more detailed information about a service offering or subscription. See "Global Search" in ["Get Started" on page 6](#).
-  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 the following navigation options:
 - **Help:** Open the online Help for the Marketplace Portal.
 - **About:** Display the UI Version and Server Version.
 - **Log Out:** Close and exit the Marketplace Portal.
-  Click the sidebar menu to display a list of all navigation links within the Marketplace Portal.
- [Need Help?](#) Click this link to open the online Help for the Marketplace Portal.



Note: These navigation components display on either the right or left side of the Dashboard, depending on the language that is configured in your browser. See "Language Display" in "Get Started" on page 6.

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 for Services" below.
- In the Dashboard, scroll up and down the rows of tiles to select service offerings by a category, such as Shop for Services, Manage Subscriptions, More Actions, and Discover More.




Tip: If you do not want to go directly to the Shop Dashboard view and want to collapse the Dashboard banner, click . To expand the Dashboard banner, click .

Tip: Click  to display all tiles in a row. Click  to hide all tiles in a row.

Tip: Use your keyboard to navigate sections, rows, and tiles in the Dashboard. See the hotkeys described in "Keyboard Navigation" in "Get Started" on page 6.

Shop for Services

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

-  **All Services:** These are all of the 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. 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. Contact your CSA Administrator for more information.

- **♥ Popular Services:** These are service offerings that are popular with other members of your organization. These are services that are in the top 10 service offerings for which a subscription request was submitted during the previous 30-day time period. Click the **See More** link to open the Popular Services view.

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

Shop Dashboard

Click **Shop Dashboard** 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 service offerings that are frequently requested by other members of your organization. These are services that are in the top 10 service offerings for which a subscription request was submitted during the previous 30-day time period.

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 31

Quick Links



Use these links to filter service offerings in the Browse Catalog view:

Offerings for Review: Show All Items, Show Items That Require Review, and Show Items That Do Not Require Review.

Categories: Show All Items, and categories defined for your organization, such as Application Servers, Application Services, Backup Services, CRM, and so on.

Manage Subscriptions

Use this row of Dashboard tiles to go directly to views that help you manage your own 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 tiles 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 pending count of approval 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.


Administration

Note: You must log in as the Consumer Organization Administrator to access this section in the Marketplace Portal Dashboard.

 **Manage User Subscriptions:** Use this tile to manage a user's subscriptions in a certain organization. Select this tile to perform actions on a subscription *on behalf of* the original subscriber. For more information, see **Manage User's Subscriptions**.

 **Catalog Management:** Use this tile to view, create, edit, and delete catalogs in your organization. For more information, see the *CSA Management Console Help*.

 **Offering Management:** Use this tile to manage service offerings in your organization's catalogs. You can view, create, delete, publish, and unpublish services offerings. For more information, see the *CSA Management Console Help*.

 **Showback Report:** Use this tile to go to HPE IT Business Analytics, which automatically gathers metrics from CSA to build key performance indicators. HPE IT Business Analytics provides scorecards and dashboards so that a Consumer Organization Administrator has insight into how to measure and optimize the cost, risk, quality, and value of IT services and processes. See the *HPE IT Business Analytics Administrator Guide* and the "Cloud Analytics" topic in the *CSA Management Console Help* for more information.

Discover More

Use this row of Dashboard tiles for hyperlinks to URLs customized for your organization by your CSA Administrator.

Pre-configured content will be visible in this tile, 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 page 24](#)

[" Review Requests" on page 69](#)

[" Requests" on page 56](#)

[" Subscriptions" on page 42](#)

[" Notifications" below](#)

[" Shopping Cart" on page 34](#)

Notifications

The **Notifications** tile provides an easy way to monitor your notifications. To manage your subscription notifications, select the **Notifications** tile in the 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"> • An approved subscription is now active. • A subscription was canceled. • A subscription has expired. • A subscription has failed.
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.

Tip: Click the magnifying glass  to find a certain notification by a meaningful keyword. Search results display in the selected Notifications view.

Related Topics


["Browse Notifications" below](#)

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

["View Notification Details" on page 23](#)

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.

Tip: Click the magnifying glass  to find a certain notification by a meaningful keyword. Search results display in the selected Notifications view.

To browse notifications:

1. In the Dashboard, in the **More Actions** section, select the **Notifications** tile 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" on the next page](#)

["View Notification Details" on page 23](#)

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" below](#)
- ["All Notifications" below](#)

Tip: In the Notifications view, use the Search filter  to find 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" on the next page](#)

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 21](#)

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

Service Catalog

You can go directly to the service offerings catalog by using the  **All Services** tile in the Marketplace Portal Dashboard **Shop for Services** section and in the  **Browse Catalog** option in the sidebar menu. Use this catalog to view individual offerings that are available in your organization.

Tip: Click the magnifying glass  to find a certain service offering by a meaningful keyword. Search results display in the Browse Catalog view.

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. When there are multiple versions of a service offering, the version number displays in parenthesis next to the name of each offering listed in the **Browse Catalog** view.

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 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.

In the **Browse Catalog** view, some service offerings in this list display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in several views within the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Requests**, **Request Details**, **Request Confirmation**, **Subscriptions**, and **Subscription Details**. As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the *CSA Management Console Help*.

Increasing the quantity for a service option may also increase the price for other options. For example, if you add a server then the number of CPUs and memory will increase, potentially increasing the price of each. For more information, see the *CSA Management Console Help*.

Related Topics

["Browse the Service Catalog" below](#)

["Filter the Service Catalog" on page 27](#)

["Search the Service Catalog" on page 29](#)

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.

In the **Browse Catalog** view, some service offerings in this list display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in several views within the Marketplace Portal, such as **Browse Catalog, Browse Catalog Details, Requests, Request Details, Request Confirmation, Subscriptions, and Subscription Details**. As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the CSA Management Console Help.

Tip: Click the magnifying glass  to find a certain service offering by a meaningful keyword. Search results display in the Browse Catalog view.

To browse the service catalog:

1. In the Dashboard, in the **Shop for Services** section, select the  **All Services** tile 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. A service offering can have documents, such as service level agreements and terms and conditions, attached to it. 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.

Note: Increasing the quantity for a service option may also increase the price for other options. For example, if you add a server then the number of CPUs and memory will increase, potentially increasing the price of each. For more information, see the *CSA Management Console Help*.

Related Topics

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

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

["Service Offerings" on page 31](#)

["Requests" on page 56](#)

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 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, click the magnifying glass  to find a certain service offering by a keyword. 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 25](#)

["Filter the Service Catalog" on page 27](#)


Featured Services

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

To view services that your organization is promoting:

1. In the Dashboard, in the **Shop for Services** section, select the  **Featured Services** tile 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

To view service offerings that were most recently added:

1. In the Dashboard, in the **Shop for Services** section, select the  **New Releases** tile 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** tile. These are service offerings that you are authorized to access.

To view services that are most frequently requested:

In the Dashboard, in the **Shop for Services** section, select the **Popular Services** tile to display a list of service offerings that are being tracked as most frequently requested.

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 29](#)

[" 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 subscriptions that are scheduled to expire soon:

1. In the Dashboard, in the **Manage Subscriptions** section, select the  Expiring Soon tile to 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 29](#)

Service Offerings

There are three basic steps in the Marketplace Portal workflow:

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

Service offerings are located in the  **All Services** tile in the Dashboard **Shop for Services** section or in  **Browse Catalog** in the sidebar menu.

Tip: Click the magnifying glass  to find a certain service offering by a meaningful keyword.





Search results display in the Browse Catalog view.

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 image.
 - 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, might 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.
 - **Show Pricing Details:** By default, the number of units, the type of unit (such as a flat cost), and the cost for each unit that corresponds to the initial price and recurring price of the subscription do not display in views throughout the Marketplace Portal, such as **Browse Catalog, Browse Catalog Details, Requests, Request Details, and Request Confirmation**. To support a common use case, detailed subscription pricing fees are hidden because they are typically used for department bill back purposes. Click **Show Pricing Details** to display all hidden subscription pricing fees.
 - **Hide Pricing Details:** If you clicked **Show Pricing Details**, the number of units, the type of unit (such as a flat cost), and the cost for each unit that corresponds to the initial price and recurring price of the subscription display in views throughout the Marketplace Portal, such as **Browse Catalog, Browse Catalog Details, Requests, Request Details, and Request Confirmation**. To hide these detailed subscription pricing fees, click **Hide Pricing Details**.

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 about a service offering. The default is set to **On**. To change this toggle by using your keyboard, tab through the Browse Catalog Details view and then stop tabbing when the toggle is lassoed by a blue rectangle. Use the directional arrows on your keyboard to slide the toggle to **Off**.
- **Option Sets 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 **Add To Cart** when you want to place a single order for more than one item.
-  Click **Checkout** to open the **Service Checkout** view. Enter your order information and then click **Submit Request**.
-  **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.
- **Validation Execution:** When user selects **Checkout**, **Add To Cart**, or **Recalculate** (if external pricing is enabled), then **semantic validation** is executed. Validation blocks User Interface until the result is calculated and if it fails, then same validation report is used as for property restrictions.

NOTE: Only not hidden and not locked properties are semantically validated.

When semantic validation identifies a failed input field, following error message is displayed: Click to resolve errors.

NOTE: When you click on the link `Click to resolve errors`, the failed input field is highlighted in the user interface with the possible error message.

Note: Increasing the quantity for a service option may also increase the price for other options. For example, if you add a server then the number of CPUs and memory will increase, potentially increasing the price of each. For more information, see the *CSA Management Console Help*.

Related Topics

["View Request Details" on page 60](#)

["View Checkout Details" on page 65](#)

["Approved and Rejected Requests" on page 64](#)

[" 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 remain in the cart, even after you log out. To empty the shopping cart, remove each item.


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** tile.
2. Select an offering, review its details, and then click **Add to Cart**.
3. While in the shopping cart, you can do the following:
 - a. Click **Edit Configuration** to change information about an offering. Click **Update** to save your changes.
 - b. Change the **Quantity** number. Click **Update** to save your changes.
 - c. Click **Remove Item** if you want to remove this offering from your shopping cart. In the Remove Item dialog, click **Yes**.
 - d. Click **Continue Shopping** to exit the shopping cart and browse the catalog to add more offerings to your shopping cart.
 - e. Use the browser's print option to print or save a copy of the contents of the shopping cart.
4. Click **Checkout** to display the Add Subscription Names view. Accept the default names or enter meaningful names for items in your shopping cart.

If the Checkout button cannot be selected, review your cart for the following messages:

- *This offering is no longer available*—The offering has been unpublished or removed from the catalog. You must remove this item from the shopping cart before you can check out.
 - *Offering has changed since it was added to the cart. Choose 'Edit Configuration' to validate offering before Checkout.*—The offering has been updated after you added it to your shopping cart. Click **Edit Configuration** and verify the changes to the offering. To accept the changes, click **Update**. If you do not want to accept the changes, return to the shopping cart and remove the item from your shopping cart.
5. 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.
 6. 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 60](#)

["View Checkout Details" on page 65](#)


["Approved and Rejected Requests" on page 64](#)

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** tile in the Dashboard **More Actions** section.

When there are multiple versions of a service offering, the version number displays in parenthesis next to the name of each offering listed in the **My Services** view.

Tip: Click the magnifying glass  to find a certain subscribed service by a meaningful keyword. Search results display in the My Services view.

Related Topics

["Browse My Services" below](#)


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

["View My Service Details" on page 40](#)


Browse My Services

You can browse services in the **My Services** view. This view displays 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, Upgrading, Upgrade Failed, and Public Action Failed.

Health status icons will be displayed for services that are online. Health status and capacity information is displayed for active subscriptions and services if the CSA administrator has it configured.

Tip: Click the magnifying glass  to find a certain subscribed service by a meaningful keyword. Search results display in the My Services view.

To browse your services

1. In the Dashboard, in the **More Actions** sections, select the **My Services** tile 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 the **Search**  tool 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. When there are multiple versions of a service offering, the version number displays in parenthesis next to the name of the offering in the **My Service Details** view.

Related Topics


["Filter My Services" below](#)

["View My Service Details" on page 40](#)

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" on the next page](#)
- ["All Service States" on the next page](#)
- ["Newest First" on page 39](#)

Tip: In the My Services view, use the Search filter  to find 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 Service 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
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

Service Instance Status	Description	Corresponding Subscription Status
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
Upgrading	The service instance is being upgraded.	Pending
Upgrade Failed	The service instance upgrade 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.
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 36](#)

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

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, unpause, 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. Health status and capacity information is displayed for active subscriptions and services if the CSA administrator has it configured.

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. Click the **Open Console** button to access the provisioned virtual machine from the browser.

To view service details

1. In the Dashboard, in the **More Actions** section, select the **My Services** tile 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 48](#).
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.

When user clicks **Execute** then semantic validation is executed.

Validation blocks User Interface until the result is calculated and if it fails, then similar validation report is used as for parameter restrictions in Marketplace Portal.

8. Wait for the Success dialog and then click **OK**.


Related Topics

["Browse My Services" on page 36](#)

["Filter My Services" on page 37](#)

Subscriptions

A subscription originates with a subscription request, which is a request for delivery of cloud services that is initiated by the subscriber (end user) using a service catalog in the Marketplace Portal. After a subscription request is approved, a service instance is created. For more information, see the Cloud Service Automation Concepts Guide and the CSA Management Console Help.

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


Note: If you are an authorized Consumer Business Manager, you can manage all user's subscriptions in your organization. See "[Manage User's Subscriptions](#)" on page 47.

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. When there are multiple versions of a service offering, the version number displays in parenthesis next to the name of each offering listed in the **Subscriptions** view.



The **All Subscriptions** tile 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, some service offerings in this list display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in several views within the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Requests**, **Request Details**, **Request Confirmation**, **Subscriptions**, and **Subscription Details**. As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the CSA Management Console Help.

Tip: Click the magnifying glass  to find a certain subscription by a meaningful keyword. Search results display in the Subscriptions view.

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 6](#).
- 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" below](#)

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

["View Subscription Details" on page 48](#)

["Modify a Subscription" on page 49](#)

["Cancel a Subscription" on page 51](#)

["Delete a Subscription" on page 53](#)

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.

In the **Subscriptions** view, some service offerings in this list display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in several views within the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**,


Requests, Request Details, Request Confirmation, Subscriptions, and Subscription Details.

As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the CSA Management Console Help.

Health status and capacity information is displayed for active subscriptions and services if the CSA administrator has it configured.

Tip: Click the magnifying glass  to find a certain subscription by a meaningful keyword. Search results display in the Subscriptions view.

To browse subscriptions:

1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** tile 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. When there are multiple versions of a service offering, the version number displays in parenthesis next to the name of the offering in the **Subscription Details** view.

Related Topics

["Filter Subscriptions" below](#)

["View Subscription Details" on page 48](#)

["Modify a Subscription" on page 49](#)

["Cancel a Subscription" on page 51](#)


["Delete a Subscription" on page 53](#)


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
- All Subscription Statuses

- Newest First
- Health Status

Note: These filters are displayed 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 are not displayed and only the magnifying glass  is displayed.

Tip: In the Subscriptions view, click the magnifying glass  to find 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.
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.

Health Status

You can filter by the following health status values:

- Normal
- Warning
- Major
- Minor
- Critical
- Suspended
- Powered off
- Unknown

Related Topics

["Browse Subscriptions" on page 43](#)

["View Subscription Details" on page 48](#)

["Modify a Subscription" on page 49](#)

["Cancel a Subscription" on page 51](#)

["Delete a Subscription" on page 53](#)

Manage User's Subscriptions


As an authorized Consumer Business Manager, you can manage all user's subscriptions in your organization.




In manager mode, you can perform actions on a subscription *on behalf of* the original subscriber, such as:

- Modify, cancel, or delete a user's subscription.
- Go to the **Request Details** view to review information about the user's original subscription request.
- Go to the **My Service Details** view to review information about the offering that fulfills the service, including service components and service topology.
- Review the subscription history and notifications for a user's subscription.

To manage a user's subscriptions in your organization:

1. In the Dashboard, in the **Administration** section, select the **Manage User Subscriptions** tile to open the **User Lookup** view.

The **User Lookup** view lists all users in your organization. By default, all users in an organization are displayed in alphabetical order. Use the Search tool  to find a certain user by name.

2. In the **User Lookup** view, select a user whose subscriptions you want to manage. The service offerings that the selected user subscribes to display in the **Subscriptions** view. In the Subscriptions view:
 - The user account name  that you are managing subscriptions *on behalf of* displays below your management mode account name .
 - Click the close icon  next to the user account name to exit management mode for that user and return to the Dashboard.
3. When you find a subscription want to manage, select its icon or name to display the Subscription Details view.

4. In the Subscriptions Details view, select an action you want to perform on this subscription, on behalf of its user, such as **View Request**, **View Linked Service**, **Modify Subscription**, **Cancel Subscription**, and **Delete Subscription**.

Related Topics

["View Subscription Details" below](#)

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

["Cancel a Subscription" on page 51](#)

["Delete a Subscription" on page 53](#)


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.
- Health status and capacity information is displayed for active subscriptions and services if the CSA administrator has it configured.
- The order number.
- The initial price and recurring price.

In the **Subscription Details** view, some service offerings in this list display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in several views within the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Requests**, **Request Details**, **Request Confirmation**, **Subscriptions**, and **Subscription Details**. As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the CSA Management Console Help.

To view subscription details

1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** tile 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 43](#)

["Filter Subscriptions" on page 44](#)

["Modify a Subscription" below](#)

["Cancel a Subscription" on page 51](#)


["Delete a Subscription" on page 53](#)

["View Request Details" on page 60](#)

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** tile 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 62.

When a user clicks **Modify Subscription** or **Recalculate** (if external pricing is enabled), then **semantic validation** is executed. Validation blocks User Interface until the result is calculated and if it fails, then same validation report is used as for property restrictions.

NOTE: Only not hidden and not locked properties are semantically validated.

When semantic validation identifies a failed input field, following error message is displayed:
Click to resolve errors.

NOTE: When you click on the link `Click to resolve errors`, the failed input field is highlighted in the user interface with the possible error message.

Related Topics

["Browse Subscriptions" on page 43](#)


["Filter Subscriptions" on page 44](#)

["View Subscription Details" on page 48](#)

["Cancel a Subscription" below](#)

["Delete a Subscription" on page 53](#)


Cancel a Subscription

You can only cancel subscriptions if the  cancel icon is displayed. You cannot cancel a subscription if this icon does is not displayed.

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** tile 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** tile 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** tile 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 44](#)

["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 in the Marketplace Portal.


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** tile 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 Detail view

1. In the Dashboard, in the **Manage Subscriptions** section, select the  **All Subscriptions** tile 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** tile 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 51](#)

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.
- 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 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** tile 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, All Request States, and Newest First.

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** tile, 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. When there are multiple versions of a service offering, the version number displays in parenthesis next to the name of each offering listed in the **Requests** view.

In the **Requests** view, some service offerings in this list display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your

Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in several views within the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Requests**, **Request Details**, **Request Confirmation**, **Subscriptions**, and **Subscription Details**. As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the CSA Management Console Help.

Tip: Click the magnifying glass  to find a certain request by a meaningful keyword. Search results display in the Requests view.

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" below](#)

["Filter Requests" on page 59](#)

["View Request Details" on page 60](#)

["View Checkout Details" on page 65](#)


["Approved and Rejected Requests" on page 64](#)

["Cancel a Request" on page 66](#)


["Delete a Request" on page 68](#)

["Reorder a Service" on page 62](#)


Browse Requests

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

In the **Requests** view, some service offerings display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in several views within the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Requests**, **Request Details**, **Request Confirmation**, **Subscriptions**, and **Subscription Details**. As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the CSA Management Console Help.

Tip: Click the magnifying glass  to find a certain request by a meaningful keyword. Search results display in the Requests view.

To browse requests:

1. In the Dashboard, in the **More Actions** section, select the  **My Orders** tile 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. When there are multiple versions of a service offering, the version number displays in parenthesis next to the name of the offering in the **Request Details** view.
4. (Optional) If the request you are looking for is not displayed, select a status in the **All Request 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 60](#)

["View Checkout Details" on page 65](#)

["Approved and Rejected Requests" on page 64](#)


["Cancel a Request" on page 66](#)

["Delete a Request" on page 68](#)

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, click the magnifying glass  to find 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 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.

Request State	Description
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 57](#)

["View Request Details" below](#)

["View Checkout Details" on page 65](#)

["Approved and Rejected Requests" on page 64](#)

["Cancel a Request" on page 66](#)


["Delete a Request" on page 68](#)

View Request Details


In the **Request Details** view, some service offerings display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in

several views within the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Request Details**, and **Request Confirmation**. As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the CSA Management Console Help.


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.
- Checkout information, such as the subscription name, group ownership, and the subscription term.
- Detailed pricing information for the initial subscription price and its recurring price.
 - Scroll down to **Price Breakdown** and then click **Expand**  .
 - ▶ **Show Pricing Details:** By default, the number of units, the type of unit (such as a flat cost), and the cost for each unit that corresponds to the initial price and recurring price of the subscription do not display in views throughout the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Requests**, **Request Details**, and **Request Confirmation**. To support a common use case, detailed subscription pricing fees are hidden because they are typically used for department bill back purposes. Click **Show Pricing Details** to display all hidden subscription pricing fees.
 - ▼ **Hide Pricing Details:** If you clicked **Show Pricing Details**, the number of units, the type of unit (such as a flat cost), and the cost for each unit that corresponds to the initial price and recurring price of the subscription display in views throughout the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Requests**, **Request Details**, and **Request Confirmation**. To hide these detailed subscription pricing fees, click **Hide Pricing Details**.

To view request details:

1. In the Dashboard, in the **More Actions** section, select the  **My Orders** tile 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 57](#)

["Filter Requests" on page 59](#)

["View Checkout Details" on page 65](#)

["Approved and Rejected Requests" on page 64](#)

["Cancel a Request" on page 66](#)


["Delete a Request" on page 68](#)

["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** tile 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.

Note: In the **Review Confirmation** view, some service offerings display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in several views within the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Requests**, **Request Details**, and **Request Confirmation**. As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the CSA Management Console Help.

Related Topics

["View Request Details" on page 60](#)

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

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: To see the most current status information, refresh the browser.

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 57](#)

["Filter Requests" on page 59](#)

["View Request Details" on page 60](#)

["View Checkout Details" below](#)

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

["Delete a Request" on page 68](#)

View Checkout Details

To review checkout details for a request:

1. In the Dashboard, in the **More Actions** section, select the **My Orders** tile.
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 62](#)

["Browse Requests" on page 57](#)

["Filter Requests" on page 59](#)

["View Request Details" on page 60](#)

["Approved and Rejected Requests" on page 64](#)

["Cancel a Request" below](#)

["Delete a Request" on page 68](#)

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** tile to display the Requests view.
2. In the **All Requests States** filter, select **Cancelable**.
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** tile to display the Requests view.
2. In the **All Requests States** filter, select **Cancelable**.
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 57](#)

["Filter Requests" on page 59](#)

["View Request Details" on page 60](#)


["View Checkout Details" on page 65](#)

["Approved and Rejected Requests" on page 64](#)

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

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** tile to display the Requests view.
2. In the **All Requests States** filter, select **Deletable**.
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** tile to display the Requests view.
2. In the **All Request States** filter, select **Deletable**.
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 57](#)

["Filter Requests" on page 59](#)

["View Request Details" on page 60](#)

["View Checkout Details" on page 65](#)

["Approved and Rejected Requests" on page 64](#)

["Cancel a Request" on page 66](#)

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.

You can approve requests for users you manage in your organization. In the Review Requests view, the number in the upper right corner is the pending count of approval requests.

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** tile in the 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** tile 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** tile 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 CSA Management Console.

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

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 **Review Requests** view, some service offerings in this list display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in several views within the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Requests**, **Request Details**, **Request Confirmation**, **Subscriptions**, and **Subscription Details**. As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the CSA Management Console Help.

Tip: Click the magnifying glass  to find a certain object by a meaningful keyword. Search results display in the Review Requests view.

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 74](#)

["Approve a Request" on page 75](#)

["Reject a Request" on page 76](#)


["Approved and Rejected Requests" on page 64](#)

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.

In the **Requests** view, some service offerings in this list display the initial price of the subscription and the recurring fee for the subscription, and some service offerings do not display these prices. Your Consumer Organization Administrator configures the option to show or hide this pricing information in Marketplace Portal views. Depending on the configuration setting, these prices will or will not display in several views within the Marketplace Portal, such as **Browse Catalog**, **Browse Catalog Details**, **Requests**, **Request Details**, **Request Confirmation**, **Subscriptions**, and **Subscription Details**. As a best practice, your Consumer Organization Administrator might want to hide these prices if they will be used for department bill back purposes. For more information, see the CSA Management Console Help.

Tip: Click the magnifying glass  to find a request approval by a meaningful keyword. Search results display in the Review Requests view.

To browse approvals

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**.
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 74](#)


["Approve a Request" on page 75](#)

["Reject a Request" on page 76](#)

Filter Approvals

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

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

Tip: In the Review Requests view, use the Search filter  to find 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:

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.

All Approval Statuses

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

Request State	Description
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 71](#)

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

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


["Reject a Request" on page 76](#)

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 71](#)

["Filter Approvals" on page 72](#)

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

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




["Approved and Rejected Requests" on page 64](#)

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 71](#)

["Filter Approvals" on page 72](#)

["View Approval Details" on page 74](#)

["Reject a Request" below](#)

["Approved and Rejected Requests" on page 64](#)



[" Notifications" on page 20](#)


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 71](#)

["Filter Approvals" on page 72](#)

["Approve a Request" on page 75](#)

["Approved and Rejected Requests" on page 64](#)

[" Notifications" on page 20](#)

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Feedback on Marketplace Portal Help (Cloud Service Automation 4.80)

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 clouddocs@hpe.com.

We appreciate your feedback!