



User Settings and Customizations

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User Settings and Customizations

You can customize your view of the End User Portal, including your landing page, dashboard, tables, reports, and actions.

Logging In to the End User Portal

Step 1

In your web browser, enter the web link for the End User Portal.

The default web link is `https://EndUserPortal_IP/app/ui/login.jsp`, where *EndUserPortal_IP* represents the IP address assigned to the End User Portal. If you are unsure of the IP address for your End User Portal, check with your administrator.

Step 2 On the launch page, enter your user name and password.

Step 3 Click **Login**.

Logging Out of the End User Portal

Step 1 On the header, click **User** and choose **Log Out**.

Step 2 In the confirmation message, choose one of the following:

- **Yes, Logout** to log out
 - **No** to cancel and remain logged in
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Search

Search is available on the header and on individual screens. What you are trying to find determines which search field you need to use.

Search for a Report

You can use the search in the header to navigate directly to a specific location or report in the End User Portal. For example, if you want to view your VMs, you can enter VMs in that Search field to be taken to that location. However, you cannot use the search in the header to find a specific VM.

When you enter a term in the **Search** field on the header, the End User Portal provides you with suggested locations or reports.

Search for an Item

You can search for an item from the related location in the End User Portal. For example, you can search for a specific VM in the **VMs** report.

When you type a search term in the **Search** field, the matching entries are filtered and listed. The total count of matching entries is shown in the **Total** field. The search term is also highlighted in the filtered results.



Note

- The Search option is available only in the non-paginated reports.
 - When you search for a catalog, the search results are filtered and listed in a tile or list view format.
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User Settings

Setting Your Preferred Language

The text in the End User Portal is displayed based on the language that you choose.

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- Step 1** On the header, click **User** and choose **Edit My Profile**.
 - Step 2** In the **User Profile** area of the **Edit My Profile** screen, choose one of the supported languages.
 - Step 3** Click **Save** and the click **Close**.
The End User Portal refreshes with the updated language selection.
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Changing Your Password

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- Step 1** On the header, click **User** and choose **Edit My Profile**.
 - Step 2** In the **Password** area of the **Edit My Profile** screen, enter your old password, enter your new password, and confirm your new password.
 - Step 3** Click **Save**.
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Viewing Your Access Permissions

Your access permissions determine which tasks you can perform in the End User Portal. Some tasks require that your administrator give you the appropriate End User Self-Service permissions.

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- Step 1** On the header, click **User** and choose **Edit My Profile**.
 - Step 2** In the **Access Profiles** area of the **Edit My Profile** screen, your access level and profile are listed.
 - Step 3** Click **Close** or click the **X** in the upper right corner to close the **Edit My Profile** screen.
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Changing Your Default Access Profile

Your administrator may assign multiple access profiles to your user profile with different access levels and permissions. You can change the default profile used when you log in to the End User Portal.

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- Step 1** On the header, click **User** and choose **Edit My Profile**.
- Step 2** In the **Access Profiles** area of the **Edit My Profile** screen, your available access profiles are listed.
- Step 3** Select the radio button of the access profile that you want to set as the default profile.
- Step 4** Click **Save**.
After clicking **Save**, the new default profile will be applied the next time you log back in to the End User Portal.
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Dashboard Settings

Enabling and Disabling Your Dashboard

With your dashboard enabled, you can add and view summary reports on your landing page. You can also view summary dashlets, if your administrator has enabled them. The dashboard is enabled by default.

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- Step 1** On the header, click **User** and choose **Edit My Profile**.
- Step 2** In the **Dashboard** area of the **Edit My Profile** screen, do one of the following:
- To enable your dashboard, click the **Enable Dashboard (in the top level menu)** check box and ensure it is checked.
 - To disable your dashboard, click the **Enable Dashboard (in the top level menu)** check box and ensure it is not checked.
- Step 3** Click **Save**.
- Step 4** Click **Close** or click the **X** in the upper right corner to close the **Edit My Profile** screen.
After saving your settings and closing the **Edit My Profile** screen, the application refreshes with the dashboard enabled or disabled.
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Creating a Custom Dashboard

You can create a custom dashboard to add one or more summary reports to your dashboard. Once you create a custom dashboard and add summary reports, you can view them on your landing page.

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- Step 1** On the landing page, click the down arrow above the dashboard.
 - Step 2** From the drop-down list, choose **Create Dashboard**.
 - Step 3** Enter your custom dashboard name and click **Submit**.
Your custom dashboard appears in the drop-down list.
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What to Do Next

You can add one or more summary reports to your custom dashboard by navigating to the summary report.

Adding a Summary Report to Your Dashboard

After you add one or more summary reports to your dashboard, you can view them on your landing page.

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- Step 1** Choose the desired option and navigate to the summary report you want to add to your dashboard.
For example, if you want to add a VM-related summary report, choose **Virtual Resources** and then click **Summary**.
 - Step 2** On the **Summary** tab, scroll down to the report that you want to add to your dashboard.
 - Step 3** In the upper right corner of the report, click **Settings** and then choose **Add to Dashboard**.
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Removing a Summary Report from Your Dashboard

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- Step 1** On your landing page, scroll down to the summary report that you want to remove from your dashboard.
 - Step 2** In the upper right corner of the report, click **Settings** and then choose **Close View**.
After you remove a report from your dashboard, you must follow the procedure in [Adding a Summary Report to Your Dashboard](#), on page 5 to put it back on your dashboard.
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Table and Column Customizations

Organizing Table Columns

For every table in the End User Portal, you can choose which columns you want to view, change the order of the columns in the table, or sort the table entries by column.


Note

This procedure assumes that you have already navigated to the table that you want to organize.

Step 1

To show or hide one or more columns in the table, do the following:

- a) Hover over a column header and then click the down arrow that displays on the right side.
- b) From the drop-down list, choose **Columns**.
- c) Check the columns that you want to display and uncheck the columns that you want to hide.

Step 2

To sort the data in a table by the entries in one column, click the column header. You can sort the column entries alphabetically by ascending or descending.

Filtering Table Entries

Use the **Filter** icon to add advanced criteria to filter the list of table entries.


Note

This procedure assumes that you have already navigated to the table that you want to filter.

Step 1

Click the **Filter** icon on top of the table columns. The **Search in Column** and the **Text** fields appear.

Step 2

In the **Search in Column** field, choose the column that contains the values you want to filter.

Step 3

In the **Text** field, enter the value that you want to view.

Note The value entered into the **Text** field does not need to be case sensitive.

Step 4

To add additional conditions, click **Add Column Filter** field and repeat steps 2 and 3.

Step 5

When you add additional conditions, choose **Match All Conditions** to view items that match all the specified conditions or choose **Match Any Condition** to view results that match any one of the specified conditions.

Step 6

Click the **Filters** button.

Step 7

To clear the filter and view all data in the table, click the **Filter** icon again.

Refreshing Report Data

Data in the End User Portal does not automatically refresh. However, you can refresh all data on a screen at any time.

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- Step 1** Choose the desired option and navigate to the report that includes the data that you want to refresh. For example, if you want to refresh the information about your VMs, choose **Virtual Resources**, then click **VMs**.
- Step 2** Click **Refresh Report Data**.
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Exporting Data from a Report

You can export the data from any report.

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- Step 1** Choose the desired option and navigate to the report that includes the data that you want to export. For example, if you want to export information about your VMs, choose **Virtual Resources**, then click **VMs**.
- Step 2** Click **Export Report**.
- Step 3** On the **Export Report** screen, choose one of the following report formats and then click **Generate Report**.
- **PDF**
 - **CSV**
 - **XLS**
- Step 4** After the report has been generated, click **Download**.
The report is downloaded in the format requested to the download location configured in your browser.
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Exporting a Summary Report

You can export the data from any individual report on a **Summary** screen. However, you cannot export multiple reports at one time.

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- Step 1** Choose the desired option and navigate to the summary report you want to export.

For example, if you want to export a VM-related summary report, choose **Virtual Resources** and then click **Summary**.

Step 2 On the **Summary** screen, scroll down to the report that you want to export.

Step 3 Click **Settings** and then choose **Export**.

Step 4 On the **Export Report** screen, choose one of the following report formats and then click **Generate Report**.

- **PDF**—Exports the summary report in a graphical format. A PDF of a summary report does not include the individual data points in a tabular format.
- **CSV**—Exports the data points from the summary report as comma separated values.
- **XLS**—Exports the data points from the summary report in a spreadsheet.

Step 5 After the report has been generated, click **Download**.
The report is downloaded in the format requested to the download location configured in your browser.

Switching to the Classic View

You can switch to the classic view of the End User Portal. The classic view is the older version of the End User Portal or Self-Service Portal.

On the header, click **User** and choose **Classic View**.

The classic view opens in a new browser tab, leaving the new End User Portal view open in an existing tab.
