



App Portal / App Broker 2018 R1

Evaluation Guide

Legal Information

Book Name: App Portal / App Broker 2018 R1 Evaluation Guide
Part Number: APPAPB-2018R1-EG00
Product Release Date: October 2018

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App Portal / App Broker 2018 R1 Evaluation Guide

The App Portal / App Broker 2018 R1 Evaluation Guide introduces you to the purpose and capabilities of App Portal, and provides exercises to help you quickly learn how to get started using App Portal in your enterprise.

Table 1-1 • App Portal / App Broker 2018 R1 Evaluation Guide

Topic	Content
Getting Started with App Portal	Introduces you to App Portal and reviews its major components.
Configuring a Catalog Item	Describes how to add a new software catalog item from System Center Configuration Manager or Altiris Client Management Suite and make it available for selection in the App Portal storefront.
Requesting a Catalog Item	Explains how to submit a request for a catalog item, how a request moves through the approval process, and how to view the progress of your request. It also explains how to view reports that summarize App Portal inventory and request activity.
Performing App Portal Administrative Tasks	Explains how to perform standard administrative tasks to configure and customize App Portal for your enterprise.

App Portal User Documentation

To view user documentation specific to your organization's App Portal app store, click the help icon at the far right of the navigation bar.

You can also access the complete set of App Portal user documentation by clicking **App Portal Help** from the login name menu.

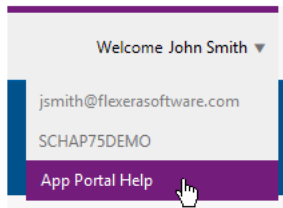


Figure 1-1: Opening User Documentation from the Login Name Menu

When you click on **App Portal Help**, the **App Portal / App Broker User Documentation** page opens, providing links to open the following documents in either HTML or PDF format:

- App Portal / App Broker Administration Guide
- App Portal / App Broker Installation Guide
- App Portal Evaluation Guide
- App Portal / App Broker Release Notes

You can also access the **App Portal / App Broker User Documentation** page at any time by visiting this site:

<http://helpnet.flexerasoftware.com/appportal/index.htm>

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Getting Started with App Portal

You can use App Portal to provide your employees all the advantages of a self-service app store while maintaining complete control of the request, approval, and fulfillment process.

Your employees will be able to request applications from an easy-to-understand catalog using a Web browser. App Portal will execute the fulfillment process from end to end: automating software approvals, enforcing proper licensing, and handing off the application request to Microsoft System Center Configuration Manager or Altiris Client Management Suite for delivery to the user's device. App Portal can also deliver mobile applications using AirWatch or MobileIron, and can deliver Apple macOS applications using JAMF Casper. The solution maintains a detailed audit trail and keeps the requester informed of the status.

This chapter introduces you to App Portal, reviews its major components, and explains how to configure your deployment technology:

- [Reviewing the App Portal User Interface](#)
- [Reviewing App Portal Components](#)
- [Accessing the Admin Tab](#)
- [Configuring Your Deployment Technology](#)

Reviewing the App Portal User Interface

The App Portal user interface (or “storefront”) is where users, managers, requesters, and approvers interact with App Portal. The interface is divided into tabs to organize the content. The tabs displayed will depend on the user's rights and the configuration settings.

App Portal's user interface, which is viewed in a web browser, is organized into tabs that extend across the screen horizontally.

The number of tabs each user sees depends upon that user's permissions. Each tab provides a specific set of App Portal functionality:

Table 2-1 • App Portal User Interface Tabs










Tab	Description
Dashboard	On this tab you can view helpful reports that demonstrate how much time and money using App Portal is helping you save in your software and operating system deployment projects: Software and OS Deployment ROI Dashboards, and the SLA Dashboard.
Browse Catalog	<p>Use to submit requests for software and other assets.</p>  <p>Note • For more information, see Browse Catalog Tab: Submitting Requests and Configuring a Catalog Item.</p>
My Requests	<p>Use to search for and view all of your submitted requests and those requests which target your current computer.</p>  <p>Note • For more information, see My Requests Tab: Viewing Request Status and Verifying Deployment Status on the My Requests Tab.</p>
My Apps	<p>Lists the applications installed on the user's device(s), and enables users to address automatic and administrator-defined alerts to ensure that those applications comply with corporate software policies.</p>  <p>Important • This feature requires that App Portal is integrated with FlexNet Manager Suite via the Flexera Service Gateway.</p>  <p>Note • For more information, see My Apps Tab: Managing Your Applications and Software Policy Score™.</p>
Approve / Reject	<p>Lists all requests that are pending your approval. To approve or reject a request, select the row for the item you wish to process and then click the appropriate button: Approve, Reassign, Reject, or Request Info.</p>  <p>Note • For more information, see Approving a Request and Managing Approval Workflows.</p>
Processed	Lists all the items that you have processed (approved or rejected).
Review	List of your requests that are currently under review, such as when an approver asks for additional information before approving it.
Profile	Lists user-specific attributes and settings.

Table 2-1 • App Portal User Interface Tabs

Tab	Description
Reporting	<p>Use to view App Portal data in a read-only, searchable, and exportable view. Over 40 reports are included with App Portal.</p>  <p>Note • For more information, see Viewing Reports.</p>
App Survey	<p>On the App Survey tab, users are prompted to identify which applications they want to have redeployed onto a new computer during OS deployment.</p>  <p>Note • App Survey is dependent upon having either a connection to FlexNet Manager Suite or the creation of App Portal inventory records for each application needing to be discovered for the migration process and then associating that inventory record with its associated software catalog item. For more information, see the “Viewing App Survey Results and Migrating Applications” topic in the App Portal / App Broker Administration Guide PDF.</p>
Admin	<p>Contains the following main views:</p> <ul style="list-style-type: none"> • Site Management—Use to configure App Portal settings including security, web site settings, deployment technology settings, Active Directory settings, and settings to integrate with the Flexera Service Gateway. • Catalog Management—Use to create and manage catalog items, which are System Center Configuration Manager applications/programs or Altiris Client Management Suite software products/policies that have been published in App Portal for deployment through the software storefront. Under Catalog Management, you can also manage approval workflows, question templates, and catalog categories. • Compliance Management—Use to track software licensing and usage using the My Apps feature and by creating upgrade and retire campaigns.  <p>Note • For more information, see Admin Tab: Configuring App Portal and Performing App Portal Administrative Tasks.</p>
Help	<p>You can customize this page to display any content you feel would be most helpful to users at your enterprise.</p>  <p>Note • For more information, see Editing the Help Tab Content.</p>

Browse Catalog Tab: Submitting Requests

The App Portal **Browse Catalog** tab lists all catalog items and is the location where users submit requests for software and other asset. You can browse through categories or perform a search to locate catalog items. You can view catalog items in card, list, or detailed view.

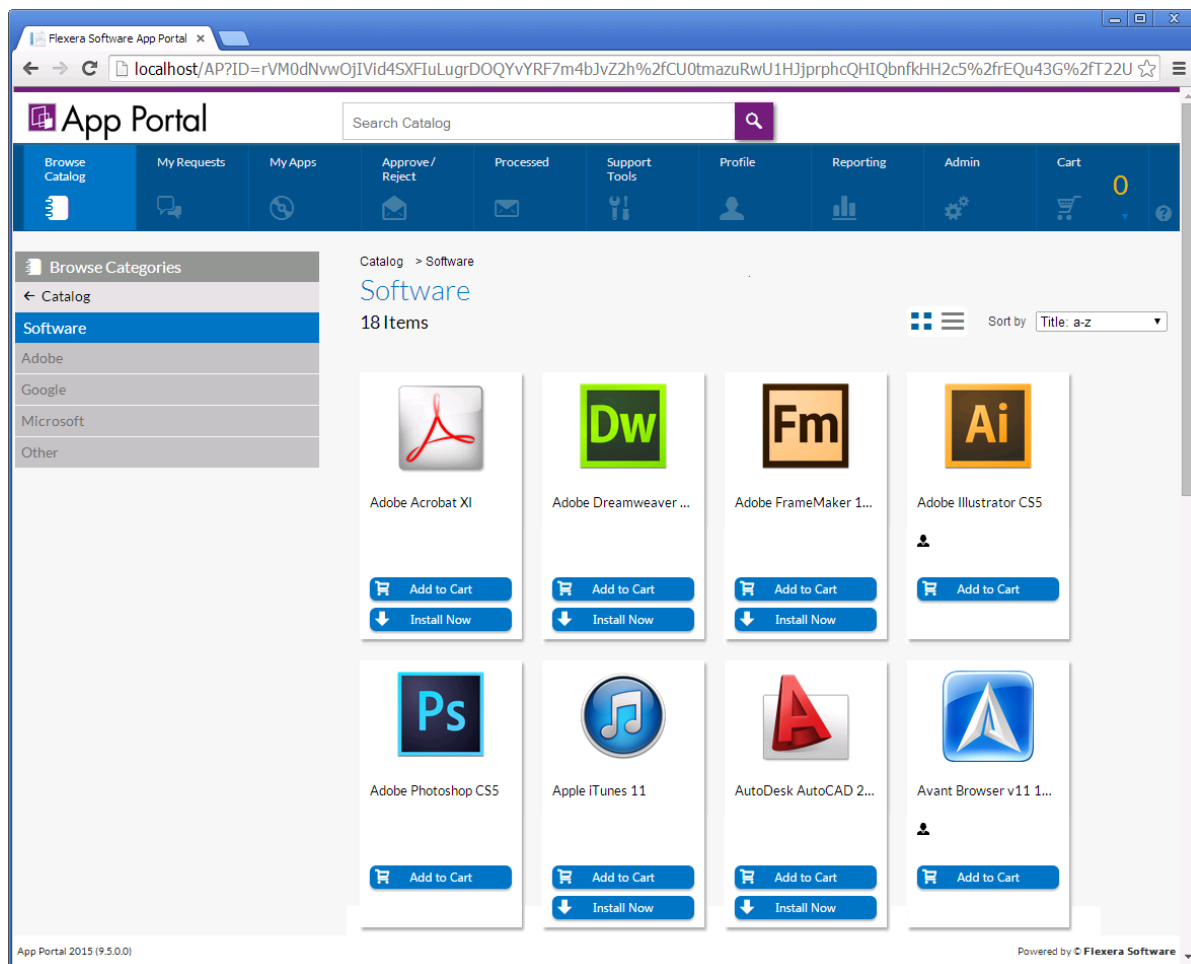


Figure 2-1: App Portal Browse Catalog Tab

Catalog items are grouped into categories in the left pane. You can browse or search (using the **Search** box at the top of the view) to locate the catalog item that you want to request. Search results or category contents are listed in the right pane.

The icons next to the catalog items let you know whether approval is required for the item and whether a license is currently available.

On the **Browse Catalog** tab, there are two checkout methods available:

- **Standard checkout**—After you locate a catalog item, click **Add to Cart** to add one or multiple catalog items to the cart, and then click on the cart to begin the checkout experience. Each time you add an item to the cart, the count (a large yellow number to the right of the cart icon) is increased. After you have selected all of the items you wish to request, click the cart icon to view the cart, and then click the **View cart and checkout** button to submit the request.

- **Express checkout**—Click **Install Now** to bypass the standard checkout experience when requesting a single catalog item. a catalog item request is automatically generated for that single catalog item, bypassing the checkout experience altogether.



Note • For more information, see [Checkout Methods: Standard and Express](#).



Note • For detailed information on submitting a request, see [Requesting a Catalog Item](#).

Types of Catalog Items: Software, Cloud, General, Group, and AirWatch Mobile

App Portal lists three types of catalog items on the **Browse Catalog** tab:

- **Software catalog items**—When creating a Software Catalog Item, App Portal connects to System Center Configuration Manager, Altiris Client Management Suite, or a Casper server and prompts you to select one of the listed items to make available in App Portal.
- **Cloud catalog items**—App Portal provides out-of-the-box support for three cloud applications: Salesforce, Box, and Microsoft Office 365. These three catalog items are automatically created during App Portal installation. After you connect App Portal to your corporate account with these cloud application vendors, you can offer these catalog items on your Browse Catalog tab to enable end users to request an account to use these cloud applications.
- **General catalog items**—When creating a General Catalog Item, you manually add a new catalog item and set its properties. General catalog items are usually used for non-software assets, such as a headset or a mouse, that you want to make available for request on App Portal. They can also be used to enable someone to make a request for a software item that is not in the catalog.
- **Group catalog items**—Catalog items can be configured to be selected as a bundle of separate applications. This is called a group catalog item. If you add a group catalog item to your cart, all of the applications in that group are added to the cart. However, if the **Allow removal from bundle?** option is selected for a catalog item on its **Catalog Item Properties** dialog box, you can choose to remove that catalog item from the bundle before adding it to your cart by clearing the check box.
- **Task sequence catalog items**—Task sequence catalog items are used to deploy operating systems. A task sequence is a mechanism used in System Center Configuration Manager for performing multiple steps or tasks on a client computer at the command-line level without requiring user intervention.
- **Mobile application catalog items**—When App Portal is connected to an AirWatch or MobileIron instance, you can use the New Catalog Item Wizard to create a mobile application catalog item containing Apple iOS and Google Android mobile apps. All iOS and Android mobile apps configured on the connected AirWatch/MobileIron instance, both internal and public store, can be associated with an App Portal catalog item and made available in App Portal.

Sample Catalog Items

When App Portal is installed, the **Browse Catalog** tab is populated with four sample General Catalog Items:

Table 2-2 • Sample Catalog Items

Category	Catalog Item
Hardware	Headset
Software	Non-Catalog Item
Software > Microsoft	Microsoft Silverlight
	Microsoft Visio 2012

When in production use, software available in App Portal will usually be added as **Software** catalog items from System Center Configuration Manager or Altiris Client Management Suite. However, these samples were added as **General** catalog items.

Checkout Methods: Standard and Express

When requesting a catalog item, you can bypass the checkout process on some catalog items by clicking the **Install Now** button.

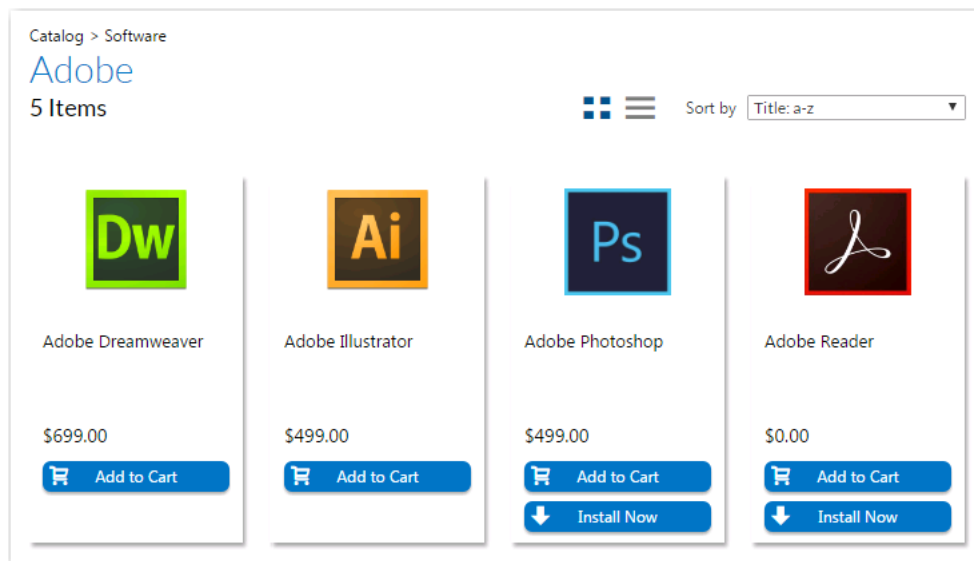


Figure 2-2: Install Now Button on Browse Catalog Tab

When you click the **Install Now** button, a catalog item request is automatically generated for that single catalog item, bypassing the checkout experience altogether. In the event that you have more than one associated device, a pop-up window will prompt you to select the desired target system.

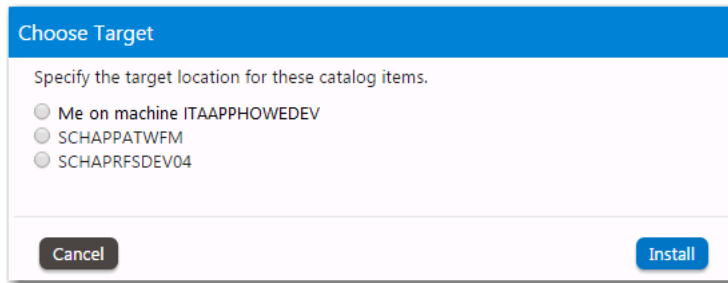


Figure 2-3: Choose Target Dialog Box

If the catalog item has a standard approval workflow associated with it, and you click **Install Now**, a message will be displayed stating that installation will begin once the request has been approved.

Express checkout is enabled by the App Portal administrator at a global level. However, even when express checkout is enabled, not all catalog items will display an **Install Now** button. Also, in some instances, you cannot use express checkout even when the **Install Now** button is displayed.

- [Conditions Preventing Display of Install Now Button](#)
- [Conditions That Prevent Use of Express Checkout](#)

Conditions Preventing Display of Install Now Button

If any of the following conditions are met, the **Install Now** button will not be displayed even when the **Enable express checkout option** is selected.

Table 2-3 • Conditions Preventing Display of Install Now Button


Condition	Description
Question templates	If the catalog item has an associated question template, the Install Now button is not displayed.
Custom approvers	<p>If the catalog item has an approval workflow associated with it that prompts the requester to select a custom approver, the Install Now button is not displayed.</p> <p></p> <p>Note • If the catalog item has a standard approval workflow associated with it, the Install Now button will be displayed. When the requester clicks Install Now, a message will be displayed stating that installation will begin once the request has been approved.</p>
Constraints, Leasing, or Allow switch to? settings	If the catalog item has Constraints, Leasing, or Allow switch to? settings defined, the Install Now button is not displayed.
Task sequence catalog items	For OSD/task sequence catalog items, the Install Now button is not displayed.
Cloud catalog items	For cloud catalog items—such as Box, Office 365 or Salesforce—the Install Now button is not displayed.

Table 2-3 • Conditions Preventing Display of Install Now Button

Condition	Description
General catalog items	For General catalog items, the Install Now button is not displayed.
Group catalog items	For Group catalog items, the Install Now button is not displayed.
File upload	If a catalog item has the Allow File Upload? option selected on the General > Global tab of the Catalog Item Properties dialog box, which enables a user to upload a file during checkout, the Install Now button is not displayed.

Conditions That Prevent Use of Express Checkout

Even if the **Install Now** button is displayed, you cannot perform express checkout in the following scenarios:

- **Multiple catalog item request**—You can only use the **Install Now** button to request one catalog item at a time. If you want to request more than one catalog item in the same request, you are required to add all catalog items to the cart and proceed through the regular checkout process.
- **Request on behalf**—If you are requesting a catalog item on behalf of another user, you cannot use the **Install Now** button to submit the request. You instead are required to add the catalog item to the cart and proceed through the regular checkout process.

My Requests Tab: Viewing Request Status

The **My Requests** tab lists all of your submitted requests and those requests which target your current computer.

Browse Catalog

My Requests

My Apps

Approve / Reject

Processed

Support Tools

Profile

Reporting

Admin

Search

Basic

Advanced

Search by:
Order #

Search value:

Show all requests

Show cancelled requests

Online / offline check

Show My Apps Requests

Filter by Date From:
5/5/2014

Filter by Date To:
6/4/2014

Search

Refresh Data

Date	Order #	Request	Target	Status	Info	Actions
6/4/2014 4:49:53 PM	FLX-19	Adobe Dreamweaver CS5	Patricia Howe (PatriciaHowe) on SCHAP75DEMO			
6/4/2014 2:06:30 PM	FLX-18	Microsoft Visio 2013 (ID: 25) - Microsoft Visio 2012	Patricia Howe (PatriciaHowe) on SCHAP75DEMO			
6/4/2014 2:04:34 PM	FLX-17	FastStone IV (Install)	Patricia Howe (PatriciaHowe) on SCHAP75DEMO			
6/4/2014 7:22:59 AM	FLX-16	Adobe Illustrator CS5 (ID: 16) - Adobe Dreamweaver CS5	Patricia Howe (PatriciaHowe) on SCHAP75DEMO			
6/3/2014 5:45:52 PM	FLX-15	Adobe Photoshop CS5	Patricia Howe (PatriciaHowe) on SCHAP75DEMO			
6/3/2014 2:20:58 PM	FLX-14 (2 Items)					

12

Results per page: 10

18 Items in 2 Pages

Figure 2-4: My Requests Tab

Each request is represented by a row in the grid and contains basic information about the request. Details of the request are visible by clicking on the request name.

For more information, see [Verifying Deployment Status on the My Requests Tab](#).

My Apps Tab: Managing Your Applications and Software Policy Score™

If App Portal is integrated with FlexNet Manager Suite, the App Portal **My Apps** tab is displayed, where you can view a list of applications installed on your devices, and address automatic and administrator-defined alerts to ensure that those applications comply with corporate software policies. This enables end users to assist IT administrators in driving continual software license reclamation and optimization.

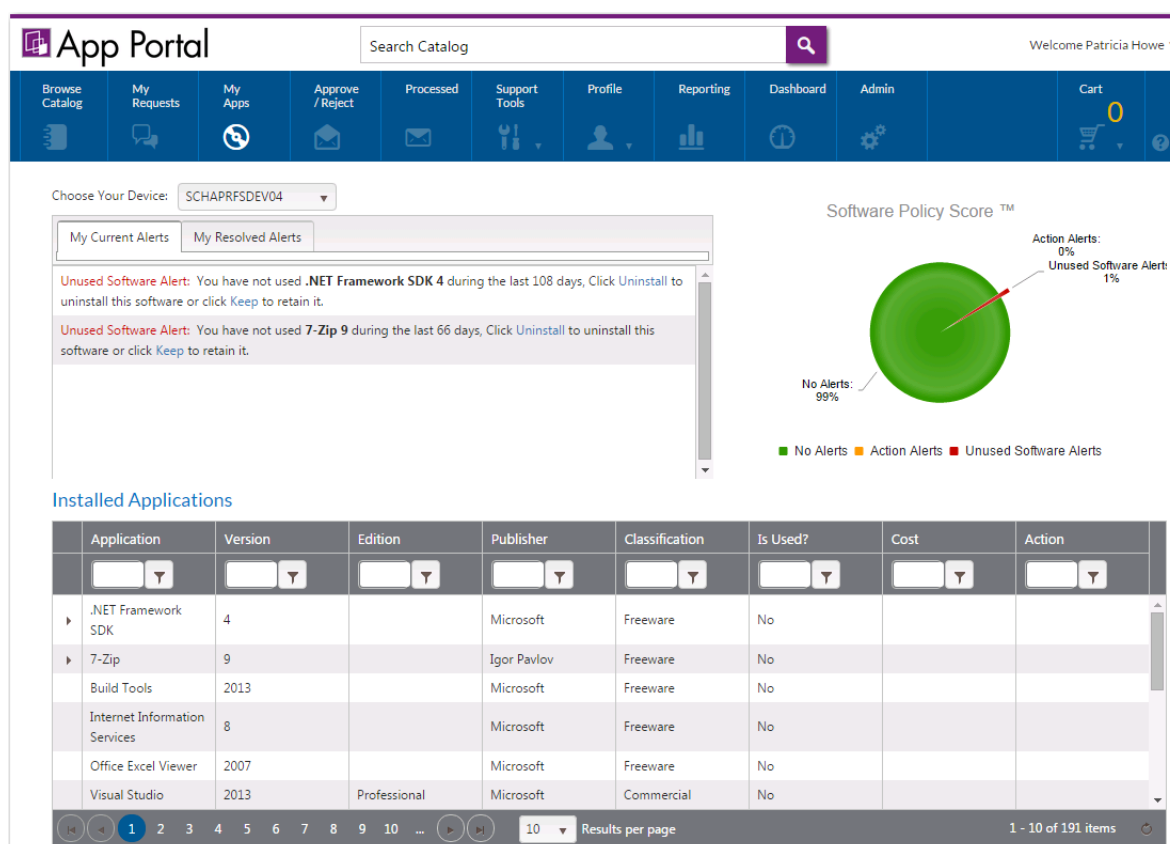


Figure 2-5: My Apps Tab

Viewing Installed Applications

When App Portal is integrated with FlexNet Manager Suite, it has access to the FlexNet Manager Suite Application Recognition Library (ARL), which uniquely identifies over 110,000 applications (including multiple versions and editions) from over 14,000 publishers.

App Portal uses this information to identify the applications that have been installed on the current user's computer, and those applications are listed in the **Installed Applications** list on the **My Apps** tab.

Application	Version	Edition	Publisher	Classification	Is Used?	Cost	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
.NET Framework	4.5		Microsoft	Freeware	Yes		
.NET Framework Multi-Targeting Pack	4		Microsoft	Freeware	Yes		
.NET Framework SDK	4		Microsoft	Freeware	Yes		
AdminStudio Application Virtualization	2015		Flexera Software	Commercial	Yes		
Application Error Reporting	12		Microsoft	Freeware	Yes		

1 2 3 4 5 6 7 8 10 Results per page 1 - 10 of 78 items

Viewing Your Software Policy Score™ Chart

The **Software Policy Score™** chart on the **My Apps** tab provides a quick way for a user to see the percentage of their installed applications which have license reclamation or optimization issues to address.

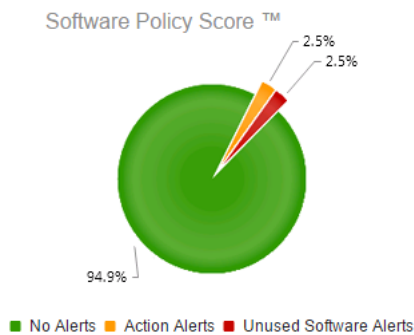


Figure 2-6: Software Policy Score on the My Apps Tab

In order to enforce corporate software policies, App Portal sends out the following types of alerts when it detects a problem with installed software:

- **Unused software alerts**—Application has not been used for the number of days specified by the App Portal administrator in the **License Reclamation Threshold** field.
- **Proof of purchase alert**—When informed by FlexNet Manager Suite that there are no remaining licenses for an application, administrators add that application to the **Proof of purchase** alert action catalog item, which triggers an alert to be sent to all users who have that application installed.
- **Administrator-created action alert**—An administrator can create a custom alert and attach a question template to it to gather information from the application user.

The **Software Policy Score™** chart classifies each application on your computer into one of three categories based upon its unresolved alerts, and displays the percentage of applications in each category:

- **No Alerts**—The applications in this category either have never had any alerts or all of their alerts have been resolved.
- **Unused Software Alerts**—The applications in this category have an unresolved unused software alert. Because unused licensed software is a large expense to an enterprise, these types of alerts have a high degree of importance

- **Action Alerts**—The applications in this category have an unresolved proof of purchase or administrator created action alert.

Your goal is to have 100% of your applications in the **No Alerts** category. Each time you resolve an alert, your Software Policy Score™ improves.

Resolving Alerts

Rather than having administrators send out email notifications to users regarding expired licenses or unused software, administrators can create and enable license reclamation and alert actions to prompt end users to address compliance issues. You resolve these issues in the **My Current Alerts** subtab of the **My Apps** tab.

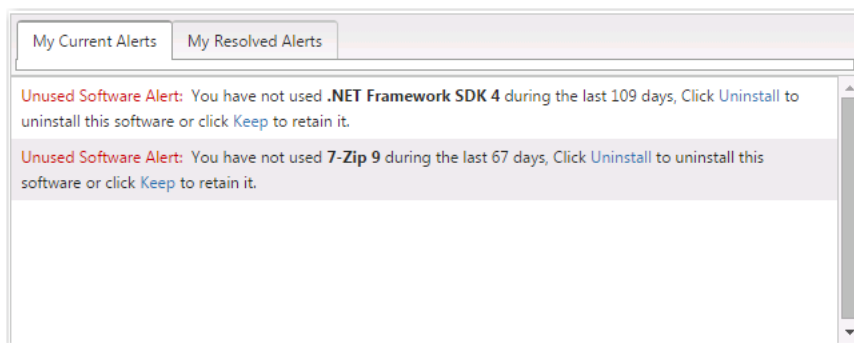


Figure 2-7: My Current Alerts Subtab of My Apps Tab

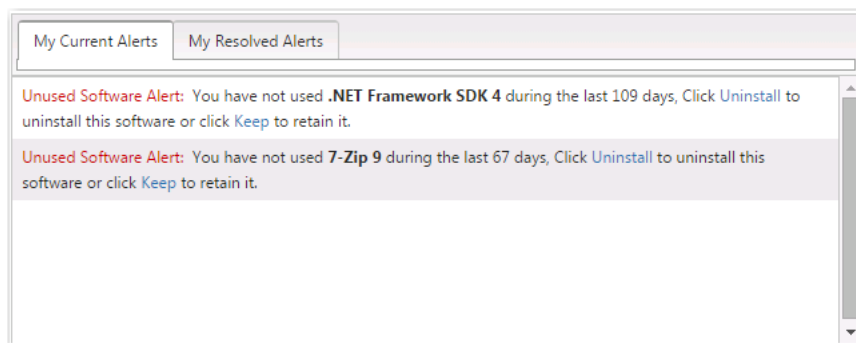
To resolve an unused software or action alert, perform the following steps:



Task

To resolve an alert:

1. Open the **My Apps** tab. All unresolved alerts are listed on the **My Current Alerts** tab.



2. To resolve an **Unused Software Alert**, perform the following steps:
 - a. Review the text of the alert you want to resolve, and decide whether you would like to uninstall or keep the application. The following is a sample alert:

Unused Software Alert: You have not used SQL Compare 10 during the last 80 days, Click Uninstall to uninstall this software or click Keep to retain it.
 - b. Click **Keep** or **Uninstall**. The **Respond to Questionnaire** panel of the **Checkout** process opens, and you are prompted to specify why you want to keep or uninstall the application:

Checkout

Items in cart

1

Back To My Apps

Respond to Questionnaire


Answer the questions below. Questions marked with an asterisk (*) are mandatory.

Please select the reason for uninstallation *

--Select--
--Select--
I did not know this software was installed
I have never used this software
I no longer use this software
Other

Please select the reason for uninstallation

Next

Your Items	Action
 Uninstall (7-Zip)	No response needed.

- Answer the listed questions and click **Next**. The **Submit Request** panel opens.
- Click **Submit**. A message appears stating that you have successfully resolved the issue:

Checkout

Order #


FLX-6

View My Apps

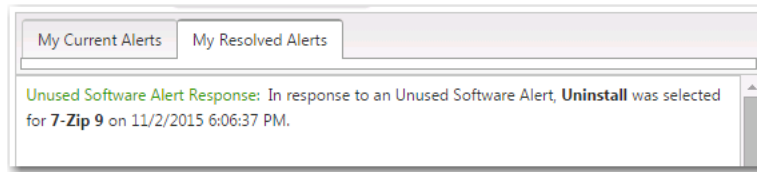
Request Complete

Order FLX-6 was created successfully

Click **My Apps** to go back to My Apps

Your Items	Action
 Uninstall (7-Zip)	Request ID 6 was successfully created

- To resolve an **Action Alert**, perform the following steps:
 - Review the text of the alert you want to resolve. The following is a sample alert:
Action Alert: You are required to perform an action Uninstall Blacklisted Software for Calculator 6.1. To perform this action, click here.
 - Click the here link. The **Checkout** process opens, and you may or may not be prompted to answer questions specific to the Action Alert on the **Respond to Questionnaire** panel.
 - Answer any questions that are listed and then click **Next**. The **Submit Request** panel opens.
 - Click **Submit**. A message appears stating that you have successfully resolved the issue.
- Return to the **My Apps** tab and open the **My Resolved Alerts** tab, where the alerts that you just resolved are now listed.



- Now that you have resolved alerts, check the **Software Policy Score** chart on the **My Apps** tab. Each time you resolve an alert, your Software Policy Score improves. Your goal is to have 100% of your applications in the **No Alerts** category.



Note • For more information, see the *App Portal 2018 R1 End User Guide* and the *App Portal 2018 R1 Configuration Guide*.

Admin Tab: Configuring App Portal

App Portal administrators use the **Admin** tab to configure App Portal settings and manage catalog items.

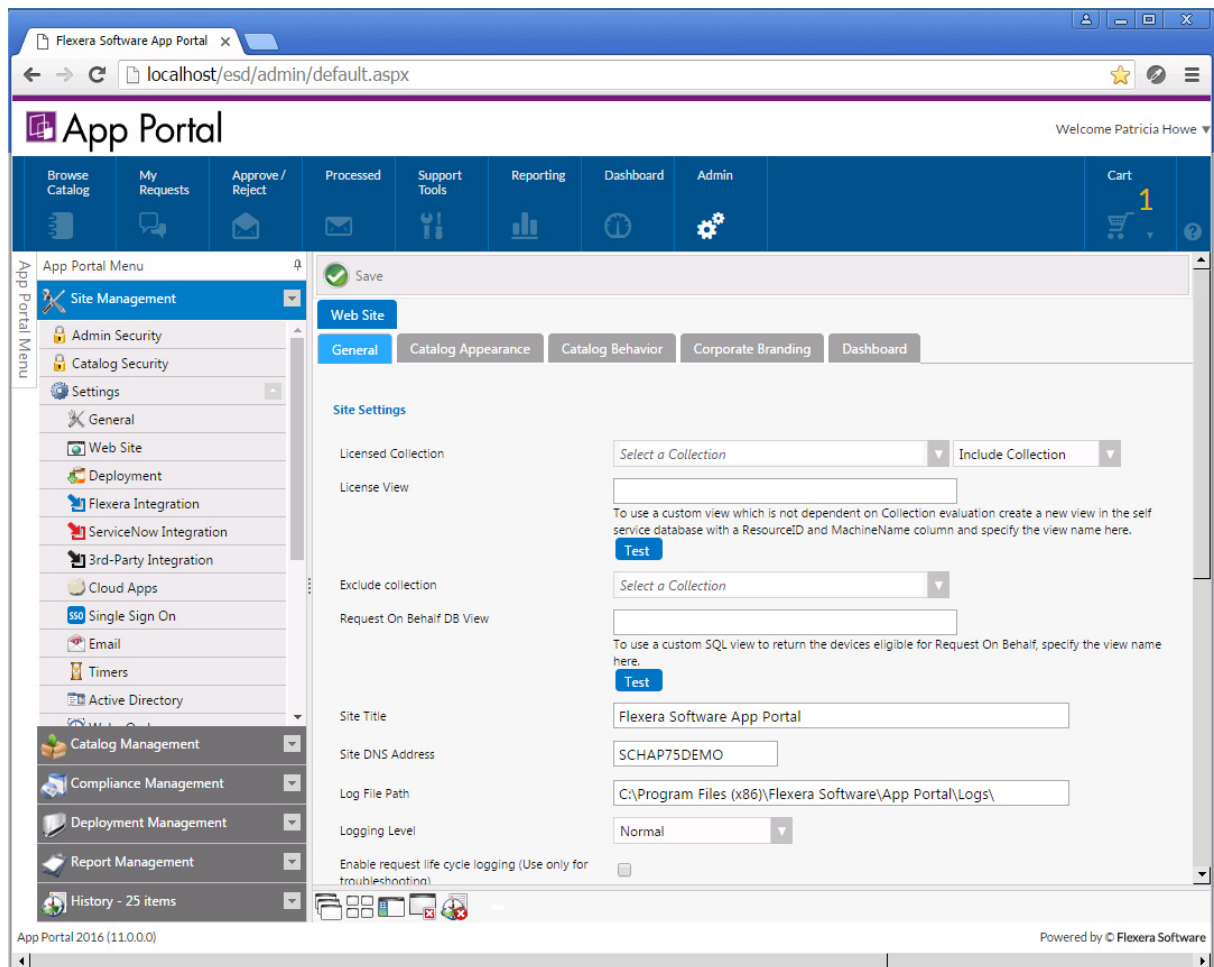


Figure 2-8: Admin Tab

The following are the two main views on the **Admin** tab that you will be interacting with:

- **Site Management**—Use to configure App Portal settings including security, web site settings, deployment technology settings, Active Directory settings, ITSM integration, and settings to integrate with the Flexera Service Gateway and FlexNet Manager Suite.
- **Catalog Management**—Use to create and manage catalog items, which are System Center Configuration Manager applications/programs or Altiris Client Management Suite software products/policies that have been published in App Portal for deployment through the software storefront. You also use Catalog Management to create mobile application catalog items (which will be deployed by AirWatch or MobileIron), macOS applications (which will be deployed by Casper) or cloud catalog items (which trigger the creation of an account for a cloud application). Under Catalog Management, you can also manage approval workflows, question templates, and catalog categories.



Note • For more information, see [Performing App Portal Administrative Tasks](#).

Reviewing App Portal Components

When learning to use App Portal, you need to understand the purpose of the following components:

- [Catalog Items](#)
- [Approval Workflows](#)
- [Question Templates](#)

Catalog Items

Catalog items are added to App Portal and made available for selection in the App Portal storefront. Catalog items are listed on the **Browse Catalog** tab and are added and edited on the on the **Admin** tab under **Catalog Management**.

Browse Catalog

My Requests

My Apps

Approve / Reject

Processed

Support Tools

Profile

Reporting

Admin

App Portal Menu

Site Management

Catalog Management

Create New Catalog Item

Current Catalog Items

View All Items

Hardware (4)

Software (20)

Adobe (5)

Google (1)

Microsoft (3)

Other (1)

Inventory Management

Deployment Management

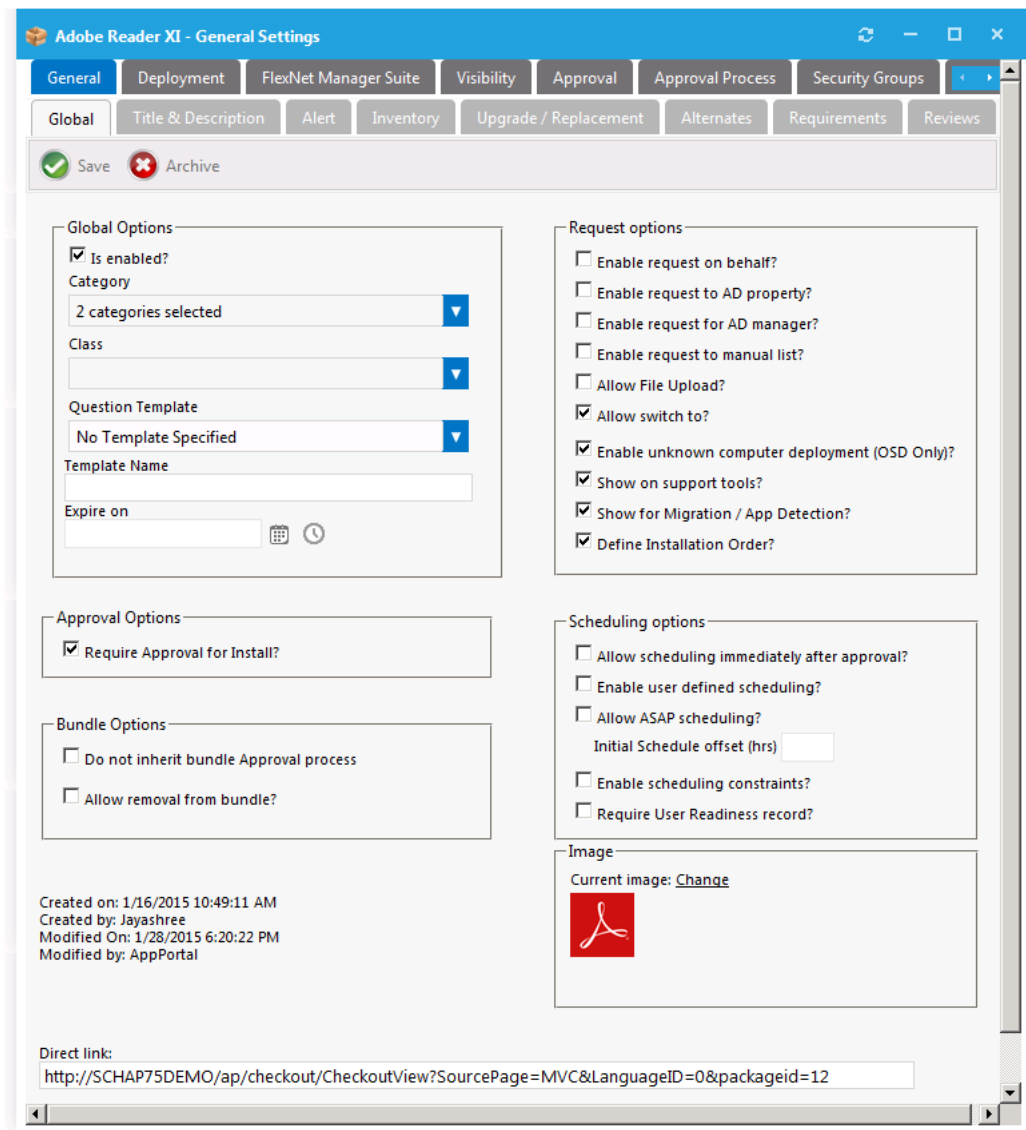
History - 13 items

Drag a column header and drop it here to group by that column

ID	Catalog Title	Type	Created
21	Adobe Acrobat XI	Package	5/23/2014 12:49:59 PM
9	Adobe Dreamweaver CS5	General	4/28/2014 9:49:30 PM
10	Adobe FrameMaker 12.0	Package	4/29/2014 10:38:37 PM
16	Adobe Illustrator CS5	Package	5/22/2014 6:08:07 PM
8	Adobe Photoshop CS5	General	4/28/2014 9:48:40 PM

Figure 2-9: Catalog Management / Current Catalog Items View

Catalog item properties are viewed and configured on a multi-tabbed properties dialog box:



Adobe Reader XI - General Settings

General | Deployment | FlexNet Manager Suite | Visibility | Approval | Approval Process | Security Groups | **Global**

Global | Title & Description | Alert | Inventory | Upgrade / Replacement | Alternates | Requirements | Reviews

Save Archive

Global Options

- ☒ Is enabled?
- Category: 2 categories selected
- Class:
- Question Template: No Template Specified
- Template Name:
- Expire on:

Request options

- ☐ Enable request on behalf?
- ☐ Enable request to AD property?
- ☐ Enable request for AD manager?
- ☐ Enable request to manual list?
- ☐ Allow File Upload?
- ☒ Allow switch to?
- ☒ Enable unknown computer deployment (OSD Only)?
- ☒ Show on support tools?
- ☒ Show for Migration / App Detection?
- ☒ Define Installation Order?

Approval Options

- ☒ Require Approval for Install?

Bundle Options

- ☐ Do not inherit bundle Approval process
- ☐ Allow removal from bundle?

Scheduling options

- ☐ Allow scheduling immediately after approval?
- ☐ Enable user defined scheduling?
- ☐ Allow ASAP scheduling?
- Initial Schedule offset (hrs):
- ☐ Enable scheduling constraints?
- ☐ Require User Readiness record?

Image

Current image: [Change](#)

Created on: 1/16/2015 10:49:11 AM
 Created by: Jayashree
 Modified On: 1/28/2015 6:20:22 PM
 Modified by: AppPortal

Direct link:
<http://SCHAP75DEMO/ap/checkout/CheckoutView?SourcePage=MVC&LanguageID=0&packageid=12>

Figure 2-10: Catalog Item Properties Dialog Box

To create a new catalog item, you can use the **New Catalog Item Wizard**. Instead of entering the required and optional information on multiple tabs of the **Catalog Item Properties** dialog box, the wizard prompts you to enter just the required information, in a simple, linear fashion. To open the wizard, select **Create New Catalog Item > New Catalog Item Wizard**.



Figure 2-11: New Catalog Item Wizard Panels for an System Center 2012 Configuration Manager Application

You have the option of opening the multi-tabbed **Catalog Item Properties** dialog box immediately after catalog item creation to configure advanced settings, or go back and edit the catalog item at a later time,



Note • Instead of using the wizard, you also have the option of creating new catalog items using the **Catalog Item Properties** dialog box. To do this, select **Create New Catalog Item > New Software Catalog Item**.

For more information, see [Configuring a Catalog Item](#).

Approval Workflows

Approval workflows are applied to catalog items to define how a request will be routed for review. In each step of an approval workflow, a user or group reviews the request.

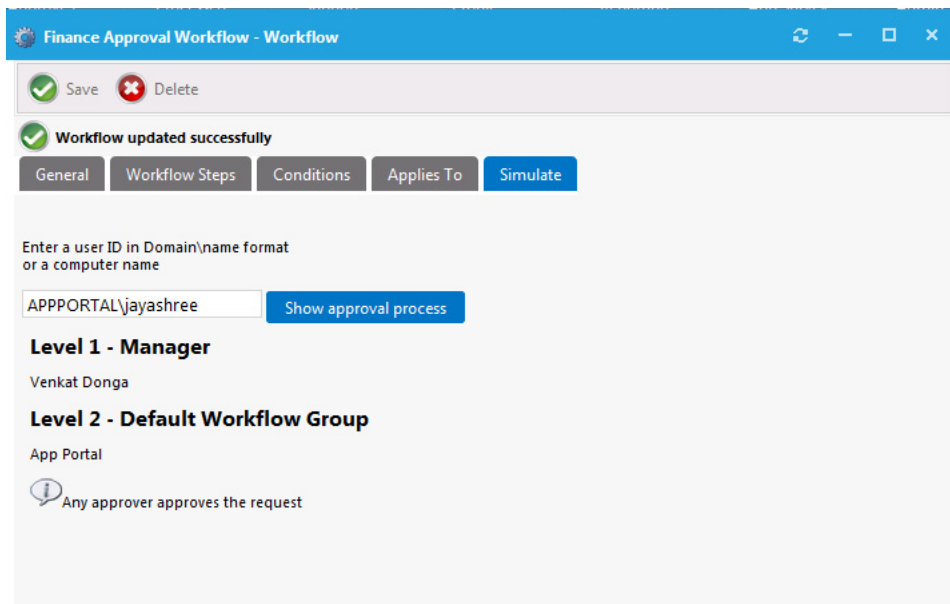


Figure 2-12: Simulation of an Approval Workflow

Approval workflows can be dynamic (evaluated based on user and computer conditions) or static (the same regardless of who requests it or where it goes), and can have conditions applied to them.

Workflows are defined and listed on the **Workflows View**, which is opened by selecting **Workflows** under **Site Management** on the **Admin** tab.

For detailed information, see [Attaching an Approval Workflow to an Existing Catalog Item](#) and [Managing Approval Workflows](#).

Question Templates

When submitting a software request, sometimes the end user needs to answer a set of questions that will give App Portal the information it needs in order to fulfill that software request.

For example, in order to approve a software request, a manager may want to know the name of the project that the end user is working on that requires this application. Or, in order to determine licensing requirements, the manager may want to know how frequently the end user will use this application or the time of day that it would be used.

In App Portal, you use the **Question Manager** to create questions, then group those questions into question templates using the **Template Manager**.

Figure 2-13: Creating New Question Dialog Box

For detailed information, see [Creating a Question Template and Attaching it to a Catalog Item](#).

Accessing the Admin Tab

Access to the App Portal site is available to all directory services users at your enterprise (as long as the site is enabled, as described in [Enabling App Portal Site for Your Enterprise](#)). All users at your enterprise will be able to use the **Browse Catalog** and **My Requests** tabs to submit a request and the **Approve / Reject** tab to approve or reject a request.

However, a user needs to have been assigned specific permissions in order to access the views on the **Admin** tab. You use **Admin Security** and **Catalog Security** under **Site Management** on the **Admin** tab to assign permissions to users and groups to give them access to the **Admin** tab.



Important • When App Portal is first installed, any user at your enterprise can use **Admin Security** and **Catalog Security** to assign permission to access the **Admin** tab. However, as soon as one user or group is added to App Portal and is assigned

permissions, no other user will be able to access the **Admin** tab until they are also assigned permission (either explicitly or as a member of a group).

If someone that does not have permission to the **Admin** tab opens it, the following error message will be displayed:

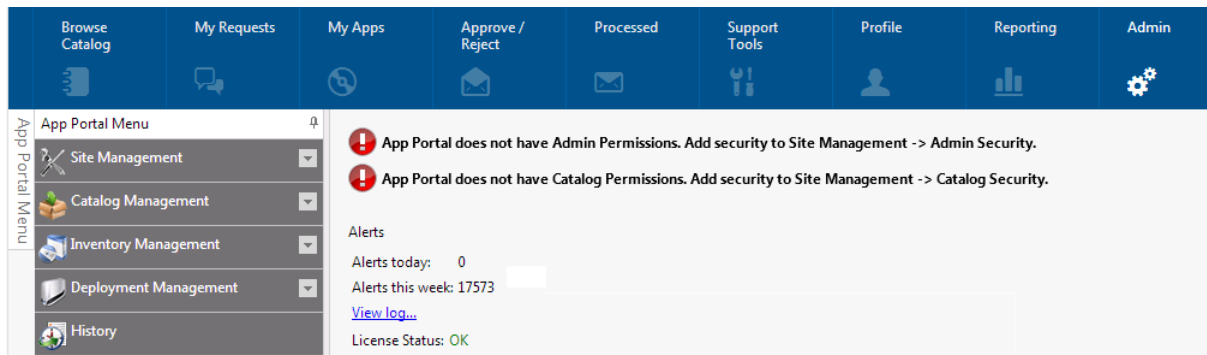


Figure 2-14: Permission Error



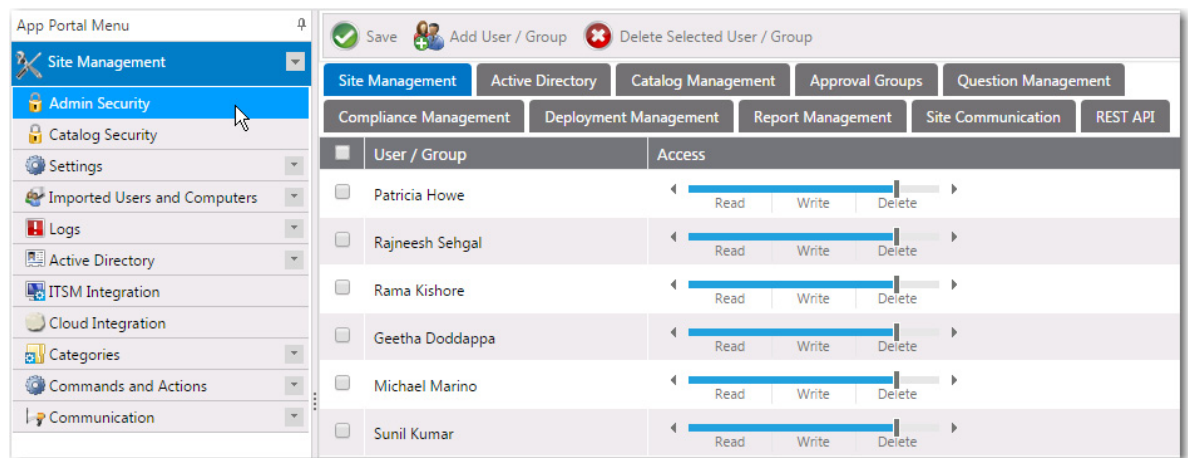
Important • If you do not have the necessary permissions to perform the steps in this section, contact your system administrator.



Task

To assign permission to access the Admin tab:

1. Open the **Admin** tab.
2. Under **Site Management**, select **Admin Security**. The **Admin Security View** opens.



3. Click the **Add User/Group** button. The following dialog box opens:

4. Use the search fields to locate your user name or a group that you are a member of.
5. Select the appropriate permissions from the **Assign rights** fields for each listed role.
6. Click **Assign Rights** to add the user or group. The selected user or group will now have access to the specified roles.



Note • For more information, see [Managing Administration and Catalog Permissions](#).

Configuring Your Deployment Technology

Before you get started using App Portal, you need to connect App Portal to a deployment technology and enter configuration settings on the **Settings > Deployment** tab under **Site Management**. The **Deployment** tab has four subtabs:

Table 2-4 • Subtabs of the Settings > Deployment Tab

Tab	Purpose
ConfigMgr	Connect App Portal to System Center Configuration Manager (Current Branch). See Entering System Center Configuration Manager (Current Branch) Settings .
SCCM 2012	Connect App Portal to System Center 2012 Configuration Manager. See Entering System Center 2012 Configuration Manager Settings .
Altiris	Connect App Portal to Altiris Client Management Suite. See Entering Altiris Client Management Suite Settings .
AirWatch	Connect App Portal to your instance of AirWatch. See Entering AirWatch Settings .
Casper	Connect App Portal to JAMF Casper Suite. See Entering Casper Settings .
MobileIron	Connect App Portal to your instance of MobileIron. See Entering MobileIron Settings .

Table 2-4 • Subtabs of the Settings > Deployment Tab

Tab	Purpose
Common	Select the deployment technology that App Portal should use to perform specific tasks. See Entering Common Deployment Technology Settings .

First, perform the tasks appropriate to the deployment technology used at your enterprise, and then perform the tasks in the [Entering Common Deployment Technology Settings](#) section.

Entering System Center Configuration Manager (Current Branch) Settings



Note • After you have launched App Portal for the first time and uploaded the license file, you are then prompted to specify the connection settings for your deployment technology. However, you are not required to enter your deployment technology settings at this time. You could skip this step and launch App Portal, and then specify the deployment settings on the **Site Management > Settings > Deployment** view. For more information, see “Getting Started” in the App Portal / App Broker Administration Guide.

To connect App Portal to System Center Configuration Manager (Current Branch), you need to open the **Settings > Deployment** view under **Site Management** on the **Admin** tab, and then select the **ConfigMgr** tab.

To enter System Center Configuration Manager (Current Branch) connection settings, perform the following steps:



Task

To enter System Center Configuration Manager (Current Branch) connection settings:

1. On the **Admin** tab, open the **Site Management > Settings > Deployment** view.
2. Open the **ConfigMgr** tab.

3. In the **Central Site Server** field, enter the machine name of the System Center Configuration Manager server.

4. In the **Central Site Database Server** field, enter the machine name where the System Center Configuration Manager server database resides.
5. In the **Central Site Database Name** field, enter the database name of the System Center Configuration Manager server database.
6. In the **Central Site Code** field, enter the site code of the System Center Configuration Manager server (in SITE_XXX format).
7. Click **Test** to test the connection settings that are entered.
8. Set the **Enable workstation verification?** field to one of the following options to enable/disable the actions in the **Select verification level** list.
 - **Select verification level**—Tells App Portal how to handle users who visit from machines that were not originally registered with App Portal.
 - **Warning**—Users will be prompted with a notification that they are not using the discovered machine.
 - **Disallowed**—Users will not be able to visit the App Portal Storefront from other machines.



Note • Users matching one of the specified attributes will not be required to accept the EULA.



Note • This field is disabled when the **User / Computer relationship** field is set to **Use SCCM last logon user**.

9. Specify the **User / Computer relationship** that App Portal needs to use by selecting one of the following options:
 - **Use SCCM last logon user**—The user to computer relationship will use SMS last logon user.
 - **Use SCCM Primary Console Usage**—Makes use of the System Center Configuration Manager / SMS SP3 feature of tracking logon duration to determine primary machine usage
 - **Use AD Computer Managed By**—Uses the AD Computer object “Managed By” attribute to determine the primary user of the computer. This setting requires inventory of the ManagedBy AD attribute in System Center Configuration Manager System Discovery.
 - **Use User Affinity**—In System Center Configuration Manager, you can directly define the users for a computer and the computers for a user. The option could also be referred to as “Use System Center Configuration Manager (Current Branch) user and device assignment”.
10. Specify any other System Center 2012 Configuration Manager options, as described in the *App Portal / App Broker Administration Guide*.
11. Click **Save**.

Entering System Center 2012 Configuration Manager Settings



Note • After you have launched App Portal for the first time and uploaded the license file, you are then prompted to specify the connection settings for your deployment technology. However, you are not required to enter your deployment technology settings at this time. You could skip this step and launch App Portal, and then specify the deployment settings on the **Site**

Management > Settings > Deployment view. For more information, see “Getting Started” in the *App Portal / App Broker Administration Guide*.

To connect App Portal to System Center 2012 Configuration Manager, you need to open the **Settings > Deployment** view under **Site Management** on the **Admin** tab, and then select the **SCCM 2012** tab.

To enter System Center 2012 Configuration Manager connection settings, perform the following steps:



Task

To enter System Center 2012 Configuration Manager connection settings:

1. On the **Admin** tab, open the **Site Management > Settings > Deployment** view.
2. Open the **SCCM 2012** tab.

3. In the **Central Site Server** field, enter the machine name of the System Center 2012 Configuration Manager server.
4. In the **Central Site Database Server** field, enter the machine name where the System Center 2012 Configuration Manager server database resides.
5. In the **Central Site Database Name** field, enter the database name of the System Center 2012 Configuration Manager server database.
6. In the **Central Site Code** field, enter the site code of the System Center 2012 Configuration Manager server (in SITE_XXX format).

7. Click **Test** to test the connection settings that are entered.
8. Set the **Enable workstation verification?** field to one of the following options to enable/disable the actions in the **Select verification level** list.
 - **Select verification level**—Tells App Portal how to handle users who visit from machines that were not originally registered with App Portal.
 - **Warning**—Users will be prompted with a notification that they are not using the discovered machine.
 - **Disallowed**—Users will not be able to visit the App Portal Storefront from other machines.



Note • Users matching one of the specified attributes will not be required to accept the EULA.



Note • This field is disabled when the **User / Computer relationship** field is set to **Use SCCM last logon user**.

9. Specify the **User / Computer relationship** that App Portal needs to use by selecting one of the following options:
 - **Use SCCM last logon user**—The user to computer relationship will use SMS last logon user.
 - **Use SCCM Primary Console Usage**—Makes use of the System Center Configuration Manager / SMS SP3 feature of tracking login duration to determine primary machine usage
 - **Use AD Computer Managed By**—Uses the AD Computer object “Managed By” attribute to determine the primary user of the computer. This setting requires inventory of the ManagedBy AD attribute in System Center Configuration Manager System Discovery.
 - **Use User Affinity**—In System Center 2012 Configuration Manager, you can directly define the users for a computer and the computers for a user. The option could also be referred to as “Use System Center 2012 Configuration Manager user and device assignment”.
10. Specify any other System Center 2012 Configuration Manager options, as described in the *App Portal / App Broker Administration Guide*.
11. Click **Save**.

Entering Altiris Client Management Suite Settings



Note • After you have launched App Portal for the first time and uploaded the license file, you are then prompted to specify the connection settings for your deployment technology. However, you are not required to enter your deployment technology settings at this time. You could skip this step and launch App Portal, and then specify the deployment settings on the **Site Management > Settings > Deployment** view. For more information, see “Getting Started” in the App Portal / App Broker Administration Guide.

To connect App Portal to Altiris Client Management Suite, you need to open the **Settings > Deployment** view under **Site Management** on the **Admin** tab, and then select the **Altiris** tab.

To enter Altiris connection settings, perform the following steps:



Task

To enter Altiris connection settings:

1. On the **Admin** tab, open the **Site Management > Settings > Deployment** view.
2. Open the **Altiris** tab.

Save

Deployment

Common ConfigMgr SCCM 2012 SCCM 2007 OS Deployment **Altiris** AirWatch Casper MobileIron

Central Site Server

Central Site Database Server

Central Site Database Name

User / Computer relationship:

☒ Use last logon user

☐ Use User Affinity

Computer Collection Folder

User Collection Folder

Advertisement Folder

Policy Folder ID (GUID)

Policy Changed Collection Update Offset ☐ Min

Use Central Site for All Deployments ☒

Update Machine Policy On Altiris Management Agent (Needs Remote WMI Access) ☒

Custom Policy Status SQL Query

Sample SQL ([PolicyGUID] and [ComputerResourceGUID] tags will be replaced with actual select Status from Evt_AeX_SWD_Execution where AdvertisementId = '[PolicyGUID]' and

3. In the **Central Site Server** field, enter the machine name of the Altiris Notification Server.



Tip • Make sure that ASDK is installed on this machine.

4. In the **Central Site Database Server** field, enter the machine name where the Altiris Notification Server database resides.
5. In the **Central Site Database Name**, enter the database name of the Altiris Notification Server database.
6. Click **Test** to test the connection settings that are entered.
7. Specify the **User / Computer relationship** that App Portal needs to use by selecting one of the following options:
 - **Use last logon user**
 - **Use User Affinity** (primary device assigned to user)
8. In the **Computer Collection Folder** field, enter the name of the folder to use to create App Portal computer filters.
9. In the **User Collection Folder** field, enter the name of the folder to use to create App Portal user filters.
10. In the **Advertisement Folder** field, enter the name of the folder to use to create App Portal advertisements.
11. After adding the user/computer to a filter for deployment, App Portal can update the policy on the Altiris Management Agent on the client to receive the deployment. However, in order to do this, the App Portal system account needs remote WMI access on all the machines. If the remote WMI permissions are granted, select the **Update Machine Policy On Altiris Management Agent** option to allow App Portal to remotely update client policy.
12. Click **Save**.



Note • The **Use Central Site for All Deployments** option is always selected, because App Portal only communicates with the central site.

Entering AirWatch Settings



Note • After you have launched App Portal for the first time and uploaded the license file, you are then prompted to specify the connection settings for your deployment technology. However, you are not required to enter your deployment technology settings at this time. You could skip this step and launch App Portal, and then specify the deployment settings on the **Site Management > Settings > Deployment** view. For more information, see “Getting Started” in the App Portal / App Broker Administration Guide.

To connect App Portal to an AirWatch instance, you need to open the **Settings > Deployment** view under **Site Management** on the **Admin** tab, and then select the **AirWatch** tab.

To enter AirWatch connection settings, perform the following steps:



Task

To enter AirWatch connection settings:

1. On the **Admin** tab, open the **Site Management > Settings > Deployment** view.
2. Open the **AirWatch** tab.

Save

Deployment

Common ConfigMgr SCCM 2012 SCCM 2007 OS Deployment Altiris **AirWatch** Casper MobileIron

AirWatch Server Details

AirWatch URL

User Name

Password

API Key

Test

Note: Users and devices from AirWatch will be synced to AppPortal along with the normal sync process

AirWatch Status Mapping

Success status values

Note: Please provide the values as pipe delimited (e.g.: 'Installed|Managed')

Failure status values

Note: Please provide the values as pipe delimited ('Failed|NotInstalled')

3. In the **AirWatch URL** field, enter the URL to your instance of AirWatch.
4. Enter the **User Name** and **Password** to your AirWatch instance.
5. Enter the **API Key** that was provided to you by AirWatch.
6. Click **Test** to test connection settings. If successful, the following message is displayed:

AirWatch Server settings are valid.



Note • AirWatch users (which are based upon an email address) and devices are synced to App Portal at the same time that the System Center Configuration Manager / Altiris users and devices are synced. App Portal users are matched with System Center Configuration Manager / Altiris users by having the same email address.



Note • When App Portal publishes a request to AirWatch, AirWatch returns a status message to indicate success or failure of the deployment. By default, these values are *InstalLed* or *Managed* for success or *NotInstalLed* for failure. If, at some future time, AirWatch changes their status messages to something different, you can update these values by performing the steps in “Entering AirWatch Status Mapping Settings” in the App Portal / App Broker Administration Guide.

Entering Casper Settings



Note • After you have launched App Portal for the first time and uploaded the license file, you are then prompted to specify the connection settings for your deployment technology. However, you are not required to enter your deployment technology settings at this time. You could skip this step and launch App Portal, and then specify the deployment settings on the **Site Management > Settings > Deployment** view. For more information, see “Getting Started” in the App Portal / App Broker Administration Guide.

To connect App Portal to a Casper server, you need to open the **Settings > Deployment** view under **Site Management** on the **Admin** tab, and then select the **Casper** tab.

To enter Casper connection settings, perform the following steps:



Task

To enter Casper connection settings:

1. On the **Admin** tab, open the **Site Management > Settings > Deployment** view.
2. Open the **Casper** subtab.

Save

Deployment

Common ConfigMgr SCCM 2012 SCCM 2007 OS Deployment Altiris AirWatch **Casper** MobileIron

Casper Server Details

Casper URL

User Name

Password

AppPortal policy folder

Note: All Policies will get created under the mentioned category name

Policy template name

Computer group template name

Test

Note: Devices from Casper will be synced to AppPortal along with the normal sync process

Casper XPath Mapping

Computer group name xpath

Policy name xpath

Policy package id xpath

Policy packages xpath

Policy groups xpath

3. In the **Casper URL** field, enter the URL to your Casper server.
4. Enter the **User Name** and **Password** to your Casper server.

5. Click **Test** to test connection settings. If successful, the following message is displayed:

Casper Server settings are valid.



Note • Casper users (which are based upon an email address) and devices are synced to App Portal at the same time that the System Center Configuration Manager / Altiris users and devices are synced. App Portal users are matched with System Center Configuration Manager / Altiris users by having the same email address.



Note • When App Portal publishes a request to Casper, Casper returns status messages, which are listed in the **Casper XPath Mapping** area of this tab. If, at some future time, Casper changes their status messages to something different, you can update these values by performing the steps in “Entering Casper XPath Mapping Settings” in the App Portal / App Broker Administration Guide.

Entering MobileIron Settings



Note • After you have launched App Portal for the first time and uploaded the license file, you are then prompted to specify the connection settings for your deployment technology. However, you are not required to enter your deployment technology settings at this time. You could skip this step and launch App Portal, and then specify the deployment settings on the **Site Management > Settings > Deployment** view. For more information, see “Getting Started” in the App Portal / App Broker Administration Guide.

To connect App Portal to a MobileIron instance, you need to open the **Settings > Deployment** view under **Site Management** on the **Admin** tab, and then select the **MobileIron** tab.

To enter MobileIron connection settings, perform the following steps:



Task

To enter MobileIron connection settings:

1. On the **Admin** tab, open the **Site Management > Settings > Deployment** view.
2. Open the **MobileIron** tab.

Save

Deployment

Common ConfigMgr SCCM 2012 SCCM 2007 OS Deployment Altiris AirWatch Casper MobileIron

MobileIron Server Details

MobileIron URL

Username

Password

Test

Note: Users and devices from MobileIron will be synced to App Portal along with the normal sync process

3. In the **MobileIron URL** field, enter the URL to your instance of MobileIron.
4. Enter the **User Name** and **Password** to your MobileIron instance.
5. Click **Test** to test connection settings. If successful, the following message is displayed:
MobileIron Server settings are valid.

Entering Common Deployment Technology Settings

On the **Settings > Deployment > Common** tab, you need to select the deployment technology that App Portal should use to perform user syncing, computer syncing, evaluating collection membership, and other tasks.

You can connect App Portal to multiple deployment technologies: System Center Configuration Manager (Current Branch), System Center 2012 Configuration Manager, Altiris, and/or Casper (in addition to AirWatch and MobileIron for mobile apps). You can also specify custom a custom connection string to another third-party deployment technology. You are permitted to set up App Portal to perform some tasks with one deployment technology and other tasks with a different deployment technology.

To enter common deployment technology settings, perform the following tasks:



Task

To enter common deployment technology settings:

1. On the **Admin** tab, open the **Site Management > Settings > Deployment** view.
2. Open the **Common** subtab.

3. If you are using more than one deployment technology, in the **Define order for detecting client deployment technology list**, specify the order in which App Portal will check them to determine which deployment technology the end user's computer is a client of.
4. From the **Syncing Users** list, select the deployment technology you want App Portal to use to sync users using built-in sync queries.
5. From the **Syncing Computers** list, select the deployment technology you want App Portal to use to sync computers using built-in queries.

6. From the **Evaluating collection membership** list, select the deployment technology that you want App Portal to use to evaluate collection membership for standard conditions.
7. From the **Inventory / OS Deployment** list, select the deployment technology that you want App Portal to use to read inventory data and perform OS deployments.



Note • *Not supported for Altiris unless also using FlexNet Manager Suite.*

8. In the **Sync Page Size** field, enter the batch size to process users and computers. The default value is **50**.
9. Click **Save**, and then click the **Sync Data Now** button to sync App Portal using the current selections.



Note • *By default, the sync also happens at 2:00 a.m. each morning. To configure the time, open the **Settings > Timers** tab and edit the **Time of day to sync users and computers** field.*



Note • *You also have the option of specifying custom sync connection strings in the **Custom Computer Sync Settings** and **Custom User Computer Map Sync Settings** areas. For more information, see the **Common Subtab** help topic under the **Deployment Tab** help topic in the App Portal / App Broker Administration Guide.*

Configuring a Catalog Item

In this chapter, you will learn how to add a new software catalog item from System Center Configuration Manager, Altiris Client Management Suite, AirWatch, or Casper to App Portal and make it available for selection in the App Portal storefront.

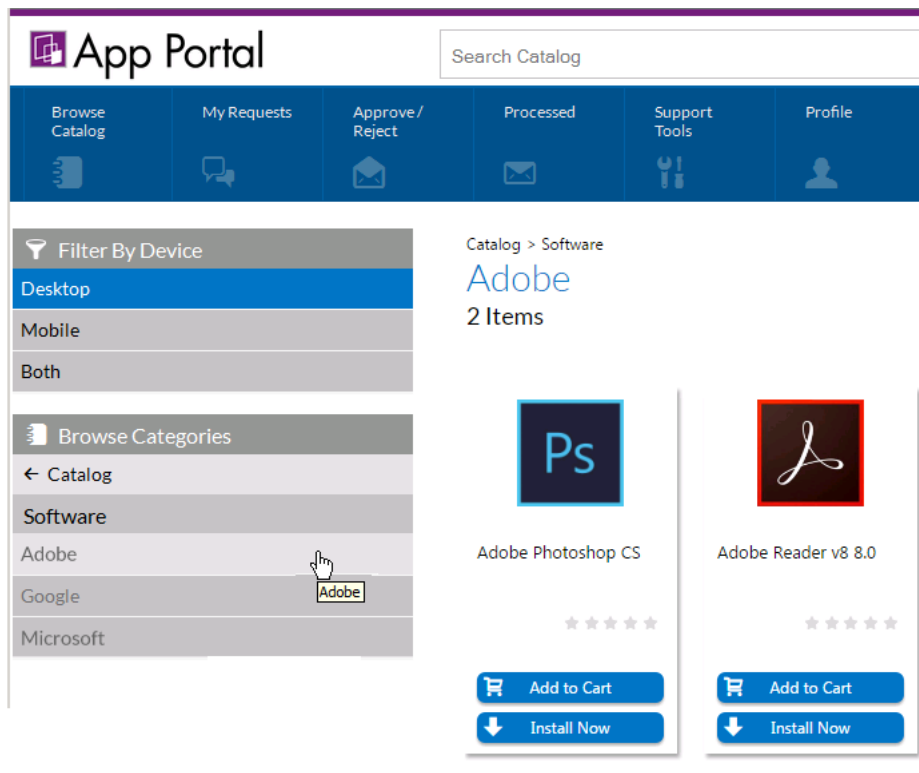
- [Creating a Category](#)
- [Adding a New Software Catalog Item](#)
- [Attaching an Approval Workflow to an Existing Catalog Item](#)
- [Creating a Question Template and Attaching it to a Catalog Item](#)



Note • App Portal provides out-of-the-box support for three cloud applications—Box, Salesforce, and Microsoft Office 365—and automatically creates a catalog item for each. You can also create a cloud catalog item for additional cloud applications. For more information, see “Configuring Cloud Application Integration” in the App Portal / App Broker Administration Guide.

Creating a Category

Catalog items are organized using categories. Categories, which are listed in the **Browse Categories** tree on the **Browse Catalog** tab, are visible to end users when they are creating an App Portal request. When an end user selects a category on the **Browse Catalog** tab, the catalog items in that category are listed:



S

Figure 3-1: Browse Catalog Tab With Adobe Category Selected



Note • A catalog item can be a member of multiple categories.

When you create a category, you have the option of setting category security and setting a category owner:

- **Set Category Security**—To control which users and/or groups are permitted to view (and request) the applications in that category, you can set category security.
- **Set Category Owner**—To only give specific users permission to manipulate the applications in a category, you can assign category owners.

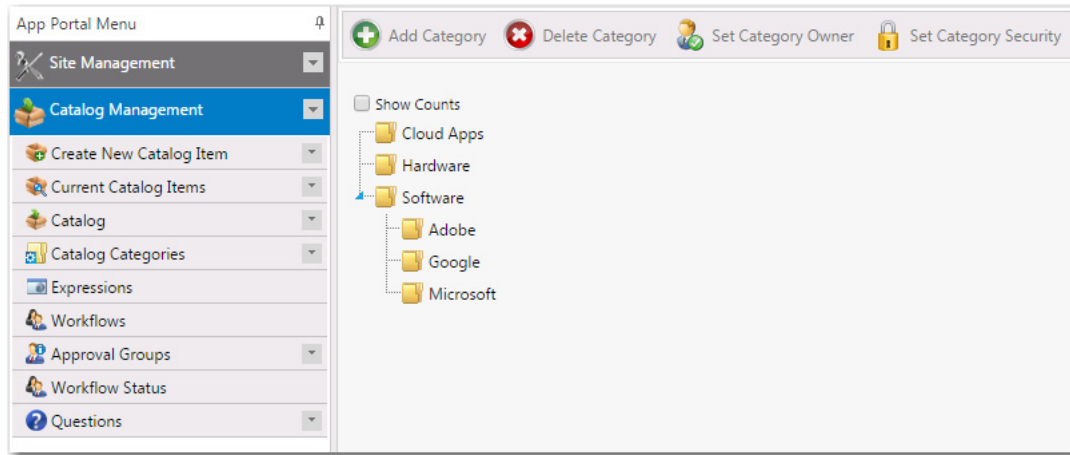
To create a catalog category, perform the following steps.



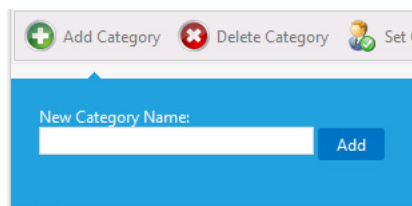
Task

To create a catalog category:

1. Open the App Portal **Admin** tab.
2. Under **Catalog Management**, select **Catalog Categories**. Existing categories are listed in the right pane.



3. Select the **Software** category and then click **Add Category**. You are prompted to enter a **New Category Name**.



4. Enter a name to identify the category, such as **Adobe**, and click **Add**. The new category is now listed under the **Software** category.

Adding a New Software Catalog Item

In this section, you will learn how to add a new software catalog item to App Portal. You will also learn how to associate App Portal with FlexNet Manager Suite so that you can use App Portal to manage application licenses.

- [Adding a New Unlicensed Software Catalog Item](#)
- [Adding Licensed Software Catalog Items](#)
- [Adding an AirWatch Mobile Application Catalog Item](#)

Adding a New Unlicensed Software Catalog Item

In this exercise, you will select a software application from System Center 2012 Configuration Manager to add to your App Portal catalog. This application does not require an associated license.



Note • While this exercise takes you through the steps of adding an application from System Center 2012 Configuration Manager, the steps for adding applications/packages from other deployment systems are very similar.

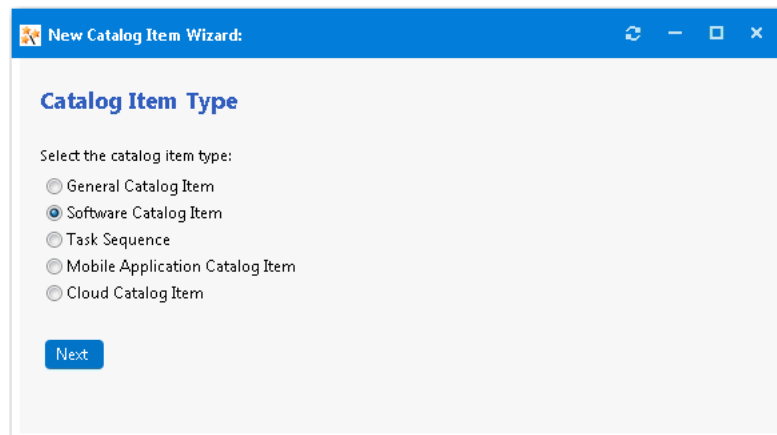


Note • To add a software catalog item, you must first provide connection settings to a deployment technology, as described in [Configuring Your Deployment Technology](#).

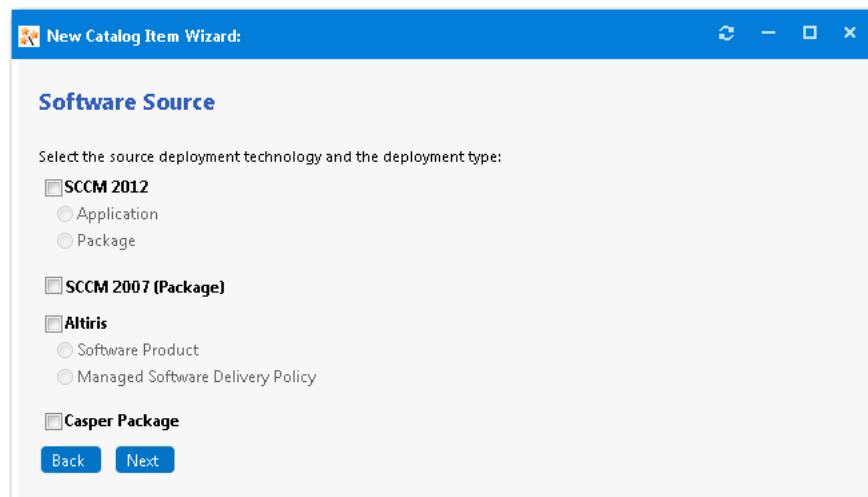
**Task**

To create a new unlicensed software catalog item:

1. Open the App Portal **Admin** tab.
2. Under **Catalog Management** in the **App Portal Menu**, select **Create New Catalog Item > New Catalog Item Wizard**. The **Catalog Item Type** panel of the **New Catalog Item Wizard** opens.



3. Select **Software Catalog Item** and click **Next**. The **Software Source** panel opens.



4. Select **SCCM 2012** and then select **Application**.
5. Click **Next**. The **SCCM 2012 Applications** panel opens.

New Catalog Item Wizard:

SCCM 2012 Applications

Click on the application that you want to associate with this catalog item and click **Next**.

Note: This grid only lists the first 100 applications in SCCM 2012. To search the entire SCCM server for an application, use the column filters.

App ID	Manufacturer	Name	Version
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2445	Google Inc.	Picasa	2.7.0
2441	Helios	TextPad 5	5.2.0
2411	Helios	TextPad 5	5.2.0
2427	Julien Vanier	Picasa (Safe Upload)	1.0
2461	Leimberg and LeClair Inc	NumberCruncher	204.0
76	Leimberg and LeClair Inc	NumberCruncher	204.0
1960	MessageLabs, Ltd.	MessageLabs Professional Online Desktop 3.6	3.60.0000
2128	Microsoft	Orca (Retired)	5.0
2135	Microsoft Corporation	Orca	5.0.7069.0000
1968	Mozilla	Firefox	16.0.2

10
4
1
2
3
4
5
11

Page size: 10

47 items in 5 pages

Back
Next

- Locate and select the application that you want to associate with this new catalog item.



Important • Only a specified number of packages are initially listed in this grid. To search the entire System Center Configuration Manager server for a package, use the column filters.

- Click **Next**. The **Catalog Item Title and Category** panel opens.

8. In the **Title** field, enter a title to identify this catalog item in your App Portal storefront. By default, the name of the package that you selected is listed in this field.
9. From the **Category** field, select a category to specify this catalog item's location in the App Portal catalog.



Note • You are required to select at least one category, but you may select more than one.

10. In the **Brief Description** field, enter the text that you want to display under the catalog item **Title** in the App Portal storefront.
11. By default, a generic icon is associated with this catalog item. If you have another image that you would like to use to identify this catalog item, click **Change** to open the **Image Selection** dialog box and select a .gif, .jpg, or .png icon file.

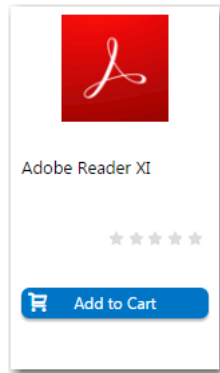


Tip • For best results, the uploaded image should be at least 80 px by 80 px.

12. In the **Search Keywords** text box, enter single words that an end user might enter when searching for this catalog item.
13. In the **Full Description** text area, enter a longer description of this catalog item, and use the items on the toolbar to format it.

The text entered in the **Title**, **Brief Description**, and **Full Description** fields will be displayed as follows:

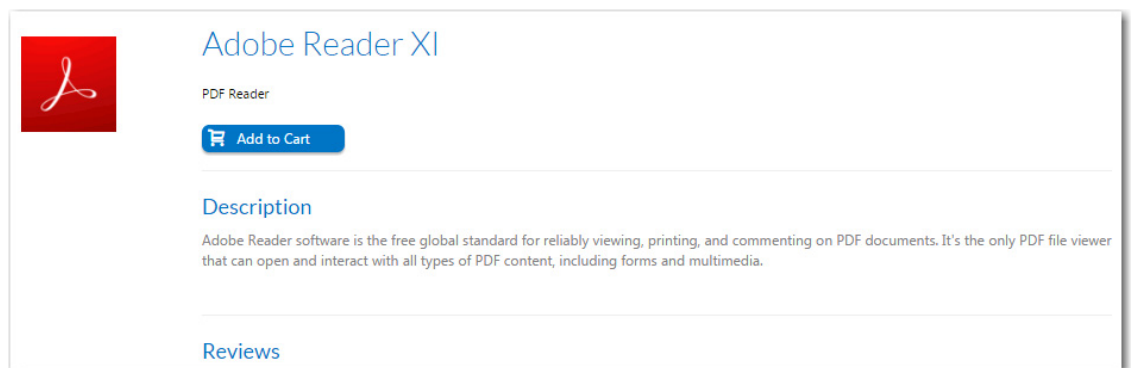
- **Title**—The text entered in the **Title** field along with the catalog item icon, will be displayed when viewing this catalog item on the **Browse Catalog** tab.



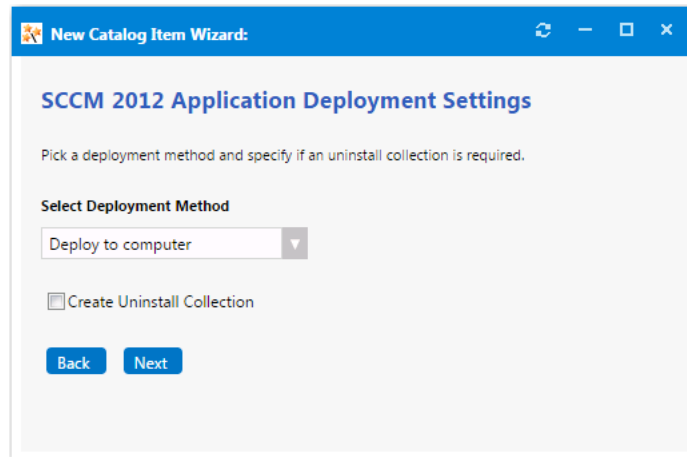
- **Brief Description**—When viewing catalog items in list view, the brief description will also be visible:



- **Full Description**—The text entered in the **Full Description** field will be displayed when a catalog item is viewed in its detail view, which is opened by clicking on the catalog item name in either the list or card view.

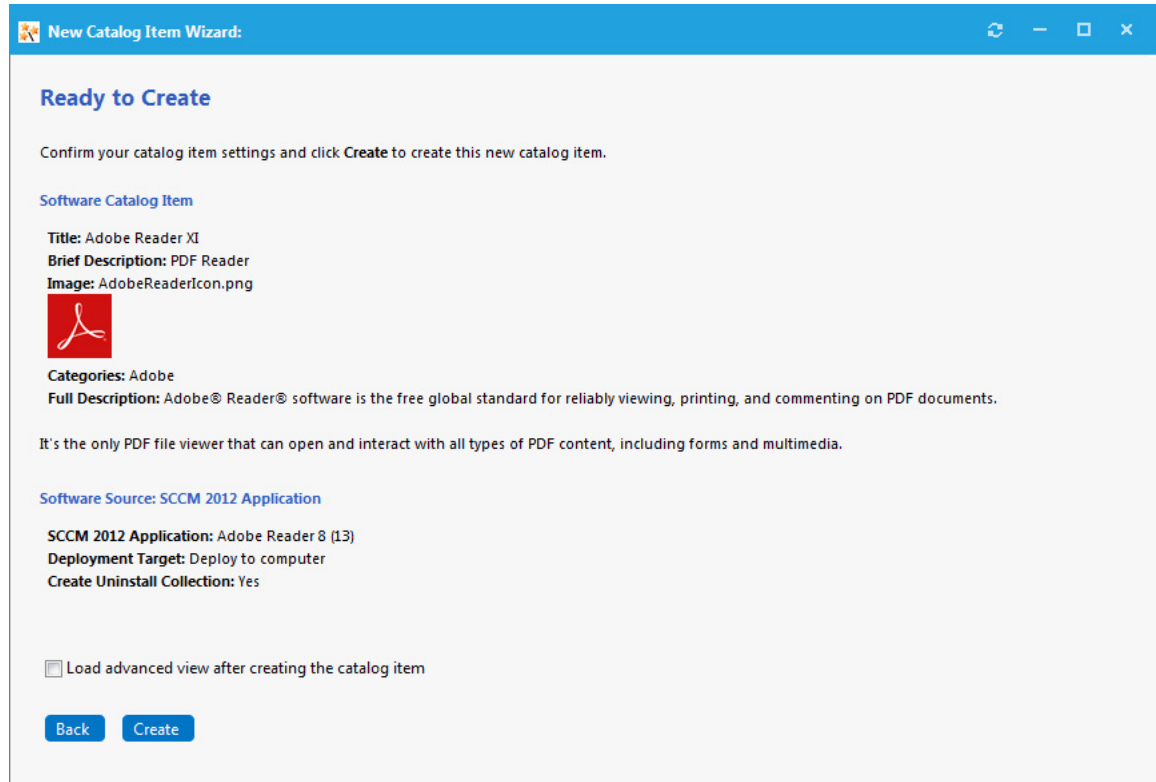


14. When you are finished editing the fields on the **Catalog Item Title and Category** panel, click **Next**.
15. The **SCCM 2012 Deployment Settings** panel opens.



Note • When adding an System Center Configuration Manager package, or an Altiris software product or policy, the options displayed on the **Deployment Settings** panel will vary.

16. From the **Select Deployment Method** list, select one of the following options to specify whether this catalog item will be deployed to a computer or to a user:
 - **Deploy to computer**
 - **Deploy to user**
17. To add an uninstall collection to this catalog item, select the **Create Uninstall Collection** option. When this option is selected, users will be able to submit an uninstall request from App Portal, and System Center Configuration Manager will uninstall the application. App Portal will inform the user when the uninstall is complete.
18. Click **Next**. The **Ready to Create** panel opens.



19. Click **Create** to create this new catalog item. The catalog item will now be listed on the **Browse Catalog** tab in the category you selected.



Note • After creating a catalog item, you can edit its basic and advanced settings on the **Catalog Item Properties** dialog box, as described in the **Setting Catalog Item Properties** topic in the *App Portal / App Broker Administration Guide*.

Adding Licensed Software Catalog Items

If you have also purchased FlexNet Manager Suite, you can use App Portal to manage application licenses.

- **Flexera Service Gateway**—App Portal communicates with FlexNet Manager Suite via the Flexera Service Gateway component. You need to enter the Flexera Service Gateway server name on the **Flexera Integration** tab of the **Site Management > Settings** view.
- **Linking a catalog item to FlexNet Manager Suite**—You can associate a catalog item with its Flexera ID when creating the new catalog item using the **New Catalog Item Wizard**. Also, after a catalog item has been added to App Portal, you can open the **FlexNet Manager Suite** tab of the catalog item's **Catalog Item Properties** dialog box and search the FlexNet Manager Suite libraries to locate the application's Flexera ID.
- **App Portal can reserve licenses**—After App Portal is connected to FlexNet Manager Suite and an application's Flexera ID has been selected, whenever an end user requests that application from App Portal, App Portal will automatically connect to FlexNet Manager Suite and request that an application license be reserved for that end user.
- **Advanced license check**—Starting with App Portal 2016, license entitlement evaluation has been enhanced to consider not only available licenses, but also second use rights, upgrade/downgrade rights, and exemption by device role rights (such as an MSDN subscription), all based upon information stored in FlexNet Manager Suite.

You can add a Flexera ID to a new catalog item using the **New Catalog Item Wizard**, or to an existing catalog item, using the **Catalog Item Properties** dialog box.

- [About Advanced License Check](#)
- [Adding a New Licensed Software Catalog Item Using the New Catalog Item Wizard](#)
- [Converting an Existing Catalog Item to a Licensed Catalog Item](#)



Note • To add a software catalog item, you must first provide connection settings to a deployment technology, as described in [Configuring Your Deployment Technology](#).

About Advanced License Check

App Portal gives users the ability, at a more advanced level, to check if a license reservation is needed for a catalog item by evaluating the following during checkout:

- **Right of second use (also known as portable use)**—The right to use the software on both a desktop and a laptop with the same owner and only consume one license.
- **Upgrade rights**—The right to use the latest version of the software as soon as it becomes available.
- **Downgrade rights**—The right to use an older version of the software than the version purchased.
- **Exemption by device role rights**—The right to install software based upon a subscription role, such as an MSDN subscription.

These additional license rights are evaluated at checkout before a license is reserved. This solution helps ensure that your organization evaluates all key entitlement rights and does not mistakenly purchase more license entitlements that you actually require.

Enabling Advanced License Check

By default, advanced license check is not enabled. To enable it globally, select the **Enable Advanced License Check with FlexNet Manager Suite** option on the **Site Management > Settings > Flexera Integration** view.

You can also control the advanced license check feature on a catalog item basis by selecting the **Check for available license during checkout** option on the **FlexNet Manager Suite** tab of the **Catalog Item Properties** dialog box.

Microsoft Silverlight - FlexNet Manager Suite Settings

General Notes Deployment **FlexNet Manager Suite** Visibility

Mapping License Reclamation Alert Action Targets

Save Clear

FlexNet Manager Suite Mapping

☒ Check for license position during checkout
☒ Check for advanced license during checkout

Select the licensing availability scope:

Global Only

This catalog item is mapped to the following Flexera ID:

Flexera ID ari://MGS-APP-00000079510

Figure 3-2: Check for Advanced License During Checkout Option

About Product Use Rights

Enabling the “advanced license check” process will improve the entitlement estimate during the reservation process, but it may run the risk of a few exceptions. For instance, the following may occur:

- Changes between the pre- and post-approval process may occur.
- Changes between the request process and the deployment / inventory may occur.
- Reassignment of license through the license reconcile process may produce unexpected results.

There are known limitations in the license optimization performed when using the advanced license check. For instance, only the user/device relevant to the request is considered. In the scenario described in the following table, no new license is required if you consider both User 1 and User 2: you just need to exchange the current licenses between User 1 and User 2. However, because only User 2 is considered at the time of the request, the system wrongly detects that a new license is needed. These are corner case scenarios but they may exist.


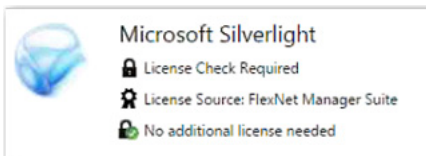
Table 3-1 •

Users	License	Request	What should happen	What will happen
User 1	Has a license with right of second use	—	User 1 and User 2 should switch licenses so that User 2 has a right of second use.	An additional license will be purchased for User 2 .
User 2	Has a license with no right of second use	User 2 requests a license for a second device		

Advanced License Check User Experience

When this feature is enabled, catalog items on the Browse Catalog tab that require a license will display the text “License Check is Required” rather than “License Required”. An advanced license check will be performed using the data from FlexNet Manager Suite to determine whether the right of second use, upgrade/downgrade rights, or exemptions by device role apply.

Table 3-2 •

Without Advanced License Check	With Advanced License Check
 <p>Items requiring a license identified by the phrase License Required.</p> <p>License availability is identified as either License available or License not available.</p>	 <p>Items requiring a license are identified by the phrase License Check Required.</p> <p>If an item requires a license and, after an advanced license check is performed, it is determined that the user already has rights to a license for that item (possibly due to second use, upgrade, downgrade, or role rights), the phrase No additional license needed is listed.</p>

Adding a New Licensed Software Catalog Item Using the New Catalog Item Wizard

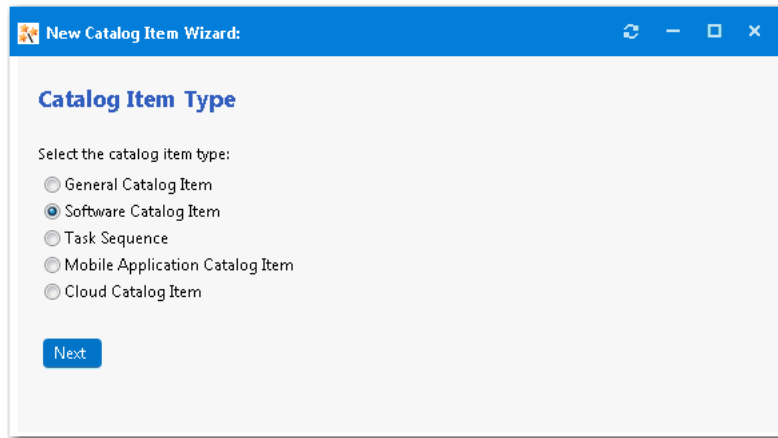
To add a new licensed software catalog item using the **New Catalog Item Wizard**, perform the following steps.



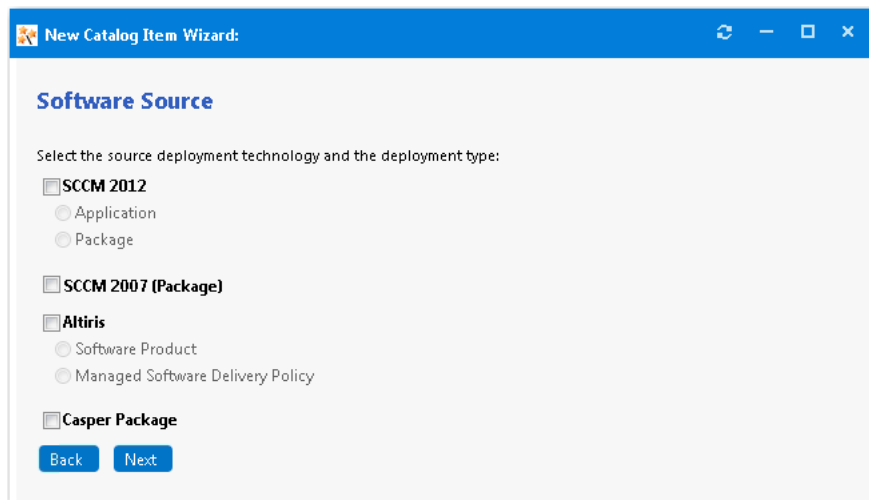
Task

To create a new licensed software catalog item:

1. Select **Site Management > Settings**. The **General** tab of the **Settings** view opens.
2. Open the **Flexera Integration** tab.
3. In the **Flexera Service Gateway Server Name** field, enter the name of your Flexera Service Gateway server.
4. Select **Catalog Management > Create New Catalog Item > New Catalog Item Wizard**. The **Catalog Item Type** panel of the **New Catalog Item Wizard** opens.



5. Select **Software Catalog Item** and click **Next**. The **Software Source** panel opens.



6. Select **SCCM 2012** and then select **Application**.
7. Click **Next**. The **SCCM 2012 Applications** panel opens.

New Catalog Item Wizard:

SCCM 2012 Applications

Click on the application that you want to associate with this catalog item and click **Next**.

Note: This grid only lists the first 100 applications in SCCM 2012. To search the entire SCCM server for an application, use the column filters.

App ID	Manufacturer	Name	Version
2445	Google Inc.	Picasa	2.7.0
2441	Helios	TextPad 5	5.2.0
2411	Helios	TextPad 5	5.2.0
2427	Julien Vanier	Picasa (Safe Upload)	1.0
2461	Leimberg and LeClair Inc	NumberCruncher	204.0
76	Leimberg and LeClair Inc	NumberCruncher	204.0
1960	MessageLabs, Ltd.	MessageLabs Professional Online Desktop 3.6	3.60.0000
2128	Microsoft	Orca (Retired)	5.0
2135	Microsoft Corporation	Orca	5.0.7069.0000
1968	Mozilla	Firefox	16.0.2

Page size: 10 47 items in 5 pages

Back **Next**

- Locate and select the application that you want to associate with this new catalog item.



Important • Only a specified number of packages are initially listed in this grid. To search the entire System Center Configuration Manager server for a package, use the column filters.

- Click **Next**. The **Catalog Item Title and Category** panel opens.

10. In the **Title** field, enter a title to identify this catalog item in your App Portal storefront. By default, the name of the package that you selected is listed in this field.
11. From the **Category** field, select a category to specify this catalog item's location in the App Portal catalog.



Note • You are required to select at least one category, but you may select more than one.

12. In the **Brief Description** field, enter the text that you want to display under the catalog item **Title** in the App Portal storefront.
13. By default, a generic icon is associated with this catalog item. If you have another image that you would like to use to identify this catalog item, click **Change** to open the **Image Selection** dialog box and select a .gif, .jpg, or .png icon file.

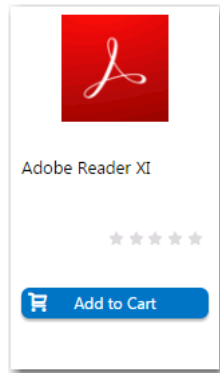


Tip • For best results, the uploaded image should be at least 80 px by 80 px.

14. In the **Search Keywords** text box, enter single words that an end user might enter when searching for this catalog item.
15. In the **Full Description** text area, enter a longer description of this catalog item, and use the items on the toolbar to format it.

The text entered in the **Title**, **Brief Description**, and **Full Description** fields will be displayed as follows:

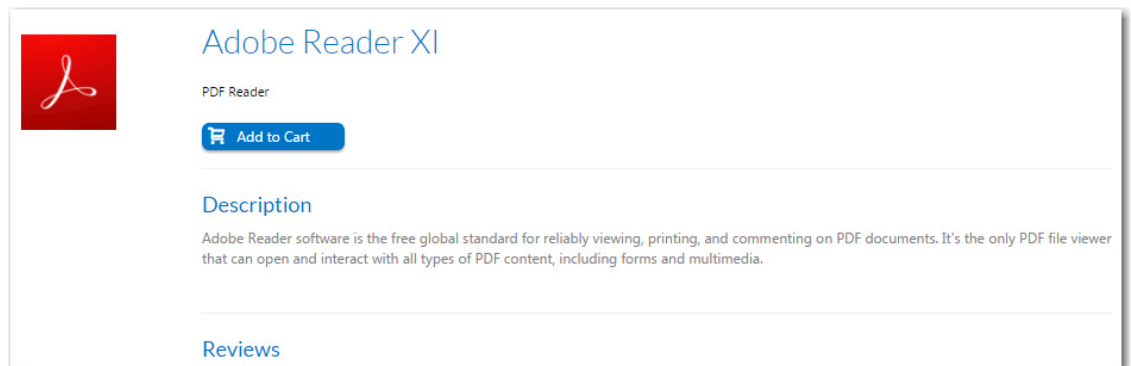
- **Title**—The text entered in the **Title** field along with the catalog item icon, will be displayed when viewing this catalog item on the **Browse Catalog** tab.



- **Brief Description**—When viewing catalog items in list view, the brief description will also be visible:



- **Full Description**—The text entered in the **Full Description** field will be displayed when a catalog item is viewed in its detail view, which is opened by clicking on the catalog item name in either the list or card view.



16. When you are finished editing the fields on the **Catalog Item Title and Category** panel, click **Next**. Because you are connected to FlexNet Manager Suite via the Flexera Service Gateway, the **Flexera ID** panel opens, and by default, does not list any products.
17. In the filter box under **Product**, enter the name of the application you are adding and press Enter. The Flexera ID list is populated with applications matching the term(s) you entered.

Product	Edition	Version
adobe		
3DVIA Player Plug In for Adobe Reader V6R2009x		6.3
Active Components Framework for Adobe		7.1
Adobe Integration		2.2
Adobe PDX Ext		1.0
AdobeIccProfiles		2
AdobePlugin		2.0
Advanced Linguistic Search Plugin for Adobe		1.4
AutoMailMerge Plugin for Adobe Acrobat		2.5
Blend for Visual Studio 2012 Add-in for Adobe FXG Import	Preview	1
Blend for Visual Studio Add-in for Adobe FXG Import		1.0

18. To track licenses for this catalog item using its Flexera ID, select the application name for this catalog item, and click **Next**. The **SCCM 2012 Deployment Settings** panel opens.



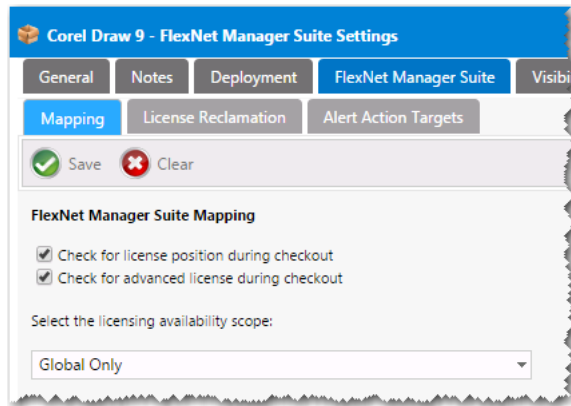
Note • When adding a System Center Configuration Manager package, or an Altiris software product or policy, the options displayed on the **Deployment Settings** panel will vary.

19. From the **Select Deployment Method** list, select one of the following options to specify whether this catalog item will be deployed to a computer or to a user:
- **Deploy to computer**

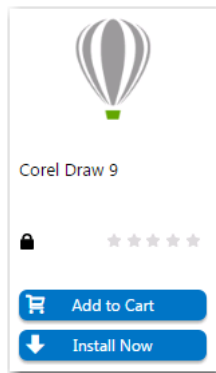
- **Deploy to user**

20. To add an uninstall collection to this catalog item, select the **Create Uninstall Collection** option. When this option is selected, users will be able to submit an uninstall request from App Portal, and System Center Configuration Manager will uninstall the application. App Portal will inform the user when the uninstall is complete.
21. Click **Next**. The **Ready to Create** panel opens.
22. Select the **Load advanced view after creating the catalog item** option.
23. Click **Create** to create this new catalog item. The catalog item will now be listed on the **Browse Catalog** tab in the category you selected. Also, because you selected the **Load advanced view after creating the catalog item** option, the **Catalog Item Properties** dialog box for this catalog item opens.

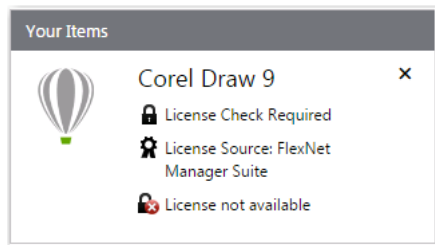
24. Open the **FlexNet Manager Suite Settings > Mapping** tab.



25. To enable license checking for this catalog item, select **Check for license position during checkout**.
26. To enable advanced license checking for this catalog item, as described in [About Advanced License Check](#), select **Check for advanced license during checkout**.
27. Click **Save** on the **Catalog Item Properties** dialog box and then close the dialog box.
28. Next, open the **Browse Catalog** tab.
29. Under **Browse Categories**, select the category that contains the catalog item that you just added. Because a license is required for this catalog item, a lock icon will be displayed.



If you add a catalog item that requires a license to the cart and then open the cart, two additional icons will be displayed for that catalog item: the **License Source** icon, and the **License available** or **License not available** icon. In the following example, the **License not available** icon is displayed.



If a license were available, the following icon would be displayed:



Converting an Existing Catalog Item to a Licensed Catalog Item

You can also add a Flexera ID to an existing catalog item by opening the **FlexNet Manager Suite** tab of the catalog item's **Catalog Item Properties** dialog box.



Task

To add a catalog item's Flexera ID:

1. Select **Current Catalog Items > View All Items** and double-click on the catalog item that you want to modify. The **Catalog Item Properties** dialog box opens.
2. Open the **FlexNet Manager Suite** tab.

The screenshot shows the 'BlackBerry - FlexNet Manager Suite Settings' dialog box. The 'FlexNet Manager Suite' tab is selected. Within this tab, the 'Mapping' sub-tab is active. At the top, there are 'Save' and 'Clear' buttons. Below them is the 'FlexNet Manager Suite Mapping' section. A 'Search' link is present. A text instruction states: 'To change the current mapping, use the following search field to locate and select a Flexera ID, and then click Save.' Below this instruction are four text input fields labeled 'Product Name', 'Version', 'Edition', and 'Publisher'. A blue 'Search' button is located below these fields. At the bottom of the mapping section is a large empty rectangular box, likely for displaying search results.

3. Enter the name of the application in the **Product Name** field and click **Search**. Possible matches are listed.
4. From the list of search results, select the appropriate entry. The selected item will be highlighted.

BlackBerry - FlexNet Manager Suite Settings

General Deployment **FlexNet Manager Suite** Visibility Approval Approval Process Settings

Mapping License Reclamation Alert Action Targets

Save Clear

FlexNet Manager Suite Mapping

Search

To change the current mapping, use the following search field to locate and select a Flexera ID, and then click **Save**.

Product Name
Blackberry

Version

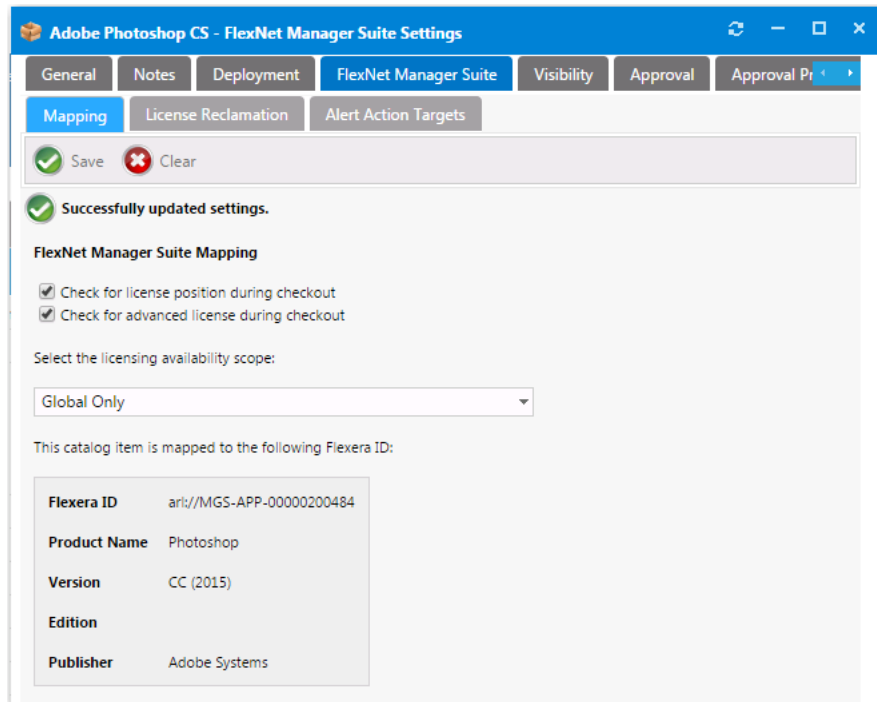
Edition

Publisher

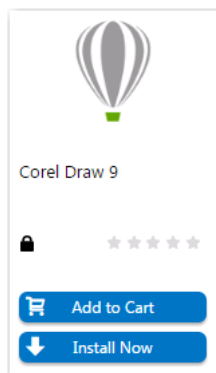
Search

- ActiveSync BlackBerry Configuration 2.0 Research In Motion
- Blackberry 3.5 Research In Motion**
- BlackBerry 5800 Series Wireless Handhelds 3.6 Research In Motion
- BlackBerry 6200 Series Wireless Handhelds 3.6 Research In Motion
- BlackBerry Administration API 10.1 Research In Motion
- BlackBerry Analysis Monitoring and Troubleshooting Tools 5.0 Research In Motion
- BlackBerry App World Browser Plugin 2 Research In Motion
- BlackBerry App World Browser Plugin 3 Research In Motion
- BlackBerry App World Browser Plugin 4 Research In Motion
- BlackBerry Application Web Loader 1.0 Research In Motion
- BlackBerry Application Web Loader 1.1 Research In Motion

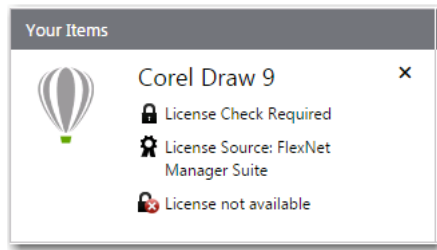
5. Click **Save**. The catalog item is now mapped to a software entry in FlexNet Manager Suite, and the product information is now listed at the top of the dialog box.



6. Make sure that the **Check for license position during checkout** and, optionally, the **Check for advanced license during checkout** options are selected.
7. Click **Save** and close the **Catalog Item Properties** dialog box.
8. Select the **Browse Catalog** tab.
9. Under **Browse Categories**, select the category that contains the catalog item that you just added. Because a license is required for this catalog item, a lock icon will be displayed.



If you add a catalog item that requires a license to the cart and then open the cart, two additional icons will be displayed for that catalog item: the **License Source** icon, and the **License available** or **License not available** icon. In the following example, the **License not available** icon is displayed.



If a license were available, the following icon would be displayed:



Adding an AirWatch Mobile Application Catalog Item



Note • To add a mobile application catalog item, you must first provide connection settings to an AirWatch instance, as described in [Entering AirWatch Settings](#).



Note • The instructions for adding mobile applications from MobileIron are similar.

When App Portal is connected to an AirWatch instance, you can use the **New Catalog Item Wizard** to create a mobile application catalog item containing Apple iOS and Google Android mobile apps. All iOS and Android mobile apps configured on the connected AirWatch instance, both internal and public store, can be associated with an App Portal catalog item and made available in App Portal.

You can add multiple versions of a mobile application to the same catalog item in order to accommodate different operating systems and different devices. For example, a single catalog item named ABC Application could contain the following versions of the same mobile app:

- ABC Application / iOS iPhone Version
- ABC Application / iOS iPad Version
- ABC Application / Android Version

When the end user requests this mobile application, the version appropriate to the user's registered device will be delivered.



Note • You can also link a mobile application to its corresponding desktop version so that end users requesting one will be asked whether they want to also receive the other. See [Linking a Mobile Application With a Desktop Application](#).



Note • If a user does not have a registered mobile device, that user will not see any mobile applications displayed on the **Browse Catalog** tab. Also, if a user has only iOS mobile devices registered, Android-only mobile applications will not be visible on the **Browse Catalog** tab for that user, and vice versa.

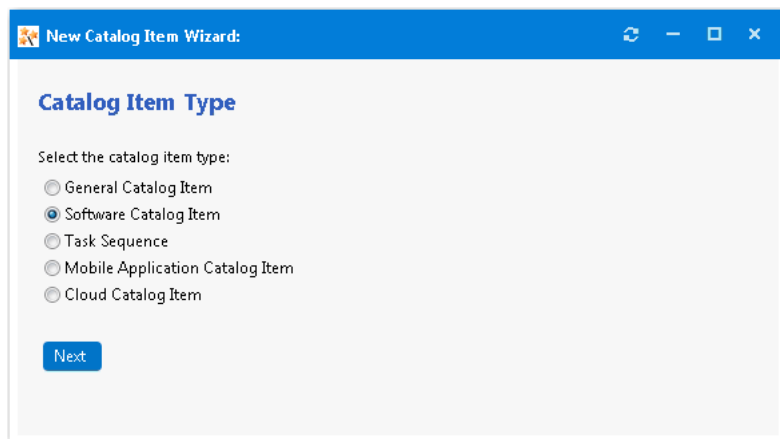
To create an AirWatch mobile application catalog item, perform the following steps.



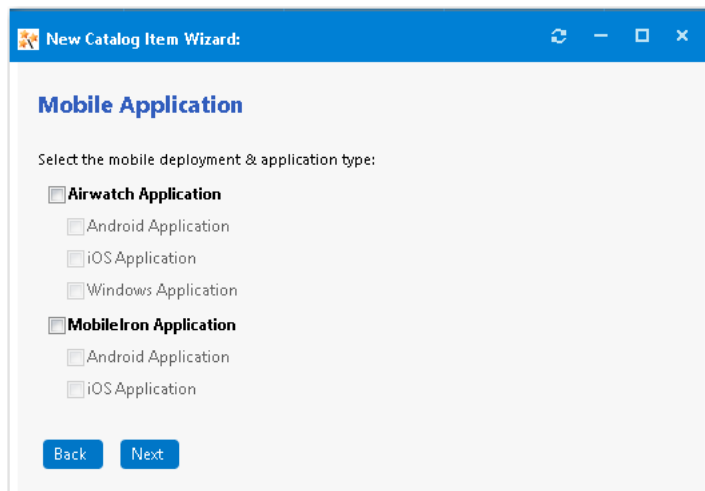
Task

To create an AirWatch mobile application catalog item:

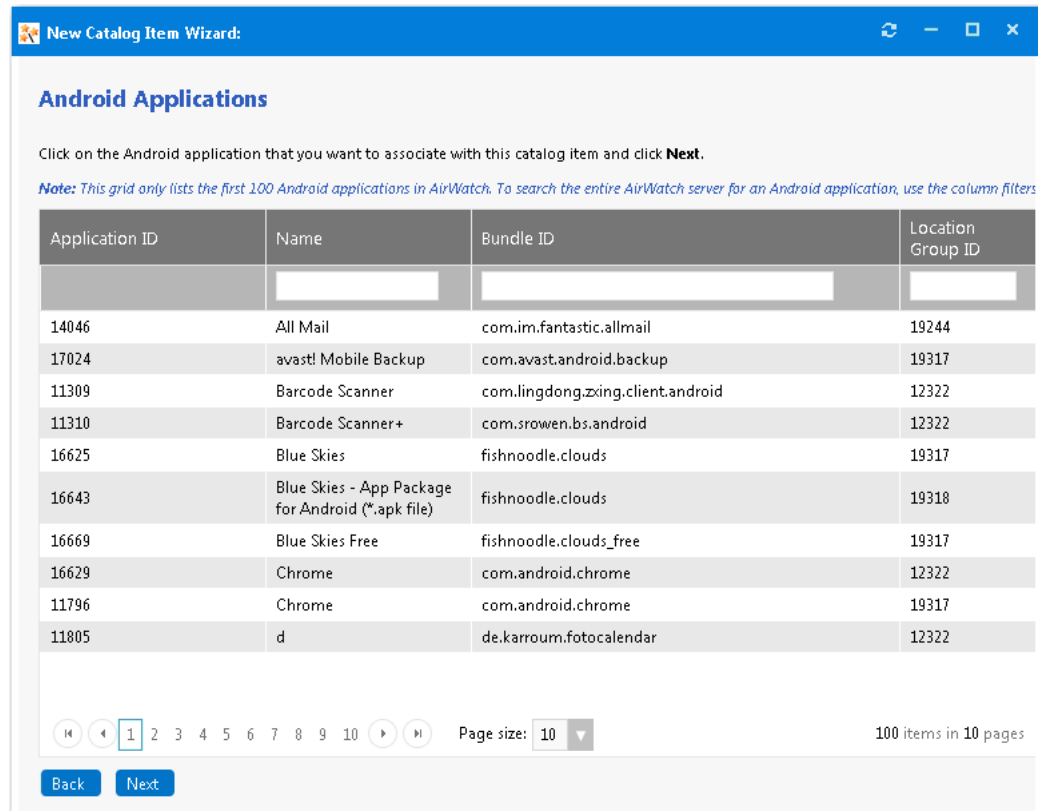
1. Make sure that you have connected App Portal to an AirWatch instance, as described in [Entering AirWatch Settings](#).
2. Under **Catalog Management**, select **New Catalog Item Wizard**. The **Catalog Item Type** panel of the **New Catalog Item Wizard** opens.



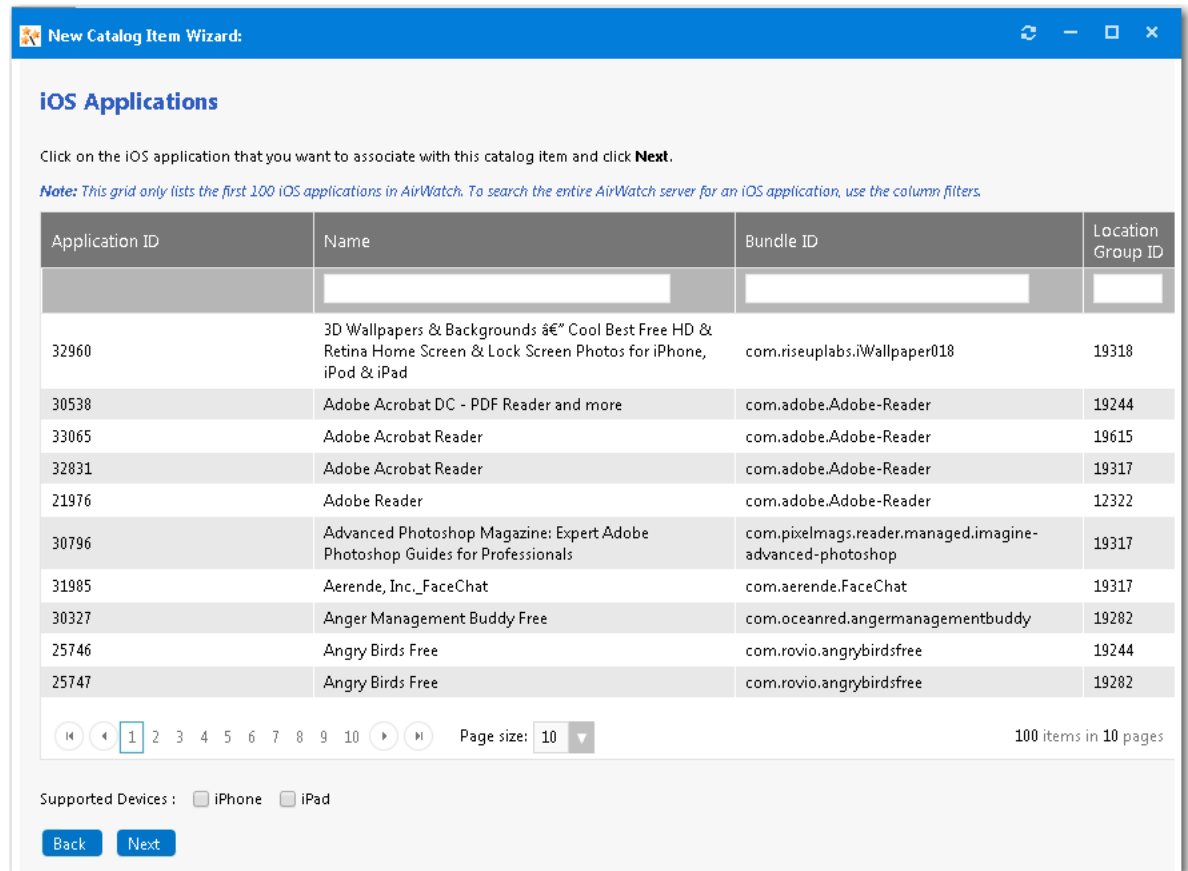
3. Select **Mobile Application Catalog Item** and click **Next**. The **Mobile Application** panel opens.



4. Select **Airwatch Application** and then the platform of the mobile application you want to add to this catalog item: **Android Application**, **iOS Application**, **Windows Application**, or more than one.
5. Click **Next**. If you selected **Android Application**, the **Android Applications** panel opens, listing all of the Android applications on the AirWatch instance.



6. Select the Android application that you want to add and click **Next**. If you selected **iOS Application** on the **AirWatch Mobile Application Catalog Item Type** panel, the **iOS Applications** panel opens.



7. Select the iOS mobile application that you want to associate with this new catalog item.
8. Next to **Supported Devices**, select **iPhone** and/or **iPad** to indicate the devices that this mobile application supports.
9. Click **Next**. The **Catalog Item Title and Category** panel opens.

10. In the **Title** field, enter a title to identify this catalog item in your App Portal storefront. By default, the name of the package or application that you selected is listed in this field.
11. From the **Category** field, select a category to specify this catalog item's location in the App Portal catalog. You are required to select at least one category, but you may select more than one.
12. In the **Brief Description** field, enter the text that you want to display under the catalog item **Title** in the App Portal storefront (when viewed in list view).
13. By default, a generic icon is associated with this catalog item. To associate a custom icon to this catalog item, click **Change** to open the **Image Selection** dialog box and select a .gif, .jpg, or .png icon file.

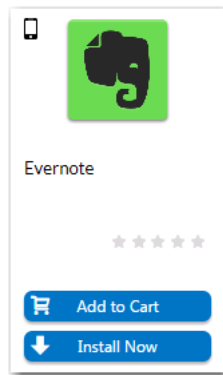


Tip • For best results, the uploaded image should be 80 px by 80 px or larger.

14. In the **Search Keywords** text box, enter single words that an end user might enter when searching for this catalog item.
15. In the **Full Description** text area, enter a longer description of this catalog item, and use the items on the toolbar to format it.

The text entered in the **Title**, **Brief Description**, and **Full Description** fields will be displayed as follows:

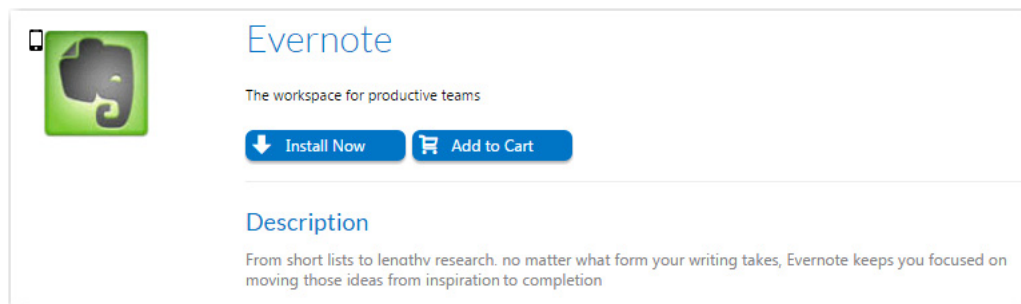
- **Title**—The text entered in the **Title** field along with the catalog item icon, will be displayed when viewing this catalog item on the **Browse Catalog** tab.



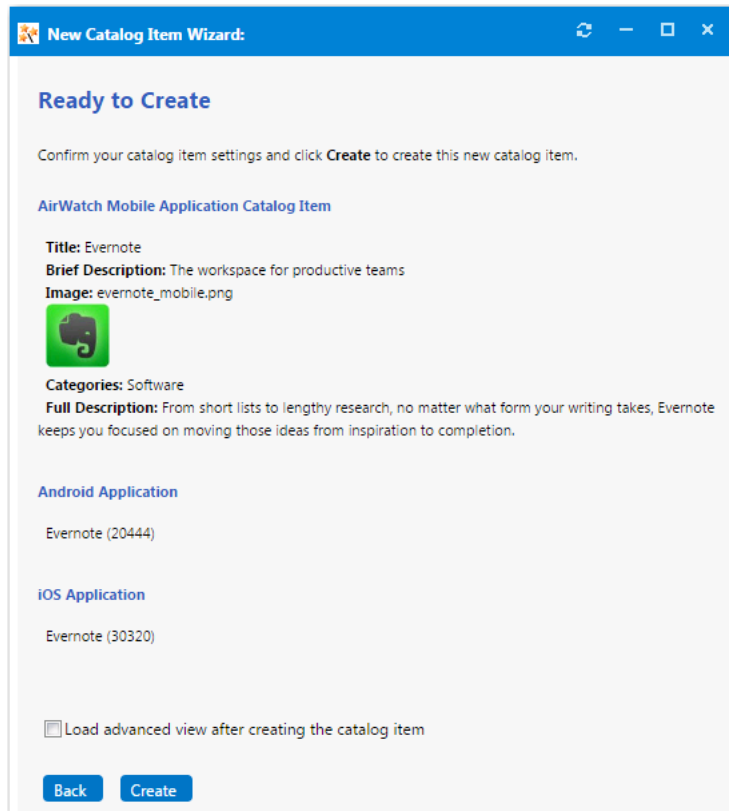
- **Brief Description**—When viewing catalog items in list view, the brief description will also be visible:



- **Full Description**—The text entered in the **Full Description** field will be displayed when a catalog item is viewed in its detail view, which is opened by clicking on the catalog item name in either the list or card view.



16. When you are finished editing the fields on the **Catalog Item Title and Category** panel, click **Next**. The **Ready to Create** panel opens.



17. If, after this catalog item is created, you want to immediately open this catalog item's **Catalog Item Properties** dialog box, where you can specify advanced settings, select the **Load advanced view after creating the catalog item** option.
18. Review the summary information and then click **Create** to create this new catalog item. The catalog item will now be listed on the **Browse Catalog** tab in the category you selected.



Note • After creating a catalog item, you can edit its basic and advanced settings on the **Catalog Item Properties** dialog box.

Linking a Mobile Application With a Desktop Application

A user can request both a desktop application and its associated mobile application in the same request. App Portal will deploy the desktop application using System Center Configuration Manager or Symantec Altiris, while it will use AirWatch to deploy the mobile application.

You can link a mobile application catalog item with its associated desktop catalog item so that when one of the linked applications is requested, the user will be informed that the other linked catalog item is also available.

- **Requesting a desktop catalog item**—If a user adds a desktop catalog item that is linked to a mobile catalog item to the cart, the user will be informed during checkout that they can optionally install the mobile catalog item onto their mobile device:

The screenshot shows the 'Your Items' section on the left and the 'Action' section on the right. In 'Your Items', there is a catalog item for 'Adobe Reader XI' with a price of '\$0.00'. Below the item name, it says 'License Required', 'License Source: FlexNet Manager Suite', and 'License not available'. In the 'Action' section, a message states 'Adobe Reader XI will be installed on the selected device.' Below this, there is a section titled 'Associated Mobile App' for 'Adobe Reader', which 'Requires approval'. A message says 'This catalog item has an associated mobile app. To request installation of this mobile app, select one or more of the listed mobile devices.' There is a text input field for 'Why do you want to install this app?'. Below this is a table with two columns: 'Device' and 'Cost'.

Device	Cost
<input type="checkbox"/> Swatimita iPhone iOS 7.0.3 DTC0 (iPhone 4S (GSM/CDMA) (16 GB Black))	\$0.00

If the user selects to also request the mobile application, both catalog items will be included on the same request, but two different request IDs will be created.

- **Requesting a mobile catalog item**—When a user clicks **Add** on a mobile application that is linked to a desktop catalog item, you will be informed that a desktop catalog item exists, and you are prompted to indicate whether you would also like to request the linked desktop catalog item. If you click **Yes**, both items are added to the cart.

The dialog box has a title bar 'Add linked item to cart?' with a close button. The main text says 'There is a desktop application catalog item linked with this mobile app. Do you want to also add this linked catalog item to your cart?'. At the bottom, there are two buttons: 'No' and 'Yes'.

To link a mobile application catalog item to a desktop catalog item, perform the following steps.



Task

To link a mobile catalog item to a desktop catalog item:

1. Open the **Link Desktop Catalog** tab of a mobile application catalog item's **Catalog Item Properties** dialog box.

Adobe Reader - Linked Desktop Catalog Item Settings

General AirWatch **Link Desktop Catalog** Visibility Approval Approval Process Notifications Permissions

Save Clear

Map Mobile and Desktop Catalog Items

After linking this mobile catalog to a desktop catalog, visibility conditions of the mobile catalog will not be taken into account. Visibility conditions of the linked desktop catalog will be applicable to the mobile catalog.

This catalog item is mapped to the following catalog item:

[Search](#)

To change the current mapping, use the following search field to locate and select a Catalog Item, and then click **Save**.

Catalog Item

Search

2. Use the **Search** field to locate the desktop catalog item that you want to link to, select it, and then click **Save**.

Adobe Reader - Linked Desktop Catalog Item Settings

General AirWatch **Link Desktop Catalog** Approval Approval Process Notifications Permissions Sessions

Save Clear

Map Mobile and Desktop Catalog Items

After linking this mobile catalog to a desktop catalog, visibility conditions of the mobile catalog will not be taken into account. Visibility conditions of the linked desktop catalog will be applicable to the mobile catalog.

This catalog item is mapped to the following catalog item:

Catalog Item	Adobe Reader XI
Licensed	False
Enabled	True
Approval Needed	True

Search

To change the current mapping, use the following search field to locate and select a Catalog Item, and then click **Save**.

Catalog Item

Search

Attaching an Approval Workflow to an Existing Catalog Item

Approval workflows, which are applied to catalog items, define how a request will be routed for review. In each step of an approval workflow, a user or group reviews the request. Workflows are defined and listed on the **Workflows View**, which is opened by selecting **Workflows** under **Site Management** on the **Admin** tab.

In this section, you will learn how to attach an approval workflow to a catalog item.



Note • For information on creating an approval workflow, see [Managing Approval Workflows](#).



Note • As an alternative to manually associating both an **Approval Workflow** and **Question Template** to a catalog item, you can instead create a **Catalog Item Template** that has an associated approval workflow and question template, and then just assign the **Catalog Item Template** to the catalog item. See [Creating a Catalog Item Template](#).

To attach an approval workflow to a catalog item, perform the following steps:



Task *To attach an approval workflow to a catalog item:*

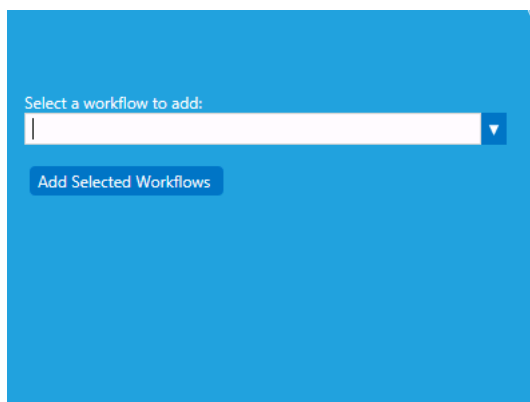
1. Open the **Admin** tab.
2. Select **Current Catalog Items > View All Items** and double-click on the catalog item that you want to modify. The **General > Global** tab of the **Catalog Item Properties** dialog box opens.
3. Under **Approval Options**, select the **Require Approval for Install?** option.

The screenshot shows the 'BlackBerry - General Settings' dialog box with the 'Global' tab selected. The 'Global Options' section includes a checked 'Is enabled?' checkbox, a 'Category' dropdown menu showing '1 categories selected', a 'Class' dropdown menu, a 'Question Template' dropdown menu showing 'No Template Specified', a 'Template Name' text field, and an 'Expire on' date/time picker. The 'Approval Options' section at the bottom has a checked 'Require Approval for Install?' checkbox.

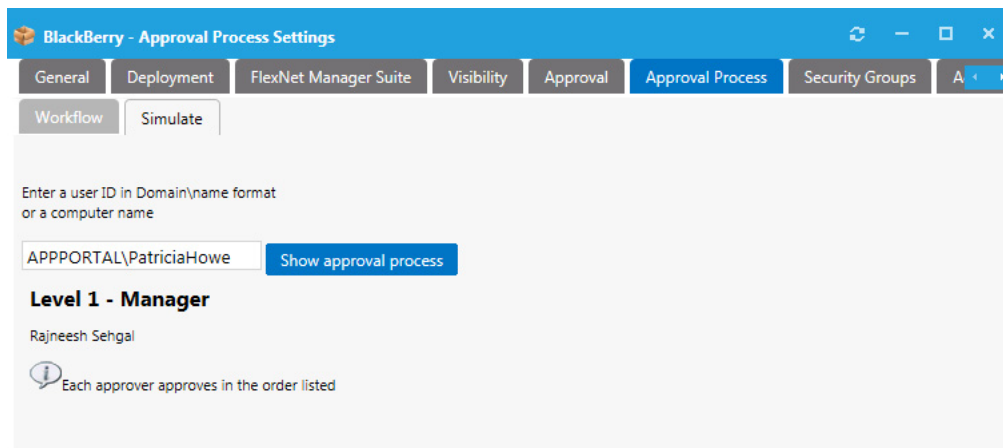
4. Open the **Approval Process > Workflow** tab.

The screenshot shows the 'BlackBerry - Approval Process Settings' dialog box with the 'Approval Process' tab selected. The 'Workflow' sub-tab is active, showing 'Add Workflow' and 'Remove Workflow' buttons. Below these is a table with columns: Name, Levels, Conditions, and Description. The table is currently empty, and a message states: 'There are no workflows defined for this catalog item. The site wide workflows will be used when approval is required.'

- Click **Add Workflow**. A pop-up dialog box opens, prompting you to select a workflow.



- From the **Select a workflow to add** list, select **Manager Workflow** and click **Add Selected Workflows**. The workflow is now listed on the **Workflow** subtab of the **Approval Process** tab.
- To view a simulation of the approval process for this catalog item, open the **Approval Process > Simulate** subtab.
- In the **Enter a user ID in Domain\name format or a computer name** field, enter your domain and user name and then click **Show approval process**. The levels in the selected approval workflow are listed:



In this example, the selected **Manager Workflow** only included one level, which was defined as the end-user's manager.

- Close the **Catalog Item Properties** dialog box.



Note • For more information on workflows, see [Managing Approval Workflows](#).

Creating a Question Template and Attaching it to a Catalog Item

When submitting a software request, sometimes the end user needs to answer a set of questions that will give App Portal the information it needs in order to fulfill that software request.

For example, in order to approve a software request, a manager may want to know the name of the project that the end user is working on that requires this application. Or, in order to determine licensing requirements, the manager may want to know how frequently the end user will use this application or the time of day that it would be used.

In App Portal, you use the **Question Manager** to create questions, then group those questions into question templates using the **Template Manager**. This section explains how to create questions, add questions to a question template, and how to attach a question template to a catalog item:

- [Creating Questions](#)
- [Creating a Question Template](#)
- [Attaching Question Template to Catalog Item](#)



Tip • In addition to associating a question template to a catalog item, you can also associate a question template with a workflow step. When a question template is linked to a workflow step, the approvers at that step will be presented with those questions. If there are required questions within the question template, the request cannot move to the next workflow step until all required questions have been answered. For example, the approver might be requested to enter a budget code for the expense. For more information, see [Managing Approval Workflows](#).

Creating Questions

To create questions to add to a question template, perform the following steps:



Task

To create questions:

1. Open the **Admin** tab.
2. Under **Catalog Management**, select **Questions > Question Manager**. The **Question Manager View** opens.

App Portal Menu			
<ul style="list-style-type: none"> Site Management Catalog Management <ul style="list-style-type: none"> Create New Catalog Item Current Catalog Items Catalog Catalog Categories Expressions Workflows Approval Groups Workflow Status Questions <ul style="list-style-type: none"> Question Manager Template Manager Question Localization Answer Localization 			
Add Question			
ID	Question Title	Required	Validation
1002	Business Purpose	No	
1006	Download URL	No	
7	KeepQuestion1	Yes	
8	KeepQuestion2	Yes	
9	KeepQuestion3	Yes	
1001	MobileCatalogQuestion	Yes	
1007	Price	No	
1	ProofOfPurchase_Question1	Yes	
2	ProofOfPurchase_Question2	Yes	
3	ProofOfPurchase_Question3	Yes	
4	ProofOfPurchase_Question4	Yes	
1004	Software Title	No	
1003	Software Vendor	No	
1005	Software Version	No	
5	UninstallationWithNoProgr	Yes	
6	UninstallationWithNoProgr	Yes	

- Click **Add Question**. The **Creating New Question** dialog box opens.

- In the **Question Title** field, enter **Reason**.
- In the **Question to be asked** text box, enter the following text:
What is the business purpose for obtaining this application?
- In the **Question details** text box, enter the following descriptive text:
ENTER SOME TEXT HERE

This information, when present, is displayed as a popup dialog when the control is focused or the mouse hovers over it.
- Under **Target**, select the **Requester** option to indicate that the requester will need to answer this question, and select the **Required** check box to indicate that answering the question is not optional.
- Under **Focus**, select **Item Specific** to indicate that this question relates to each item in the end user's cart, and therefore will be asked for each item.



Note • If the question related to the entire request (such as asking for the end user's cost center), you would select **Request Specific**, and the question would only be asked once per request.

9. Under **Question Format**, select **Rich Text Box**.
10. Click **Save**. The new question is now listed on the **Question Manager View**.
11. Click **Add Question** again. The **Creating New Question** dialog box opens.
12. In the **Question Title** field, enter **Department**.
13. In the **Question to be asked** text box, enter: **What is your department?**
14. In the **Question details** field, enter **Select your department from the list**.
15. Under **Target**, select the **Requester** option to indicate that the requester will need to answer this question, and select the **Required** check box to indicate that answering the question is not optional.
16. Under **Focus**, select **Request Specific**.
17. Under **Question Format**, select **Dropdown List**.
18. Click **Save**. You are notified that the question was created successfully, and, because you selected **Dropdown List** as the question format, the **Answers** tab is enabled, where you need to enter the values for the list.
19. Open the **Answers** tab.

Creating New Question

Save

Successfully Created Question What is your department?

Question **Answers** Question Condition Standard Condition

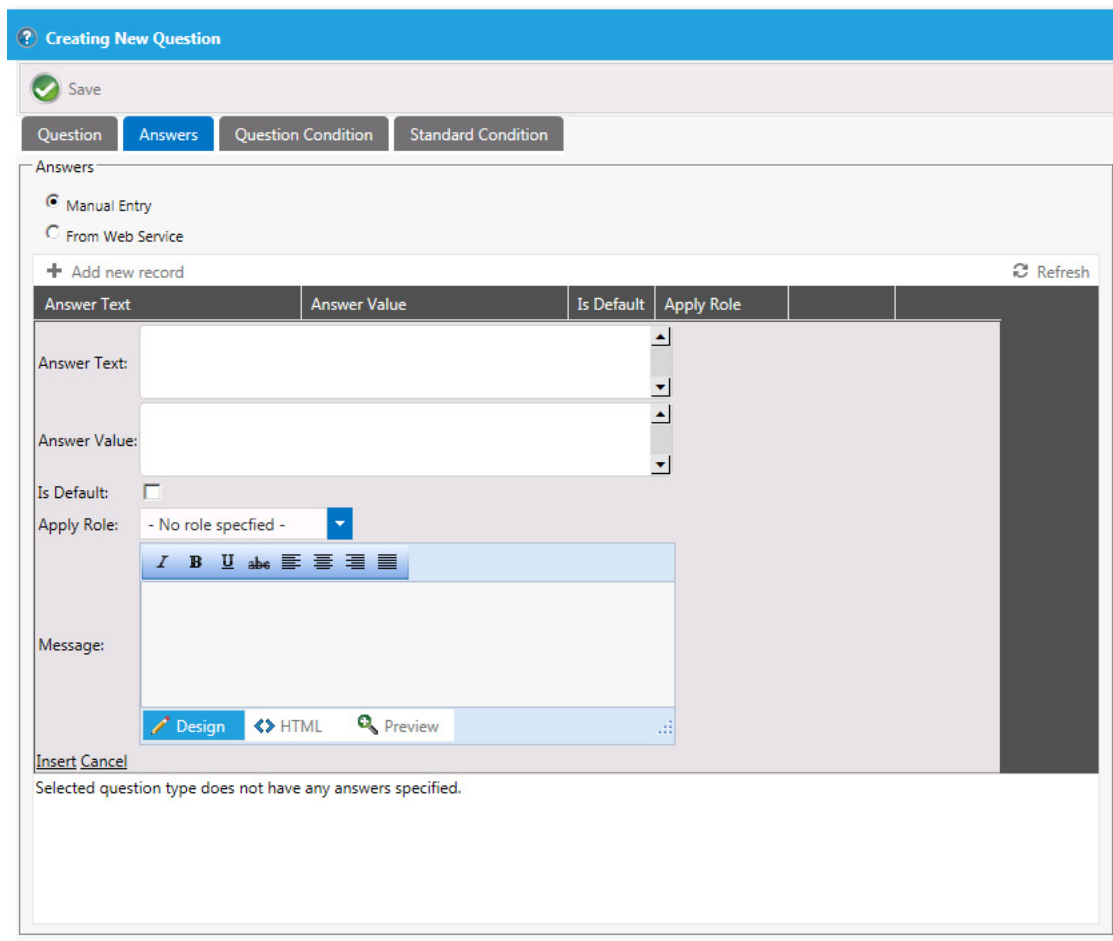
Answers

☒ Manual Entry
☐ From Web Service

+ Add new record Refresh

Answer Text	Answer Value	Is Default	Apply Role
Selected question type does not have any answers specified.			

20. Click **Add new record**. Additional entry fields are displayed.



Creating New Question

Save

Question | **Answers** | Question Condition | Standard Condition

Answers

☒ Manual Entry
☐ From Web Service

+ Add new record Refresh

Answer Text	Answer Value	Is Default	Apply Role
Answer Text:		<input type="checkbox"/>	- No role specified -
Answer Value:			

Is Default: ☐

Apply Role: - No role specified -

Message:

Design | HTML | Preview

[Insert](#) [Cancel](#)

Selected question type does not have any answers specified.

21. In the **Answer Text** field, enter **Engineering**.
22. In the **Answer Value** field, enter **ENG**.
23. Click **Insert**.
24. Repeat the above steps to enter additional records for: Marketing (MKTG), Accounting (ACCT), and Administration (ADMIN).
25. Click **Save**. The new question is now listed on the **Question Manager View**.

Creating a Question Template

To create a new question template, perform the following steps:



Task

To create a new Question Template:

1. Open the **Admin** tab.
2. Under **Catalog Management**, select **Questions > Template Manager**. The **Template Manager View** opens.
3. Click **Add Template**. The **Creating New Question Template** dialog box opens.

4. In the **Template Name** field, enter **Business Reason**.
5. In the **Available Questions** list, select **Reason** and click the right arrow button to move it to the **Current Questions** list.
6. Move the **Department** question from the **Available Questions** list to the **Current Questions** list.
7. Click **Save**. A message stating that the template was successfully created is displayed.
8. Close the **Creating New Question Template** dialog box. The new question template is now listed on the **Template Manager View**.

Attaching Question Template to Catalog Item

After you have created a question template, the next step is to attach that template to a catalog item.



Note • As an alternative to manually associating both an **Approval Workflow** and **Question Template** to a catalog item, you can instead create a **Catalog Item Template** that has an associated approval workflow and question template, and then just assign the **Catalog Item Template** to the catalog item. See [Creating a Catalog Item Template](#).



Task

To attach a question template to a catalog item:

1. Open the **Admin** tab.
2. Under **Catalog Management > Current Catalog Items**, select the group that contains the catalog item you want to edit. The catalog items are listed in the right pane.
3. Double-click the catalog item that you want to edit. That item's **Catalog Item Properties** dialog box opens.
4. Select the **General** tab and make sure that the **Global** subtab is selected.

iTunes 12.0.1 - General Settings

General Deployment FlexNet Manager Suite Visibility

Global Title & Description Alert Inventory Upgrade

Save Archive

Global Options

☒ Is enabled?

Category

1 categories selected

Class

Question Template

No Template Specified

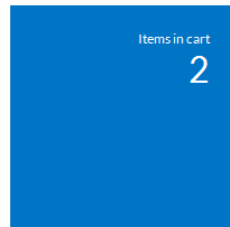
Template Name

Expire on

5. From the **Question Template** list, select **Business Reason** (the question template you just created).
6. Click **Save**. The question template is now attached to the catalog item.
7. To display this question template, perform the following steps:
 - a. Select the **Browse Catalog** tab.
 - b. Select the group that contains the catalog item that you just edited.
 - c. Locate the catalog item and click **Add** to it to your cart.
 - d. Add another catalog item to the cart.
 - e. Click on the **Cart** and then click **View cart and checkout**. The **Choose Target** panel opens.

- f. Specify the target location for these catalog items, and then click **Next**. The **Respond to Questionnaire** panel opens.

Checkout



Continue Shopping

Respond to Questionnaire

Back

Next

Answer the questions below. Questions marked with an asterisk (*) are mandatory.

What is your department? *

-Select-

Your Items	Action
Google Earth 4.1 × License Required License Source: FlexNet Manager Suite License available	What is the business purpose for obtaining this application? * <div> <div>B I U</div> <div></div> </div>
Picasa v_2.7 × License Required License Source: FlexNet Manager Suite License not available	No response needed.

Note that both of the questions in the catalog item's associated **Business Reason** question template are listed.

- Because the **Department** question is request-specific, it is listed at the top of the panel.
 - Because the **Reason** question is item-specific, it is listed in the **Action** table, in the same row as the catalog item.
- g. Hover over the selection list next to the What is your department? question. The text that you entered in the **Question details** text box on the **Creating New Question** dialog box is displayed in a pop-up dialog box.

Respond to Questionnaire

Back

Next

Answer the questions below. Questions marked with an asterisk (*) are mandatory.

What is your department? *

-Select-

Select your department from the list.

4

Requesting a Catalog Item

In this chapter, you will learn how to submit a request for a catalog item, how a request moves through the approval process, and how to view the progress of your request. It also explains how to view reports that summarize App Portal inventory and request activity.

- [Browsing for Catalog Items](#)
- [Requesting Catalog Items](#)
- [Approving a Request](#)
- [Verifying Deployment Status on the My Requests Tab](#)
- [Viewing Reports](#)

Browsing for Catalog Items

You submit requests for software and other assets on the App Portal **Browse Catalog** tab.

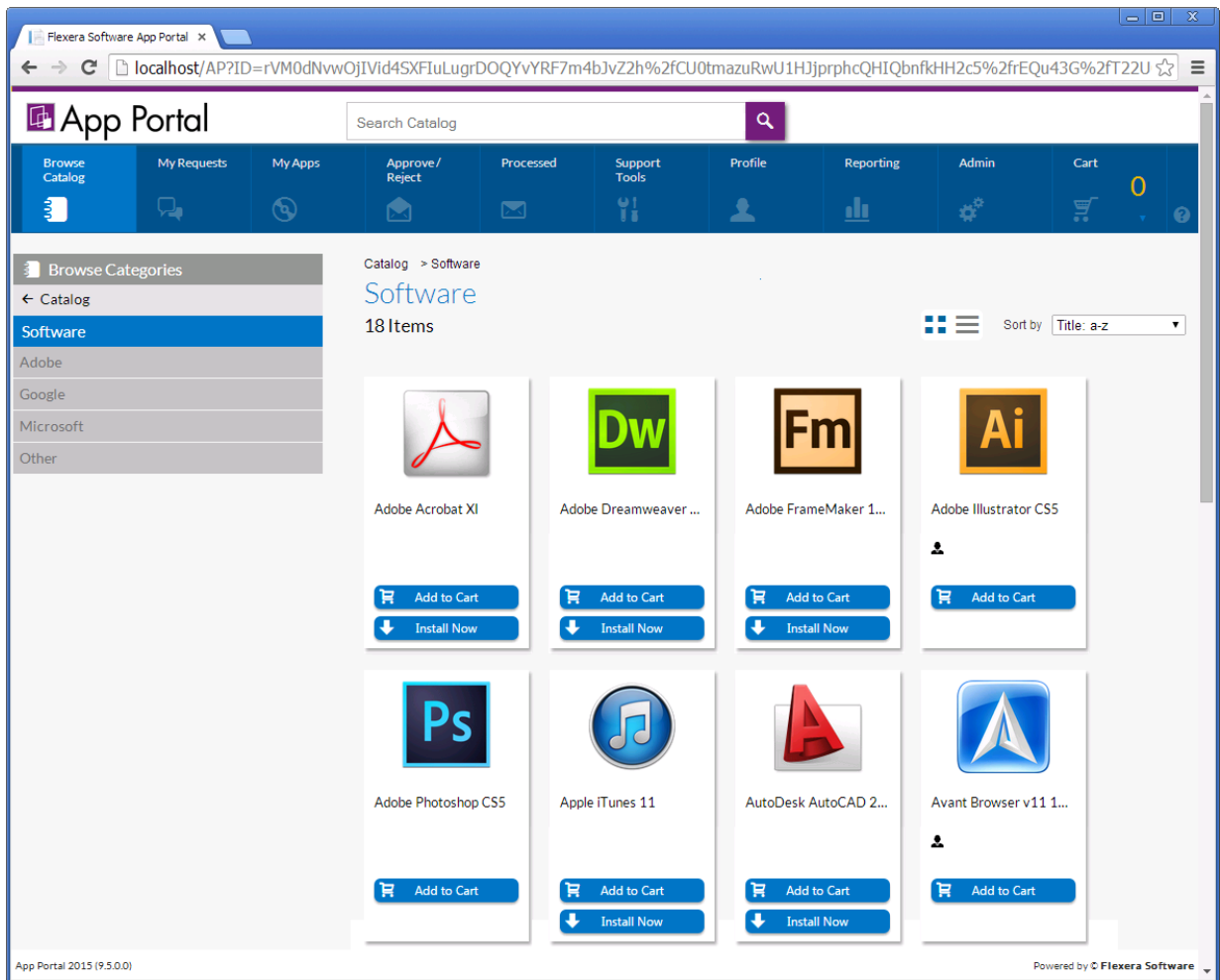


Figure 4-1: App Portal Browse Catalog Tab With Software Catalog Selected

Information about the **Browse Catalog** tab is described in the following sections:

- [Areas of the Browse Catalog Tab](#)
- [Browsing Through Catalog Items in the Results Pane](#)
- [Sorting Catalog Items](#)
- [Requesting Catalog Items](#)

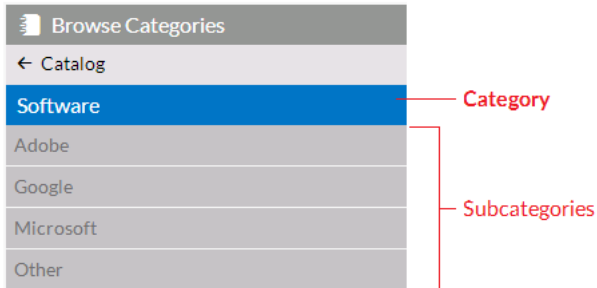
Areas of the Browse Catalog Tab

The **Browse Catalog** view is divided into several areas:

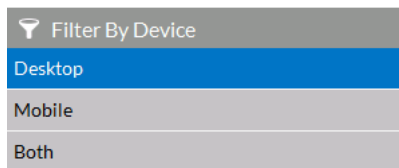
- **Browse Categories menu**—In the left pane, browse to the category that contains the catalog item you want to request. In this list, if the category name is listed in bold, it indicates that it contains subcategories.



Click on the category to display its subcategories.



- **Filter By Device menu**—If your App Portal catalog contains mobile application catalog items, and you have a mobile device registered with App Portal, you can use the **Filter By Device** menu to toggle the display to view desktop items, mobile items or both.



- **Search box**—Use the Search box, above the tabs, to filter the list of displayed catalog items.
- **Results pane**—The right pane either lists all of the catalog items in the selected category or the search results. Catalog items, which can be listed in either card or list format, include icons that provide additional information about each software item. See [Icons Displayed on the Browse Catalog Tab and on Checkout Screens](#) for more information.

Browsing Through Catalog Items in the Results Pane

The Results Pane either lists all of the catalog items in the selected category or the search results. Catalog items can be displayed in either *card* or *list* view. Additional catalog item information can be viewed on the *detail* view.

- [Card View](#)
- [List View](#)
- [Detail View](#)

Card View

When in *card* view, catalog items are displayed in three or more columns; the number of columns that are displayed depends upon the width of the browser window.

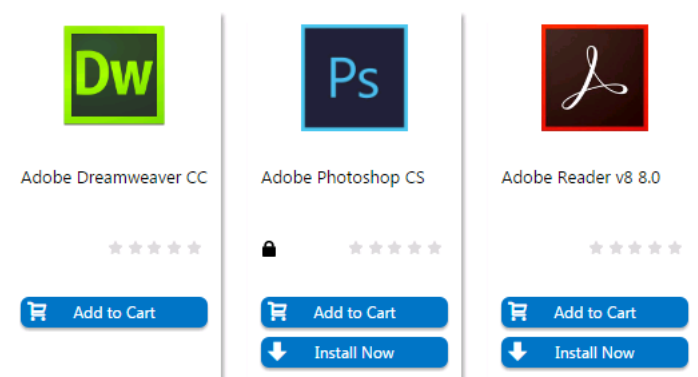


Figure 4-2: Card View

For each catalog item, a product icon and product title is displayed, along possible additional icons such as a star rating and other informational icons.

On the **Browse Catalog** tab, there are two checkout methods available:

- **Standard checkout**—After you locate a catalog item, click **Add to Cart** to add one or multiple catalog items to the cart, and then click on the cart to begin the checkout experience. Each time you add an item to the cart, the count (a large yellow number to the right of the cart icon) is increased. After you have selected all of the items you wish to request, click the cart icon to view the cart, and then click the **View cart and checkout** button to submit the request.
- **Express checkout**—Click **Install Now** to bypass the standard checkout experience when requesting a single catalog item. A catalog item request is automatically generated for that single catalog item, bypassing the checkout experience altogether.

For more information on the two checkout methods, see [Checkout Methods: Standard and Express](#).

List View

To view the catalog items in a *list* view, click on the list icon above the columns of items.



Figure 4-3: Buttons to Toggle Between Card and List View

When viewing catalog items in list view, catalog items are displayed in one column.

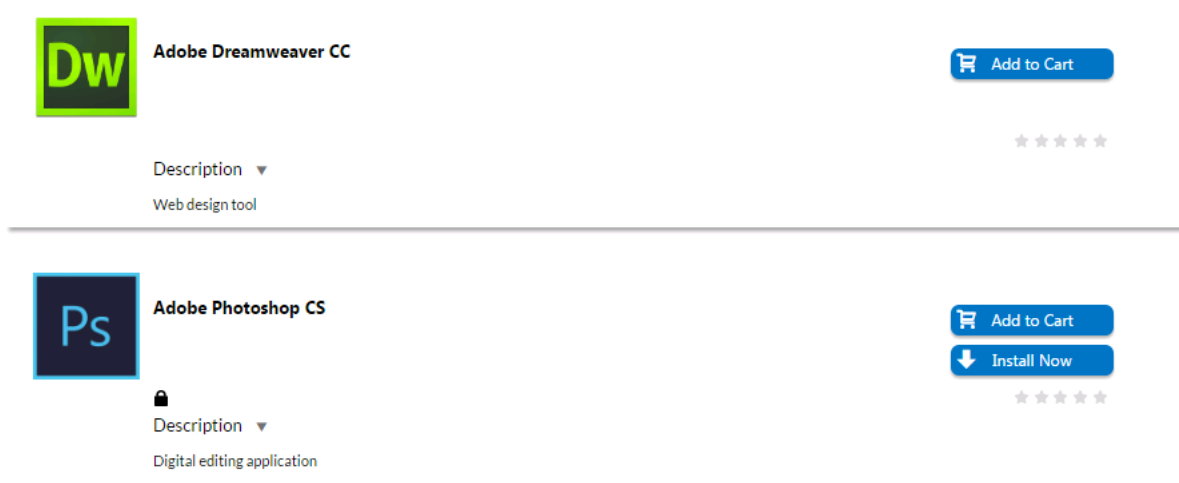


Figure 4-4: List View

In addition to the product icon, product title, star rating, informational icons, and an **Add to Cart** and (possibly) **Install Now** buttons, the list view also includes a description of the catalog item, if one exists. You can click the arrow button next to the word **Description** to toggle between viewing and hiding the description.

Detail View

You can view additional information about a catalog item—such as its full description and all of its ratings and reviews—by clicking on the catalog item name in either the *card* or *list* view to open the *detail* view.

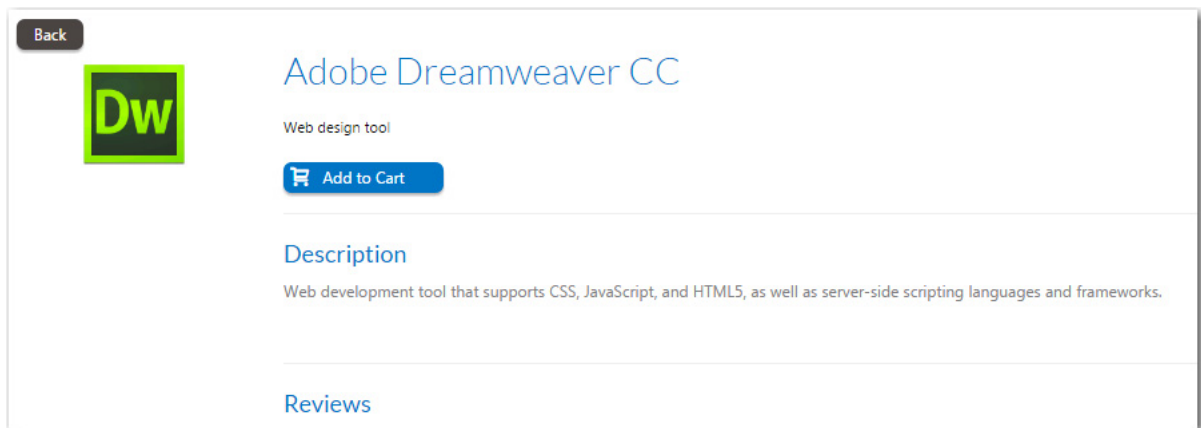
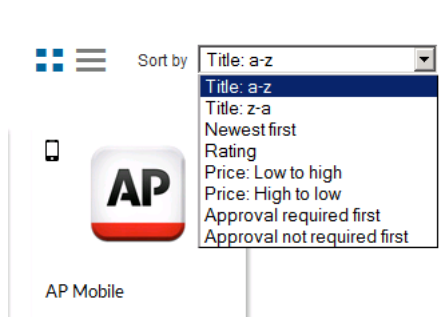


Figure 4-5: Detail View

Sorting Catalog Items

If you are viewing a large number of catalog items in the results pane, you may wish to sort the catalog items. To sort a list of catalog items, use the **Sort by** list.

**Figure 4-6:** Sort By List

The following types of sorts can be performed using the **Sort by** list:

Table 4-1 • Sort Types

Sort Type	Description
Title: a-z	Alphabetical order from A to Z
Title: z-a	Alphabetical order from Z to A
Newest first	Catalog items added to the catalog most recently will be listed first.
Rating	Catalog items with the highest user rating will be listed first.
Price: Low to high	Most expensive catalog items will be listed first.
Price: High to low	Least expensive catalog items will be listed first.
Approval required first	Catalog items requiring administrator approval will be listed first.
Approval not required first	Catalog items that do not require administrator approval will be listed first.

Icons Displayed on the Browse Catalog Tab and on Checkout Screens

Icons are displayed next to catalog items on the **Browse Catalog** tab to provide more information about that catalog item's approval status and license availability. The following icons are displayed on the **Browse Catalog** tab:

Table 4-2 • Icons Displayed on the Browse Catalog Tab


Icon	Name	Browse Catalog Tab?	Checkout Screens?	Purpose
	Requires Approval	Yes	No	Catalog item has an associated approval template, which means that it must be approved prior to deployment.

Table 4-2 • Icons Displayed on the Browse Catalog Tab















Icon	Name	Browse Catalog Tab?	Checkout Screens?	Purpose
	License Required	Yes	Yes	Catalog item requires a license.
	Mobile Application	Yes	Yes	<p>Catalog item is a mobile application.</p>  <p>Note • Displayed in top left corner for mobile application catalog items.</p>  <p>Note • If you do not have a mobile device that is registered with App Portal, you will not see any mobile applications displayed on the Browse Catalog tab. Also, if you have only iOS mobile devices registered, Android-only mobile applications will not be visible on the Browse Catalog tab, and vice versa.</p>
	Install Time	No	Yes	Indicates the amount of time it will take to install this catalog item.
	Installed	Yes	No	Catalog item is already installed on your machine.
	Alternate Catalog Item	Yes	No	<p>An alternate catalog item exists for this catalog item.</p>  <p>Note • Sometimes when a user selects a catalog item and goes to check it out, they are prevented from doing so for various reasons, such as if their machine is not found, their machine is not on the network, or the version that they want is not in the catalog. If administrators have associated an alternate catalog item for this item, the user will be able to request this alternate item.</p>
	License Source: FlexNet Manager Suite	No	Yes	Source of this catalog item's license is FlexNet Manager Suite.
	License Available (n)	No	Yes	A license is available for this catalog item.

Table 4-2 • Icons Displayed on the Browse Catalog Tab

Icon	Name	Browse Catalog Tab?	Checkout Screens?	Purpose
	License Not Available	No	Yes	No licenses are available for this catalog item.
	Requires Reboot	No	Yes	Indicates the installation of this catalog item requires that the machine be rebooted.
 	Star rating	Yes	No	These stars indicate the rating (1 to 5 stars in half star increments) that other users have given to this application after it has been installed on their machine. If all stars are gray, either application rating is disabled or no users have rated the application.



Note • A different set of informational icons are used on the **My Requests** tab, as described in [Requesting Catalog Items](#).

Requesting Catalog Items

As described in [Checkout Methods: Standard and Express](#), catalog items have either an **Add to Cart** button or an **Add to Cart** button *and* an **Install Now** button. Therefore, you can use either method to request catalog items.

- [Requesting a Catalog Item Using Express Checkout](#)
- [Requesting Catalog Items Using Standard Checkout](#)

Requesting a Catalog Item Using Express Checkout

You can request one catalog item at a time using the **Install Now** button, bypassing the standard multi-page check out process.

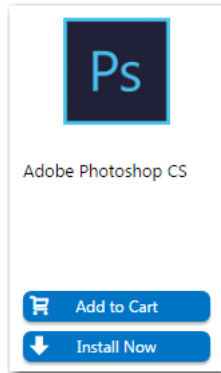
If you only want to request one catalog item, and none of the conditions listed in [Conditions That Prevent Use of Express Checkout](#) exist, you can request a catalog item using express checkout.



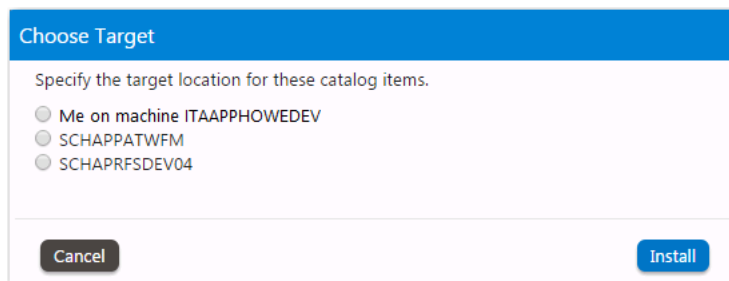
Task

To request a catalog item using express checkout:

1. Search for and locate the catalog item you want to request, as described in [Browsing for Catalog Items](#).



2. On the catalog item that you want to request, click **Install Now**.
3. In the event that you have more than one associated device, a pop-up window will prompt you to select the desired target system.



4. Select the desired target device and click **Install**.
 - **No approval required**—If no approval is required, the installation process will be launched.
 - **Approval required**—If the catalog item has a standard approval workflow associated with it, a message will be displayed stating that installation will begin once the request has been approved.

Requesting Catalog Items Using Standard Checkout

As described in [Checkout Methods: Standard and Express](#), catalog items have either an **Add to Cart** button or an **Add to Cart** button and an **Install Now** button. You can request one catalog item at a time using the **Install Now** button, bypassing the standard multi-page check out process.

If express checkout is not available, due to the reasons listed in [Conditions Preventing Display of Install Now Button](#), or if you cannot use express checkout due to the reasons described in [Conditions That Prevent Use of Express Checkout](#), you need to use standard checkout to request catalog items.

- [Overview of the Checkout Screen](#)
- [Adding Items to Cart and Checking Out](#)

Overview of the Checkout Screen

The App Portal checkout screen list the catalog items in a table, with summary information at the top of the screen.

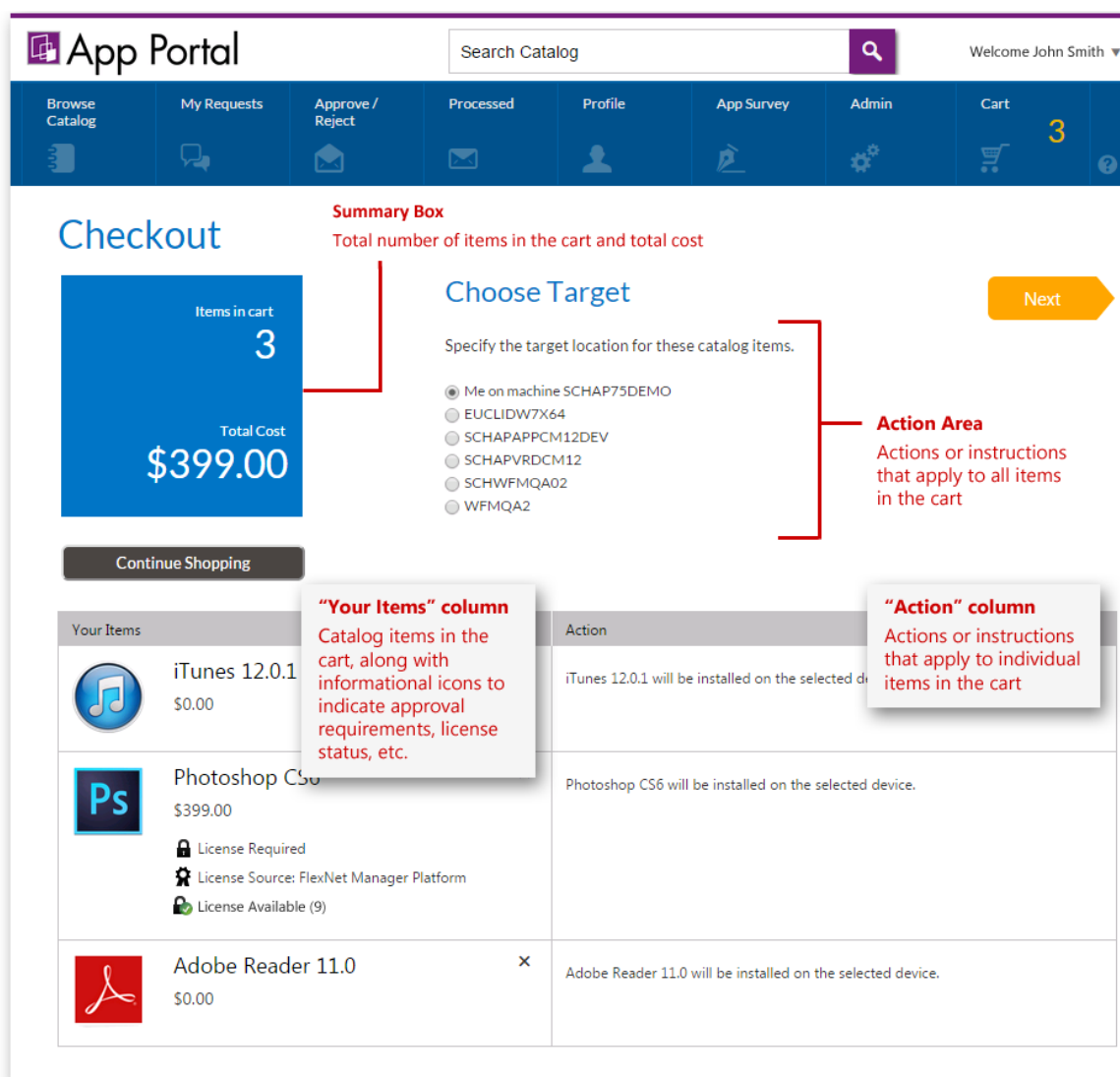


Figure 4-7: Choose Target Panel of Checkout

Information on the checkout screens is organized into the following areas:

- **Summary box**—This box includes the total number of catalog items in the cart, along with the total price of all items.
- **Action area**—Below the checkout page name, instructions and actions that apply to all items in the cart are listed. For example, on the **Choose Target** panel of the checkout, if the user has more than one registered computer, they are prompted to select the machine onto which to install all of the software in the cart.
- **"Your Items" column**—The **Your items** column of the table lists the items in the cart, including informational icons to indicate license status. To remove an item from the cart, click the **X** in the top right corner of the cell.
- **"Action" column**—The **Action** column prompts the user to take some action regarding that catalog item, such as to make a selection or answer a question, or provides instructions or information specific to that catalog item.

- **Next button**—Click to proceed to the next panel in the checkout process.

Adding Items to Cart and Checking Out

After you have located the catalog item that you would like to request, your next step is to add that catalog item to your shopping cart and check out.



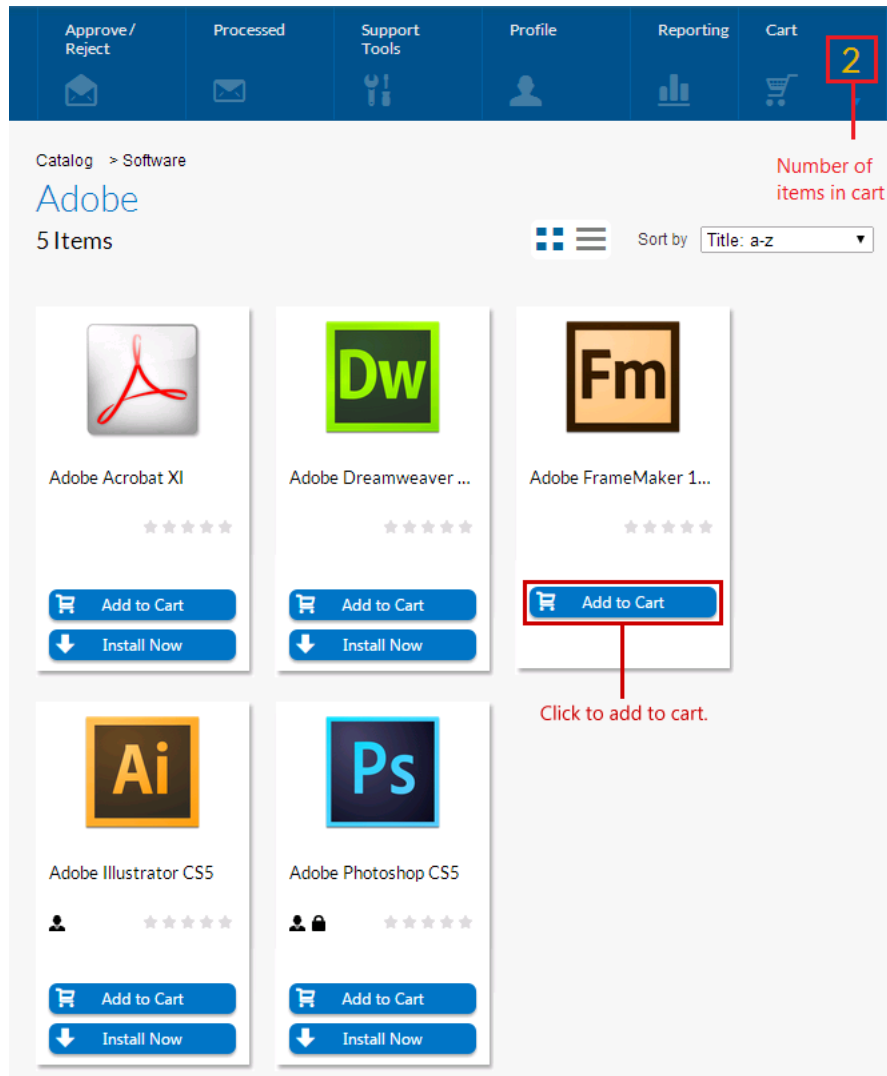
Important • *The number of panels that will be displayed during a catalog item checkout depends upon the options specified on the catalog item.*



Task

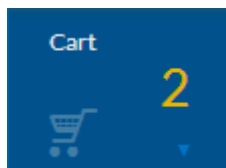
To add catalog items to your shopping cart and checkout:

1. Locate the first catalog item you want to request.
2. Once you locate the item, begin the checkout process by clicking the **Add to Cart** button in the catalog item card. When an item is added to the shopping cart, the cart count will increase.

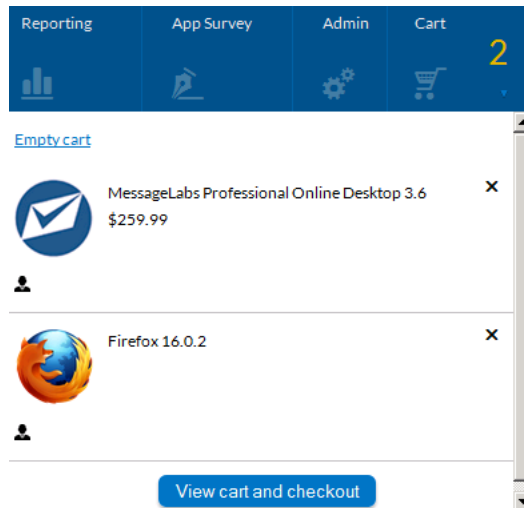


3. Add additional items to the cart, if desired.

4. Click the **Cart** icon.



The Cart Summary pop-up dialog box opens, listing the items in the cart.



Note • To remove an item from the cart, click the **X** in the top right corner of the catalog item. To empty the entire cart, click **Empty cart**.

5. Click **View cart and checkout**. The first panel of the Checkout procedure opens. If you are required to select a target location for these catalog items, the **Choose Target** view opens.

Checkout

Items in cart

2

Total Cost

\$259.99

Continue Shopping

Choose Target

Specify the target location for these catalog items.

☒ SCHAPAPPCM12BOM

Your Items	Action
<div style="display: flex; align-items: center;"> <div> Firefox 16.0.2 ✕ </div> </div> <div style="display: flex; align-items: center; margin-top: 5px;"> <small>Requires Reboot</small> </div>	Firefox 16.0.2 will be installed on the selected device.
<div style="display: flex; align-items: center;"> <div> MessageLabs Professional Online Desktop 3.6 ✕ </div> </div> <div style="margin-top: 5px;"> <small>\$259.99</small> </div>	MessageLabs Professional Online Desktop 3.6 will be installed on the selected device.



Important • The level of interactivity during the checkout process depends on the request options and rights of the requester. The **Choose Target** panel is only displayed if the user has the ability to request to a device other than their current one, or if the item allows for both install and uninstall. In the absence of these choices the **Me on machine MYCOMPUTER** and **Install** options are selected by default and the checkout is automatically advanced to the next panel.

On the **Choose Target** view, the number of items in the cart and the total cost are listed in the blue box, and the selected catalog items are listed in the table below

Checkout

Items in cart
2

Total Cost
\$259.99




Continue Shopping

Choose Target

Specify the target location for these catalog items.

SCHAPAPPCM12BOM

Next

Your Items	Action
 Firefox 16.0.2  Requires Reboot	Firefox 16.0.2 will be installed on the selected device.
 MessageLabs Professional Online Desktop 3.6 \$259.99	MessageLabs Professional Online Desktop 3.6 will be installed on the selected device.

- The number of panels that will be displayed during a catalog item checkout depends upon the options specified on the catalog item by the App Portal administrator. The instructions on these panels and the actions that you need to take are self-explanatory, such as answering questions.

Perform the requested tasks and click **Next** to continue, until you reach the **Submit Request** panel.

Checkout

Items in cart
2

Total Cost
\$259.99

Continue Shopping

Submit Request




Click Submit to submit this request.

Summary

Your Items	Machine	User
Firefox 16.0.2	SCHAPAPPCM12BOM	App Portal
MessageLabs Professional Online Desktop 3.6	SCHAPAPPCM12BOM	App Portal

Back

Submit

Your Items	Action
 Firefox 16.0.2  Requires Reboot	Approval Workflow Level 1 - Manager swati s Each approver approves in the order listed
 MessageLabs Professional Online Desktop 3.6 \$259.99	Approval Workflow Level 1 - Manager swati s Each approver approves in the order listed

The **Submit Request** panel is the final step in the request process. It summarizes the items being requested and the targets of the request. If approvals are required, it lists approval information.

7. Review the listed information about your order.
8. Click **Submit** to submit the request. Upon successful submission, an Order Number and Request ID are displayed, and a message appears indicating successful submission. The following confirmation screen opens:

Checkout

Order #

FLX-11

Total Cost

\$259.99




Request Complete

Order **FLX-11** was created successfully

Click **Continue Shopping** to request more items or click **View Status** to view the status of your submitted requests.

Continue Shopping

View Status

Your Items	Action
 Firefox 16.0.2  Requires Reboot	Request ID 23 was successfully created
 MessageLabs Professional Online Desktop 3.6 \$259.99	Request ID 24 was successfully created

9. Click **View Status**. The **My Requests** tab opens and your request is listed.

Browse Catalog My Requests Approve / Reject Processed Support Tools Profile Reporting App Survey Admin

Search

Basic Advanced

Search by:

Order #

Search value:

☐ Show all requests

☐ Show cancelled requests

☐ Online / offline check

☐ Show My Apps Requests

Filter by Date From:








12/29/2014 calendar

Filter by Date To:












1/28/2015 calendar

Search

↻ Refresh Data

Date	Order #	Request	Target	Status	Info	Actions
1/28/2015 7:49:33 PM	FLX-11(2 Items)					
		MessageLabs Professional Online Desktop 3.6 (Install)	App Portal (AppPortal) on SCHAPAPPCM12BOI			
		Firefox 16.0.2 (Install)	App Portal (AppPortal) on SCHAPAPPCM12BOI			

Icons are displayed in the **Status**, **Info**, and **Actions** columns of the Requests list to specify information about the request:

Column	Icon	Description
Status	Pending Approval 	When an approval is required before this request can be processed, The Pending Approval icon is displayed. Clicking on the icon displays the current approval process, whom has approved the request, and whom is pending approval.
	Approved 	When the request has been approved, the Pending Approval icon switches to the Approved icon.
	Pending SCCM Deployment 	The application has not yet begun to install. Clicking on this icon shows the most recent status from System Center Configuration Manager.
	Waiting for install status messages 	Indicates that the application has not begun to install.
	Install Complete 	The Install Complete icon indicates that the application has successfully been installed on the target end user's machine.
	Install Failed 	If the software request fails, then an error icon is displayed.
Info	Processing Time 	If you hover over this icon, the time that has elapsed since the installation of this application was begun is listed.
	Completed 	When installation of this application is complete, the Processing time icon switches to this icon to indicate that processing has been completed and the application has been installed.
	Request has Associated Questions 	Indicates that this request has an associated question template.
	Add a Note 	Click to add a note to this request.
Actions	Cancel 	Click to cancel this request.

- If an Approval Template was associated with this catalog item, the **Pending approval** icon will be displayed in the **Status** column. For more information, see [Approving a Request](#).

Approving a Request

If you requested a catalog item which requires approval by your manager, you manager would need to launch App Portal and open the **Approval** tab.



Task

To approve a request:

1. Ask the person who is assigned to approve your request to launch App Portal.
App Portal opens, with that user's name at the top.
2. Open the **Approve/Reject** tab. The catalog item that you submitted will be listed, with a **Status** of **Pending Approval**.

The screenshot shows the 'Approve/Reject' tab in the App Portal. The left sidebar contains search filters, and the main area displays a table of requests.

	Date	Order #	Request	Requester	Target	Status	Info	Actions
<input type="checkbox"/>	2/4/2015 9:53:31 AM	FLX-13	Mozilla Thunderbird 4.4 (Install)	Patricia Howe (PatriciaHo...)	on SCHAPAPP...	Pending Approval	?	?

3. Click on the request name. The **Approval** dialog box opens.
4. Click **Approve**. A pop-up dialog box opens, prompting you to enter any approval notes.
5. Click **Approve**. The request is no longer listed on the **Approve/Reject** tab, and App Portal instructs System Center Configuration Manager to install the requested application.
6. Proceed with the steps in [Verifying Deployment Status on the My Requests Tab](#).

Verifying Deployment Status on the My Requests Tab



You can view the deployment status of your catalog item request on the **My Requests** tab.

**Task**

To view deployment status on the My Requests tab:

1. Open the **My Requests** tab. Your request is listed:

The **Status** column of the request should now display the following icons:

Icon	Description
Approved	 When the request has been approved, the Pending approval icon switches to the Approved icon.
Succeeded	 When installation of this application is complete, the Waiting for install status messages icon switches to this Install complete icon, indicating that the application has successfully been installed on the target end user's machine.

2. Open your Windows Start menu and locate the shortcut for the newly installed application.

Viewing Reports

On the **Reporting** tab, you can view App Portal data in a read-only, searchable, and exportable view. Over 40 reports are included with App Portal. You can view existing reports, create and edit report categories, and even create your own custom reports.

**Task**

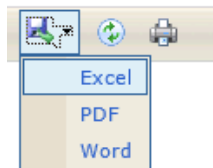
To view App Portal reports:

1. Open the **Reporting** tab.
2. In the **App Portal Menu**, open one of the report categories and select the report that you want to view. The report opens in the right pane.

The screenshot shows the App Portal interface with a top navigation bar containing links: Browse Catalog, My Requests, Approve / Reject, Processed, Support Tools, Profile, Reporting, App Survey, and Admin. On the left is the 'App Portal Menu' with categories like Approvers, Catalog Items, and Catalog Requests. Under 'Catalog Requests', 'Requests Pending Approval' is selected. The main content area displays the 'App Portal' logo and the title 'Requests Pending Approval'. Below the title, it states 'This report lists all requests that are pending approval.' and shows a table of pending requests.

Package Title	Request Status	Date Requested
Adobe Reader XI	Pending	1/22/2015 6:30:02 PM
AimKeys	Pending	1/30/2015 4:16:48 PM
Firefox 16.0.2	Pending	1/29/2015 1:49:33 AM
Headset	Pending	1/20/2015 12:40:44 AM
iTunes 12.0.1	Pending	1/22/2015 6:30:02 PM
MessageLabs Professional Online Desktop 3.6	Pending	1/29/2015 1:49:33 AM
Mozilla Thunderbird 4.4	Pending	2/4/2015 6:28:40 PM
Mozilla Thunderbird 4.4	Pending	2/4/2015 6:41:52 PM
Pandora Radio	Pending	1/28/2015 1:01:57 PM
Pandora Radio	Pending	1/28/2015 1:02:11 PM
Pandora Radio	Pending	1/28/2015 1:03:08 PM

3. If you want to export the report to **Excel**, **PDF**, or **Word** format, click the **Export** button in the toolbar and select the appropriate option:



4. To print the report, click the **Print** button in the toolbar.

Configuring ITSM Integration

App Portal includes out-of-the-box integration, via web services, with both ServiceNow and BMC Remedy IT Service Management (ITSM) systems. You can also use App Portal's built-in reusable framework to integrate with other ITSM systems.

By integrating App Portal with your ITSM system, you are unifying your app store with your service desk. This enables you to leverage your established ITSM approval workflows and procedures. It also enables you to present to your employees a common portal for all service requests, a single place to request both applications and IT services. This encourages easier adoption and eliminates the need for additional training.

When ITSM integration is set up, whenever specified actions occur in App Portal (such as when a request is submitted), tickets in the attached ITSM system can be automatically opened or closed, or the status of a ticket can be reported on. Notations of these actions are recorded in both App Portal and the ITSM system. You can also embed the App Portal interface within the ServiceNow interface, giving your users an even more integrated experience.



Note • You can use App Portal's out-of-the-box catalog items to directly request a Box, Office 365, or Salesforce account from the vendor. However, you can also set up a cloud catalog item to generate a request in an ITSM system for account creation in Box, Office 365, or Salesforce. For more information, see "Creating Cloud Catalog Items to Request Box, Office 365, and Salesforce Access Using ITSM System" in the App Portal / App Broker Administration Guide.



Note • You can also use App Broker for ServiceNow or App Broker for BMC to integrate App Portal's app store features with the ServiceNow or BMC MyIT service catalog interfaces. When you integrate ServiceNow or BMC MyIT with App Broker, instead of using the App Portal end user interface, employees request software directly in the ITSM system's self-service portal. For more information, see "Using App Broker for ServiceNow" and "Using App Broker for BMC" in the App Portal / App Broker Administration Guide.

Information about ITSM integration is organized in the following topics:

- [Connecting to ServiceNow or BMC Remedy and Creating Default Operations](#)
- [Setting ITSM Actions on Catalog Items](#)
- [Viewing ITSM Notations in App Portal and ITSM System](#)



Note • You can also integrate with another ITSM system and manually add and configure default operations, as described in *Integrating With Another ITSM System* in the *App Portal 2018 R1 Configuration Guide*.

Connecting to ServiceNow or BMC Remedy and Creating Default Operations

To integrate App Portal with Service Now or BMC Remedy, you first need to open the **Site Management > Settings > ServiceNow Integration** or **3rd-Party Integration** tab and provide the URLs to the relevant web services along with the credentials required to create incidents on these systems.



Task

To connect to ServiceNow or BMC Remedy:

1. On the **Admin** tab, open the **Site Management > Settings > ServiceNow Integration** view:

The screenshot shows the 'ServiceNow Integration' configuration form. At the top, there is a 'Save' button with a green checkmark icon. Below it, the 'ServiceNow Integration' tab is selected. The form contains three input fields: 'ServiceNow Instance URL (e.g. https://instance.service-now.com)' with the value 'https://ven01305.service-now.com/navpage.do', 'ServiceNow User Name' with the value 'admin', and 'ServiceNow Password' with masked characters '.....'. At the bottom right, there are two buttons: 'Test' and 'Create Default ITSM Operations'.

Or, for BMC Remedy, open the **3rd-Party Integration** view:

The screenshot shows the '3rd-Party Integration' configuration form. At the top, there is a 'Save' button with a green checkmark icon. Below it, the '3rd-Party Integration' tab is selected. The form is divided into two sections: 'Proxy Settings' and 'Remedy Integration'. The 'Proxy Settings' section has three input fields: 'Proxy Server Name', 'Proxy Server Port', and a checkbox for 'By Pass Proxy for Local Address'. The 'Remedy Integration' section has three input fields: 'Remedy Instance Uri (e.g. http://instance:portnumber/arsys/WSDL/public/instance)', 'Remedy User Name' with the value 'Mmarino', and 'Remedy Password' with masked characters '.....'. At the bottom right, there are two buttons: 'Test' and 'Create Default Operations'.

2. Do one of the following:
 - In the **ServiceNow Instance URL** field, enter the URL to your instance of ServiceNow.
 - In the **Remedy Instance Url** field, enter the URL to your instance of the Remedy web service.
3. Enter the **User Name** and **Password** to your ITSM system. The account used to connect must have access to invoke web methods in the respective ITSM system.
4. Click **Test** to test the connection to the ITSM system.
5. Next, click the **Create Default Operations** button for your ITSM system. This prompts App Portal to connect to the default incident management APIs, extract web methods and their parameters, and create the default web service operations. When App Portal is complete, the following message appears:

Default ServiceNow/Remedy Operations created successfully. Please click ITSM Integration node to view the list of systems and operations.

The following web methods are created:

ITSM System	Service	Operations
ServiceNow	Incident Management Service	<ul style="list-style-type: none"> • Create ServiceNow Incident • Delete Existing ServiceNow Incident • Get Existing ServiceNow Incident Status • Update Existing ServiceNow Incident
	Request Management Service	<ul style="list-style-type: none"> • Create ServiceNow Request • Create ServiceNow Request for Cloud • Get Existing ServiceNow Request Status • Update ServiceNow Request
Remedy	Create Incident Management Service	<ul style="list-style-type: none"> • Create Remedy Incident
	Incident Status Management Service Wrapper	<ul style="list-style-type: none"> • Get Existing Remedy Incident Status
	Query Incident Management Service	<ul style="list-style-type: none"> • Update Existing Remedy Incident



Note • When you click **Create Default Operations**, App Portal imports all web services. If you then modify one of the web services (as described in [About ITSM Operations](#)) and click **Create Default Operations** again, App Portal will not overwrite the already-imported (and edited) web service. It will only import new web services or web services that were deleted.

6. Click **Save** to save your entries.

At this point, ITSM integration is complete. However, you may choose to customize/configure these operations for your organization, as described in *Configuring Operations* in the *App Portal / App Broker Administration Guide*. For more information on these default operations, see [About ITSM Operations](#).

About ITSM Operations

You can view the details of an ITSM operation on its **Configure Operation** view. The following is the Configure Operation view for the BMC Remedy **Create Remedy Incident** operation.

Configure Operation

Enter a descriptive name:
Create Remedy Incident

Select operation:
HelpDesk_Submit_Service

Select operation type:
CREATE

Select Return Field Mapping:
Any Return Value

Configure Fields

Field	Type	Value	Default Value	Valid Values
Assigned_Group	System.String			
Assigned_Group_Shift_Name	System.String			
Assigned_Support_Company	System.String			
Assigned_Support_Organization	System.String			
Assignee	System.String			
Categorization_Tier_1	System.String			
Categorization_Tier_2	System.String			

Figure 5-1: Configure Operation View for Create Remedy Incident

On the **Configure Operation** view, the operation settings are listed at the top, and the parameter settings are listed in the table in the **Configure Fields** area. If App Portal has automatically configured a field, a value will be listed in the Value column.

- [About the Operation Settings](#)
- [About the Parameter Settings](#)

About the Operation Settings

The operation settings, which are listed at the top of the **Configure Operation** view, identify the operation's name, associate an operation and operation type that exists in the ITSM system, and specifies the expected value that will be returned to App Portal when this operation is executed.

Table 5-1 • Operation Settings on the Configure Operation View

Property	Description
Enter a descriptive name	Name of the operation assigned by App Portal.
Select operation	Identifies the operation in the ServiceNow or Remedy system. For example, ServiceNow uses the insert operation to create incidents.
Select operation type	Identifies the type of operation in the ServiceNow or Remedy system. For example, the ServiceNow insert operation has a operation type of CREATE.
Select Return Field Mapping	Identifies the return value for this operation. When an ITSM incident is created, App Portal expects an incident ID to be returned. In the case of the Create ServiceNow Incident operation, the return value is a <i>strongly typed</i> object, which means that it consists of several primitive types: sys_id and number. Because sys_id represents the incident number, you would select sys_id from this list. App Portal will store the returned sys_id as a variable: Record ID. If the return value is a <i>primitive type</i> object, which means that it only consists of one parameter, select Any Return Value from this list.

About the Parameter Settings

For each parameter in the **Configure Fields** table, the following information is listed::

Table 5-2 • Properties in the Configure Fields Table

Property	Description
Field	Name of the parameter in the ITSM system. There are two types of parameters: <ul style="list-style-type: none"> ● Strongly typed object—Parameter (or class) consisting of multiple primitive types or subparameters. For example, a parameter named FullName could consist of two subparameters: FirstName and LastName. A strongly typed object is displayed with a gray background, and each of its subparameters has a white background. ● Primitive object—Parameter that has only one value, such as an integer (10), a decimal (10.0), or a string (text).
Type	Identifies the data type of the parameter, such as System_String, or System_Boolean.
Value	If a value is entered in this field, that value is sent to the ITSM system. If the field is blank, the ITSM will assign this parameter its default value.

Table 5-2 • Properties in the Configure Fields Table

Property	Description
Default Value	<p>Used to provide a value to send to the ITSM system if no valid value was returned by App Portal.</p> <p>For example, supposed that the parameter is department and the valid values are IT, Engineering, Administration, or QA. If the catalog item triggering the ServiceNow incident did not have a department specified, then App Portal would send to ServiceNow the default value (such as None).</p>
Valid Values	<p>For some parameters, valid values are listed in this column. For example, the Reported_Source parameter for the Create Remedy Incident operation lists the following valid values:</p> <ul style="list-style-type: none"> ● DirectInput ● Email ● ExternalEscalation ● Fax ● SelfService ● etc. <p>Because the valid values are listed here, it makes it easy for you to select one and copy it to the Default Value column.</p>

The **Configure Fields** table lists all of the parameters associated with the selected ITSM system operation. However, App Portal only interacts with a portion of these parameters: those that relate to create, read, update, or delete tasks.

- **App Portal automatically defines mandatory parameters**—App Portal automatically defines parameters that are either mandatory for performing the operation or are descriptive. For each of these defined parameters, App Portal will gather data and pass it on to the ITSM system. App Portal variables will be replaced with incident-specific values at run time.
- **App Portal does not define optional parameters**—App Portal does not automatically define optional parameters. For those parameters that are not configured in App Portal, it is assumed that the ITSM system will insert its default value into that field when the incident is created.
- **Variables are used in strings**—Note that App Portal variables are used in parameters with a type of “string”, and those variables will be replaced with incident-specific values at run time. The variables are used customize these notations to refer to a specific App Portal catalog item request. These notations will be displayed in both App Portal and in the ITSM system.
- **All incidents will use the same parameters**—Every incident that is created in the ITSM system will use the same data values, with the exception of the fact that variables are resolved at run time.

For example, for the Create ServiceNow Incident operation, App Portal defined the following parameters:

Table 5-3 • Defined Parameters for the Create ServiceNow Incident Operation

Field	Value
category	inquiry
comments_and_work_notes	New incident created by App Portal
description	Request for Catalog Item ##PackageTitle## was submitted in App Portal by ##FullName## for Device ##MachineName##
escalation	0
impact	2
incident_state	1
severity	3
short_description	Request for ##PackageTitle## was submitted in App Portal.
state	1
urgency	2

You may choose to define additional parameters in the **Configure Fields** table. If you want to pass a value for one of the initially undefined parameters to the ITSM system, you need to determine what the valid values are for that parameter in the ITSM system, and then enter the value that you would like to pass into the **Value** column for that parameter on the **Configure Operation** view.

Editing an Existing Operation

To edit an existing operation, perform the following steps:

**Task****To edit an existing operation:**

1. On the **Admin** tab, select **Site Management > ITSM Integration**. The **ITSM Integration** view opens, listing the available services of the connected systems.

App Portal Menu	+ Add System			
Site Management	System Name	System Description		
Admin Security	Remedy - Create Incident Management Service	Default out of the box Remedy Create Incident Management Service	Configuration	Delete
Catalog Security	Remedy - Create Request Management Service	Default out of the box Remedy Create Request Management Service	Configuration	Delete
Settings	Remedy - Incident Status Management Service Wrapper	Default out of the box Remedy Incident Status Management Service Wrapper	Configuration	Delete
Imported Users and Computers	Remedy - Query Incident Management Service	Default out of the box Remedy Query Incident Management Service	Configuration	Delete
Logs	Remedy - Service Request Status Management Service Wrapper	Default out of the box Remedy Service Request Status Management Service Wrapper	Configuration	Delete
Active Directory	ServiceNow - Catalog Import Set Management Service	Default out of the box ServiceNow Catalog Import Set Management Service	Configuration	Delete
ITSM Integration	ServiceNow - Create Incident Management Service	Default out of the box ServiceNow Create Incident Management Service	Configuration	Delete
Cloud Integration	ServiceNow - Create Request Management Service	Default out of the box ServiceNow Create Request Management Service	Configuration	Delete
Categories				
Commands and Actions				
Communication				

If you are connected to Service Now, two services are listed:

- **ServiceNow - Incident Management Service**
- **ServiceNow - Create Request Management Service**

If you are connected to Remedy, three services are listed:

- **Remedy - Create Incident Management Service**
- **Remedy - Incident Status Management Service**
- **Remedy - Query Incident Management Service**


If you have added a connection to another ITSM system, it will be listed here.

2. Click on one of the services. A list of the operations included in the selected service opens:

serviceNOW™ « Back				
+ Add Operation Copy Operation				
Operation Description	Operation Name	Operation Type	Mapped Return Field	
Create ServiceNow Incident	insert	CREATE	sys_id	Delete
Delete Existing ServiceNow Incident	deleteRecord	DELETE	count	Delete
Get Existing ServiceNow Incident Status	get	STATUS	state	Delete
Update Existing ServiceNow Incident	update	UPDATE	sys_id	Delete

3. Click on an operation. The **Configure Operation** view for that operation opens.

« [Back](#)

 Save

Configure Operation

Enter a descriptive name:

Select operation:

Select operation type:

Select Return Field Mapping:

Configure Fields

Field	Type	Value	Default Value	Valid Values
insert1	insert			
active	System.Boolean	<input type="text"/>	<input type="text"/>	
activeSpecified	System.Boolean	<input type="text"/>	<input type="text"/>	
activity_due	System.String	<input type="text"/>	<input type="text"/>	
approval	System.String	<input type="text"/>	<input type="text"/>	
approval_history	System.String	<input type="text"/>	<input type="text"/>	
approval_set	System.String	<input type="text"/>	<input type="text"/>	
assigned_to	System.String	<input type="text"/>	<input type="text"/>	
assignment_group	System.String	<input type="text"/>	<input type="text"/>	
business_duration	System.String	<input type="text"/>	<input type="text"/>	

4. In the top part of this screen, review and edit the operation settings, as described in [About the Operation Settings](#).
5. In the **Configure Fields** table, edit the parameters, as described in [About the Parameter Settings](#).
6. Click **Save** to save your edits.

Setting ITSM Actions on Catalog Items

In order for a catalog item request to trigger an event in an ITSM system, you need to define ITSM-specific actions. These ITSM actions can be specified both on a global level or on a specific catalog item:

- **Global level**—Open the **Site Management > Commands and Actions > Request Commands** view and add the ITSM action to an event. If the ITSM action is defined here, it will apply to all catalog items.
- **Catalog item level**—Open the **Actions** tab of the **Catalog Item Properties** dialog box and add the ITSM action to an event. If the ITSM action is defined here, it will apply to only this specific catalog item.

You can select any of the actions in the **Current Events and Actions** column and then associate an ITSM action to it. In the following example, an ITSM-related action has been associated with the **On Submit**, **On Cancel**, and **On Check Status** events. Upon the submission of a request containing this catalog item, a **Create ServiceNow Incident** action will be triggered:

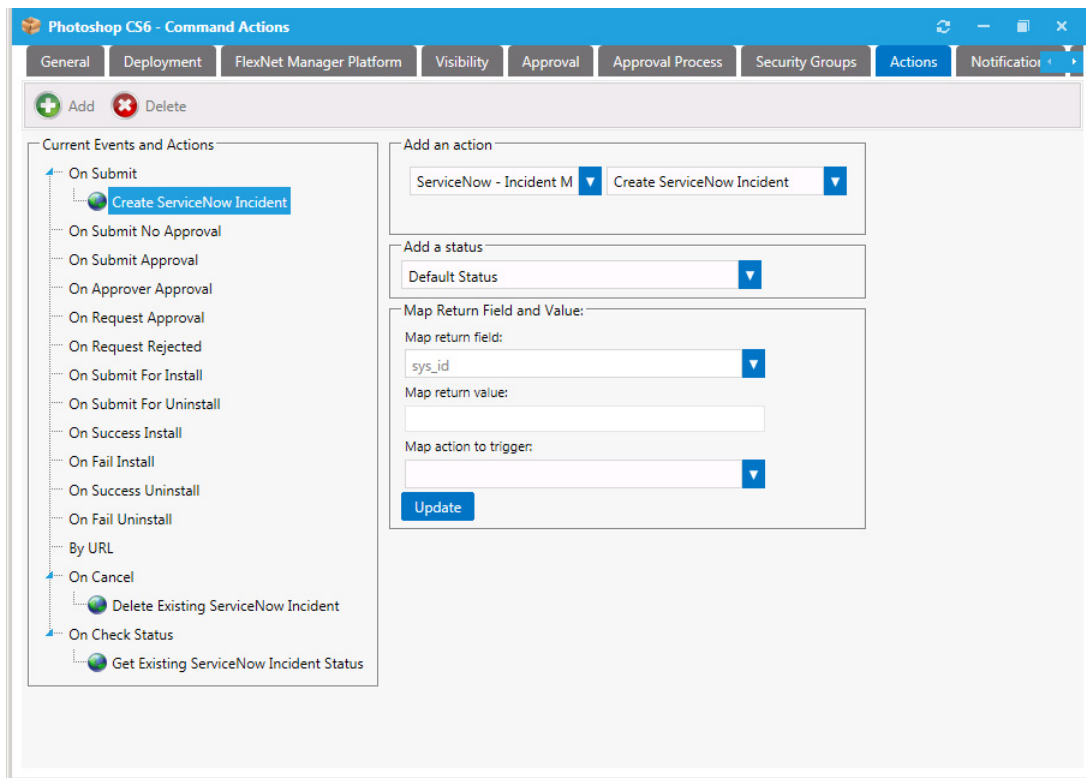


Figure 5-2: ITSM-Related Actions on a Catalog Item

To add an ITSM action, perform the following steps.



Task

To add an ITSM action to a catalog item:

1. Do one of the following:
 - Open the **Actions** tab of the catalog item's **Catalog Item Properties** dialog box.
 - Open the **Site Management > Commands and Actions > Request Commands** view.

The Actions view opens.

2. In the **Current Events and Actions** tree, select the event that you want to add an action to.

For example, if you want to trigger the creation of an incident in the ITSM system when catalog items are submitted in a request, select **On Submit**.
3. From the **Select a service** list, select the name of the ITSM operation that you want to trigger. For example, you could select **Create ServiceNow Incident**.
4. [If applicable] From the **Add a status** list, select one of the following statuses to indicate the status that the request will be assigned after this action is performed:
 - Default Status
 - Completed
 - In Progress
 - Warning
5. The **Map return field** list will be pre-selected based upon the action and operation that you picked.
6. [If applicable] In the **Map return value** field, enter the value that you want to match, such as when you are adding an action to an **On Check Status** event. In this instance, you would want to take some action depending upon what value is returned from the ITSM system. For example, if the **Map return value** is set to **True**, then you want App Portal to trigger the action you select.
7. [If applicable] From the **Map action to trigger** list, select one of the following three actions that you want App Portal to trigger if the return value from the ITSM system matches the value entered in the **Map return value** field:
 - Execute Operation
 - Initiate Deployment
 - Cancel App Portal Request



Note • The **Initiate Deployment** action could be used if you want to perform the approval process in the external ITSM system, not in App Portal. As soon as App Portal received notification of the approval in ITSM, deployment could be triggered. For more information on setting this up, see [Deploying via API to Enable App Portal Approvals in an External ITSM System](#).

8. Click **Add** to add the action.

About the On Check Status Event

The **On Check Status** event exists specifically for use in ITSM integration. If this event is associated with an action, App Portal will periodically monitor the ITSM system for a particular status. The moment that App Portal detects that the selected status has been reached, an additional action can be taken. For example, if a status of **Approved** is reached in a ServiceNow incident, App Portal could then trigger the deployment of the software.

Deploying via API to Enable App Portal Approvals in an External ITSM System

When a request is submitted, if a catalog item does not require an approval, App Portal automatically triggers deployment of that catalog item. However, if you have integrated App Portal with an ITSM system and you want to perform approvals using that system, you would not want the catalog item to be deployed until the external approval was performed.

In this situation, you would need to select the **Start deployment using API?** option on a catalog item's **Deployment > Global** tab of the **Catalog Item Properties** dialog box to delay deployment until a response from the ITSM system would trigger the deployment via App Portal's API.

In any other scenario, this option can also be used to have more control over deployment, post-request submission.

Viewing ITSM Notations in App Portal and ITSM System

When App Portal is integrated with an ITSM system, notations are made in both App Portal and the ITSM system to track the progress of an incident. In the following example, a notation of the creation of an ITSM incident, with its ticket number, appears on the **Notes** tab of the **Request Details** dialog box.

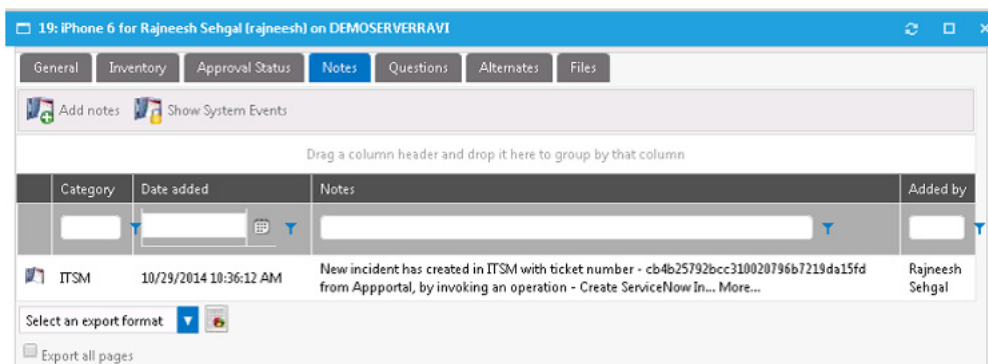
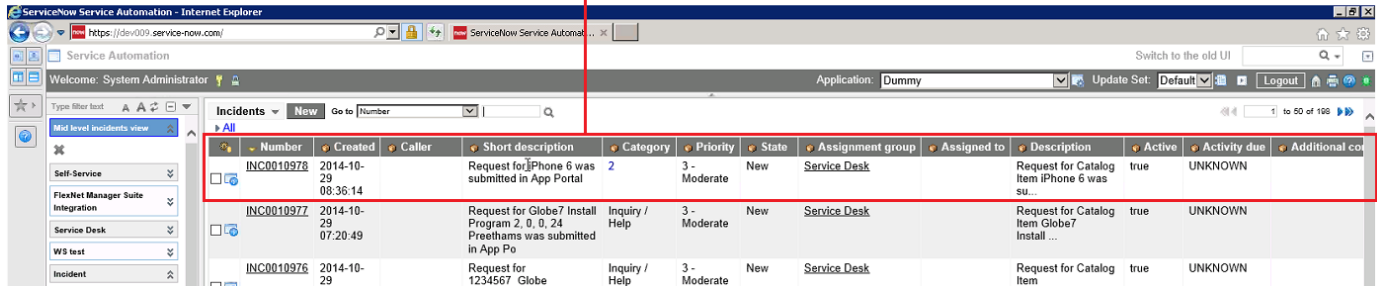


Figure 5-3: Notation from ITSM System Displayed on the Notes Tab of Request Details Dialog Box

ServiceNow Example

Below is an example of a notation that is made in ServiceNow when App Portal created an incident. Note that the text that is displayed was defined in the **Value** field for the **short_description** parameter of the **Create ServiceNow Incident** operation.

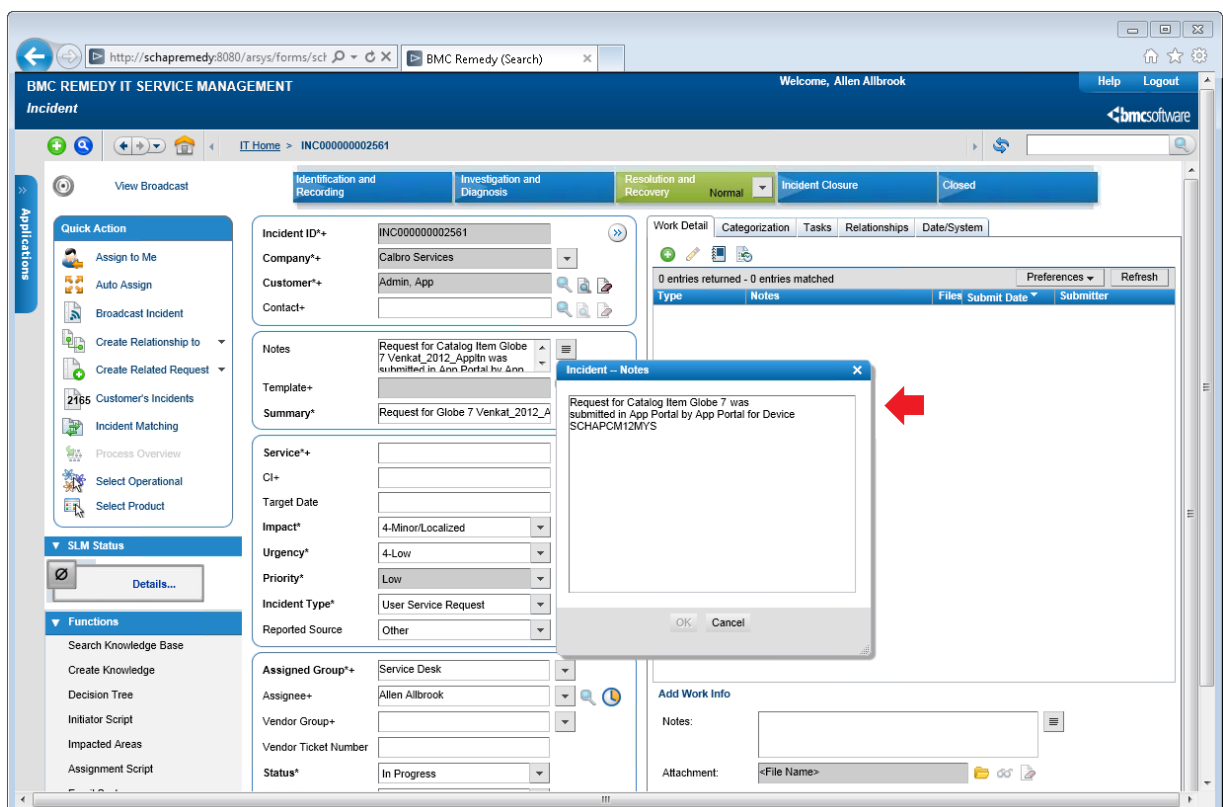
ServiceNow incident that was automatically created by App Portal upon request submission.



Number	Created	Caller	Short description	Category	Priority	State	Assignment group	Assigned to	Description	Active	Activity due	Additional co
INC0010978	2014-10-29 08:36:14		Request for iPhone 6 was submitted in App Portal	2	3 - Moderate	New	Service Desk		Request for Catalog Item iPhone 6 was su...	true	UNKNOWN	
INC0010977	2014-10-29 07:20:49		Request for Globe7 Install Program 2, 0, 0, 24 Preethams was submitted in App Po	Inquiry / Help	3 - Moderate	New	Service Desk		Request for Catalog Item Globe7 Install ...	true	UNKNOWN	
INC0010976	2014-10-29		Request for 1234567_Globe	Inquiry / Help	3 - Moderate	New	Service Desk		Request for Catalog Item	true	UNKNOWN	

BMC Remedy Example

Below is an example of a notation that is made in BMC Remedy when App Portal created an incident. Note that the text that is displayed was defined in the **Value** field for the **Notes** parameter of the **Create Remedy Incident** operation.



BMC REMEDY IT SERVICE MANAGEMENT

Welcome, Allen Allbrook

Incident

IT Home > INC000000002561

View Broadcast

Identification and Recording Investigation and Diagnosis Resolution and Recovery Normal Incident Closure Closed

Quick Action

- Assign to Me
- Auto Assign
- Broadcast Incident
- Create Relationship to
- Create Related Request
- 2165 Customer's Incidents
- Incident Matching
- Process Overview
- Select Operational
- Select Product

SLM Status

Details...

Functions

- Search Knowledge Base
- Create Knowledge
- Decision Tree
- Initiator Script
- Impacted Areas
- Assignment Script

Incident ID* INC000000002561

Company* Calbro Services

Customer* Admin_App

Contact*

Notes

Request for Catalog Item Globe 7 Venkat_2012_AppIn was submitted in App Portal for Device SCHAPCM12MYS

Template*

Summary* Request for Globe 7 Venkat_2012_A

Service*

CI*

Target Date

Impact* 4-Minor/Localized

Urgency* 4-Low

Priority* Low

Incident Type* User Service Request

Reported Source Other

Assigned Group* Service Desk

Assignee* Allen Allbrook

Vendor Group*

Vendor Ticket Number

Status* In Progress

Work Detail

Categorization Tasks Relationships Date/System

0 entries returned - 0 entries matched

Preferences Refresh

Type Notes File Submit Date Submitter

Incident - Notes

Request for Catalog Item Globe 7 was submitted in App Portal by App Portal for Device SCHAPCM12MYS

OK Cancel

Add Work Info

Notes:

Attachment: File Name

Figure 5-4: Notation in BMC Remedy of Incident Created by App Portal

6

Performing App Portal Administrative Tasks

In this chapter you will learn how to perform standard administrative tasks to configure and customize App Portal for your enterprise.

- [Enabling App Portal Site for Your Enterprise](#)
- [Managing Administration and Catalog Permissions](#)
- [Managing Approval Workflows](#)
- [Creating a Catalog Item Template](#)
- [Editing Default Email Notifications](#)
- [Branding Your App Portal Site](#)
- [Connecting to the Flexera Service Gateway](#)

Enabling App Portal Site for Your Enterprise

When the App Portal site is enabled, all directory services users at your enterprise are able to access the App Portal site and perform activities such as using the **Browse Catalog** and **My Requests** tabs to submit a request and the **Approve / Reject** tab to approve or reject a request.

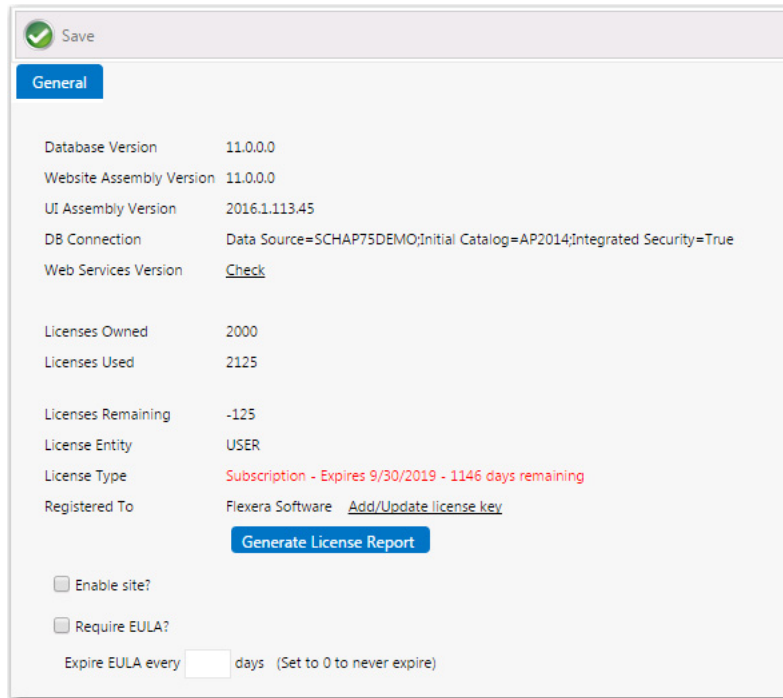
However, while setting up App Portal's security settings, creating the default templates, and adding catalog items, you would not want these users to be able to access the site (unless they have explicitly been given permission). Therefore, there is “switch” setting which you need to select before App Portal is available to all of the users and groups in your enterprise.



Task

To enable App Portal for your enterprise:

1. Open the **Admin** tab.
2. Select **Site Management > Settings > General**. The **General** view opens.



Save

General

Database Version	11.0.0.0
Website Assembly Version	11.0.0.0
UI Assembly Version	2016.1.113.45
DB Connection	Data Source=SCHAP75DEMO;Initial Catalog=AP2014;Integrated Security=True
Web Services Version	Check
Licenses Owned	2000
Licenses Used	2125
Licenses Remaining	-125
License Entity	USER
License Type	Subscription - Expires 9/30/2019 - 1146 days remaining
Registered To	Flexera Software Add/Update license key

[Generate License Report](#)

☐ Enable site?

☐ Require EULA?

Expire EULA every days (Set to 0 to never expire)

3. Select the **Enable site?** option.
4. Click **Save**. App Portal will now be visible in all users and groups in your enterprise.



Note • A user needs to have been assigned specific permissions in order to access the views on the **Admin** tab, as described in [Accessing the Admin Tab](#) and [Managing Administration and Catalog Permissions](#).

Managing Administration and Catalog Permissions

You manage user access to the views and functionality of the **Admin** tab using the **Admin Security** and **Catalog Security** views under **Site Management**.

- [Managing Administration Permissions](#)
- [Managing Catalog Permissions](#)

Managing Administration Permissions

When configuring App Portal, you will need to specify which users and groups can view and modify settings on the various App Portal views on the **Admin** tab. This secures the App Portal site settings to the listed groups and users. You configure administrative security on the **Admin Security View**, which is opened by selecting **Admin Security** under **Site Management** on the **Admin** tab.

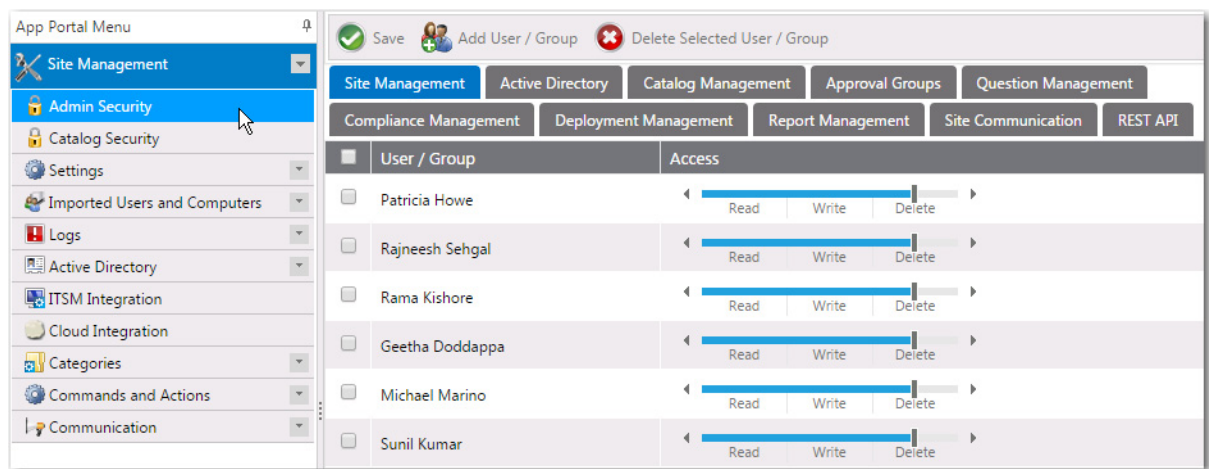


Figure 6-1: Admin Security View

On each of the tabs of the **Admin Security View**, you can view and edit the security settings (**Read**, **Write**, **Delete**) for *existing* users and groups for that particular role.

However, you assign *initial* permissions to a user or group for *all roles* on the pop-up dialog box that opens when you click **Add User/Group** on the **Admin Security View**.

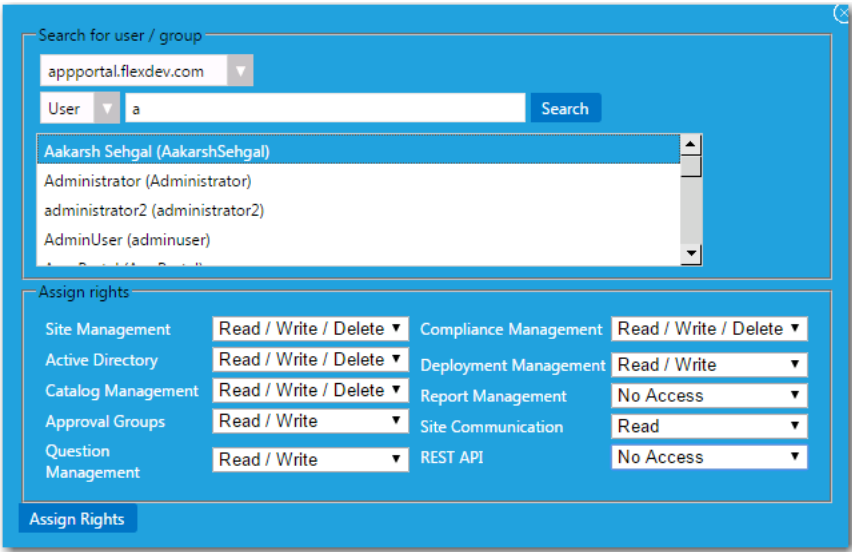


Figure 6-2: Admin Security Pop-Up Dialog Box



Note • Permissions are the “most restrictive model”. For example, if a user is in two groups where one is granted Read permission and the other granted Write permission, the permissions will be Read; they are not cumulative.

Adding a User or Group to Admin Roles

To add a user or group to Admin roles, perform the following steps:



Task

To add a user or group to Admin roles:

1. On the **Admin** tab, open the **Site Management > Admin Security** view.
2. Click the **Add User/Group** button. The following dialog box opens:

3. Use the search fields to locate the user or group that you want to add.
4. Select the appropriate permissions from the **Assign rights** fields for each listed role. Under **Assign rights**, the following roles are listed:

Role	Permission
Site Management	<p>Can view, create / modify, or delete configuration items under the following subnodes of Site Management:</p> <ul style="list-style-type: none"> • Site Management > Admin Security • Site Management > Catalog Security • Site Management > Settings (all subnodes except Active Directory) • Site Management > Imported Users and Computers • Site Management > Logs • Site Management > ITSM & Cloud Integration • Site Management > Categories • Site Management > Commands and Actions
Active Directory	<p>Can view, create / modify, or delete configuration items under the following nodes:</p> <ul style="list-style-type: none"> • Site Management > Settings > Active Directory • Site Management > Active Directory

Role	Permission
Catalog Management	Can view, create / modify, or delete items under the following nodes: <ul style="list-style-type: none"> ● Catalog Management > Create New Catalog Item ● Catalog Management > Current Catalog Items ● Catalog Management > Catalog ● Catalog Management > Catalog Categories ● Catalog Management > Expressions ● Catalog Management > Workflows ● Catalog Management > Workflow Status
Approval Groups	Can view, create / modify, or delete items under the following nodes: <ul style="list-style-type: none"> ● Catalog Management > Approval Groups
Question Management	Can view, create / modify, or delete items under the following nodes: <ul style="list-style-type: none"> ● Catalog Management > Questions
Compliance Management	Can view, create / modify, or delete items under the following nodes: <ul style="list-style-type: none"> ● Compliance Management
Deployment Management	Can view, create / modify, or delete items under the following nodes: <ul style="list-style-type: none"> ● Deployment Management
Report Management	Can view, create / modify, or delete items under the following nodes: <ul style="list-style-type: none"> ● Report Management
Site Communication	Can view, create / modify, or delete items under the following nodes: <ul style="list-style-type: none"> ● Site Management > Communication
REST API	Enables access to all REST API endpoints.

5. Click **Assign Rights** to add the user or group. The selected user or group will now have access to the specified roles.

Managing Catalog Permissions

When configuring App Portal, you will need to specify which users and groups can view and modify the App Portal catalog. This secures the App Portal site catalogs to the listed groups and users. You configure catalog security on the **Catalog Security View**, which is opened by selecting **Catalog Security** under **Site Management** on the **Admin** tab.

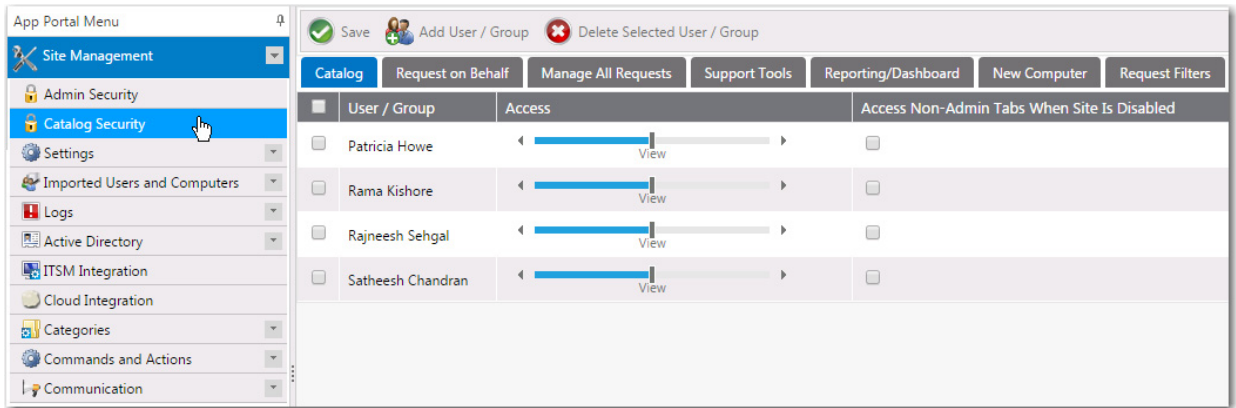


Figure 6-3: Catalog Security View

On each of the tabs of the **Catalog Security View**, you can view and edit the security settings for *existing* users and groups for that particular role.

However, you assign *initial* permissions to a user or group for all roles on the pop-up dialog box that opens when you click **Add User/Group** on the **Catalog Security View**.

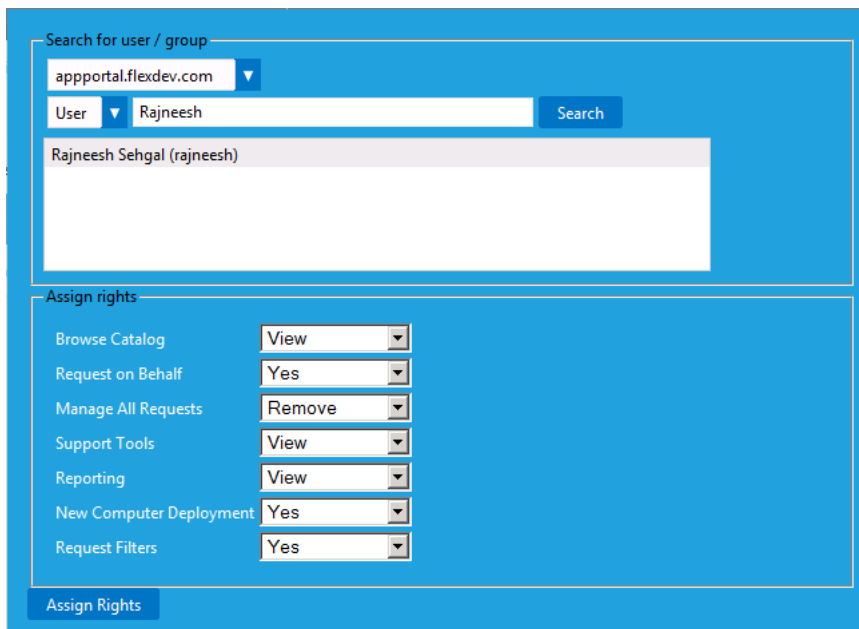


Figure 6-4: Catalog Security Pop-Up Dialog Box

Assigning Catalog Permissions to a User or Group

To enable permissions to see and manage the App Portal catalog, perform the following steps:



Task

To assign catalog permissions:

1. On the **Admin** tab, open the **Site Management > Catalog Security** view.
2. To add a user or group, click the **Add User/Group** button. The following dialog box opens:

3. Use the search fields to locate the user or group that you want to add.
4. Select the appropriate permissions from the **Assign rights** fields for each listed role. Under **Assign rights**, the following roles are listed:

Role	Permission
Browse Catalog	Allows users to see the catalog hierarchy. If no group is defined, it is visible for all. Add groups to restrict access.
Request on Behalf	Determines whether members can perform request on behalf for catalog items enabled for request on behalf. Recommended members: Help Desk / Support Staff.
Manage All Requests	Can view, create / modify, or delete request items under My Requests tab. Grants visibility to the Show all requests check box so users can see not only their own requests but all others as well. Recommended members: Help Desk / Support Staff.
Support Tools	Grants access to the Support Tools tab. Recommended members: Help Desk / Support Staff.
Reporting	Grants access to the Reporting tab. Recommended members: Help Desk / Support Staff / Business Analysts.

Role	Permission
New Computer Deployment	Grants access to the New Computer button during a request on behalf action. Recommended members: PC Builders.
Request Filters	Not implemented.

- Click **Assign Rights** to add the user or group.



Note • You can also select the **Access Non-Admin Tabs When Site Is Disabled** option on the **Site Management > Catalog Security** view to permit that user to view the end user facing App Portal interface even though the App Portal site is not enabled (because the **Enable site?** option on the **Site Management > Settings > General** view is not selected).

Managing Approval Workflows

Approval workflows are applied to catalog items to define how a request will be routed for review. In each step of an approval workflow, a user or group reviews the request.

- [About Approval Workflows](#)
- [Creating a New Approval Workflow](#)
- [Additional Workflow Step Properties](#)

About Approval Workflows

Approval workflows can be dynamic or static, and can have conditions applied to them.

Dynamic vs. Static Workflow Steps

Each workflow step (also referred to as a level) can be either dynamic or static:

- **Dynamic** steps are evaluated based on user and computer conditions. For example, if the workflow step is defined as **Manager**, the end user's manager will be required to approve the request.
- **Static** steps are the same regardless of who requests it or where it goes. For example, if the workflow step is assigned to a specific user, that same user will be required to approve all requests for this catalog item, no matter which end user requests it.

Workflows are defined and listed on the **Workflows View**, which is opened by selecting **Workflows** under **Site Management** on the **Admin** tab.

Using Conditions

Workflows and the workflow steps can have conditions applied to them. Conditions determine whether the workflow and / or workflow step should be applied to the given situation.

- **Single workflow applied to catalog item**—When you assign a single workflow to a catalog item, the conditions of the *workflow* are not evaluated; only the *workflow step* conditions are evaluated.

- **Multiple workflows applied to catalog item**—When you apply more than one workflow to a catalog item, the conditions of the workflow as well as the steps within that workflow are evaluated.

Conditions can be based on user attributes including group and OU membership, AD property value, System Center Configuration Manager collection membership for both users and computers, and catalog item properties such as cost and inventory availability.

Creating a New Approval Workflow

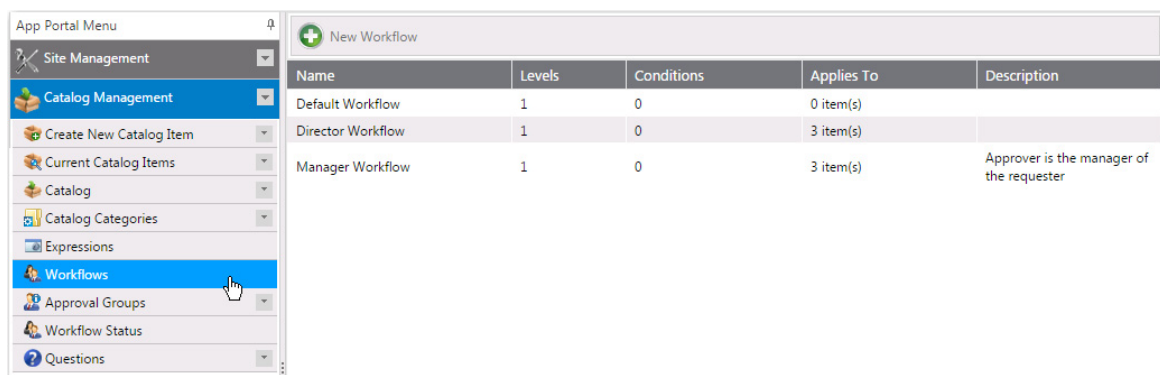
To create a new approval workflow, perform the following steps.



Task

To create a new approval workflow:

1. On the **Admin** tab, select **Workflows** under **Catalog Management**. The **Workflows View** opens.



2. Click **New Workflow**. The **General** tab of the **Create New Workflow** dialog box opens.

Create New Workflow

Save

General Workflow Steps Conditions Applies To Simulate

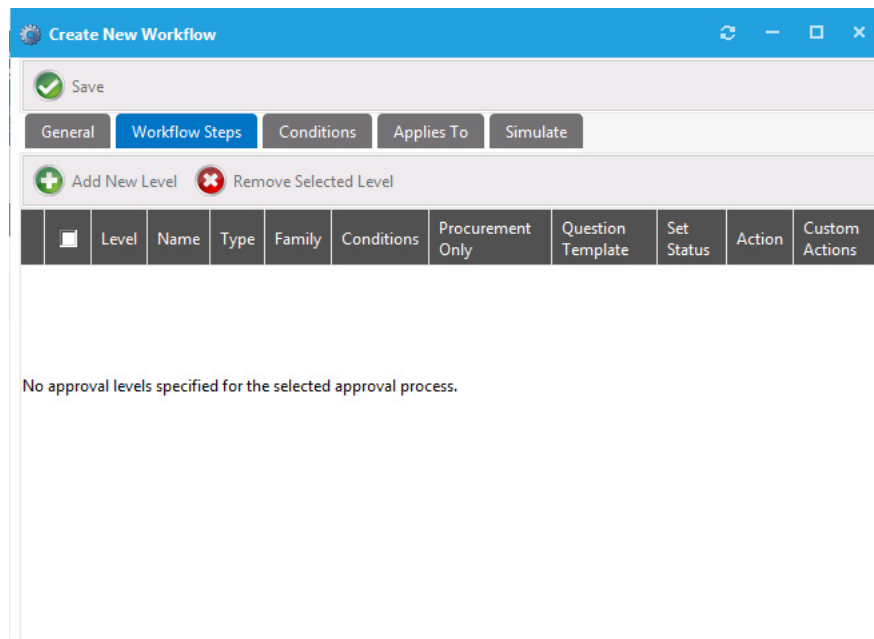
Workflow Name:

Workflow Description:

Process Type: Linear

☐ Allow requester to define workflow

3. In the **Workflow Name** field, enter a friendly name to identify this workflow, such as Finance Workflow, Engineering Application Workflow, Expensive Software Workflow, etc.
4. In the **Workflow Description** field, provide details about the workflow and its use.
5. From the **Process Type** list, select one of the following options:
 - **Linear**—The approval process functions in a linear fashion. Each approver must approve the request in order as defined in each workflow step.
 - **Pool**—Anyone in any workflow step can approve the request. It takes only one approver to approve the request. All approvers will be notified of the request.
 - **Pool within Group**—This option will allow anyone within a workflow to approve the request before it is forwarded to the next workflow step.
6. To enable the requester to change who the members of the workflow step are, select the **Allow requester to define workflow** option.
7. To force the requester to define the workflow members, select the **Force requester to define workflow** option.
8. Click **Save** to save the edits you made on the **General** tab.
9. Open the **Workflow Steps** tab.



Save

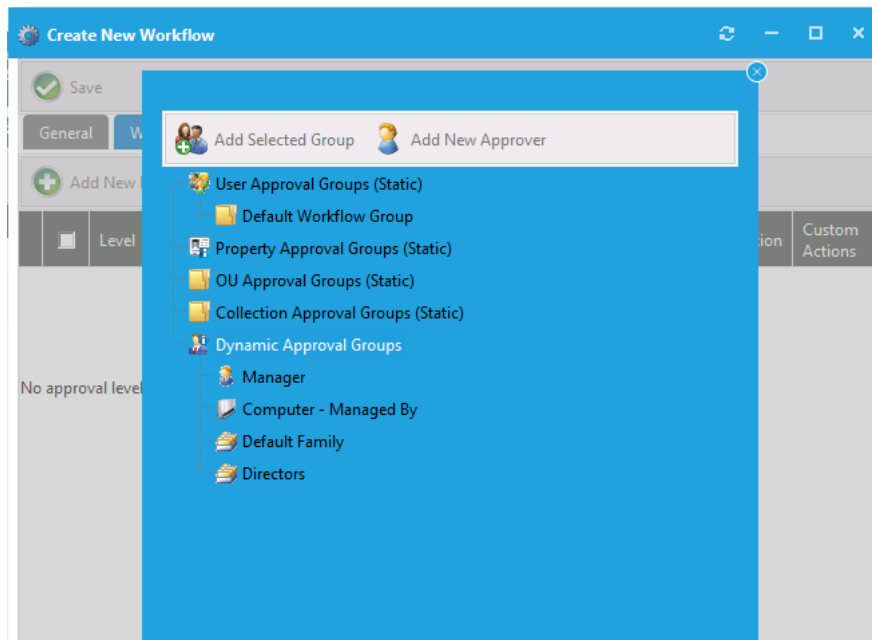
General Workflow Steps Conditions Applies To Simulate

+ Add New Level - Remove Selected Level

	Level	Name	Type	Family	Conditions	Procurement Only	Question Template	Set Status	Action	Custom Actions
No approval levels specified for the selected approval process.										

Note the following regarding workflow steps:

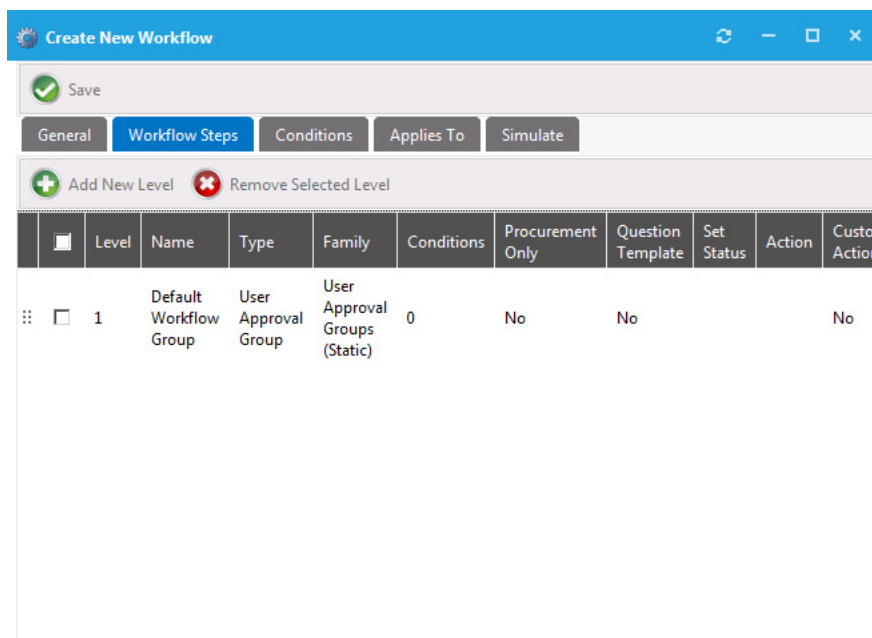
- Workflow steps are executed from top to bottom.
 - Each step can be configured with conditions to determine whether the step will be used.
 - Steps can contain direct members, static workflow groups, and dynamic workflow groups.
 - Steps can also execute custom actions when that step is processed.
10. Click **Add New Level**. A dialog box pops up prompting you to make a selection.



11. To add a static set of approvers, select a group in one of the following workflow group categories and then click **Add Selected Group**:

- **User Approval Group (Static)**
- **Property Approval Group (Static)**
- **OU Approval Group (Static)**
- **Collection Approval Group (Static)**

For example, under **User Approval Group (Static)**, select **Default Workflow Group** and then click **Add Selected Group**. The new workflow step is now listed on the **Workflow Steps** tab.





Note • To create a new workflow group, select **Workflow Groups** under **Site Management**.



Note • Approvers within these types of groups are static; they do not change based on user or computer conditions.

12. If you want to add a dynamic set of approvers, click **Add New Level**, and select one of the following under **Dynamic Approval Groups**:

Option	Description
Manager	Uses the Manager attribute from Active Directory.
Computer - Managed By	Uses the Managed By attributes of the computer object in Active Directory.
<Property Defined Group>	<p>Uses the approvers specified for the property defined.</p> <p>For example, create a property-based workflow group for the IT Department. Then, specify the group to use the department attribute and the values include IT Department, Info Tech, and Information Technology values from the department attribute in Active Directory. This action exposes the Department attribute under the Dynamic Approval Group.</p> <p>Adding the Department as a workflow step will cause the workflow to look at the requesting users department, search for a value that matches IT Department, Info Tech, or Information Technology and use the corresponding approvers identified for that group.</p>



Note • In order to effectively use dynamic approval groups you should have Workflow Groups created for every value of the property you choose to use.



Note • Dynamic approval groups display properties, not actual groups. When you create a dynamic workflow group for at least one property (department, OU, collection, etc.) that property is exposed here.

13. Click **Add Selected Group**. The new workflow step is now listed on the **Workflow Steps** tab.

Create New Workflow

Save

General Workflow Steps Conditions Applies To Simulate

+ Add New Level - Remove Selected Level

	Level	Name	Type	Family	Conditions	Procurement Only	Question Template	Set Status	Action	Custom Action
☐	1	Default Workflow Group	User Approval Group	User Approval Groups (Static)	0	No	No			No
☐	2	Manager	Dynamic Property	Dynamic Approval Groups	0	No	No			No



Note • For more options available to you regarding workflow steps, see [Additional Workflow Step Properties](#).

14. Click **Save** to save the edits you made on the **Workflow Steps** tab.
15. Open the **Conditions** tab, which lists any conditions that are applied to the workflow step.

Create New Workflow

Save

General Workflow Steps Conditions Applies To Simulate

Group and OU (0) AD Property (0) Collections (0) Question Condition (0) Catalog Item

+ Add Condition - Remove Condition

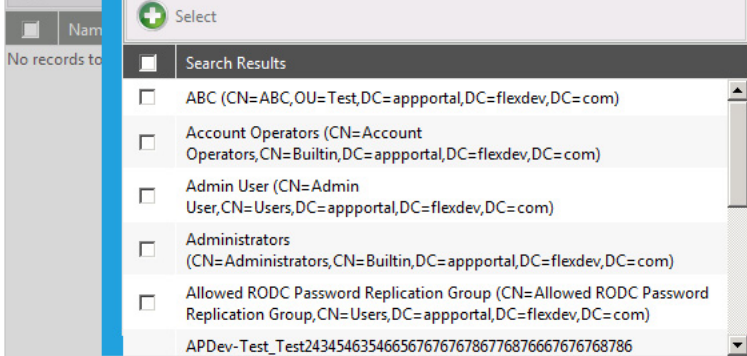
	Name	Value	Enforcement
No records to display.			

☐ Apply to OU and child OUs

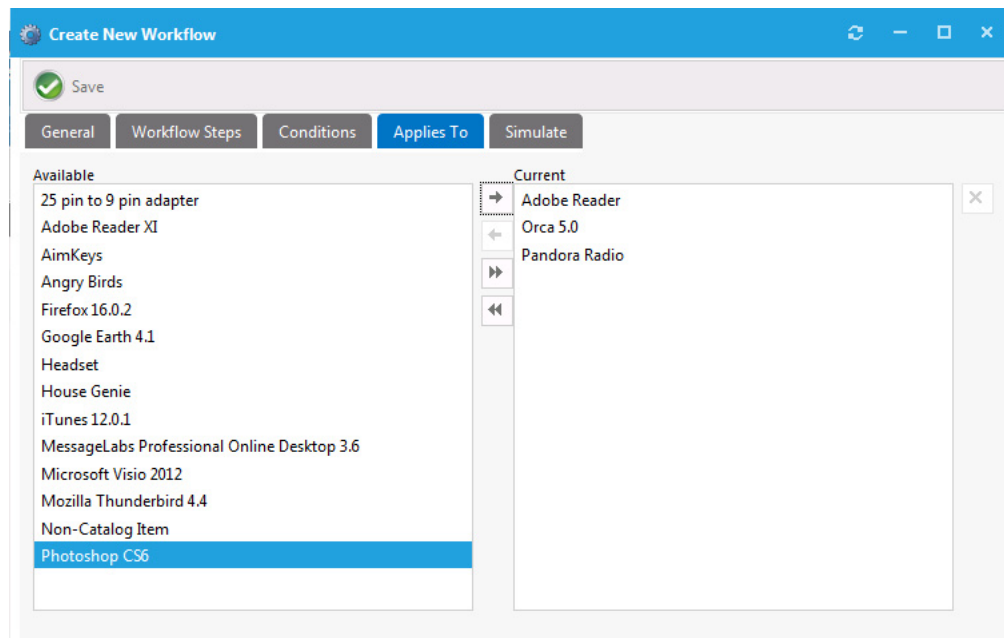
The conditions that you apply to a workflow step determines when the step should apply.

- Conditions specified here are limited to **Include**, meaning you define conditions when you want the item to apply.

- 16.** To add a condition, perform the following steps:



- 17.** Click **Save** to save the edits you made on the **Conditions** tab.

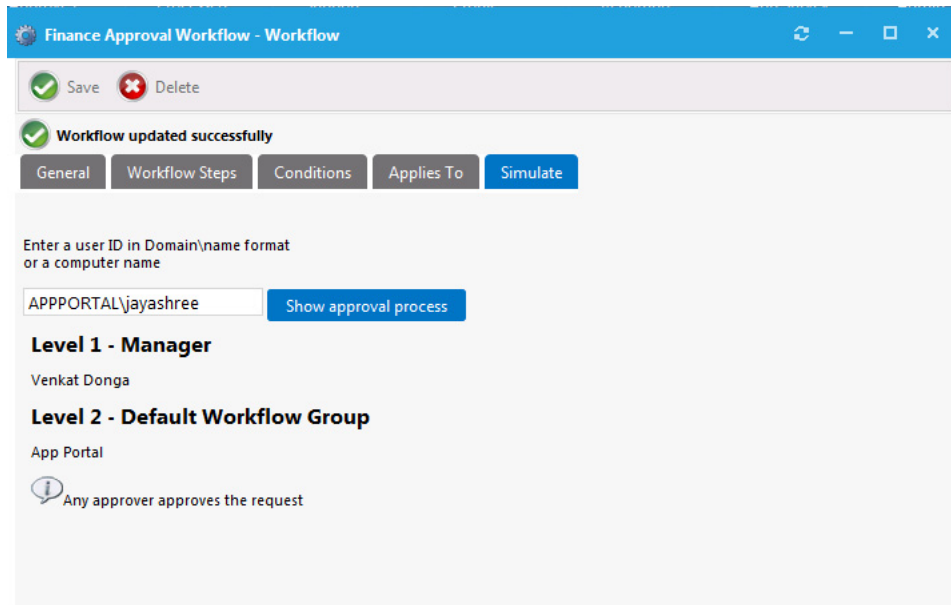


Note • If more than one workflow is applied to a single catalog item, the conditions on the workflow will be evaluated to determine which one to use. If more than one workflow applies to a given catalog item, the first workflow identified will be used.



Note • Be cautious not to create conditions that overlap.

19. Click **Save** to save the edits you made on the **Applies To** tab.
20. Open the **Simulate** tab, on which you can enter a user ID or a computer name so that you can simulate the approval process for that user or computer.
21. Enter the user ID or computer name and click **Show approval process**. The approval process is displayed:



22. Click **Save**. The new approval workflow is now listed on the **Workflows View**.

Additional Workflow Step Properties

You can modify additional properties of a workflow step by double-clicking the step on the **Workflow Steps** tab of the **Create New Workflow** dialog box.

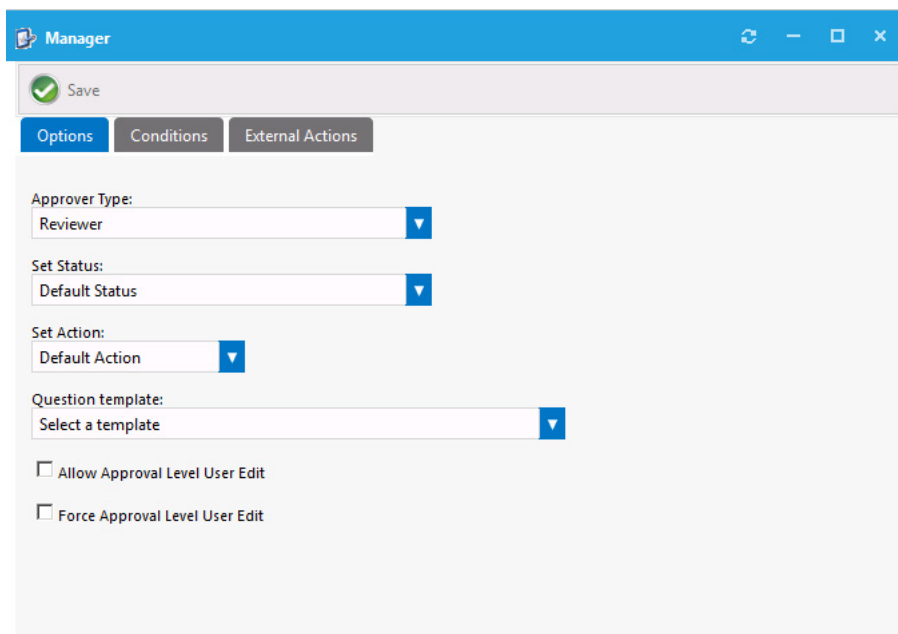


Figure 6-5: Workflow Step Properties Dialog Box

The workflow step properties are displayed on three tabs:

- **Options Tab**

- [Conditions Tab](#)
- [External Actions Tab](#)

Options Tab

The **Options** tab of a workflow step's **Properties** dialog box includes the following properties:

Table 6-1 • Workflow Step Properties

Property	Description
Approver Type	Select one of the following options: <ul style="list-style-type: none">• Reviewer• Purchaser
Set Status	Select a custom status for this workflow step. Workflow status is created and managed under Settings > Workflow Status . Setting a status other than Default Status will set the request with the identified status when that workflow step is in progress.
Set Action	Software installations are typically triggered and allowed for installation after all workflow steps have occurred. If you wish to have this action occur earlier in the workflow process, identify the step in which you want the software install action to occur.
Question template	Select a question template to link to the specified workflow step. When a question template is linked to a workflow step, the approvers at that step will be presented with those questions. If there are required questions within the question template, the request cannot move to the next workflow step until all required questions have been answered.
Allow Approval Level User Edit	Select this option if you wish to allow this specific approval step to be identified by the requester. With this option enabled the requester will be able to change the users within this step.

Conditions Tab

The **Conditions** tab of a workflow step's **Properties** dialog box lists any conditions that are applied to the workflow step.

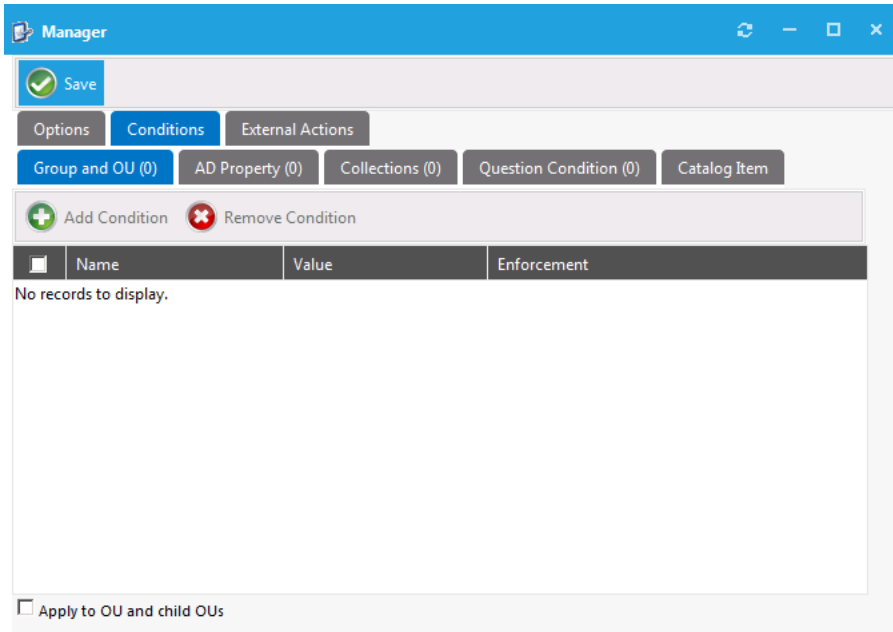


Figure 6-6: Conditions Tab of Workflow Step Properties Dialog Box

The conditions that you apply to a workflow step or the workflow itself determines when the step or workflow should apply. Conditions specified here are limited to **Include**, meaning you define conditions when you want the item to apply. An additional condition, **Catalog Item**, is present only for workflow step and workflow conditions. This condition offers the ability to include a step or apply a workflow based on the license availability and cost of a catalog item.

External Actions Tab

You can have a workflow step execute a custom action. Custom actions are defined under **Site Management > Commands and Actions**. You can use a custom action to execute an executable, script, web service, etc.

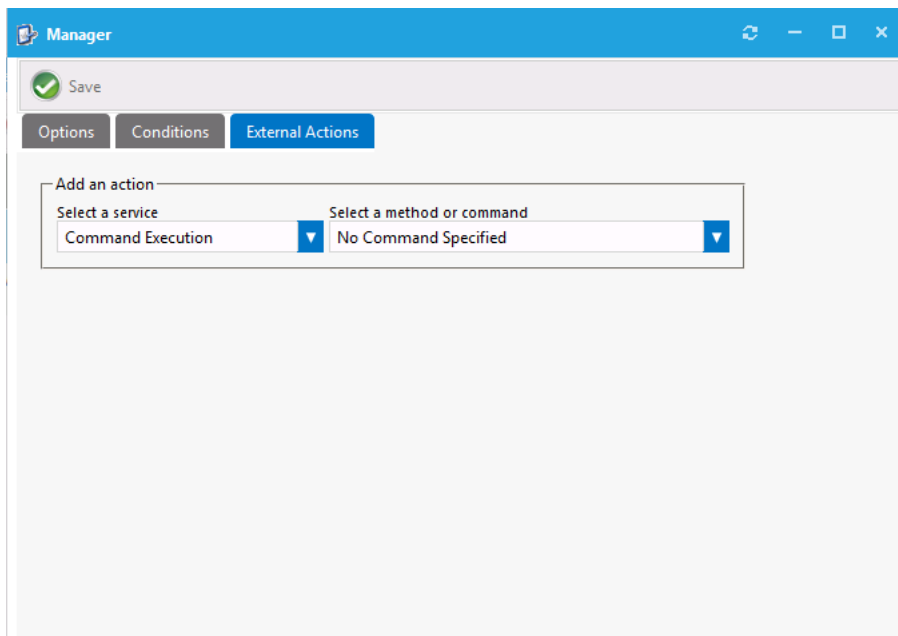


Figure 6-7: External Actions Tab of Workflow Step Properties Dialog Box

Creating a Catalog Item Template

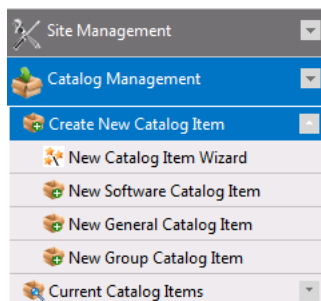
When you create a new catalog item, you can select an existing template to load settings from a previously created catalog item. For catalog items with a complex set of properties, creating a template to use during catalog item creation could prove to be quite beneficial.



Task

To create a catalog item Template:

1. Open the **Admin** tab, and click on **Catalog Management**:



2. Locate an existing catalog item that you would like to use as a template. You should select a catalog item that has the desired Approval Workflow and Question Template selected, as well as other deployment settings.
3. Double-click that catalog item to open its **Catalog Item Properties** dialog box.
4. On the **General > Global** tab, enter a name for the template in the **Template Name** text box.

5. Click **Save**. The next time that you create a new catalog item, you will be able to select this template when creating a new catalog item:
 - **New Catalog Item Wizard**—The template will be listed in the **Template** list on the **Catalog Item Title and Category** panel.
 - **New Catalog Item Properties Dialog Box**—The template will be listed in the **Load settings from template** list on the **General > Global** tab.



Note • After you click **Save** on the **New Catalog Item Properties** dialog box the first time, the **Load settings from template** property will no longer be listed on the **General > Global** tab.

Editing Default Email Notifications

System notifications are notifications that are used to communicate with the users. They can be modified to suit your company's language preferences and content.

You view and edit notifications on the **Communication > Notifications** view under **Site Management** on the **Admin** tab.



Note • Before beginning to edit your default email notifications, make sure that the **HTML Email Format** option on the **Email** tab of the **Site Management > Settings** view is selected.

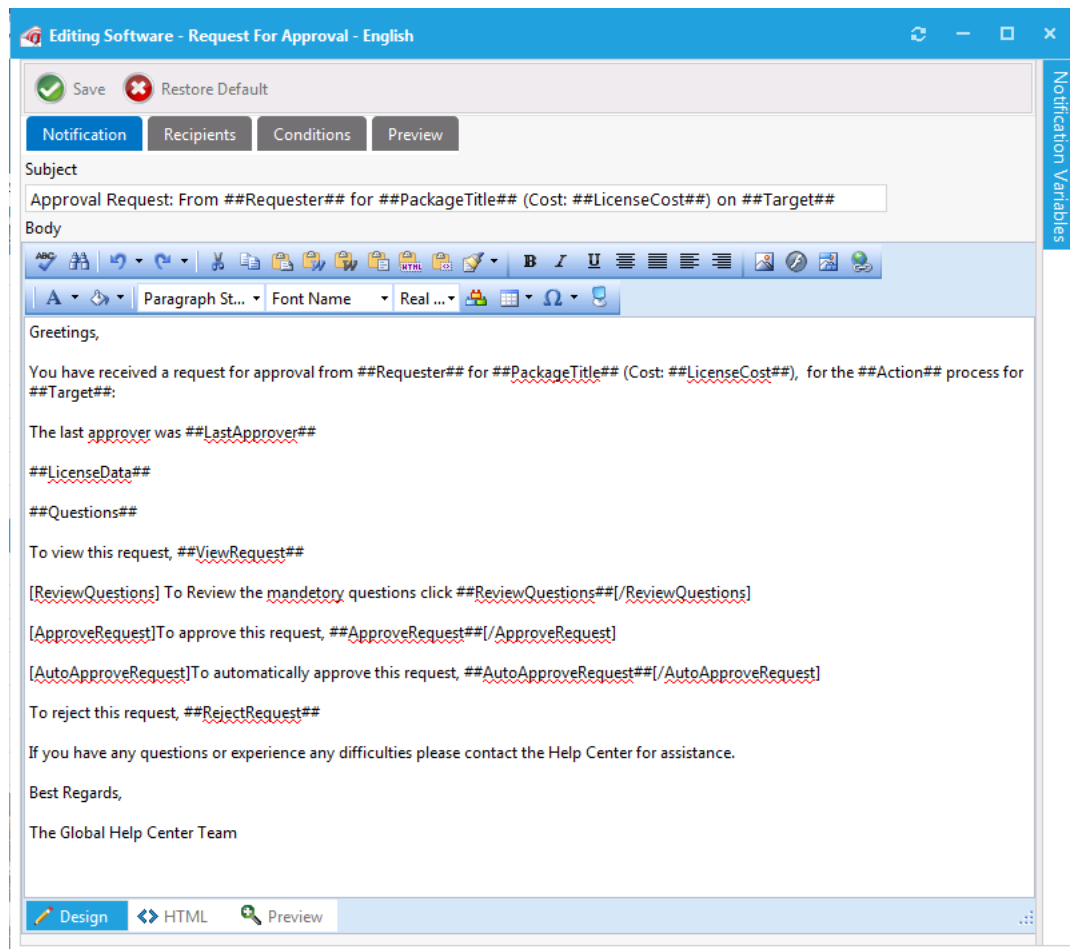


Task

To edit a default notification email:

1. Open the **Admin** tab.
2. Under **Site Management**, select **Communication > Notifications**. The default email notifications are listed on the following tabs: **Global**, **Software**, **General**, **Security**, and **License Reclamation**.

3. Locate the notification that you want to edit and double-click on it. The email opens in an editor window.

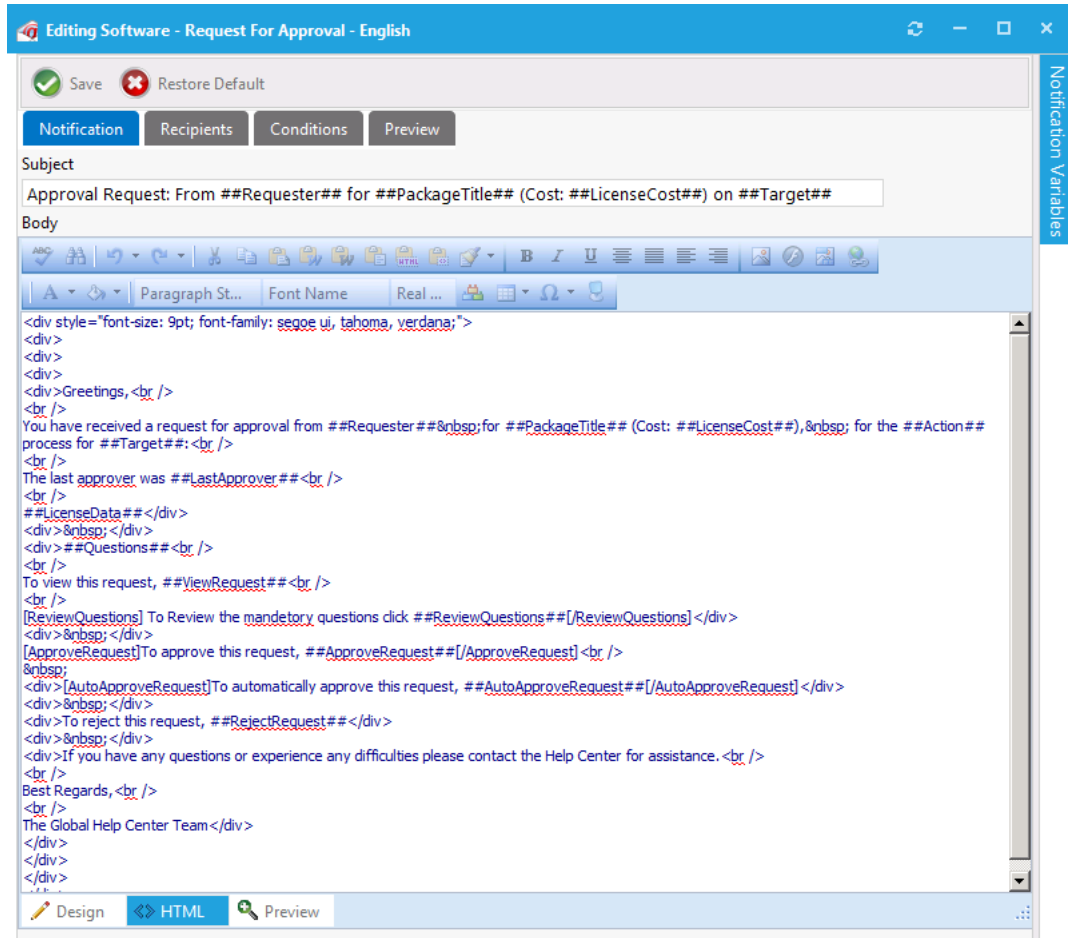


4. Edit and format the email using the tools on the toolbar.

Or, if you prefer to directly edit the HTML code of the email, click **HTML** at the bottom of the editor.

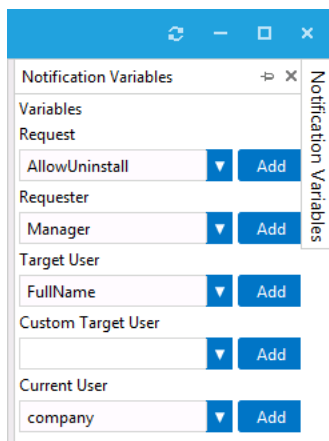


The HTML code will be displayed:



When editing notifications, you can customize them to match your company brand by including company fonts, colors, and logos.

- To insert a variable into the email, click on the **Notification Variables** button on the right side of the dialog box to open the **Notification Variables** dialog box, select a variable from the list, and click **Add**.



- To add additional recipients to these emails, as CC or BCC notifications, open the **Recipients** tab and enter email addresses, one per line.

Editing Software - Request For Approval - English

Save Restore Default

Notification Recipients Conditions Preview

Recipient options

CC Addresses (one per line)

BCC Addresses (one per line)

jwilson@flexerasoftware.com
rpatel@flexerasoftware.com
esimon@flexerasoftware.com

7. To specify conditions on a notification, open the **Conditions** tab.

Editing Software - Request For Approval - English

Save Restore Default

Notification Recipients Conditions Preview

Exclude notification when there is a condition match:

Group and OU (0) AD Property (0) Collections (0)

+ Add Condition - Remove Condition

	Name	Value	Enforcement
<input type="checkbox"/>	memberOf	App Portal Escalation Team	Exclude

Most notifications have a conditions option to filter the recipient against membership rules to determine whether the recipient should receive the notification. If a match is found against one of the conditions then the notification is not sent to the recipient. Recipients include both the requester and target user of the request.

In the above example if the target user or the requestor is in the **DHCP Administrators** Security Group, the notification will not be sent.

8. After you have finished editing the notification email, click **Save**.



Tip • In addition to listing email notification files, the **Global** subtab of the **Communication > Notifications** view also lists HTML files that can be edited to brand various portions of the App Portal site. See [Branding Your App Portal Site](#).

Branding Your App Portal Site

There are several tasks you can perform to brand your App Portal Site. Most of these tasks are performed under **Site Management > Settings** on the **Admin** tab. In addition to adding company fonts, colors, and logos to the default email notifications that are sent out by App Portal, as described in [Editing Default Email Notifications](#), you can also perform the following tasks:

- [Changing the Page Header Logo](#)
- [Customizing the Welcome Page](#)

- Customizing the App Portal User Interface Colors
- Displaying a EULA to New Users
- Editing the Help Tab Content
- Adding Announcements to the Page Header
- Specifying a Company Support Home Page URL
- Updating the Site Name in Browser Title Bar

Changing the Page Header Logo

By default, the Flexera Software App Portal logo is displayed in the page header:

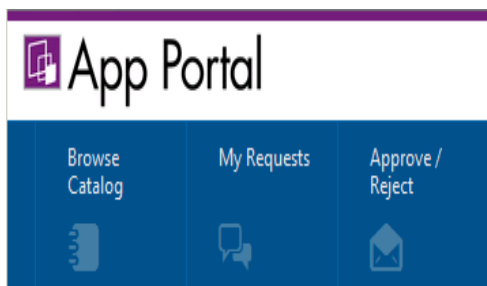


Figure 6-8: App Portal Logo in Page Header

To display a different image in the page header, perform the following steps:



Task

To change the page header logo:

1. Open the **Admin** tab.
2. Under **Site Management**, select **Settings > Web Site > Catalog Appearance**. The **Web Site > Catalog Appearance** view opens.
3. Scroll down to the **Visual Styling** properties and locate the **Company Logo URL** property.

Visual Styling

Company Logo URL (e.g. /ap/Images/ap-logo.jpg)	<input type="text" value="/ap/Images/ap-logo.jpg"/>
URL for company support home page	<input type="text" value="http://support.flexerasoftware.com"/>
Hover text for support icon	<input type="text" value="Support Site"/>
Allow User Theme Selection	<input type="checkbox"/>
Built-in Web Site Theme	<input type="text" value="Windows7"/> ▼
Custom Web Site Theme	<input type="text" value="Flexera"/> ▼
Apply custom theme to Admin UI	<input checked="" type="checkbox"/>
Enable Form Decoration	<input checked="" type="checkbox"/>
Splitter Height Offset	<input type="text" value="50"/>

This field lists the location of the company logo that appears at the top left of all App Portal screens. By default, the location of the App Portal logo is listed in this field:

/ap/Images/ap-logo.jpg

4. In the **Company Logo URL** field, enter the location of the image you want to appear in the page header. You can specify either a local file or a URL to a file at a remote location.



Tip • The image should be a maximum of 40 pixels in height. The default App Portal logo is displayed at 40px H by 176px W, but a replacement image can be wider; it just cannot be more than 40 pixels in height. If the specified image is more than 40 pixels in height, it will be automatically reduced in size and displayed at a height of 40 pixels.

5. Click **Save**. The new image now appears in the Page Header of your site.



Tip • To see the new logo, you may need to close your App Portal browser and then reopen it or refresh the browser window.

Customizing the Welcome Page

By default, a generic message is listed on the Welcome Page, which is displayed when the **Browse Catalog** tab is selected and a catalog item is not selected.

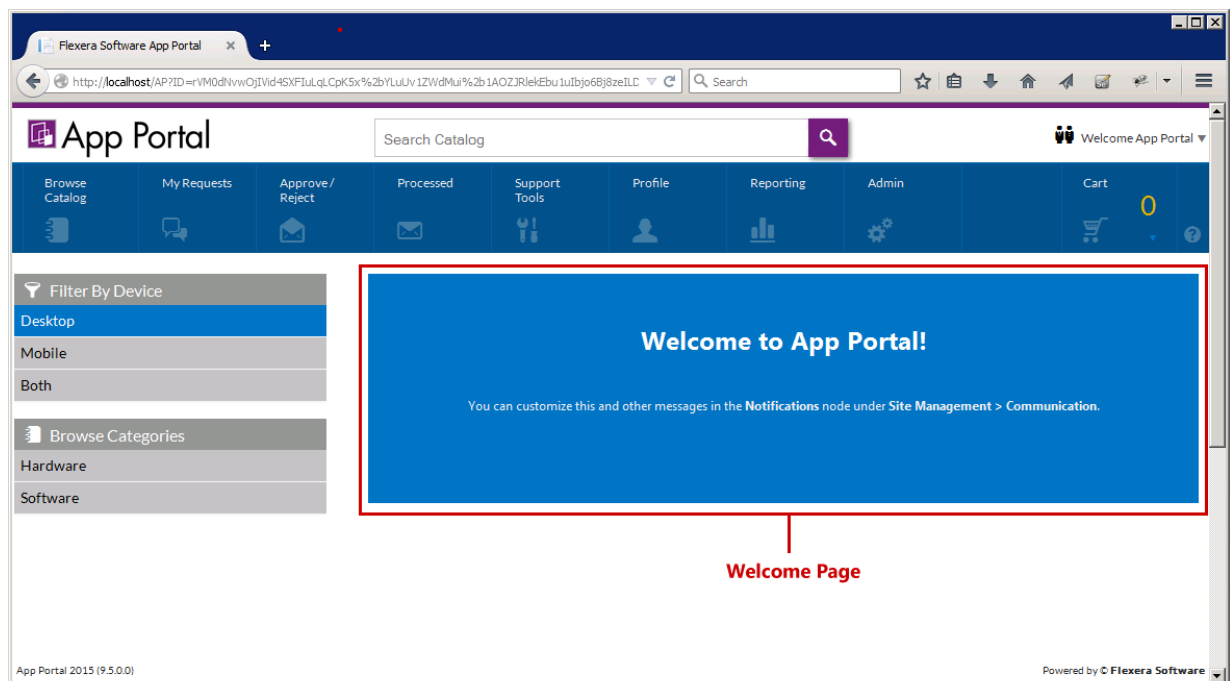


Figure 6-9: Welcome Page

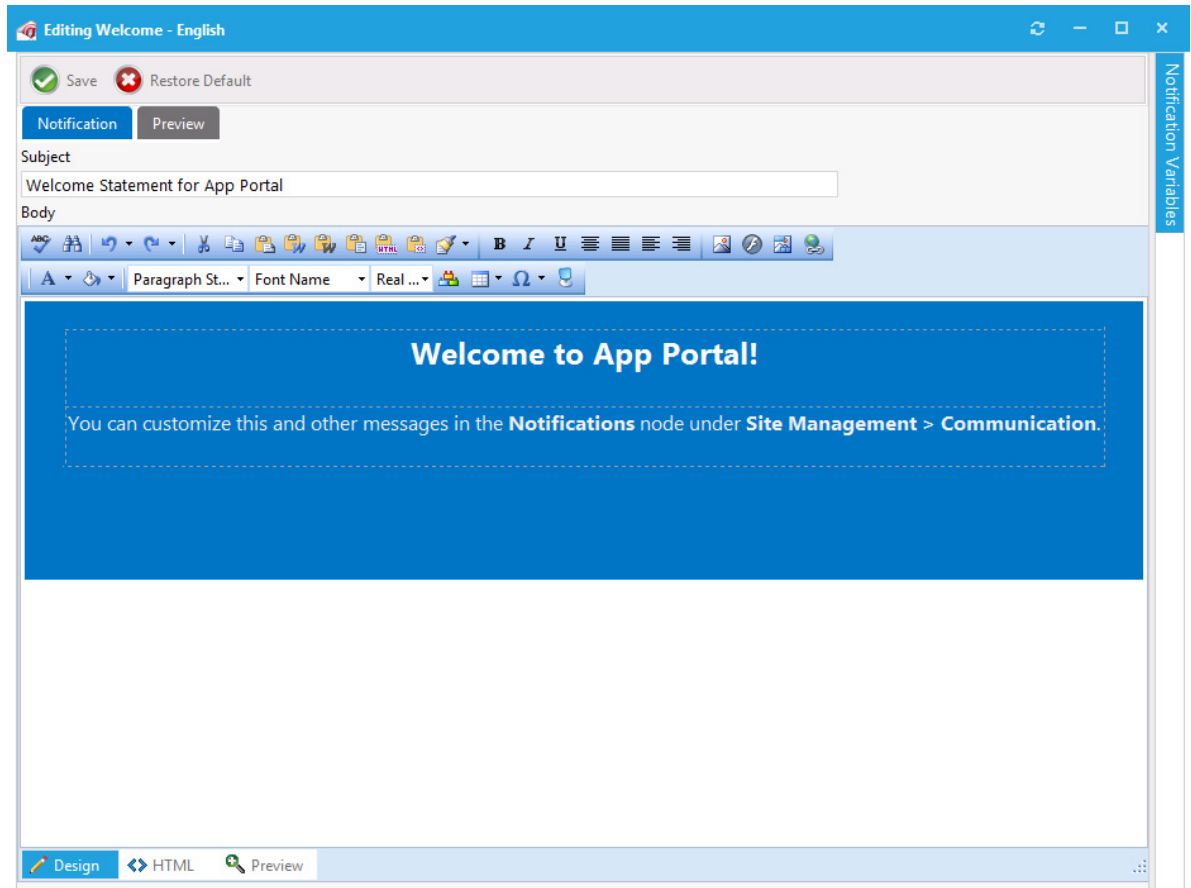
To customize your Welcome Page, perform the following steps:



Task

To customize the Welcome Page:

1. Open the **Admin** tab.
2. Under **Site Management**, select **Communication > Notifications**. The **Notifications View** opens.
3. On the **Global** tab, double-click on **Welcome**. The **Welcome** file opens in an HTML Editor.



4. Edit the text, using the functions on the toolbar to customize it.
5. To add images, click the **Image Manager** button (), and use the **Image Manager** to upload and select an image to insert.
6. Make any other necessary edits in the Editor window. Or, if you prefer to directly edit the HTML code, click **HTML** at the bottom of the editor.



7. Click **Save**. The edited Welcome page is now displayed.



Tip • To see the edited Welcome Page, you may need to close your App Portal browser and then reopen it.

Customizing the App Portal User Interface Colors

By default, App Portal's user interface is branded with a color theme that mostly consists of various shades of blue and gray. However, you can change the color theme on the **Corporate Branding** tab of the **Site Management > Settings > Web Site** view.

Components	Sub components	Flexera default color(in hex)	Your custom color(in hex)
Nav bar	Background	#005289	#005289
	Icons (unselected)	#407DA7	#407DA7
	Hover	#0076c7	#0076c7
Browse categories menu	Menu header background	#959595	#959595
	Categories background	#c2c2c2	#c2c2c2
	Category (Hover)	#009cf8	#009cf8
Buttons	Primary	#0076c7	#0076c7
	Primary (Hover)	#009cf8	#009cf8
	Secondary	#494444	#494444
	Secondary (Hover)	#6D6969	#6D6969
Grid/Table	Header row background	#757778	#757778

Figure 6-10: Corporate UI Branding Tab

There are two methods for changing the App Portal color theme to match your corporate colors:

- [Changing the Base Color and Automatically Generating Other Colors](#)
- [Changing the Individual Component Colors](#)



Important • If you have modified the CSS files shipped with previous releases of App Portal to customize the colors of the site, those changes will not be retained when you upgrade to App Portal 2015 R2. You will need to perform the steps listed here to customize the colors of your App Portal user interface.

Changing the Base Color and Automatically Generating Other Colors

The easiest way to change the App Portal color theme is to simply change the color listed in the **Select base color** field. App Portal will then automatically generate color codes of various shades of that color that will be used throughout the site.



Task

To change the color theme by selecting a new base color:

1. Identify the HEX value of your desired corporate color. For example, if your company had a green logo, the color could be #006600:

#006600

2. On the **Admin** tab, open the **Site Management > Settings > Web Site** view.
3. Open the **Corporate Branding** tab.

Save

Web Site

General Catalog Appearance Catalog Behavior Corporate Branding Dashboard

Corporate UI Branding

Select base color : #005289 Apply

Components	Sub components	Flexera default color(in hex)	Your custom color(in hex)
Nav bar	Background	#005289	#005289
	Icons (unselected)	#407DA7	#407DA7
	Hover	#0076c7	#0076c7
Browse categories menu	Menu header background	#959595	#959595
	Categories background	#c2c2c2	#c2c2c2
	Category (Hover)	#009cf8	#009cf8
Buttons	Primary	#0076c7	#0076c7
	Primary (Hover)	#009cf8	#009cf8
	Secondary	#494444	#494444
	Secondary (Hover)	#6D6969	#6D6969
Grid/Table	Header row background	#757778	#757778

4. In the **Select base color** box, enter **#006600** and click **Apply**. The colors in the **Your custom color** column are automatically changed based upon the base color that you entered.

Save

Web Site
 General
 Catalog Appearance
 Catalog Behavior
 Corporate Branding
 Dashboard

Corporate UI Branding

Note: On Save click, the page will be auto refreshed to apply color changes across the site

Select base color : To preview the selected base color, click **Apply**.
To save the selected base color, click **Save**.

Components	Sub components	Flexera default color(in hex)	Your custom color(in hex)
Nav bar	Background	#005289	#6600
	Icons (unselected)	#407DA7	#1e841e
	Hover	#0076c7	#147a14
Browse categories menu	Menu header background	#959595	#a700a
	Categories background	#c2c2c2	#63c963
	Category (Hover)	#009cf8	#147a14
Buttons	Primary	#0076c7	#6600
	Primary (Hover)	#009cf8	#1e841e

- If you are satisfied with the colors listed in the **Your custom color**, click **Save**. The browser window will be refreshed and the new color theme will be displayed.
- To return to the default Flexera Software colors, click the **Reset to default** button at the bottom of the **Corporate UI Branding** tab.

Changing the Individual Component Colors

You have the option of setting the color individually for each of the listed components of the App Portal application. This is a more difficult option because you have to specify slight variations in your corporate color to serve as hover colors and the background colors for drop down menus, etc.



Task

To change the color theme by specifying colors for App Portal components:

1. Specify the colors that you want to use for the following App Portal components:

Component	Sub Components	Your Custom Color
Nav bar	Background	
	Icons (unselected)	
	Hover	
Browse categories menu	Menu header background	
	Categories background	
	Category (hover)	
Buttons	Primary	
	Primary (hover)	
	Secondary	
	Secondary (hover)	
Grid/Table	Header row background	
	Row (hover) background	
	Row (alternate) background	
View and dialog box tabs	Tabs (selected)	
	Background	
Highlight color	Search box button, Top border, Progress wheel	
Pop up dialog box	Background	
Others	View titles/subtitles	
	Hyperlink	
	Background of summary box on Checkout page (in progress)	
	Welcome menu hover	
	Dropdown menu hover	
	Admin tab navigation menu hover	
	Image button hover	


2. On the **Admin** tab, open the **Site Management > Settings > Web Site** view.
3. Open the **Corporate Branding** tab.























Save

Web Site

General Catalog Appearance Catalog Behavior **Corporate Branding** Dashboard

Corporate UI Branding

Select base color : #005289  Apply

Components	Sub components	Flexera default color(in hex)	Your custom color(in hex)
Nav bar	Background	#005289 	#005289 
	Icons (unselected)	#407DA7 	#407DA7 
	Hover	#0076c7 	#0076c7 
Browse categories menu	Menu header background	#959595 	#959595 
	Categories background	#c2c2c2 	#c2c2c2 
	Category (Hover)	#009cf8 	#009cf8 
Buttons	Primary	#0076c7 	#0076c7 
	Primary (Hover)	#009cf8 	#009cf8 
	Secondary	#494444 	#494444 
	Secondary (Hover)	#6D6969 	#6D6969 
Grid/Table	Header row background	#757778 	#757778 

4. In the **Your custom color** column, enter the colors you have selected.
5. Click **Save**. The browser window will be refreshed and the new colors you specified will be displayed.
6. To return to the default Flexera Software colors, click the **Reset to default** button at the bottom of the **Corporate UI Branding** tab.

Displaying a EULA to New Users

You can choose to display an End User License Agreement the first time an end user opens App Portal. After that user accepts the EULA, it will no longer be displayed.

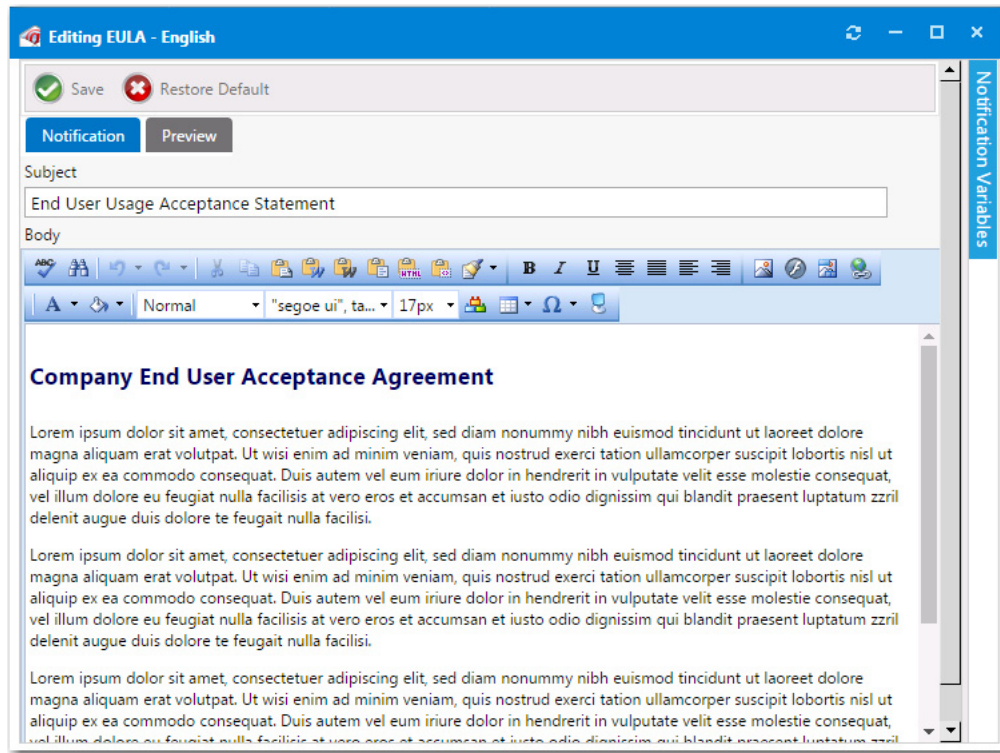
To enable the display of a EULA to new users, perform the following steps:



Task

To enable the display of a EULA to new users:

1. On the **Admin** tab under **Site Management**, select **Settings**.
2. On the **General** tab, select the **Require EULA?** option and click **Save**.
3. Under **Site Management**, select **Communication > Notifications**. The **Notifications** view opens.
4. On the **Global** tab, double-click on **EULA**. The default **EULA** file opens in an HTML Editor.

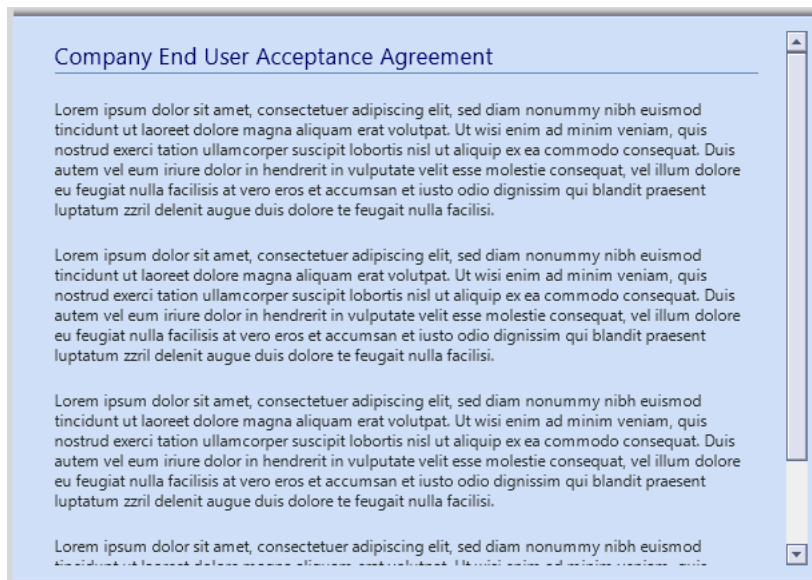


5. Insert the text of your organization's EULA, and format it using the functions on the toolbar.

If you prefer to directly edit the HTML code, click **HTML** at the bottom of the editor.



6. Click **Save**. The next time a new user opens App Portal for the first time, they will be prompted to accept the EULA.



Editing the Help Tab Content

You can customize the **Help** tab to display any content you feel would be most helpful to users at your enterprise.

To customize the content of the **Help** tab, perform the following steps:

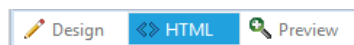



Task

To customize the content of the Help tab:

1. Open the **Admin** tab.
2. Under **Site Management**, select **Communication > Notifications**. The **Notifications View** opens.
3. On the **Global** tab, double-click on **Help Page**. The **Help Page** file opens in an HTML Editor.
4. Edit the text, using the functions on the toolbar to customize it.

If you prefer to directly edit the HTML code, click **HTML** at the bottom of the editor.



5. To add images, click the **Image Manager** button (), and use the **Image Manager** to upload and select an image to insert.



Note • You cannot use Image Manager when you are in **HTML** mode. You must be in **Design** mode.

6. Make any other necessary edits, and then click **Save**. The new content will now be displayed on the **Help** tab.

Adding Announcements to the Page Header

You use the **Communication > Announcements** view to add announcements to the App Portal site. Announcements are displayed on the top right corner of the browser window.

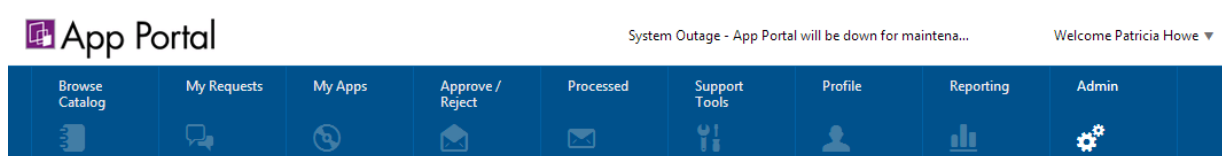


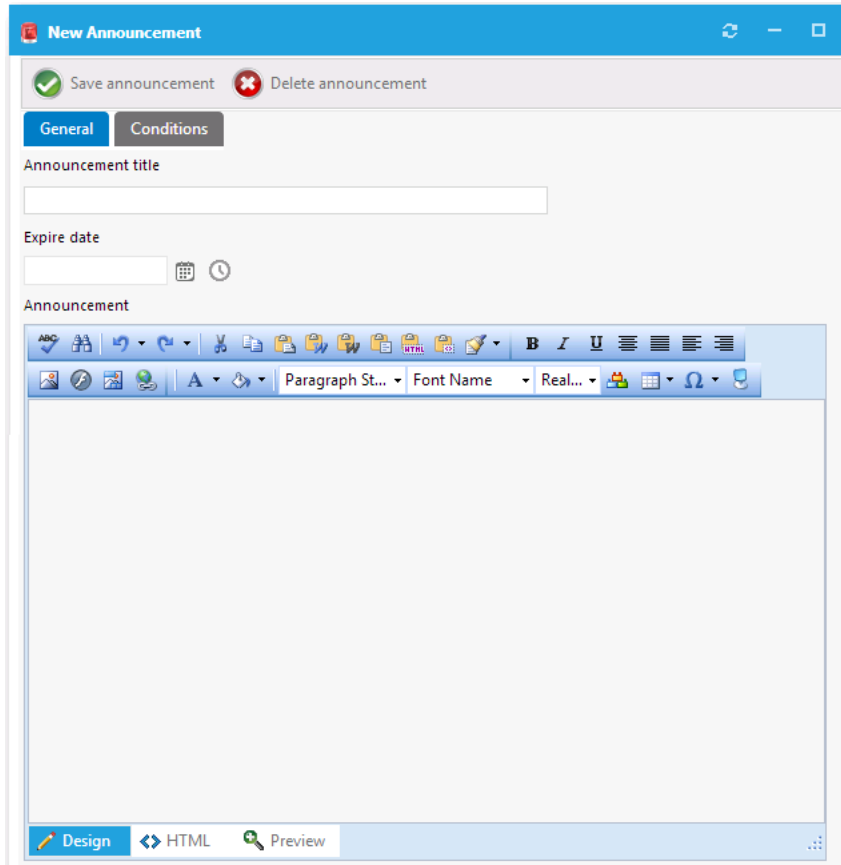
Figure 6-11: Announcement Displayed on the App Portal Site



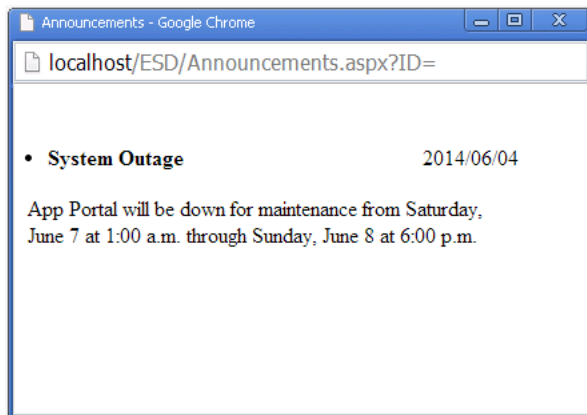
Task

To add announcements to the App Portal page header:

1. Open the **Admin** tab.
2. Under **Site Management**, select **Communication > Announcements**. The **Announcements View** opens.
3. Click **New**. The **New Announcement** dialog box opens.



4. In the **Announcement title** field, enter a brief title for this new announcement.
5. In the **Expire date** field, enter the date and time after which you no longer want this announcement displayed. If you do not enter an **Expire date**, the announcement will not expire.
6. In the **Announcement** text editor, enter the text of the announcement.
7. Click **Save announcement**. The next time the browser window is refreshed, the **Announcement title**, along with the beginning text of the announcement will be displayed. If a user clicks on the announcement title, a browser window opens displaying the full text of the message.



Specifying a Company Support Home Page URL

If you specify a URL for a company Support site, a support icon will be displayed at the top of each App Portal page, which will be linked to that site:

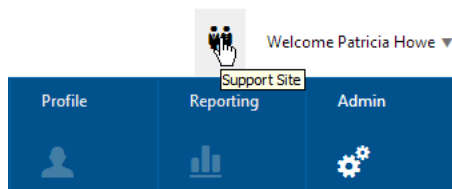


Figure 6-12: Displaying Link to Company Support Page

To specify a company Support home page, perform the following steps:



Task

To specify a company Support home page:

1. On the **Admin** tab under **Site Management**, select **Settings > Web Site**.
2. Open the **Catalog Appearance** tab.
3. Under **Visual Styling**, enter a URL in the **URL for company support home page** field.
4. Click **Save**. The next time the App Portal browser window is opened, the Support icon will be displayed, and it will be linked to the Support site URL you entered.

Updating the Site Name in Browser Title Bar

You can customize the name that is displayed in the title bar of the App Portal browser window. By default, Flexera Software App Portal is displayed.



Task

To update the site name in the browser title bar:

1. On the **Admin** tab under **Site Management**, select **Settings > Web Site**.
2. Open the **General** tab.
3. Under **Site Settings**, edit the title in the **Site Title** field.
4. Click **Save**. The next time the App Portal browser window is opened, the new site title will be displayed.

Connecting to the Flexera Service Gateway

If you have also purchased FlexNet Manager Suite, you can use App Portal to manage application licenses.

App Portal communicates with FlexNet Manager Suite via the Flexera Service Gateway component. To connect App Portal to the Flexera Service Gateway, perform the following steps.

**Task**

To connect to the Flexera Service Gateway:

1. Select **Site Management > Settings > Flexera Integration**. The **Flexera Integration** view opens.
2. In the **Flexera Service Gateway Server Name** field, enter the name of your Flexera Service Gateway server



Note • To integrate with FlexNet Manager Suite, you may also have to enter appropriate credentials.



Note • For more information on using the FlexNet Manager Suite to manage application licenses, see [Adding Licensed Software Catalog Items](#).

