Logging Into the Customer Portal

2. Enter your User ID and Password when prompted. Contact the DST Service Desk at (850) 487-1746 if you need assistance logging into the portal.

3. The portal Home Page will appear upon successful login.
**Header Details**

**View User Profile**
The current user’s ID will appear at the top/right of the site header. The following options are available by clicking the arrow outlined in the below image.

![User Profile Arrow](image)

**New Browser Window**
The **New Browser Window** button opens the portal in another tab without requiring a second login. This allows the user to have multiple site pages open concurrently.

**My Profile – Reset Password**
Selecting **My Profile** opens the current user’s customer contact record for editing. **Note - Only certain fields may be edited by the user. There is also the option to **Change Password** on the record’s toolbar which prompts for the current password and the new password.**

![Contact Information](image)

**Logout**
To logout of the site, click the **Logout** option or close the browser window.

**Home Page Details**

**Search the DST Knowledge Base**
The below button will prompt for the entry of a keyword or phrase. Knowledge articles containing the entered keyword or phrase will be available for selection. Knowledge articles include frequently asked questions as well as step-by-step instructions (with screenshots) on how to perform common tasks.
Current List of Available Knowledge Article Topics:

<table>
<thead>
<tr>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a New Application to the CMDB</td>
</tr>
<tr>
<td>Exception Workflow Diagram</td>
</tr>
<tr>
<td>Export Portal Grids to Excel or CSV File</td>
</tr>
<tr>
<td>How to Create and Update Agency Account Information</td>
</tr>
<tr>
<td>How to Filter Data in Portal Grids</td>
</tr>
<tr>
<td>How to Open New Portal Browser Window</td>
</tr>
<tr>
<td>How to Set Criticality on Servers and Applications</td>
</tr>
<tr>
<td>How to Submit a Firewall Rule Request</td>
</tr>
<tr>
<td>How to Submit a Server Decommission</td>
</tr>
<tr>
<td>How to Submit a Service Order</td>
</tr>
<tr>
<td>Mark Portal Notification as Read</td>
</tr>
<tr>
<td>Modify Change/Release Portal Calendar View</td>
</tr>
<tr>
<td>Performing a Wildcard Search</td>
</tr>
<tr>
<td>Portal QuickAction to Request a Ticket Update</td>
</tr>
<tr>
<td>Portal QuickActions</td>
</tr>
<tr>
<td>Reset Portal Password - Customer Instructions</td>
</tr>
<tr>
<td>Server Decommission FAQs</td>
</tr>
<tr>
<td>Service Order - Add/Remove CIs from Disaster Recovery</td>
</tr>
<tr>
<td>Submit Blackout Request</td>
</tr>
<tr>
<td>View Portal Grid in Full Screen</td>
</tr>
<tr>
<td>Why Do I See Change/Releases with No Configuration Items</td>
</tr>
</tbody>
</table>

Please contact the [DST Service Desk](#) to request a knowledge article on a specific topic.

Report an Incident

Click the [Report an Incident](#) button to submit an incident to the DST Service Desk. An incident can also be reported via the [Submit Request → Incident](#) menu item.
Items Pending Agency Action
This displays items requiring action by the agency including pending approvals, configuration item updates, incidents/service requests requiring customer response, etc. Each item displays a (count) of pending actions.

**Note - The information button next to Delegation Requests and End of Life Servers displays a pop-up window with additional information.**

Notifications
The Notifications section includes notices to DST customers. Notifications may be related to planned outages, portal changes, the addition of knowledge-base articles, tips and tricks, frequently asked questions, and other information that may be useful to our customers. Notifications are temporarily posted, so please review when you log into the DST Customer Portal.

**Notifications**
CIs Related to Scheduled Release Search Added to Portal
7/24/2019 12:35 PM
Users can export a list of CIs related to a specific release by going to the site's Search menu and selecting "CIs Related to Scheduled Release". The user will be prompted to enter the Release ID and can export the results to .csv or .xlsx.

Menu Bar Details
The Customer Portal menu is always visible as the user navigates the site. The available menu items are based on the current user’s assigned roles, so the menu options will vary between users. In addition, menu items may be visible even though the user doesn’t have the appropriate role to submit the request type.
Unauthorized users will receive an error message when attempting to submit a request without the appropriate permissions.

Menu Icons

- Creates a new record.
- High priority item.
- Returns search results in a grid.
- Opens a calendar.
- Opens a document repository.
- Appears on the right of the menu item and indicates a submenu. Hover over the menu item to see the submenu.
- Opens a report. **Note – Reports must be opened in the Internet Explorer browser.**
- Opens a dashboard.
- Opens a website.
- Opens a .pdf document.

Home

The Home button returns the user to the Home page.
Submit Requests
Use the Submit Request menu to submit items to the DST Service Desk. Upon selection, a new record will appear for authorized submitters. Unauthorized submitters will receive an error message.

Manage Requests
The Manage Requests section is to review/monitor previously submitted requests.
Change/Release Schedule
Includes searches to view change/releases that may impact the customer.

The Change/Release Calendar displays a calendar view of change/releases. Release type visibility can be modified by changing the selections with the Legend to the right of the calendar. Click on a specific month to view results.
Documents
Provides available document repositories that are used for sharing documents. Authorized users can create folders and add items to the repository. Documents that cannot be emailed are often placed in the agency’s document repository.

Reports
Includes available reports that can be printed or saved.

**Note – Reports must be opened in the Internet Explorer browser. Google Chrome will not open the reports.**
Configuration Management
Includes searches of configuration items owned by the customer agency.

Other

Account Management
Alerts
Availability Statistics
Billing (MPWR)
Blackout Request Calendar
Capacity Plans
Cost Estimate
DST Contacts
Portal User Guide
Service Catalog
Quick Search

To perform a quick search for a specific record, select the record type from the Quick Search options and enter a record number or keyword.

If no record type is selected, all record types will be searched. For example, searching all records for “Print” produced the below results.

**Blackout Requests**

Blackout Requests containing the text “print”.

Blackout Request ID 2170

Last Modified January 10 @ 3:14 PM by Stacy Nouveau

**Incidents**

Incidents containing the text “print”. Open incidents only.

224684, In Progress, Priority 3

Last Modified Thursday @ 2:27 PM by David Bennett

Category: Backup

Self-Category: Request Report Information

Service Request #: 462131

Priority: Average

Requester: Erin Durham

Email: Erin.Durham@FloridaMemorial.com

Phone: (850) 717-6177

Summary: We need the backup reports. I would like the backup reports to be in an excel spreadsheet and is a print report if possible.

We need two new backup reports.

180384, On Hold, Priority 3

Last Modified July 15 @ 10:26 AM by Norma Lamonica

Category: Seminars

Self-Category: Add/Maintain Access/Permission

Please make a ticket for interdepartmental team to complete the request below.

From: Todd Brandon

Sent: Monday, September 10, 2010 9:54 AM

To: Kazuki, Michael <Michael.Kazuki@FloridaMemorial.com>, Kazuki, Clark <Clark.Kazuki@FloridaMemorial.com>

Cc: Matt, Christopher <Christopher.Matt@FloridaMemorial.com>
Modifying Grids

Sort Columns
Grids can be sorted by clicking on the column header. Click the column header a second time to reverse the sort order. Sorted column(s) will have an up or down arrow indicating the column is sorted in ascending or descending order. Click the Multi-Column Sort button on the grid toolbar to sort by more than one column.

Filter Grid Contents
Most columns can be filtered by clicking the blue filter icon within the column header. Depending on the field type, you will be prompted to select from a list of checkboxes or type the filter criteria. Multiple items can be selected or entered. The Category column is filtered to display records in which the column’s value is “Cherwell” or “SQL”.

Add/Remove Columns
Columns can be added/removed from the grid by clicking the Columns button on the grid toolbar. When the Column Selector window opens, click the arrow to expand the list of available columns. Columns can be added or removed by selecting/deselecting the checkbox next to the column name. These changes will remain when the user next logs into the portal.
Rearrange Column Order
Columns can be rearranged by dragging/dropping the column header to a new location on the grid. Changes made to grid column orders are permanent and will be visible the next time the user logs into the portal.

Exporting Search Results
Click the Export button on the grid’s toolbar to export search results into a CSV or Excel file. Depending on your browser settings, the file may appear as a downloaded file at the bottom of the browser window and/or within your PC’s Downloads folder. The column order and any sorting or filtering that has been applied to the grid will be reflected in the exported file.

Menu Actions

Request Update
Users can request an update on an incident, service request, and service order by selecting the record within a grid and clicking the Action button on the grid toolbar. Select Request Update from the Actions submenu.

The Request Update option is also available on records returned when a search is performed using the Quick Search menu.

When the Request Update option is selected, the user is prompted to enter additional information that will be provided to the DST technician. The update request will also be included in the ticket’s journal.

Request Reschedule
Grids containing scheduled releases will include an Action menu item to Request Reschedule. When selected, the user is prompted to provide details which will be sent to the release owner and the DST Release Manager.

How to Provide Feedback
All users may submit portal feedback to DST by selecting Portal Feedback within the Submit Request menu.