

USU Portal

Administration

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1. Introduction

The USU Portal is the entry point into the product world of the USU group. It is a common front end for various source systems that can bundle the information depending on the use case and enables the user to easily access the source system.

USU Portal supports the maintenance of multiple portal pages. A portal page is a collection of dashlets. The composition can be made according to the requirements of your use case. One Portal page can consist of many dashlets. One dashlet is connected to one source system. Therefore, a portal page can show data from different source systems.

For example, a portal page on the topic of customer self-service: As an end user, you get all information about your incidents, orders, or current news on one page. The data of the individual dashlet used here can come from different source systems.

This documentation covers working with the **USU Portal administration client**, a stand-alone web application used for creation and administration of the USU Portal.

2. USU Software Compose

2.1. Introduction

USU Software Compose is a package which simplifies installation and configuration of **USU applications** on **Kubernetes (K8s)** clusters. The applications are basically interconnected, integrated and pre-configured.

With the USU Software Compose, **USU GmbH** has introduced a new installation process for USU Service Management **Platform** and the related **apps**. In this guide, we will provide you with step-by-step instructions on how to install and configure the USU Service Management, USU platform and the apps using this new process.



Please note that the requirements are based on the current version and features of the applications. For the future changes, please check the latest documentation and updates for the application before installing or upgrading it.

Basic guide structure

This user guide is divided into three main sections:

- **System requirements**

Provides an overview of system and hardware requirements, software requirements, operating system and database management system.

- **USU central helm chart and docker image registry**

Where to find your app and download the right USU Software Compose package.

- **USU Software Compose Installation process**

Guides you through the essential steps of the USU Software Compose installation and configuration.

Writing conventions

The following formatting conventions are used:

- Words in bold font

Names of actions, parameters and attributes; GUI buttons and keyboard keys.

Names of editors and catalogs; windows and dialog windows; window sections; menus, widgets.

Product and company names, important words which need to stand out.

- Words in italic font

Parameter values, attribute values, statuses

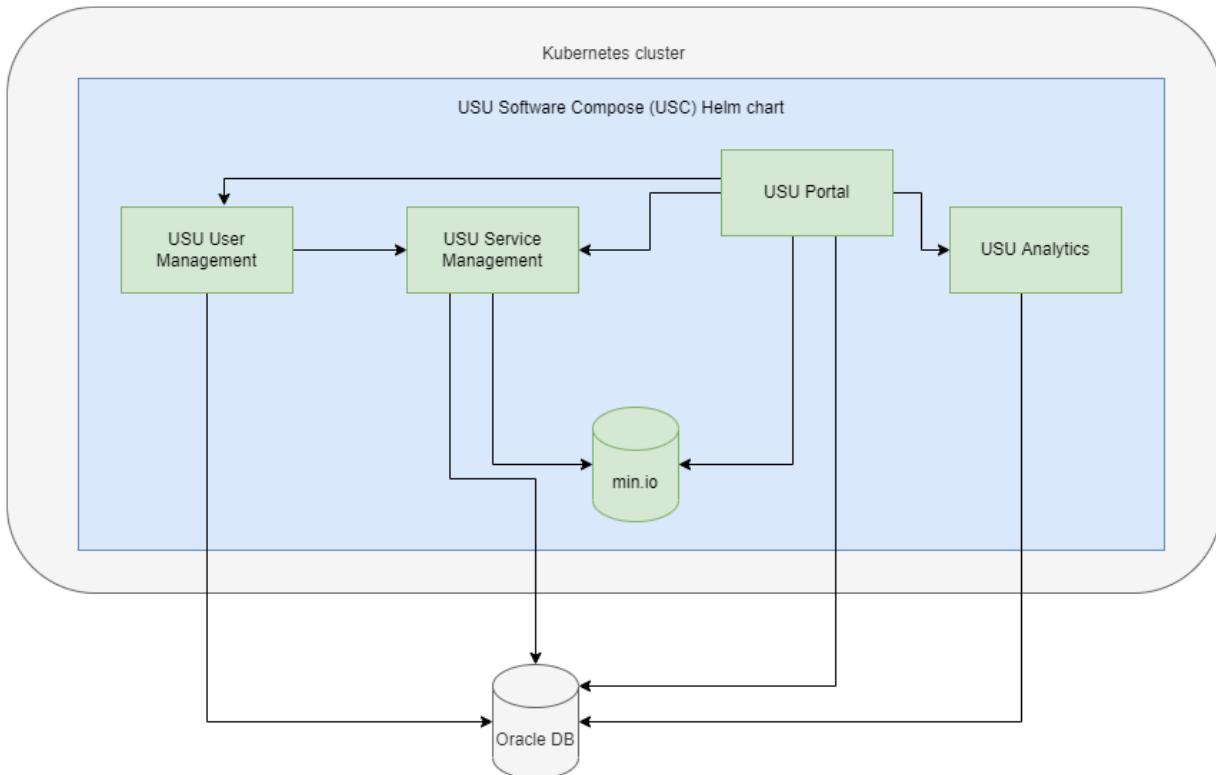
- Words in code-like format

Code examples

2.2. Basic concept

From a technical point of view, USU Software Compose is an umbrella **Helm chart** with dependencies to one or multiple Helm charts with USU applications and a single point of configuration for these applications.

Example:



USU Software Compose contains all **3rd party components** such as relational database or object storage which are necessary to deploy USU applications. However, it is possible to change the configuration to use externally deployed and managed 3rd party components.

2.3. System requirements

USU Service Management and USU Analytics are available as container software together with other apps. In this case, they require a **Docker** or **Kubernetes** infrastructure. However, they can be also deployed using the WAR file on e.g. Tomcat.



- **Docker infrastructure** is the set of components and technologies that enable the creation, deployment, and management of Docker containers. Docker containers are isolated and lightweight environments that run applications and services independently from the underlying infrastructure.
For details, see [Docker](#).
- **Kubernetes infrastructure** is the combination of resources (including servers, physical or virtual machines, cloud platforms and more) that supports a Kubernetes environment.

For details, see [Kubernetes](#).

The following chapters also provide an overview of hardware requirements, software requirements, operating system and database management system.

2.3.1. Hardware requirements

This chapter provides some guidelines for choosing the optimal **hardware configuration** for the application. Before you install the software, make sure that your computer meets the minimum hardware requirements.

The **server** needs to be able to run the application containers:

Hardware	Minimum	Recommended
Processor (CPU)	1 Core	2 Cores
Memory (RAM)	4 GB	8 GB

For the USU Software Compose deployment of the apps including USU User Management and USU Service Management:

Hardware	Minimum	Recommended
Processor (CPU)	4 Cores	8 Cores
Memory (RAM)	24 GB	36 GB



The hardware requirements may vary depending on the operating system, the version of the software you are using and the amount of different apps in that USC package. Ask [USU Support](#) or contact us by [email](#) for a recommendation regarding your specific environment.

2.3.2. Deployment with Kubernetes

Please refer to the standard [K8s installation documentation](#) for information regarding the general prerequisites for running USU apps on Kubernetes infrastructure.

2.3.3. Software requirements

Before you install the software, make sure that your system meets the minimum software requirements.



The software requirements may vary depending on the operating system and the version of the software you are using. Ask [USU Support](#) or contact us by [email](#) for a recommendation regarding your specific environment.

2.3.3.1. Operating system

The following table lists the most widespread operating systems and their support:

Operating System	Version	Supported
Windows	10 and higher	YES
Linux	Distributions supporting Kubernetes	YES
macOS	x	NO
Chrome OS	x	NO

2.3.3.2. Database management system

An app database is currently available for the following DMBS:

Operating System	Version	Supported
Windows	10 and higher	YES
Linux	Distributions supporting Kubernetes	YES
macOS	x	NO
Chrome OS	x	NO

2.3.3.3. USU Service Management

All products in USC can only be used in combination with USU Service Management v. 5.3 and higher.

2.3.3.4. USU User Management

The following USU User Management and Keycloak versions need to be run for the apps:

App version	USU User Management version	Keycloak version
1.0.x	5.x.x	19.x
2.0.x	6.x.x	20.x
3.0.x	8.x.x	24.x

2.3.3.5. Object storage system

Apps require an object storage implementing the S3 API. In the standard deployment, we provide MinIO as Database Management Systems. Other S3 API clients are currently not tested.

2.3.3.6. Web browser

End users and Admins access the individual apps via web UI.

The following web browsers are officially supported:

Web browser	Version	Supported
Google Chrome	114.0.x (Official Build) (64-bit)	YES
Microsoft EDGE	114.0.x (Official build) (64-Bit)	YES
Mozilla Firefox	115.0.2 (64-bit)	YES
Other	x	NO

2.4. USU central helm chart and docker image registry

The apps that you buy from **USU GmbH** come as an external digital content that you can download, install, or reinstall. After you purchase the software, you get an access to the **Nexus repository**. This is a registry of all USC packages where you can install your apps from. To find a specific download, you need to sign in with the Nexus account, find your app and download the package with all the apps you have bought and you want to install.

Steps to take to find and download your app:

1. Your Administrator gets a unique **login credentials** for your user into the **Nexus repository: USU**.
Alternatively, please ask **USU Support** or contact us by [email](#) for a **PULL user** to access the account.
2. After you log in, you can see various installation packages for USU Software composes.
Pick the correct package.



The screenshot shows the Sonatype Nexus Repository interface. The top navigation bar includes the 'Sonatype Nexus Repository' logo, 'OSS 3.52.0-01', and icons for 'Browse', 'Search', and 'Settings'. The left sidebar has 'Browse' selected. The main content area shows a tree view of packages under 'usu-devops' and 'usu-internal-releases'. The 'usu-devops' tree includes 'external-releases' and 'internal-releases' sub-folders, each containing various sub-folders like 'usc-one', 'usc-one-local', 'usc-portal', etc. At the bottom of the tree view, 'README.html' is highlighted with a grey background. Below the tree view, there are two files: 'README.html' and 'README.md'.

Note that there are two types of releases:

- **External** - Production releases
- **Internal** - Pre-releases intended for internal USU use

3. A **README file** is generated down below the list.

Open the file and find what specific package is relevant for your installation.

Release Composes

Name	Content	Notes
usc-one	Analytics + AppStudio + Platform + Portal + Portal Adapters + Shop + Theming Configurator + USM 5.3 + USM Mobile + User Management	
usc-portal	Portal + Portal Adapters + USM 5.3 + User Management	
usc-shopx	Shop + USM 5.3 + USM Mobile + User Management	
usc-test	<i>Unspecified</i>	Internal only
usc-ulm	Localization + User Management	Internal only
usc-usm	USM 5.3 + USM Mobile + User Management	Discontinued, switch to usc-usm53
usc-usm53	USM 5.3 + USM Mobile + User Management	
usc-uum	Theming Configurator + User Management	
usc-vmx	AppStudio + Platform + USM 5.3 + USM Mobile + USM Portal Adapter + User Management	



The README file is updated and modified on regular basis. Please always check that you have the latest version.

Note that there are two release variants:

- **Default** - For cloud and server installations on Linux platform
- ***-local** - For local laptop installations on Windows/Linux platform (demos, trainings etc.)

4. Download the package.

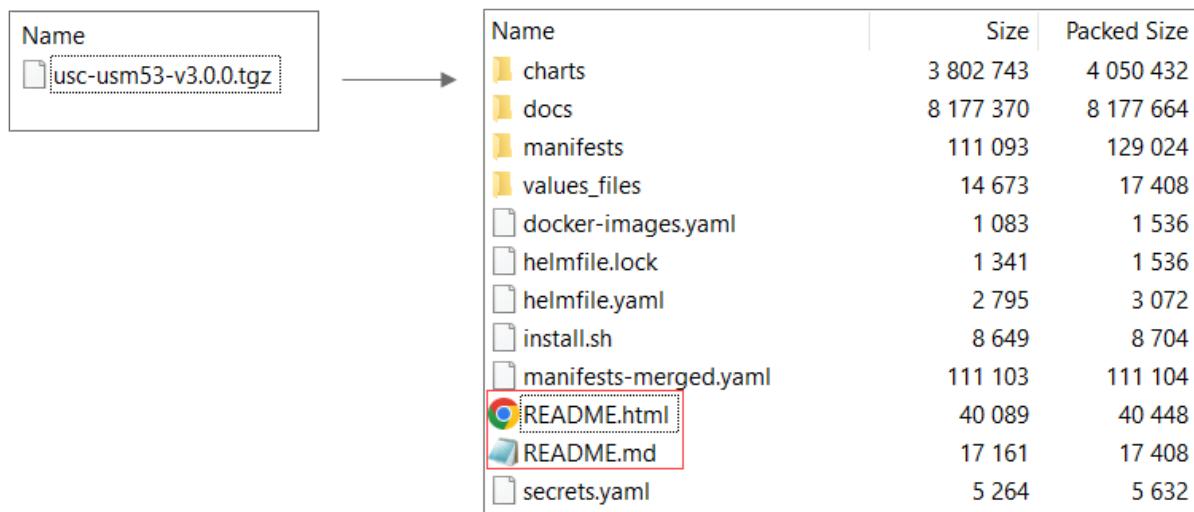
The package also contains **other README files** which contain a detailed set of instructions on how to proceed with the installation of this particular package's content. Note that you can find detailed version info of each application in the readme file.

For details, jump to [USC installation process \(page 11\)](#).

2.5. USU Software Compose Installation process

The **README** file, which is an inherent part of every USU Software Compose package you download, contains a complete technical USU Software Compose **Installation and Configuration Guide**. Check this guide for a full overview.

Example: Unzipped USM53 package with the README files inside.



Name	Size	Packed Size
charts	3 802 743	4 050 432
docs	8 177 370	8 177 664
manifests	111 093	129 024
values_files	14 673	17 408
docker-images.yaml	1 083	1 536
helmfile.lock	1 341	1 536
helmfile.yaml	2 795	3 072
install.sh	8 649	8 704
manifests-merged.yaml	111 103	111 104
README.html	40 089	40 448
README.md	17 161	17 408
secrets.yaml	5 264	5 632



This README file is also updated and modified on regular basis. Please always check that you have the latest version with your latest package.

With every package, the key elements of the USU Software Compose installation and configuration process are:

- Configuration in `values.yaml` (page 13)
- Different installation methods (page 15)
- Secrets (page 17)

2.5.1. Configuration in `values.yaml`

The `*.yaml` files contain and allow you to set configuration of the downloaded app.

- The basic configuration (default values) of the downloaded app is set in the **values.yaml** file located deep in the **charts** folder.

4 složky, 8 souborů						
usc-usm53-v3.0.0						
charts	1 složka	40755	semaphore	root	05.09.23 9:16	
usc-usm53	12 složek	40755	semaphore	root	05.09.23 9:16	
index	1 složka	40755	semaphore	root	05.09.23 9:16	
mail-relay	1 složka	40755	semaphore	root	05.09.23 9:16	
usm-mariadb	1 složka	40755	semaphore	root	05.09.23 9:16	
usm-mobile	1 složka	40755	semaphore	root	05.09.23 9:16	
usm	1 složka	40755	semaphore	root	05.09.23 9:16	
valuemation	1 složka	40755	semaphore	root	05.09.23 9:16	
usm	1 složka	40755	semaphore	root	05.09.23 9:16	
5.3.06	1 složka	40755	semaphore	root	05.09.23 9:16	
usm	2 složky, 5 souborů	40755	semaphore	root	05.09.23 9:16	
charts	2 složky	40755	semaphore	root	05.09.23 9:16	
templates	1 složka, 9 souborů	40755	semaphore	root	05.09.23 9:16	
.helmignore	356 B	100644	semaphore	root	05.09.23 9:16	
Chart.lock	357 B	100644	semaphore	root	05.09.23 9:16	
Chart.yaml	642 B	100644	semaphore	root	05.09.23 9:16	
README.md	12,3 KiB	100644	semaphore	root	05.09.23 9:16	
values.yaml	13,7 KiB	100644	semaphore	root	05.09.23 9:16	
uum-account-ui	1 složka	40755	semaphore	root	05.09.23 9:16	
uum-admin-ui	1 složka	40755	semaphore	root	05.09.23 9:16	

- Any configuration changes must be done in **dedicated `*.yaml` files** located in the **values_files** folder.

After the configuration, **install.sh** or the **installation method based on Helm** is used.

usc-usm53-v3.0.0	4 složky, 8 souborů				
charts	1 složka	40755	semaphore	root	05.09.23 9:16
docs	1 složka	40755	semaphore	root	05.09.23 9:15
manifests	12 složek	40755	semaphore	root	05.09.23 9:16
values_files	12 souborů	40755	semaphore	root	05.09.23 9:17
index.yaml	1,1 KiB	100644	semaphore	root	05.09.23 9:17
mail-relay.yaml	349 B	100644	semaphore	root	05.09.23 9:17
usm-mariadb.yaml	1,5 KiB	100644	semaphore	root	05.09.23 9:17
usm-mobile.yaml	1 016 B	100644	semaphore	root	05.09.23 9:17
usm.yaml	3,6 KiB	100644	semaphore	root	05.09.23 9:17
uum-account-ui.yaml	626 B	100644	semaphore	root	05.09.23 9:17
uum-admin-ui.yaml	729 B	100644	semaphore	root	05.09.23 9:17
uum-keycloak-bitnami.yaml	2,4 KiB	100644	semaphore	root	05.09.23 9:17
uum-keycloak-mariadb.yaml	412 B	100644	semaphore	root	05.09.23 9:17
uum-minio.yaml	741 B	100644	semaphore	root	05.09.23 9:17
uum-redis.yaml	193 B	100644	semaphore	root	05.09.23 9:17
uum-service.yaml	1,8 KiB	100644	semaphore	root	05.09.23 9:17
README.html	39,1 KiB	100644	semaphore	root	05.09.23 9:15
README.md	16,8 KiB	100644	semaphore	root	05.09.23 9:15
docker-images.yaml	1,1 KiB	100644	semaphore	root	05.09.23 9:17
helmfile.lock	1,3 KiB	100644	semaphore	root	05.09.23 9:17
helmfile.yaml	2,7 KiB	100644	semaphore	root	05.09.23 9:15
install.sh	8,4 KiB	100755	semaphore	root	05.09.23 9:15
manifests-merged.yaml	108,5 KiB	100644	semaphore	root	05.09.23 9:17
secrets.yaml	5,1 KiB	100600	semaphore	root	05.09.23 9:15



Before doing any configuration changes, it is highly recommended to utilize a **version control system** for the content of this USU Software Compose package. Make sure to exclude and handle separately any security-sensitive content from the repository.

To initialize a repository in the root of this package, run:

```
echo "/secrets.yaml*" > .gitignore
git init
git add .
git commit -m "Initial state"
```

Check various command line options of the **install.sh** utility:

```
./install.sh -h
```



It is also highly recommended that you change all of the default passwords.

2.5.2. Different installation methods

The following methods describe in what way you can install a package into Kubernetes cluster.

2.5.2.1. Method: Install.sh

For this method, please see the **Quick Start** section in the USU Software Compose **Installation and Configuration Guide** embedded in the [README file in the package \(page 11\)](#).

2.5.2.2. Advanced installation methods

Unlike the [Quick Start approach \(page 15\)](#), a pre-configured Kubernetes cluster is expected to exist.

This includes:

- Any of k3s, minikube, microk8s etc. running on a Linux OS platform, or a cloud provider.
- Installed and configured cert-manager.
With cert-manager, it's also recommended to install trust-manager for CA (bundle) trust distribution across a Kubernetes cluster.
- Installed and configured MetalLB.
- Installed NGINX Ingress Controller.
- Installed vals.

Prepare namespaces:

1. Create namespace(s):

```
kubectl create namespace usc-one
```

2. Create .docker/config.json containing credentials for accessing docker images:

```
DOCKER_CONFIG=.docker/ docker login docker.devops.usu.group
```

3. Create image pull secrets:

```
kubectl -n usc-one create secret docker-registry usu-regcred --from-file=.dockerconfigjson=.docker/config.json
```

2.5.2.2.1. Method 1

This method is sort of a static installation with the least configuration flexibility.

This USU Software Compose is in one namespace. Thus, it is possible to apply merged k8s templates:

Example:

```
vals eval -decode-kubernetes-secrets -f manifests-merged.yaml | kubectl -n usc-one apply -f -
```

2.5.2.2.2. Method 2

This method offers the best flexibility. Charts are installed from the charts/directory (air gap).

To discover configuration possibilities, check the corresponding Readme files within the (sub)charts.

Example:

```
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm.yaml usm ${find charts/usc-one/usm/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm-mariadb.yaml usm-mariadb ${find charts/usc-one/usm-mariadb/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm-portal-adapter.yaml usm-portal-adapter ${find charts/usc-one/usm-portal-adapter/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm-mobile.yaml usm-mobile ${find charts/usc-one/usm-mobile/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm-account.yaml usm-account ${find charts/usc-one/usm-account/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm-account-ui.yaml usm-account-ui ${find charts/usc-one/usm-account-ui/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm-service.yaml usm-service ${find charts/usc-one/usm-service/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm-keycloak-bitnami.yaml usm-keycloak-bitnami ${find charts/usc-one/usm-keycloak-bitnami/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm-keycloak-mariadb.yaml usm-keycloak-mariadb ${find charts/usc-one/usm-keycloak-mariadb/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm-redis.yaml usm-redis ${find charts/usc-one/usm-redis/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/usm-minio.yaml usm-minio ${find charts/usc-one/usm-minio/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/vmx-web-ui.yaml vmx-web-ui ${find charts/usc-one/vmx-web-ui/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/vmx-web-ui-storage.yaml vmx-web-ui-storage ${find charts/usc-one/vmx-web-ui-storage/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/vmx-core-service.yaml vmx-core-service ${find charts/usc-one/vmx-core-service/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/vmx-core-service-mariadb.yaml vmx-core-service-mariadb ${find charts/usc-one/vmx-core-service-mariadb/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/vmx-rabbitmq.yaml vmx-rabbitmq ${find charts/usc-one/vmx-rabbitmq/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/vmx-teams-service.yaml vmx-teams-service ${find charts/usc-one/vmx-teams-service/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/vmx-minio.yaml vmx-minio ${find charts/usc-one/vmx-minio/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/shopx-service.yaml shopx-service ${find charts/usc-one/shopx-service/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/shopx-service-mariadb.yaml shopx-service-mariadb ${find charts/usc-one/shopx-service-mariadb/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/shopx-admin-ui.yaml shopx-admin-ui ${find charts/usc-one/shopx-admin-ui/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/thc-service.yaml thc-service ${find charts/usc-one/thc-service/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/thc-service-mariadb.yaml thc-service-mariadb ${find charts/usc-one/thc-service-mariadb/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/mail-relay.yaml mail-relay ${find charts/usc-one/mail-relay/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/portal-yaml.portal.yaml portal-mariadb ${find charts/usc-one/portal/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/portal-minio.yaml portal-minio ${find charts/usc-one/portal-minio/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/portal-search-adapter.yaml portal-search-adapter ${find charts/usc-one/portal-search-adapter/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/portal-usm-adapter.yaml portal-usm-adapter ${find charts/usc-one/portal-usm-adapter/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/us-ui.yaml us-ui ${find charts/usc-one/us-ui/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/us-service.yaml us-service ${find charts/usc-one/us-service/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/us-analytics.yaml us-analytics ${find charts/usc-one/us-analytics/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/us-mariadb.yaml us-mariadb ${find charts/usc-one/us-mariadb/ -mindepth 4 -maxdepth 4}
helm -n usc-one secrets --evaluate-templates --evaluate-templates-decode-secrets install -f values_files/index.yaml index ${find charts/usc-one/index/ -mindepth 4 -maxdepth 4}
```

2.5.2.2.3. Method 3

This method utilizes USU Nexus Repository (online), still provides the flexibility, ease of control and other features such as diff'ing, simple updating etc.

Example:

```
export HELM_USER=<usu-nexus-username>
export HELM_PASSWORD=<usu-nexus-password>
helmfile apply --skip-diff-on-install --concurrency 1
```

2.6. Secrets

For security reasons, **values files** and **k8s manifests** do not contain plain passwords but placeholders only. By decoupling this, various secret backends can be used. For simplicity, USU Software Compose comes preconfigured with a local secrets.yaml file as a central secrets store.

Secrets contained in the secrets.yaml of this USU Software Compose package were generated during the release process. Before installation or updating, make sure to change all pregenerated secrets in secrets.yaml prefixed with changeMe with your own safe secrets.

Follow these steps when updating:

1. Providing that secrets.yaml.orig contains secrets from a previous USU Software Compose installation, and secrets.yaml belongs to this USU Software Compose package, it's possible to merge them using e.g. **yq tool**:

```
yq eval-all '. as $item ireduce ([]; . * $item)' secrets.yaml
secrets.yaml.orig > secrets.yaml.new
```
2. Check the resulting secrets.yaml.new and rename it to secrets.yaml (rewrite the file) and proceed with updating.
3. For future updates, store the secrets.yaml securely (It will be referenced as secrets.yaml.orig.).

3. USU Portal System requirements

3.1. Resource requirements

The server needs to be able to run the USU Portal containers:

- \geq 2 CPU cores
- \geq 16 GB RAM
- \geq 30 GB disk space

3.2. Operating system

Installation is supported on the following operating systems:

- Red Hat Enterprise Linux 7
- Centos 7
- Ubuntu 18.0.4
- SUSE Linux Enterprise Server 11 SP3+



You need the 64-bit version of those operating systems.

3.3. Software requirements

These are the software requirements.

3.3.1. Database Management System

USU Portal requires a database to store repository data. It supports the following Database Management Systems:

- MariaDB 10.6.4
- Microsoft SQL Server 2019
- Oracle 19c

3.3.2. Web browser

End-users access the USU Portal via web UI. Following web browsers are supported:

- \geq Google Chrome version 89.0.4389.114
- \geq Microsoft Edge version 89.0.774.68
- \geq Mozilla Firefox version 87.0
- \geq Apple Safari version 14.0.3



Microsoft Internet Explorer is not supported.

4. Prerequisites

The following sections summarize and outline issues that should be considered and understood prior to installation or performing changes to an established environment.

4.1. Supported platforms

To run the solution properly, the hardware and software requirements should meet those described in the [System Requirements](#). It's possible to use less capable infrastructure, but in most scenarios, this will result in an undesirable level of performance.

4.2. Basic Skills and Knowledge

To install the software, the responsible person must be familiar with technical concepts of Docker or Kubernetes administration and system administration operations pertaining to network services, including modifying the firewall to open specific ports. It is also required to have knowledge of using the operating system command line interface and/or graphical system administration tools.

In addition, the installer should be familiar with the following software components:

- Database management systems and SQL administration clients
- Operating systems administration (modern Linux distributions)
- Web browser
- Text editor

4.3. Binaries and licenses

The installation requires several software packages and files.

- Release package
- Docker images via access to USU public docker registry `devops.usu.group`
- Suitable JDBC driver for database management system
- Installed database management system

On client:

- Tools to access Docker or Kubernetes (mandatory)
- PDF reader (optional)
- Text editor (optional)

Usually, the installation is performed by USU staff which will provide the release package and the credentials to access USU public docker registry `devops.usu.group` in advance or at the day of installation. If, however, you want to install the software on your own, the suitable release package and credentials to access USU public docker registry `devops.usu.group` can be provided upon request.

4.4. Database setup

USU Portal requires a database. Ask your database administrator to create a database for you. You will need the credentials and the connection string during the installation of the system. Below you can find the create statements for the supported database systems.

4.4.1. MariaDB

To create a database on an existing MariaDB database server, please use this SQL and adjust it to your needs:

```
-- -----
-- USU PORTAL
-- -----  
  
CREATE DATABASE IF NOT EXISTS usu_portal CHARACTER SET = utf8 COLLATE utf8_unicode_ci;  
GRANT ALL ON usu_portal.* TO 'usu_portal'@'%' IDENTIFIED BY 'password';  
COMMIT;  
  
FLUSH PRIVILEGES;
```

For MariaDB please make sure that `lower_case_table_names = 1`. If the parameter does not have value 1, the system cannot function.

Please check the default settings for MariaDB in `my.cnf/my.ini`. They should look like this:

```
lower_case_table_names = 1  
max_connections = 100  
collation-server = utf8_unicode_ci  
character-set-server = utf8
```

4.4.2. Microsoft SQL Server

To create a database on an existing Microsoft SQL Server database server, please use this SQL and adjust it to your needs:

```
-- -----  
-- USU PORTAL  
-- -----  
  
USE master;  
IF NOT EXISTS (SELECT name FROM master.sys.server_principals WHERE name = N'usu_portal')  
    CREATE LOGIN [usu_portal] WITH PASSWORD = N'password', CHECK_POLICY = OFF  
CREATE DATABASE usu_portal COLLATE Latin1_General_100_BIN2;  
GO  
  
USE [usu_portal];  
CREATE USER usu_portal FOR LOGIN usu_portal;  
EXEC sp_addrolemember 'db_datareader', 'usu_portal';  
EXEC sp_addrolemember 'db_datawriter', 'usu_portal';  
EXEC sp_addrolemember 'db_ddladmin', 'usu_portal';  
GO  
  
USE master;
```

4.4.3. Oracle

To create a database on an existing Oracle database server, please use this SQL and adjust it to your needs:

```
-- -----  
-- USU PORTAL
```

```
-- -----  
CREATE BIGFILE TABLESPACE usu_portal DATAFILE 'usu_portal.dbf' SIZE 100M AUTOEXTEND ON EXTENT  
MANAGEMENT LOCAL SEGMENT SPACE MANAGEMENT AUTO;  
  
CREATE USER usu_portal IDENTIFIED BY "password" DEFAULT TABLESPACE usu_portal QUOTA UNLIMITED  
ON usu_portal;  
  
GRANT CREATE JOB, CREATE MATERIALIZED VIEW, CREATE PROCEDURE, CREATE SEQUENCE, CREATE SESSION,  
CREATE SYNONYM, CREATE TABLE, CREATE TRIGGER, CREATE VIEW TO usu_portal;  
  
GRANT SELECT ANY TABLE TO usu_portal;  
GRANT INSERT ANY TABLE TO usu_portal;  
GRANT UPDATE ANY TABLE TO usu_portal;  
GRANT DELETE ANY TABLE TO usu_portal;
```

4.5. Access rights, Network environment and Firewall rules

- Connection to the Internet via HTTPS or at least to public docker registry <https://hub.docker.com/> (firewall opened at hosts *.docker.io and *.docker.com via HTTPS protocol) is possible
- Server must be able to connect to USU public docker registry devops.usu.group (firewall opened at hosts *.devops.usu.group via HTTPS protocol)
- Server must be able to connect database server
- Connection to USU products:
 - Portal server has to be able to connect to these systems via HTTPS, the corresponding port has to be opened. The connection to outside systems is done from docker containers and therefore the firewall for docker containers needs to be opened.
 - If there are self signed SSL certificates used at these systems, the public self signed certificate need to be imported into Java keystore and mounted to Java based docker containers into folder /opt/java/openjdk/lib/security/cacerts.
- Firewall between docker containers on internal docker network needs to be opened. Containers need to be able to communicate with each other via various ports (HTTP, HTTPS, 8500...)
- If there is reverse proxy in front of USU Portal (e.g. NGINX, Apache HTTP Server), it is needed to allow large requests in reverse proxy (e.g. for NGINX the parameter is named client_max_body_size).

5. Operations

5.1. Localization Management

By default the USU Portal including the portal pages, dashlets and drawers are localized in the following languages:

1. English
2. German
3. Italian
4. French
5. Spanish
6. Dutch

The USU Portal uses local saved translation files. These translation files are included in the installation package.

The language selection is user-dependent and is done via the [User Management \(page 91\)](#).

USU Localization Manager

The USU Portal version 3.1.0 is able to connect to USU Localization Manager to maintain the localizations of the application.



Localization of the USU Portal in this context means everything except portal pages, dashlets, drawers and menu.

Portal pages, dashlets, drawers and the menu can only be localized within the administration tools of the USU Portal.

The automatic initialization of USU Localization Manager with USU Portal localization is not implemented. This connection must be configured manually:

1. Make sure USU Localization Manager is installed and configured.
2. Go to **USU KnowledgeHub > Tools > Downloads** and select category **Service Management > Self-Service Portal**.
Download the translation file `usu-portal_translations_export-v3.json`
3. Go to Localization Manager and login as administrator:
User with rights for client `ulm_service` and `roleglobal:admin`
4. Go to **Global administration > Import** and import the file `usu-portal_translations_export-v3.json`
5. Now you have to configure the USU Portal to connect to USU Localization Manager:
 - a. Open `charts/usu-portal/values.yaml` and set `ulm:enabled true`
 - b. Change values of `ulm:ulmExtUrl` and `ulm:ulmIntUrl` to correct values of your installation.

```
ulm:  
  # -- (boolean) USU Localization Manager usage enabled
```

```
enabled: true
# -- (string) USU Localization Manager service external URL (external for the Portal
client)
ulmExtUrl: "https://ulm-service.example.com"
# -- (string) USU Localization Manager service internal URL (internal for the Portal
backend)
ulmIntUrl: "http://ulm-service/"
```

6. Restart the application.

USU Portal will get the translation values from USU Localization Manager.

5.2. Deep link to detail views

It's possible to copy deep links to open specific USU Portal objects from outside the application:

- Portal pages
- Form drawers (e.g. ticket creation drawer)
- Detail drawers (e.g. drawer that shows details of a specific ticket)

To get the URL of the deep link is to open the page or drawer and copy the URL from your browser.

6. Home

Home is the main entry point of the USU Portal Administrator app. From here you have access to the most important areas to administer the app.

Page designer

Each page of the Portal can be configured using intuitive drag & drop editor.

[> Open](#)

Dashlet editor

Contents of the page can be further modified using form-based dashlet editor.

[> Open](#)

Drawer editor

Whether creating a detail of a list or table record, or allowing users to create their own records in forms, drawer designer will guide you through the process.

[> Open](#)

Menu configuration

Portal routes can be configured using drag & drop editor.

[> Open](#)

Global configuration

The global configuration encompasses multiple global settings like whitelisting certain URLs, managing dashlet categories, modifying global search and more.

[> Open](#)

Toolkit

Toolkit serves to save entire state of the application and uploading previously downloaded ones.

[> Open](#)

- [Page designer \(page 26\)](#)
- [Dashlet editor \(page 30\)](#)
- [Drawer editor \(page 61\)](#)
- [Menu configuration \(page 84\)](#)
- [Global configuration \(page 86\)](#)
- [Toolkit \(page 90\)](#)

You also have the following configurations available via the main menu:

- [Instance \(page 92\)](#)
- [User Management \(page 91\)](#)

7. Page designer

You can design and maintain your portal pages via **Administration > Page designer**.

The Page designer provides a list of existing portal page configurations. Here you can manage and edit existing configurations and create new configurations.

On the left you have the following options:

<input type="button" value="Renderer type"/> Renderer type
You can filter the existing dashlet configurations by a specific renderer type.
Click on to select a specific renderer type. To reset the filter, click on .
<input type="button" value="Filter configurations"/> Filter configuration
You can filter the existing configurations.
Drag and drop your file here or Select files
You can upload a configuration via drag and drop or via Select files .

On the left you have the following options:

Download as JSON
Download the current configuration as .JSON .
Download as ZIP
Download the current configuration as .ZIP . This will download the page itself, all used dashlets and all connected drawer and put it in one zip archive.
Open page designer
Open the page designer to edit the page.
Create duplicate
Copy an existing page and save it under a different name.
Delete
Delete a page configuration.

7.1. Create a new portal page

You can create a new portal page configuration via the Page designer.

1. Go to **Administration > Page designer**.
2. Click on **+ Create configuration**. A modal form opens.
3. Provide technical name of your new portal page.
The system will check for duplicates and warn you, if the technical name already exists on the system.
4. Click **Yes** to create the new page.
5. Design your portal page with the page designer.
6. Click **Save**.



The name of the saved configuration corresponds to the ID + technical name in the JSON.

You will find your new portal page configuration in the overview list.

7.2. Edit a portal page

Edit a existing portal page configuration via the Page designer:

1. Go to **Administration > Page designer**.
2. Select the desired portal page in the overview list.
3. Click on the to open the portal page. Now you can edit the portal page.
4. Click **Save** to save your updates.

7.3. General page configuration

Page title

When creating a page, the page title must be specified. This page title corresponds to the ID and the unique technical name in the JSON configuration.



The page title cannot be edited using the page designer.

Settings

In this section, you will find the general page settings. Click on this icon to adjust the settings of the page.

You have the following options:

Caption	Define a caption. To add additional language versions of the caption, click on .
Title visibility	Defines if the page title should be displayed or not.
Description	Add a page description. To add additional language versions of the caption, click on .
Comment	Add a comment.
Background image	Add a background image to the page. It is possible to show only part of the image by setting the height. To upload or browse images open minio via Toolkit > Open minio . In the image library you can choose the image for the background and enter the file name in the text field.
Background height	The height defines the row up to which the background image is visible.
Background color	Define the background color of the page. You can use strings, e. g. "red" or "white" or HEX color codes.

Enabled on	Defines on which device the portal page can be displayed: <ul style="list-style-type: none"> • ALL: Visible on all devices. • MOBILE: Only visible on mobile devices. • DESKTOP: Only visible on desktops.
Allowed roles	Defines the page permissions (page 29) . The roles entered define who can see the portal page.

In addition you can add a **KFirst widget (page 47)** or **Chatbot (page 39)** to your portal page.



You configure either the KFirst Widget or Chatbot per portal page.

The KFirst Widget can include the Chatbot.

You can switch between tab **KFirst** and **Chatbot**.

Here you have the following options:

ID	(Technical) ID of the KFirst widget or Chatbot You can select the technical ID via drop down.
Enabled on	Defines on which device the KFirst widget or Chatbot can be displayed: <ul style="list-style-type: none"> • ALL: Visible on all devices. • MOBILE: Only visible on mobile devices. • DESKTOP: Only visible on desktops.
Allowed roles	Defines the page permissions (page 29) . The roles entered define who can see the KFirst widget or the Chatbot.

In the upper right corner you can switch between Mobile and Desktop view by clicking on the corresponding button.



This view will not open a simulation, how the page will look like on a mobile device. It will just simulate what will be visible on Mobile or Desktop.

7.4. Dashlet catalog

The dashlet catalog on the right is organized in categories. Here you can:

- see all dashlets which are available for display on the page
- search dashlets
- display more information about a dashlet by mouse-over
- add dashlets to the page via drag and drop
- define dashlet categories



The categories are saved in the dashlet configuration. A category can be assigned to multiple dashlets.

You can create a new or edit a dashlet configuration via **Administration > Dashlet editor**.

7.5. Design a portal page

1. Configure the [general page settings \(page 27\)](#).
2. To add a dashlet, drag and drop the dashlet from the dashlet catalog.
3. Customize your dashlets:
 1.  **Dashlet settings**

	Copy the dashlet description.
Display on a tile	Show content on a tile.
Drawer with	Drawer width in percent (in relation to the portal page)
Refresh Enabled	Enable or disable automatic dashlet refresh
Refresh every x seconds	If automatic update is enabled, enter the desired time frame (in seconds) here.
Enabled on	Defines on which device the dashlet can be displayed: <ul style="list-style-type: none"> • ALL: The dashlet is visible on all devices. • MOBILE: The dashlet is only visible on mobile devices. • DESKTOP: The dashlet is only on desktops.
Clickable on	Defines on which device the dashlet is clickable: <ul style="list-style-type: none"> • ALL: The dashlet is clickable on all devices. • MOBILE: The dashlet is only clickable on mobile devices. • DESKTOP: The dashlet is only clickable on desktops.
Allowed roles	Defines the page permissions (page 29) . The roles entered define who can see the portal page.

2. In addition you have the following options and information available:

	Delete the dashlet from the portal page.
	Optional: Displays informational warnings about a dashlet by mouse-over
Change position	Drag and drop a dashlet to adjust the position
Resize	To resize the dashlet on the portal page, right-click the bottom right corner of the dashlet and drag the dashlet to the desired size.

4. Click on **Save** to save your portal page.

7.6. Portal page permissions

Portal page permissions can be defined via the page designer settings.

The roles entered define who can see the portal page. These two users are always available by default:

- USU:PORTAL:USER
- USU:PORTAL:ADMIN

The ADMIN role contains the USER role.

Any Keycloak role can be included to this array.

8. Dashlet editor

You can create new and edit existing dashlet configurations via **Administration > Dashlet editor**.

Due to their visualization some dashlets have some minimal requirements to display its content. Additional requirements may apply based on users' screen size and grid definition. Unmet requirements will be displayed in the respective dashlet. The minimum requirements can be found in the dashlet descriptions.

You have the following options:

- [Create new configuration \(page 31\)](#)
- [Delete a configuration \(page 60\)](#)

On the left you have the following options:

<input type="button" value="Renderer type"/> Renderer type You can filter the existing dashlet configurations by a specific renderer type. Click on  to select a specific renderer type. To reset the filter, click on  .
<input type="button" value="Filter configurations"/> Filter configuration You can filter the existing configurations. Drag and drop your file here or Select files You can upload a configuration via drag and drop or via Select files .

Below you find a list of existing dashlet configurations:

 Create duplicate Copy an existing configuration and save it under a different name.
 Delete Delete a configuration.

On the right you have the following options:

 Preview You can preview your configuration. <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> A preview is only available for portal page and dashlet configuration. Not all dashlets can produce a preview.</div>
 ... More <ul style="list-style-type: none">• Download as JSON Download the current configuration as .JSON.• Download as ZIP Download the current configuration as .ZIP.

Below you find a editor to edit existing configurations.

8.1. Create new configuration

You can create a new dashlet and drawer configuration within the USU Portal.

1. Click on **+ Create configuration**.
2. Enter the **Technical name** of the dashlet you want to create.
3. Choose the desired **Dashlet type** from the drop-down list.
4. Click **Yes** to create a new dashlet configuration.
Click **No** to cancel the process.

You will find your configuration in the overview list.

8.2. Dashlet configuration

Configuring dashlets is a manual process. You can configure a variety of dashlet types, which are listed in the next chapters.

The configuration of the following dashlet types is made via configurator:

- Action (page 32)
- Actions Group (page 34)
- Bar (page 35)
- Budget (page 37)
- Button (page 38)
- Chatbot (page 39)
- Customizable Item List (page 40)
- KFirst (page 47)
- KPI (page 49)
- Line (page 51)
- Pie (page 54)
- Search (page 55)
- SingleValue (page 57)
- Table (page 58)

The configuration of the following dashlet types is made via JSON:

- Item List (page 46)
- Markdown (page 53)
- Markdown List



Not all dashlet types are supported by all USU products.

Further learning and reading

- [USU Portal Compatibility Matrix](#)



The availability of this content depends on your access rights.

8.2.1. General dashlet attributes

General information



The general information about the dashlet cannot be edited.

Field	Purpose
Version	Version of the USU Portal.
ID	ID of the dashlet
Technical name	Technical name of the dashlet
Renderer type	Definition to specify which data format to expect and how to render it

General settings

Field	Purpose
Comment	Comment on the dashlet
Dashlet categories	Categories to which the dashlet should be assigned in the dashlet catalog
Preferred caption	Preferred caption for the dashlet in different languages
Description	Description of the dashlet in different languages The description is displayed below the title in the dashlet overview list.

8.2.2. Dashlet types

8.2.2.1. Action

The action dashlet is a collection of links as a list. The click on a list item opens the target.

Action Portlet example

[Open a hyperlink](#)

This action will open a hyperlink when it is whitelisted in your installation ...

[Create ticket in USU Service Management](#)

With this action you create a ticket in USM, if it is registered ...

[Open USM shop](#)

With this action open the USM shop ...

[Open Portal page](#)

With this action open a other Portal page ...

You have the following options available:

 Rearrage
Rearrage the components via drag and drop.
 Edit
Opens the edit menu for the component.
 Delete
Deletes the component.

In addition to the general attributes, you have the following configuration options:

Caption	Select the language and the corresponding translation of the caption.
Language/Translation	Confirm your entry with + Add .
Question	Select the language and the corresponding translation of the question.
Language/Translation	Confirm your entry with + Add .
Description	Select the language and the corresponding translation of the description.
Language/Translation	Confirm your entry with + Add .

Actions

Title	Select the language and the corresponding translation of the description.						
Language/Translation	Confirm your entry with + Add .						
Subtitle	Select the language and the corresponding translation of the description.						
Language/Translation	Confirm your entry with + Add .						
Link Type							
Depending on the selected type you have to define additional attributes.							
• Drawer:							
<table border="1"> <tr> <td>Object ID</td><td>Add the Object ID</td></tr> <tr> <td>Drawer width</td><td>Define the width of the drawer.</td></tr> </table>		Object ID	Add the Object ID	Drawer width	Define the width of the drawer.		
Object ID	Add the Object ID						
Drawer width	Define the width of the drawer.						
• Page ID:							
<table border="1"> <tr> <td>Page ID</td><td>Select the portal page using the drop down menu.</td></tr> </table>		Page ID	Select the portal page using the drop down menu.				
Page ID	Select the portal page using the drop down menu.						
<ul style="list-style-type: none"> New tab: This opens a defined target link in a new tab. Script: This produces a runlink to USU Service Management. 							
For New tab an Script you have the following attributes available:							
<table border="1"> <tr> <td>Target</td><td>Add the target URL/path of the resource and define the request method.</td></tr> <tr> <td>Method</td><td> <ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td></tr> <tr> <td>Body Params/Body Editor</td><td> <p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . Body Editor With the body editor you can create/edit the keys and values directly via JSON. </td></tr> </table>		Target	Add the target URL/path of the resource and define the request method .	Method	<ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 	Body Params/Body Editor	<p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . Body Editor With the body editor you can create/edit the keys and values directly via JSON.
Target	Add the target URL/path of the resource and define the request method .						
Method	<ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 						
Body Params/Body Editor	<p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . Body Editor With the body editor you can create/edit the keys and values directly via JSON. 						

Allowed for the following roles	The roles entered define who can see the dashlet/component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
--	---

8.2.2.2. Actions Group

The action group dashlet enables the structured display of links. In this structure you can define single links or link lists. Link list are indicated by an arrow down icon.

The screenshot shows a structured layout of links and categories. At the top, a row of links is shown: Analytics test page, KWidget test page, LIMA test page, Mock data page, SAPOP page, USM test page, and ZIS test page. Below this is a 'Control' section with buttons for Control & Re-Harvesting, Strategic Optimization, Simulation, and Planning. The main area is organized into categories: Core (Optimized Compliance, Reporting and BI, Demand, Financial Management, Contract Management, Licence Management), Collect (Usage/Inventory & Recognition, Connections, Scanning & Discovery), and Master Data (People Directory, Device Directory, Organization, Master Catalog).

In addition to the general attributes, you have the following configuration options:

Title	Select the language and the corresponding translation of the action group title.
Language/Translation	Confirm your entry with + Add .
Button Width	Define the width of the button in px.

Categories

You have the following options available:

Rearrage
Rearrage the components via drag and drop.
Edit
Opens the edit menu for the component.
Delete
Deletes the component.

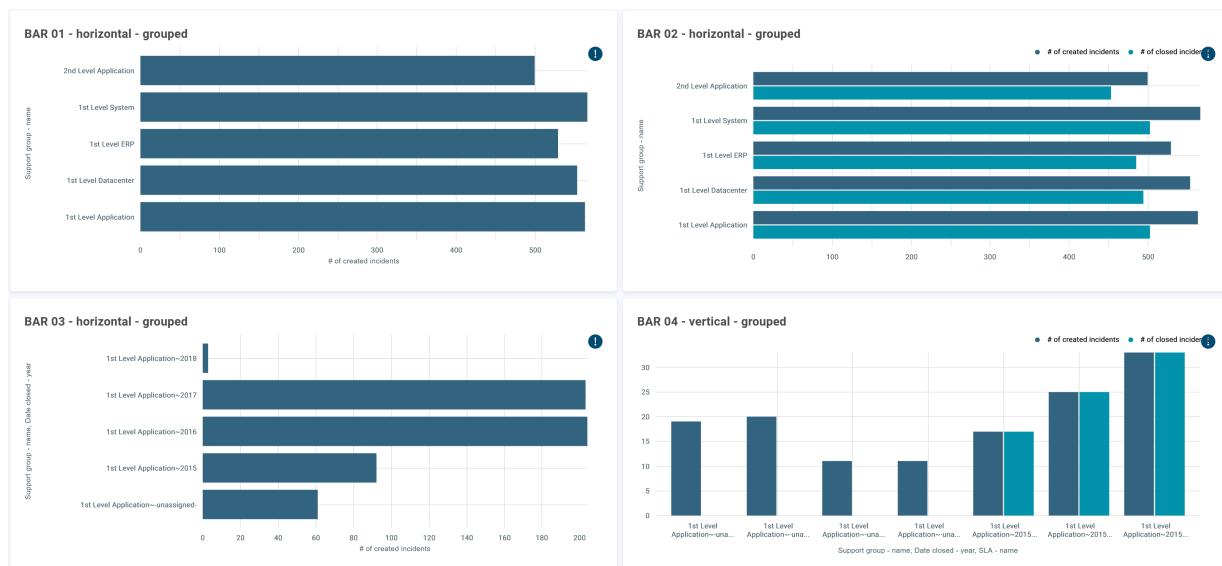
To add a category, click on + **Add**. You have the following options:

Title	Select the language and the corresponding translation of the action title.
Language/Translation	Confirm your entry with + Add .

Icon	Select a icon. This icon will be shown in front of the label.												
Type	<p>Depending on the selected type you have to define additional attributes.</p> <ul style="list-style-type: none"> • Drawer: <table border="1"> <tr> <td>Object ID</td> <td>Add the Object ID</td> </tr> <tr> <td>Drawer width</td> <td>Define the width of the drawer.</td> </tr> </table> <ul style="list-style-type: none"> • Page ID: <table border="1"> <tr> <td>Page ID</td> <td>Select the portal page using the drop down menu.</td> </tr> </table> <ul style="list-style-type: none"> • New tab: This opens a defined target link in a new tab. • Script: This produces a runlink to USU Service Management. <p>For New tab and Script you have the following attributes available:</p> <table border="1"> <tr> <td>Target</td> <td>Add the target URL/path of the resource and define the request method.</td> </tr> <tr> <td>Method</td> <td> <ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td> </tr> <tr> <td>Body Params/ Body Editor</td> <td> <p>The field is only available when the target method POST is selected.</p> <p>i</p> <ul style="list-style-type: none"> • Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON. </td> </tr> </table>	Object ID	Add the Object ID	Drawer width	Define the width of the drawer.	Page ID	Select the portal page using the drop down menu.	Target	Add the target URL/path of the resource and define the request method .	Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 	Body Params/ Body Editor	<p>The field is only available when the target method POST is selected.</p> <p>i</p> <ul style="list-style-type: none"> • Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON.
Object ID	Add the Object ID												
Drawer width	Define the width of the drawer.												
Page ID	Select the portal page using the drop down menu.												
Target	Add the target URL/path of the resource and define the request method .												
Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 												
Body Params/ Body Editor	<p>The field is only available when the target method POST is selected.</p> <p>i</p> <ul style="list-style-type: none"> • Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON. 												
Allowed for the following roles	<p>The roles entered define who can see the dashlet/component. These two roles are always available by default:</p> <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p>												

8.2.2.3. Bar

The bar chart dashlet displays the data as bar chart from the source system. It can also be linked.



In addition to the general attributes, you have the following configuration options:

Resource

Target	<p>Add the target URL/path of the resource and define the request method:</p> <ul style="list-style-type: none"> • GET: request data from the defined resource • POST: send data to create/update a resource <p>Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the </p>
Body Params/Body Editor	<p> The field is only available when the target method post is selected.</p> <ul style="list-style-type: none"> • Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON.

Configuration

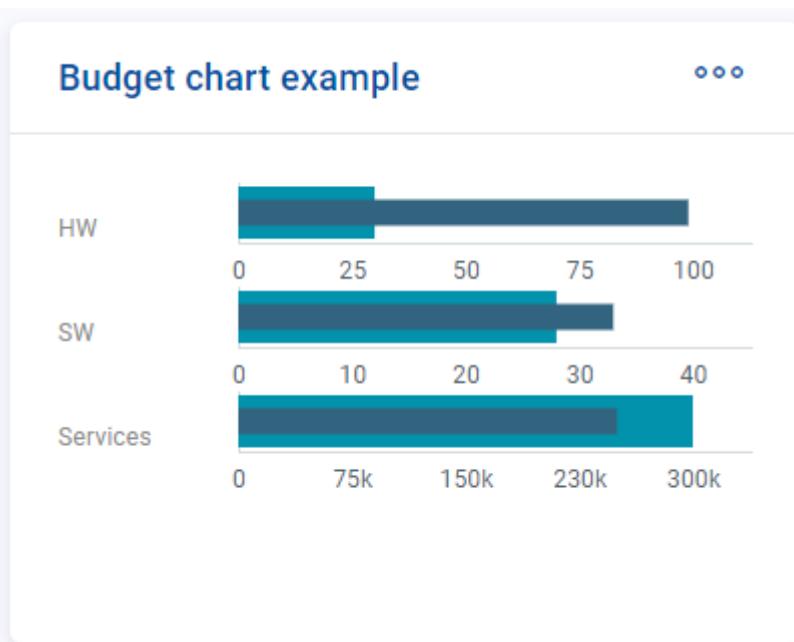
X axis Date Time Format	Configure the date time format of the x axis. A complete list of possible formats you find here: https://date-fns.org/v2.30.0/docs/format
Y axis Date Time Format	Configure the date time format of the y axis. A complete list of possible formats you find here: https://date-fns.org/v2.30.0/docs/format
Unit	Select the language and the corresponding translation of the unit.
Language/Translation	Confirm your entry with + Add . Delete your entry by clicking on  .
Footer	
Language/Translation	Select the language and the corresponding translation of the footer label. Confirm your entry with + Add . Delete your entry by clicking on  .
Footer Color	Define the font color of the footer using the color picker.
Group mode	Defines how to arrange the bar chart. <ul style="list-style-type: none"> • grouped • stacked
Orientation	Defines the orientation of the bars <ul style="list-style-type: none"> • horizontal • vertical
Legend position	Defines the position of the bar chart legend <ul style="list-style-type: none"> • Top center • Top left • Top right

Example 1. Bar dashlet

Example of a bar chart JSON configuration: `DashletExamplesChart.json`

8.2.2.4. Budget

The budget chart dashlet displays the data as bar chart from the source system. It can also be linked. The bars are displayed one above the other. This way, possible differences can be identified quickly.



In addition to the general attributes, you have the following configuration options:

Resource

Target	<p>Add the target URL/path of the resource and define the request method:</p> <ul style="list-style-type: none"> • GET: request data from the defined resource • POST: send data to create/update a resource <p>Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the .</p>
Body Params/Body Editor	<p> The field is only available when the target method <code>post</code> is selected.</p> <p> • Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the .</p> <p> • Body Editor With the body editor you can create/edit the keys and values directly via JSON. </p>

Configuration

Unit	Select the language and the corresponding translation of the header.
Language/Translation	Confirm your entry with + Add .
Footer	Select the language and the corresponding translation of the header.
Language/Translation	Confirm your entry with + Add .

Footer Color

Define the text color of the footer using the color picker.

Example 2. Budget dashlet

You will find several examples for bar chart implementations. Open **Administration > Dashlet editor** and search for budget.

The example uses USU IT Monitoring (ZIS) as source system.

Example of a budget chart JSON configuration: DashletExamplesChart.json

8.2.2.5. Button

The dashlet is a button with a link.



In addition to the general attributes, you have the following configuration options:

Title							
Language/Translation Select the language and the corresponding translation of the Button. Confirm your entry with + Add .							
Button type							
Depending on the selected type you have to define additional attributes.							
<ul style="list-style-type: none"> Drawer: <table border="1"> <tr> <td>Object ID</td> <td>Add the Object ID</td> </tr> <tr> <td>Drawer width</td> <td>Define the width of the drawer.</td> </tr> </table> Page ID: <table border="1"> <tr> <td>Page ID</td> <td>Select the portal page using the drop down menu.</td> </tr> </table> New tab: This opens a defined target link in a new tab. Script: This produces a runlink to USU Service Management. 		Object ID	Add the Object ID	Drawer width	Define the width of the drawer.	Page ID	Select the portal page using the drop down menu.
Object ID	Add the Object ID						
Drawer width	Define the width of the drawer.						
Page ID	Select the portal page using the drop down menu.						
For New tab and Script you have the following attributes available:							
Target Method Body Params/Body Editor	Add the target URL/path of the resource and define the request method . <ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. <p>i The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . Body Editor With the body editor you can create/edit the keys and values directly via JSON. 						

Example 3. Button dashlet

You will find several examples for button chart implementations. Open **Administration > Dashlet editor** and search for button.

Example of a button chart JSON configuration: DashletExamplesStatic.json

8.2.2.6. Chatbot

The USU Chatbot was formerly available only from [KFirst \(page 47\)](#) widget. Now the chatbot is available as a single dashlet.



You can assign a Chatbot or a KFirst widget to a portal page. Unlike the other dashlets, the Chatbot and KFirst dashlet can only be added via the the [Page designer \(page 26\)](#).

In addition to the general attributes, you have the following configuration options:

Target	<p>Target URL to fetch the Chatbot</p> <p>To get the target URL do the following:</p> <ol style="list-style-type: none"> 1. Open the Chatbot Manager 2. Choose or create a chatbot and open the details page 3. Go to Mandatory settings > Widget UI settings 4. Under Basic settings, copy the URL from the URL field <p>The URL should have /bot.html suffic</p>
Method	<p>Add the target URL/path of the resource and define the request method.</p> <ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method.
Body Params/ Body Editor	<p> The field is only available when the target method POST is selected.</p> <p>• Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the .</p> <p>• Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p>

Search listener

When using a search, the listener allows the [Chatbot \(page 39\)](#) to respond automatically if it can help with the topic.

The chatbot offers his help via a message. The user can then click on the Chatbot to open it and use it accordingly.



The availability of this feature depends on the USU Chatbot version used.

The feature needs a USU Knowledge Center 7.3 and a configured USU Chatbot 2.9 installed and connected to USU Portal.



This feature is automatically available if a chatbot and a search is configured on a portal page.

8.2.2.7. Customizable Item List

The dashlet shows a list of items from a source system.

My open tickets

Search by ticket number, title and description

CA-0000093 | Again some image in a ticket description
 Created (CA) Call 3 Medium By: [REDACTED] For: [REDACTED] To solve till: 11/01/2023 12:00:00 Reported at: 10/31/2023 12:58:42

CA-0000092 | Ticket creation with images causes issues
 Created (CA) Call 3 Medium By: [REDACTED] For: [REDACTED] To solve till: 11/01/2023 12:00:00 Reported at: 10/31/2023 12:54:33

CA-0000079 | Mein SAP-Zugang geht nicht mehr
 Created (CA) Call 3 Medium By: [REDACTED] For: [REDACTED] To solve till: 10/13/2023 09:44:23 Reported at: 10/12/2023 09:44:23

IN-0004342 | Oracle not available
 Waiting for Major Incident (IN) Incident 3 Medium By: [REDACTED] For: [REDACTED] To solve till: 10/13/2023 09:17:09 Reported at: 10/12/2023 09:17:09

IN-0004256 | VoIP telephone system malfunction
 Waiting for Major Incident (IN) Incident 3 Medium By: [REDACTED] For: [REDACTED] To solve till: 10/03/2023 13:06:28 Reported at: 10/02/2023 13:06:28

IN-0004157 | VOIP not working
 Waiting for Major Incident (IN) Incident 3 Medium By: [REDACTED] For: [REDACTED] To solve till: 09/22/2023 13:57:04 Reported at: 09/21/2023 13:57:04

[Create ticket](#)

1 of 10 < > >>

In addition to the general attributes, you have the following configuration options:

Resource

Target	Add the target URL/path of the resource and define the request method .
Method	<ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method.

Body Params/ Body Editor	<p>i The field is only available when the target method <code>post</code> is selected.</p> <p>• Body Params Define a key and value. Click on <code>+</code> to add another key and value. Delete a key and value by clicking on the .</p> <p>• Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p>
---	---

Item templates

With this template you define the display of the items within the dashlet.

Header	Select the language and the corresponding translation of the header.
Language/Translation	You can reference to an attribute in the source system, e.g. <code> \${[item].[details].[REFERENCE_ATTRIBUT]}</code> . Confirm your entry with <code>+</code> Add .

Body

You have the following options available:

 Rearrange
Rearrange the components via drag and drop.
 Edit
Opens the edit menu for the component.



Deletes the component.

To add a component, click on  **Add**. You have the following options:

Depending on the selected **Component** you have to define additional attributes.

- Badge:

Value	Define the value of the badge. You can reference to an attribute in the source system: \${[item].[details].[REFERENCE_ATTRIBUT]}.
Type	Defines the color representation of the badge: <ul style="list-style-type: none"> • Default: not highlighted • Info: highlighted in blue • Success: highlighted in green • Warn: highlighted in red
Allowed for the following roles	The roles entered define who can see the dashlet/component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled on the following devices	Defines on which device the resource will be visible. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

- Button:



This functionality will no longer be available in the next version.

Icon	Select a icon. This icon will be shown in front of the label.						
Type	Select the appearance of the button: <ul style="list-style-type: none"> • primary: The button is highlighted in color. • secondary: The button has a solid colored frame. • tertiary: The button is not highlighted. 						
Label	Select the language and the corresponding translation of the header. You can reference to an attribute in the source system: \${[item].[details].[REFERENCE_ATTRIBUT]}. Confirm your entry with  Add .						
Allowed for the following roles	The roles entered define who can see the dashlet/component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.						
Button type	Depending on the selected type you have to define additional attributes. <ul style="list-style-type: none"> • Drawer: <table border="1"> <tr> <td>Object ID</td> <td>Add the Object ID</td> </tr> <tr> <td>Drawer width</td> <td>Define the width of the drawer.</td> </tr> </table> • Page: <table border="1"> <tr> <td>Page ID</td> <td>Select the portal page using the drop down menu.</td> </tr> </table> 	Object ID	Add the Object ID	Drawer width	Define the width of the drawer.	Page ID	Select the portal page using the drop down menu.
Object ID	Add the Object ID						
Drawer width	Define the width of the drawer.						
Page ID	Select the portal page using the drop down menu.						

<ul style="list-style-type: none"> • New tab: This opens a defined target link in a new tab. • Script: This produces a runlink to USU Service Management. <p>For New tab and Script you have the following attributes available:</p> <table border="1"> <tr> <td>Target</td><td>Add the target URL/path of the resource and define the request method.</td></tr> <tr> <td>Method</td><td> <ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td></tr> <tr> <td>Body Params/Body Editor</td><td> <p>i The field is only available when the target method POST is selected.</p> <p>Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p> </td></tr> </table>	Target	Add the target URL/path of the resource and define the request method .	Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 	Body Params/Body Editor	<p>i The field is only available when the target method POST is selected.</p> <p>Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p>							
Target	Add the target URL/path of the resource and define the request method .												
Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 												
Body Params/Body Editor	<p>i The field is only available when the target method POST is selected.</p> <p>Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p>												
Allowed For													
Clickable on the following devices	Defines on which device the resource will be clickable. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE 												
Enabled on the following devices	Defines on which device the resource will be visible. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE 												
• Title:	<table border="1"> <tr> <td>Value</td><td>Select the language and the corresponding translation of the title value.</td></tr> <tr> <td>Language/Translation</td><td> <p>You can reference to an attribute in the source system: \${[item].[details].[REFERENCE_ATTRIBUT]}.</p> <p>Confirm your entry with + Add.</p> </td></tr> </table>	Value	Select the language and the corresponding translation of the title value.	Language/Translation	<p>You can reference to an attribute in the source system: \${[item].[details].[REFERENCE_ATTRIBUT]}.</p> <p>Confirm your entry with + Add.</p>								
Value	Select the language and the corresponding translation of the title value.												
Language/Translation	<p>You can reference to an attribute in the source system: \${[item].[details].[REFERENCE_ATTRIBUT]}.</p> <p>Confirm your entry with + Add.</p>												
• TextField:	<table border="1"> <tr> <td>Value</td><td>Define the value of the TextField.</td></tr> <tr> <td></td><td> <p>You can reference to an attribute in the source system: \${[item].[details].[REFERENCE_ATTRIBUT]}.</p> </td></tr> <tr> <td>Label</td><td>Select the language and the corresponding translation of the textfield value.</td></tr> <tr> <td></td><td> <p>Confirm your entry with + Add.</p> </td></tr> <tr> <td>Allowed for the following roles</td><td>The roles entered define who can see the dashlet/component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p> </td></tr> <tr> <td>Enabled on the following devices</td><td>Defines on which device the resource will be visible. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE </td></tr> </table>	Value	Define the value of the TextField.		<p>You can reference to an attribute in the source system: \${[item].[details].[REFERENCE_ATTRIBUT]}.</p>	Label	Select the language and the corresponding translation of the textfield value.		<p>Confirm your entry with + Add.</p>	Allowed for the following roles	The roles entered define who can see the dashlet/component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p>	Enabled on the following devices	Defines on which device the resource will be visible. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE
Value	Define the value of the TextField.												
	<p>You can reference to an attribute in the source system: \${[item].[details].[REFERENCE_ATTRIBUT]}.</p>												
Label	Select the language and the corresponding translation of the textfield value.												
	<p>Confirm your entry with + Add.</p>												
Allowed for the following roles	The roles entered define who can see the dashlet/component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p>												
Enabled on the following devices	Defines on which device the resource will be visible. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE 												
• LineBreak:	No additional configuration is needed.												
Item details													
Object ID	Add the Object ID												
Drawer width	Define the width of the drawer.												

Footer templates

You have the following options available:

⤵ Rearrage

Rearrage the components via drag and drop.

 Edit
Opens the edit menu for the component.
 Delete
Deletes the component.

To add a component, click on + **Add**. You have the following options:

Component	Select the component.
	 Only button is available in the footer.
Icon	Select a icon. This icon will be shown in front of the label.
Type	Select the appearance of the button: <ul style="list-style-type: none">• primary: The button is highlighted in color.• secondary: The button has a solid colored frame.• tertiary: The button is not highlighted.
Label	Select the language and the corresponding translation of the header. Confirm your entry with + Add .
Allowed for the following roles	The roles entered define who can see the dashlet/component. These two roles are always available by default: <ul style="list-style-type: none">• USU:PORTAL:USER• USU:PORTAL:ADMIN The ADMIN role contains the USER role.

Button type

Depending on the selected type you have to define additional attributes.

- Drawer:

Object ID	Add the Object ID
Drawer width	Define the width of the drawer.

- Page ID:

Page ID	Select the portal page using the drop down menu.
---------	--

- New tab: This opens a defined target link in a new tab.
- Script: This produces a runlink to USU Service Management.

For New tab and Script you have the following attributes available:

Target	Add the target URL/path of the resource and define the request method .
Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method.
Body Params/Body Editor	 The field is only available when the target method POST is selected. <ul style="list-style-type: none"> • Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON.

Allowed For

Clickable on the following devices	Defines on which device the resource will be clickable. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE
Enabled on the following devices	Defines on which device the resource will be visible. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Pagination

Pageable	Enable/Disable the pagination capabilities of the list.
----------	---

Search

Enable or disable the search. Search enabled will display the search capabilities:

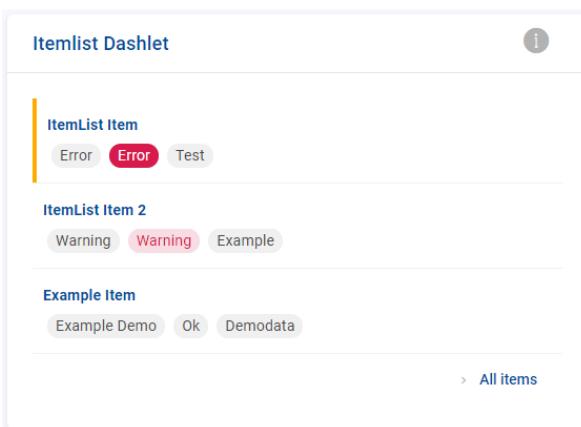
Placeholder	Select the language and the corresponding translation of the placeholder.
Language/Translation	Confirm your entry with + Add .
Search condition	
You have two options for creating/editing the conditions: via Designer or Editor .	

Designer	With the designer you can create search conditions via the user interface: <ul style="list-style-type: none">• Field: Define the field to be searched.• Operator: Select the operator via drop down menu.<ul style="list-style-type: none">• like• notlike• ==• !=• <• <=• >• >=• startswith• between• in• isEmpty• isNotEmpty• Value: Define the value of the search.• Logical operator: This is only necessary if more than one condition. OR: At least one condition must apply. AND: All conditions must apply. <p>+ Add condition: Add an additional condition. ☒ Remove condition: Deletes the corresponding condition. ☒ Clear all conditions</p>
Editor	With the editor you can create/edit the search conditions directly via JSON.
Enabled on the following devices	Defines on which device the resource will be visible. <ul style="list-style-type: none">• ALL• DESKTOP• MOBILE

8.2.2.8. Item List

The dashlet shows a list of items from a source system.

Click on an item to open it in the source system.



Renderer type	ITEM_LIST
Requirements	Size height >= 2
Example	<p>PortletExamplesDynamic.json</p> <p>Open Administration > Dashlet editor and search for ITEM_LIST.</p> <p>The example uses USU IT Monitoring (ZIS) as source system.</p>

8.2.2.9. KFirst

The KFirst dashlet is an integration of the USU Knowledge Management product KWidget aka KFirst. You can easily connect an existing USU Knowledge Center to the USU Portal and use tools like Knowledge Search, FAQ and Chatbot.



Unlike the other dashlets, the KFirst dashlet can only be added via the the [Page designer \(page 26\)](#).



Only one KFirst dashlet can be inserted per Portal Page.

In addition to the general attributes, you have the following configuration options:

Resource

Target	Add the target URL/path of the resource and define the request method .
Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method.
Body Params/ Body Editor	<p> The field is only available when the target method POST is selected.</p> <p> <ul style="list-style-type: none"> • Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON. </p>

8.2.2.9.1. Chatbot authentication



To make the USU Chatbot authentication work, configuration in all relevant systems is needed: USU Chatbot, USU Service Management and USU Portal.

1. Login in private mode on your KFirst Manager application.
e. g. <https://your.server.url/kfirst-mananger>
2. Go to **Widgets > Portal > Activity sets > mainpage**
3. Scroll down to the **Activities** section

4. Click on the pencil icon to edit the relevant Bot.
5. Open the **Special Settings** tab and add `&sessionId=${KFIRST.config.sessionId}` at the end of the Object URL
e.g. `https://your.server.url/kbot-widget/bots/vm/74jgcMhl-InYfsSieo1Ls4vVdx0qFhCjrjggoLQN-Q=/bot.html?sessionId=${KFIRST.config.sessionId}`
6. Click on **Save changes**

To integrate authentication, follow the following steps:

1. Call the **Authentication Service** with OpenID-Connect-UserInfo-Token. You will get the `generated_session_id` as response.

You can find the service and a detailed documentation (README) here:

[Chatbot templates - GISA authorization service](#)



The availability of this content depends on your access rights.

2. Add the KFirst snippet to portal website, where `generated_session_id` is a response from the service.

```

<script>
/*
   Call Keycloak Service
   Get generated session id in response
*/
var KFIRST = {};
KFIRST.config = {};
KFIRST.config.sessionId = "generated_session_id";
</script>

<script type="text/javascript"
  src="http://localhost:28080/kfirst-widget/js/loader.js?apikey=fL-zz10-
c9ReWdmh4fN8E4Vgc7pYspIq0sFwfFpdsgy%3D"
  async="async" defer="defer">
</script>

```

3. Configure the bot as embedded frame activity with adjusted URL

e. g. `http://localhost:xxxxx/kbot-widget/bots/preview/Zyi69raJNp5k3y1XNICW1281p7fjkvz3gsSpPFbd1Y=/bot.html?sessionId=${KFIRST.config.sessionId}`

Chatbot language

There are two ways to set the language for the chatbot:

Preset language via URL

1. Login in private mode on your KFirst Manager application.
e. g. `https://your.server.url/kfirst-mananger`
2. Go to **Widgets > Portal > Language settings**
3. Scroll to the **2. Language detection** section
4. Click on **Add**.
5. In the dialog select **URL parameter** and click **Add**.
6. Activate the lang URL parameter and save that it's on the highest position.
7. Go to **Widgets > Portal > Activity sets > mainpage**

8. Scroll down to the **Activites** section
9. Click on the pencil icon to edit the Self-Service-Bot.
10. Open the **Special Settings** tab and add `lang=${KFIRST.config.lang}` to the Object URL.
e. g. `https://your.server.url/kbot-widget/bots/Test/8Es81xfH4FL_V5seIKsgCRkOZfgXaFfec4w3sLo0Z8=/bot.html?lang=${KFIRST.config.lang}&sessionId=${KFIRST.config.sessionId}`
11. Click on **Save changes**
12. Open the Chatbot Manager App.
13. Go to **Home > Bots overview > [Botname] > Mandatory Settings > Widget UI Settings**
14. Open the **Advanced settings** tab
15. Choose the Language detection method **Language from URL query parameter**.

Language based on browser language

1. Login in private mode on your KFirst Manager application.
e. g. `https://your.server.url/kfirst-mananger`
2. Go to **Widgets > Portal > Language settings**
3. Scroll to the **2. Language detection** section
4. Click on **Add**.
5. In the dialog select **Browser language** and click **Add**.
6. Activate the Browser language parameter.
7. Open the Chatbot Manager App.
8. Go to **Home > Bots overview > [Botname] > Mandatory Settings > Widget UI Settings**
9. Open the **Advanced settings** tab
10. Choose the Language detection method **Language from browser**.

8.2.2.10. KPI

This KPI dashlet type shows one number and a short text.



The KPI dashlet supports only USU Service Management as resource.

Resource

Target	Add the target URL/path of the resource and define the request method .
Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method.

Body Params/ Body Editor	 The field is only available when the target method <code>POST</code> is selected.
	<ul style="list-style-type: none">Body Params Define a key and value. Click on <code>+</code> to add another key and value. Delete a key and value by clicking on the .Body Editor With the body editor you can create/edit the keys and values directly via JSON.

Configuration

Title	Select the language and the corresponding translation of the title.
Language/ Translation	Confirm your entry with <code>+</code> Add .
Background Color	Define the background color using the color picker.
Font Color	Define the font color using the color picker.

Actions	<p>To add an action, click on + Add. You have the following configurations available:</p> <table border="1"> <tr> <td data-bbox="414 278 573 316">Icon</td><td data-bbox="573 278 1372 316">Select a icon. This icon will be shown in front of the label.</td></tr> <tr> <td data-bbox="414 316 573 428">Type</td><td data-bbox="573 316 1372 428"> Select the appearance of the button: <ul style="list-style-type: none"> primary: The button is highlighted in color. secondary: The button has a solid colored frame. tertiary: The button is not highlighted. </td></tr> <tr> <td data-bbox="414 428 573 496">Label</td><td data-bbox="573 428 1372 496"> Select the language and the corresponding translation of the header. Confirm your entry with + Add. </td></tr> <tr> <td data-bbox="414 496 573 646">Allowed for the following roles</td><td data-bbox="573 496 1372 646"> The roles entered define who can see the dashlet/component. These two roles are always available by default: <ul style="list-style-type: none"> USU:PORTAL:USER USU:PORTAL:ADMIN The ADMIN role contains the USER role. </td></tr> <tr> <td data-bbox="414 646 573 685">Button type</td><td data-bbox="573 646 1372 685"> Depending on the selected type you have to define additional attributes. </td></tr> <tr> <td data-bbox="414 685 573 1394" style="vertical-align: top;"> Type </td><td data-bbox="573 685 1372 1394"> <ul style="list-style-type: none"> Drawer: <table border="1"> <tr> <td data-bbox="605 765 727 795">Object ID</td><td data-bbox="727 765 906 795">Add the Object ID</td></tr> <tr> <td data-bbox="605 795 727 826">Drawer width</td><td data-bbox="727 795 906 826">Define the width of the drawer.</td></tr> </table> Page ID: <table border="1"> <tr> <td data-bbox="605 907 684 936">Page ID</td><td data-bbox="684 907 970 936">Select the portal page using the drop down menu.</td></tr> </table> New tab: This opens a defined target link in a new tab. <p>Script: This produces a runlink to USU Service Management.</p> <table border="1"> <tr> <td data-bbox="605 1057 727 1087">Target</td><td data-bbox="727 1057 1351 1087">Add the target URL/path of the resource and define the request method.</td></tr> <tr> <td data-bbox="605 1087 727 1147">Method</td><td data-bbox="727 1087 1351 1147"> <ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td></tr> </table> <table border="1"> <tr> <td data-bbox="605 1147 727 1349" style="text-align: center;"> Body Params/Body Editor </td><td data-bbox="727 1147 1351 1349">  The field is only available when the target method POST is selected. <p>Body Params Define a key and value. Click on * to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p> </td></tr> </table> </td></tr> <tr> <td data-bbox="414 1394 573 1432">Allowed For</td><td data-bbox="573 1394 1372 1432"></td></tr> <tr> <td data-bbox="414 1432 573 1560">Clickable on the following devices</td><td data-bbox="573 1432 1372 1560"> Defines on which device the resource will be clickable. <ul style="list-style-type: none"> ALL DESKTOP MOBILE </td></tr> <tr> <td data-bbox="414 1560 573 1664">Enabled on the following devices</td><td data-bbox="573 1560 1372 1664"> Defines on which device the resource will be visible. <ul style="list-style-type: none"> ALL DESKTOP MOBILE </td></tr> </table>	Icon	Select a icon. This icon will be shown in front of the label.	Type	Select the appearance of the button: <ul style="list-style-type: none"> primary: The button is highlighted in color. secondary: The button has a solid colored frame. tertiary: The button is not highlighted. 	Label	Select the language and the corresponding translation of the header. Confirm your entry with + Add .	Allowed for the following roles	The roles entered define who can see the dashlet/component. These two roles are always available by default: <ul style="list-style-type: none"> USU:PORTAL:USER USU:PORTAL:ADMIN The ADMIN role contains the USER role.	Button type	Depending on the selected type you have to define additional attributes.	Type	<ul style="list-style-type: none"> Drawer: <table border="1"> <tr> <td data-bbox="605 765 727 795">Object ID</td><td data-bbox="727 765 906 795">Add the Object ID</td></tr> <tr> <td data-bbox="605 795 727 826">Drawer width</td><td data-bbox="727 795 906 826">Define the width of the drawer.</td></tr> </table> Page ID: <table border="1"> <tr> <td data-bbox="605 907 684 936">Page ID</td><td data-bbox="684 907 970 936">Select the portal page using the drop down menu.</td></tr> </table> New tab: This opens a defined target link in a new tab. <p>Script: This produces a runlink to USU Service Management.</p> <table border="1"> <tr> <td data-bbox="605 1057 727 1087">Target</td><td data-bbox="727 1057 1351 1087">Add the target URL/path of the resource and define the request method.</td></tr> <tr> <td data-bbox="605 1087 727 1147">Method</td><td data-bbox="727 1087 1351 1147"> <ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td></tr> </table> <table border="1"> <tr> <td data-bbox="605 1147 727 1349" style="text-align: center;"> Body Params/Body Editor </td><td data-bbox="727 1147 1351 1349">  The field is only available when the target method POST is selected. <p>Body Params Define a key and value. Click on * to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p> </td></tr> </table>	Object ID	Add the Object ID	Drawer width	Define the width of the drawer.	Page ID	Select the portal page using the drop down menu.	Target	Add the target URL/path of the resource and define the request method .	Method	<ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 	Body Params/Body Editor	 The field is only available when the target method POST is selected. <p>Body Params Define a key and value. Click on * to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p>	Allowed For		Clickable on the following devices	Defines on which device the resource will be clickable. <ul style="list-style-type: none"> ALL DESKTOP MOBILE 	Enabled on the following devices	Defines on which device the resource will be visible. <ul style="list-style-type: none"> ALL DESKTOP MOBILE
Icon	Select a icon. This icon will be shown in front of the label.																														
Type	Select the appearance of the button: <ul style="list-style-type: none"> primary: The button is highlighted in color. secondary: The button has a solid colored frame. tertiary: The button is not highlighted. 																														
Label	Select the language and the corresponding translation of the header. Confirm your entry with + Add .																														
Allowed for the following roles	The roles entered define who can see the dashlet/component. These two roles are always available by default: <ul style="list-style-type: none"> USU:PORTAL:USER USU:PORTAL:ADMIN The ADMIN role contains the USER role.																														
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Type	<ul style="list-style-type: none"> Drawer: <table border="1"> <tr> <td data-bbox="605 765 727 795">Object ID</td><td data-bbox="727 765 906 795">Add the Object ID</td></tr> <tr> <td data-bbox="605 795 727 826">Drawer width</td><td data-bbox="727 795 906 826">Define the width of the drawer.</td></tr> </table> Page ID: <table border="1"> <tr> <td data-bbox="605 907 684 936">Page ID</td><td data-bbox="684 907 970 936">Select the portal page using the drop down menu.</td></tr> </table> New tab: This opens a defined target link in a new tab. <p>Script: This produces a runlink to USU Service Management.</p> <table border="1"> <tr> <td data-bbox="605 1057 727 1087">Target</td><td data-bbox="727 1057 1351 1087">Add the target URL/path of the resource and define the request method.</td></tr> <tr> <td data-bbox="605 1087 727 1147">Method</td><td data-bbox="727 1087 1351 1147"> <ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td></tr> </table> <table border="1"> <tr> <td data-bbox="605 1147 727 1349" style="text-align: center;"> Body Params/Body Editor </td><td data-bbox="727 1147 1351 1349">  The field is only available when the target method POST is selected. <p>Body Params Define a key and value. Click on * to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p> </td></tr> </table>	Object ID	Add the Object ID	Drawer width	Define the width of the drawer.	Page ID	Select the portal page using the drop down menu.	Target	Add the target URL/path of the resource and define the request method .	Method	<ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 	Body Params/Body Editor	 The field is only available when the target method POST is selected. <p>Body Params Define a key and value. Click on * to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p>																		
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Drawer width	Define the width of the drawer.																														
Page ID	Select the portal page using the drop down menu.																														
Target	Add the target URL/path of the resource and define the request method .																														
Method	<ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 																														
Body Params/Body Editor	 The field is only available when the target method POST is selected. <p>Body Params Define a key and value. Click on * to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p>																														
Allowed For																															
Clickable on the following devices	Defines on which device the resource will be clickable. <ul style="list-style-type: none"> ALL DESKTOP MOBILE 																														
Enabled on the following devices	Defines on which device the resource will be visible. <ul style="list-style-type: none"> ALL DESKTOP MOBILE 																														

8.2.2.11. Line

The line chart dashlet displays the data as line chart from the source system. It can also be linked.



In addition to the general attributes, you have the following configuration options:

Resource

Target	<p>Add the target URL/path of the resource and define the request method:</p> <ul style="list-style-type: none"> • GET: request data from the defined resource • POST: send data to create/update a resource <p>Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the </p>
Body Params/Body Editor	<p> The field is only available when the target method post is selected.</p> <p> • Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON. </p>

Configuration

X axis Date Time Format	Configure the date time format of the x axis. A complete list of possible formats you find here: https://date-fns.org/v2.30.0/docs/format
Y axis Date Time Format	Configure the date time format of the y axis. A complete list of possible formats you find here: https://date-fns.org/v2.30.0/docs/format
Unit	Select the language and the corresponding translation of the unit.
Language/Translation	Confirm your entry with + Add .
Footer	
Language/Translation	Select the language and the corresponding translation of the footer label. Confirm your entry with + Add .
Footer Color	Define the font color of the footer using the color picker.

Legend position	Defines the position of the bar chart legend <ul style="list-style-type: none"> • Top center • Top left • Top right
------------------------	--

Example 4. Line dashlet

You will find several examples for bar chart implementations. Open **Administration > Dashlet editor** and search for LINE.

The examples use USU Analytics as source system and need analyzer reports as source for the data. The analyzer reports can be sent to you on request.

Example of a line chart JSON configuration: DashletExamplesChart.json

8.2.2.12. Markdown



This dashlet type is deprecated.

The markdown dashlet displayed standardized formatted text. To format the text, you need to use Markdown syntax.

Markdown example

John Mustermann

Position: Key Account Manager

Phone: +49 123 456789 - 9999

Mobil: +49 177 4567890

E-Mail: fake@example.com

Website: <https://usu.com/>

Address: Löblich Str. 100 - 12345 Kleinstadt - Deutschland

[See more...](#)

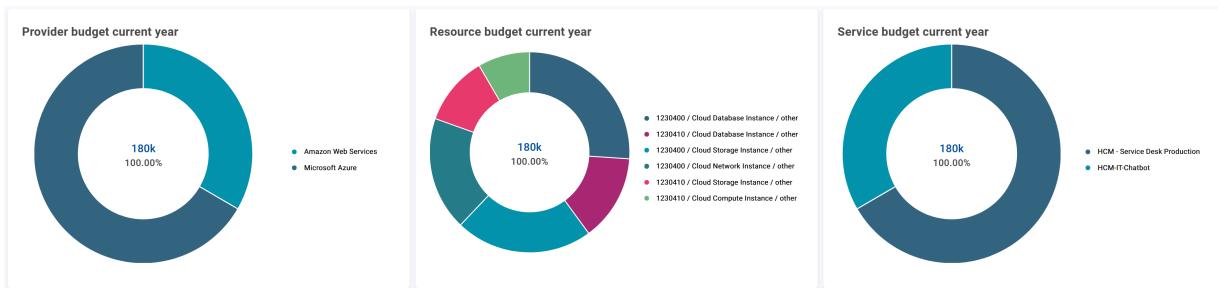
Renderer type	MARKDOWN
Requirements	
Example	doc-0002-dashlet-0008.json DashletExamplesStatic.json

Specifics

Attribute / Object	Purpose
mdContent	Defines the content of the static dashlet

8.2.2.13. Pie

The pie chart dashlet displays the data as pie chart from the source system. It can also be linked.



In addition to the general attributes, you have the following configuration options:

Resource

Target	<p>Add the target URL/path of the resource and define the request method:</p> <ul style="list-style-type: none"> • GET: request data from the defined resource • POST: send data to create/update a resource <p>Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the .</p>
Body Params/Body Editor	<p> The field is only available when the target method post is selected.</p> <p> • Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON. </p>

Configuration

Pie size percentage	Defines the size of the pies.
Unit	Select the language and the corresponding translation of the unit.
Language/Translation	Confirm your entry with + Add .
Footer	Select the language and the corresponding translation of the footer label.
Language/Translation	Confirm your entry with + Add .
Footer Color	Define the font color of the footer using the color picker.
Legend position	<p>Defines the position of the pie chart legend</p> <ul style="list-style-type: none"> • Bottom • Top • Left • Right

Example 5. Pie dashlet

You will find several examples for bar chart implementations. Open **Administration > Dashlet editor** and search for pie.

The examples use USU Analytics as source system and need analyzer reports as source for the data. The analyzer reports can be sent to you on request.

Example of a pie chart JSON configuration: `PortletExamplesChart.json`

8.2.2.14. Search

How can we help you today?



Type your search term and press enter to start search...

In addition to the general attributes, you have the following configuration options:

Configuration

The search configuration is divided into three tabs.

Attributes

You have the following options:

Visible	Visibility of the global search.
Auto focus	Automatically get focus when the USU Portal loads
Placeholder	<p>Placeholder of the search bar.</p> <ol style="list-style-type: none">1. Activate the toggle to add a placeholder.2. Select the language and the corresponding translation of the placeholder.3. Click on + to add the placeholder.4. To delete a language version, click on ×.

Resources

Create new resource

You have the following options:

Language/ Translation	Select the language and the corresponding translation of the category. Confirm your entry with the + icon.
Target	Add the target URL/path of the resource and define the request method : <ul style="list-style-type: none">• GET: request data from the defined resource• POST: send data to create/update a resource Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the
Enabled on the following devices	Defines on which device the resource will be displayed. <ul style="list-style-type: none">• ALL• DESKTOP• MOBILE

Allowed for the following roles	The roles entered define who can see the portal menu item. These two users are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
--	--

Click on **Add** to create the new resource.

Created resources

In the lower area you can see and edit existing resources.

You can delete an existing resources by clicking on the **×**.

Drawer Mappings

Create new drawer mapping

You have the following options:

Type	Define the drawer type.
Object ID	Add the Object ID
Drawer width	Define the width of the drawer.

Click on **Add** to create the new drawer mapping.

Created drawer mappings

In the lower area you can see and edit existing drawer mappings.

You can delete an existing drawer mapping by clicking on the **×**.

Following information are available as variable and can be used as substitution variable e. g. in search dashlet greetings:

Variable	Value (Example)
<code> \${[stored].[token].[given_name]}</code>	Max
<code> \${[stored].[token].[family_name]}</code>	Mustermann
<code> \${[stored].[token].[name]}</code>	Max Mustermann
<code> \${[stored].[token].[email]}</code>	max.mustermann@usu.com
<code> \${[stored].[token].[company]}</code>	USU
<code> \${[stored].[token].[locale]}</code>	en
<code> \${[stored].[token].[preferred_username]}</code>	MMU

Search listener

When using a search, the listener allows the [Chatbot \(page 39\)](#) to respond automatically if it can help with the topic.

The chatbot offers his help via a message. The user can then click on the Chatbot to open it and use it accordingly.



The availability of this feature depends on the USU Chatbot version used.

The feature needs a USU Knowledge Center 7.3 and a configured USU Chatbot 2.9 installed and connected to USU Portal.



This feature is automatically available if a chatbot and a search is configured on a portal page.

8.2.2.15. SingleValue

This dashlet shows a single value. It can be linked.

Re-harvesting potential: Inactive u...

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Resource

Target	<p>Add the target URL/path of the resource and define the request method:</p> <ul style="list-style-type: none"> • GET: request data from the defined resource • POST: send data to create/update a resource <p>Define a key and value. Click on to add another key and value. Delete a key and value by clicking on the .</p>
Body Params/Body Editor	<p> The field is only available when the target method post is selected.</p> <ul style="list-style-type: none"> • Body Params Define a key and value. Click on to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON.

Configuration

Unit	Select the language and the corresponding translation of the unit.
Language/Translation	<p>Confirm your entry with Add.</p> <p>Delete your entry by clicking on .</p>

Footer	Select the language and the corresponding translation of the footer.
Language/Translation	Confirm your entry with + Add . Delete your entry by clicking on  .
Footer color	Define the font color of the footer using the color picker.
Additional info	Select the language and the corresponding translation of the additional information.
Language/Translation	Confirm your entry with + Add . Delete your entry by clicking on  .
Color	Define the font color of the additional info using the color picker.

Example 6. SingleValue dashlet

You will find several examples for bar chart implementations. Open **Administration > Dashlet editor** and search for Single Value.

The examples use USU Analytics as source system and need analyzer reports as source for the data. The analyzer reports can be sent to you on request.

Example of a single value chart JSON configuration: `PortletExamplesChart.json`

8.2.2.16. Table

The dashlet shows a table of items from a source system.

My Tasks

Details	Task description	State 	Request	Planned Start 
	Approve requisition as Organization Manager.	Offered	New Notebook Workplace	12/23/2021 10:3
	Please check documents and approve or decline request	Offered	-	12/23/2021 10:3
	Approve requisition as Organization Manager.	Offered	New PC Workplace	12/23/2021 10:3

1 of 1

In addition to the general attributes, you have the following configuration options:

Resource

Target	Add the target URL/path of the resource and define the request method : <ul style="list-style-type: none">• GET: request data from the defined resource• POST: send data to create/update a resource Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the 
Body Params/Body Editor	<p> The field is only available when the target method <code>post</code> is selected.</p> <ul style="list-style-type: none">• Body Params Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the .• Body Editor With the body editor you can create/edit the keys and values directly via JSON.

Item templates

Columns You have the following options available: <table border="1"><tr><td> Rearrange Rearrange the components via drag and drop.</td></tr><tr><td> Edit Opens the edit menu for the component.</td></tr><tr><td> Delete Deletes the component.</td></tr></table> To add a column, click on + Add . You have the following options:	 Rearrange Rearrange the components via drag and drop.	 Edit Opens the edit menu for the component.	 Delete Deletes the component.
 Rearrange Rearrange the components via drag and drop.			
 Edit Opens the edit menu for the component.			
 Delete Deletes the component.			

Component	You have the following components available:
	<ul style="list-style-type: none"> • TableText • TableNumber • TableDate
	<p> Table with column type <i>TableDate</i> cannot process all types of localized date formats.</p>
General Settings	
Header	Select the language and the corresponding translation of the header.
Language/Translation	Confirm your entry with + Add .
	Delete your entry by clicking on  .
Value	Define the value of the component.
	You can reference to an attribute in the source system: \${[item].[details].[REFERENCE_ATTRIBUTE]}.
Target Field	Define the target field.
Allowed for the following roles	The roles entered define who can see the dashlet/component. These two roles are always available by default:
	<ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p>
Enabled on the following devices	Defines on which device the resource will be visible.
	<ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE
Filter configurations	
Sortable	Enable/disable the sort function.
Filterable	Enable/disable the table filter function.
Use custom filter component	 To use custom filter components you have to enable filtering.
	<p>Choose between text or autocomplete filter type.</p> <p>Using autocomplete you have to define the following attributes:</p> <ul style="list-style-type: none"> • Format Options: <ul style="list-style-type: none"> • Label: Define the label text in different languages. • Value: Define the value of the custom filter component. <p>Click on + Add to create additional values.</p>
Item details	
Object ID	Add the Object ID.
Drawer Width	Define the width of the drawer.

8.3. Delete a configuration

1. In the list of existing configurations, click on .
2. A new dialog opens. Confirm the request with **Yes**.

9. Drawer editor

You can configure your drawers via **Administration > Drawer editor**.

A drawer is a sliding panel hidden in the right part of the current page. There are two drawer types:

- [Item details drawer \(page 61\)](#)
- [Form drawer \(page 73\)](#)

In the right area you find a list of drawer configurations. In the left area a editor to edit existing configurations or create a new one.

You have the following options:

- [Create configuration \(page 82\)](#)
- [Delete a configuration \(page 83\)](#)

On the left you have the following options:

<input type="text" value="Renderer type"/> x v	Renderer type
You can filter the existing dashlet configurations by a specific renderer type.	
Click on v to select a specific renderer type. To reset the filter, click on x .	
<input type="text" value="Q Filter configurations"/>	Filter configuration
You can filter the existing configurations.	
Drag and drop your file here or Select files	
You can upload a configuration via drag and drop or via Select files .	

<input type="checkbox"/> Create duplicate
Copy an existing configuration and save it under a different name.
<input type="checkbox"/> Delete
Delete a configuration.

On the right you have the following options:

... More
<ul style="list-style-type: none">• Download as JSON Download the current configuration as .JSON.• Download as ZIP Download the current configuration as .ZIP.

9.1. Item details drawer

The item details drawer type is used to define the detail view, which is opened by clicking on an item. It can be opened from customizable item list or table dashlet.

9.1.1. Components

ActiveDocument

General settings

In this tab you have the following general configuration options:

Action message	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled on device	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Component specific settings

In this tab you have the following configuration options:

Icon	Select a Icon using the dropdown menu. This icon will be shown in front of the label.
Type	Defines the appearance of the component: <ul style="list-style-type: none"> • primary: Highlighted in color • secondary: Solid colored frame • tertiary: no highlighting
Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.

Button type	<p>Select the Type using the drop down menu.</p> <p>Depending on the selected type you have to define additional attributes.</p> <ul style="list-style-type: none"> • Drawer: <table border="1" data-bbox="403 384 800 449"> <tr> <td>Object ID</td><td>Add the Object ID</td></tr> <tr> <td>Drawer width</td><td>Define the width of the drawer.</td></tr> </table> <ul style="list-style-type: none"> • Page ID: <table border="1" data-bbox="403 541 895 574"> <tr> <td>Page ID</td><td>Select the portal page using the drop down menu.</td></tr> </table> <ul style="list-style-type: none"> • New tab or Current tab: This opens a defined target link in a new or in the current tab. • Script: This produces a runlink to USU Service Management. • Action: <p>Depending on the selected type you have the following attributes available:</p> <table border="1" data-bbox="382 781 1378 1230"> <tr> <td data-bbox="382 781 514 815">Target</td><td data-bbox="514 781 1378 815">Add the target URL/path of the resource and define the request method.</td></tr> <tr> <td data-bbox="382 815 514 893">Method</td><td data-bbox="514 815 1378 893"> <ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td></tr> <tr> <td data-bbox="382 893 514 1230">Body Params/ Body Editor</td><td data-bbox="514 893 1378 1230"> <p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> • Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the trash. • Body Editor With the body editor you can create/edit the keys and values directly via JSON. </td></tr> </table>	Object ID	Add the Object ID	Drawer width	Define the width of the drawer.	Page ID	Select the portal page using the drop down menu.	Target	Add the target URL/path of the resource and define the request method .	Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 	Body Params/ Body Editor	<p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> • Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the trash. • Body Editor With the body editor you can create/edit the keys and values directly via JSON.
Object ID	Add the Object ID												
Drawer width	Define the width of the drawer.												
Page ID	Select the portal page using the drop down menu.												
Target	Add the target URL/path of the resource and define the request method .												
Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 												
Body Params/ Body Editor	<p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> • Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the trash. • Body Editor With the body editor you can create/edit the keys and values directly via JSON. 												
Clickable on device	<p>Defines on which device the resource is clickable.</p> <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE 												
Enabled on device	<p>Defines on which device the resource is enabled.</p> <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE 												

AttachmentsDownload

General settings

In this tab you have the following general configuration options:

Label	<p>Select the Language using the dropdown menu. Add the corresponding Translation of the component.</p> <p>Confirm your entry with + Add.</p> <p>You can delete your translation by clicking on trash.</p>
Allowed roles	<p>The roles entered define who can see the component. These two roles are always available by default:</p> <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p>

Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE
------------------------	---

Component specific settings

In this tab you have the following configuration options:

Source	Target	Add the target URL/path of the resource and define the request method .
	Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method.
	Body Params/ Body Editor	 The field is only available when the target method POST is selected. <ul style="list-style-type: none"> • Body Params Click on + to add a key and avalue. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON.
Download	Target	Add the target URL/path of the resource and define the request method .
	Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method.
	Body Params/ Body Editor	 The field is only available when the target method POST is selected. <ul style="list-style-type: none"> • Body Params Click on + to add a key and avalue. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON.

AttachmentsUpload

General settings

In this tab you have the following general configuration options:

Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Component specific settings

In this tab you have the following configuration options:

Data Targetfield	Define the data of the targetfield.
Filename Targetfield	Define the filename of the targetfield.
Multiple	To upload multiple files activate the toggle.

Validation settings

In this tab you have the following configuration options:

Required	Activate validation using the toggle.
Allowed file types	<p>Insert the file types allowed for upload to the text field.</p> <p>Confirm your entry with + Add.</p> <p>To remove a entry click on the × next to the file type.</p>

Submit button settings

In this tab you have the following configuration options:

Type	Defines the appearance of the component: <ul style="list-style-type: none"> primary: Highlighted in color secondary: Solid colored frame tertiary: no highlighting 							
Label	<p>Select the Language using the dropdown menu. Add the corresponding Translation of the component.</p> <p>Confirm your entry with + Add.</p> <p>You can delete your translation by clicking on .</p>							
Button type	<table border="1"> <tr> <td>Target</td> <td>Add the target URL/path of the resource and define the request method.</td> </tr> <tr> <td>Method</td> <td> <ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td> </tr> <tr> <td>Body Params/Body Editor</td> <td>  The field is only available when the target method POST is selected. <p>Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p> </td> </tr> </table>		Target	Add the target URL/path of the resource and define the request method .	Method	<ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 	Body Params/Body Editor	 The field is only available when the target method POST is selected. <p>Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p>
Target	Add the target URL/path of the resource and define the request method .							
Method	<ul style="list-style-type: none"> GET method retrieves data from the specified target POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 							
Body Params/Body Editor	 The field is only available when the target method POST is selected. <p>Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the .</p> <p>Body Editor With the body editor you can create/edit the keys and values directly via JSON.</p>							
Clickable device	Defines on which device the resource is clickable. <ul style="list-style-type: none"> ALL DESKTOP MOBILE 							

Badge General settings

In this tab you have the following general configuration options:

Value	Define the value of the component. You can reference to an attribute in the source system: \${[item].[details].[REFERENCE_ATTRIB]}.
Type	Defines the color representation of the component: <ul style="list-style-type: none"> • Default: not highlighted • Info: highlighted in blue • Success: highlighted in green • Warn: highlighted in red
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled on devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Button

General settings

In this tab you have the following general configuration options:

Icon	Select a Icon using the dropdown menu. This icon will be shown in front of the label.
Type	Defines the appearance of the component: <ul style="list-style-type: none"> • primary: Highlighted in color • secondary: Solid colored frame • tertiary: no highlighting
Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.

Button type	<p>Select the Type using the drop down menu.</p> <p>Depending on the selected type you have to define additional attributes.</p> <ul style="list-style-type: none"> • Drawer: <table border="1" data-bbox="403 384 806 449"> <tr> <td>Object ID</td><td>Add the Object ID</td></tr> <tr> <td>Drawer width</td><td>Define the width of the drawer.</td></tr> </table> <ul style="list-style-type: none"> • Page ID: <table border="1" data-bbox="403 541 901 574"> <tr> <td>Page ID</td><td>Select the portal page using the drop down menu.</td></tr> </table> <ul style="list-style-type: none"> • New tab or Current tab: This opens a defined target link in a new or in the current tab. • Script: This produces a runlink to USU Service Management. • Action: <p>Depending on the selected type you have the following attributes available:</p> <table border="1" data-bbox="382 781 1378 1230"> <tr> <td data-bbox="382 781 514 815">Target</td><td data-bbox="514 781 1378 815">Add the target URL/path of the resource and define the request method.</td></tr> <tr> <td data-bbox="382 815 514 893">Method</td><td data-bbox="514 815 1378 893"> <ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td></tr> <tr> <td data-bbox="382 893 514 1230">Body Params/ Body Editor</td><td data-bbox="514 893 1378 1230"> <p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> • Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the trash. • Body Editor With the body editor you can create/edit the keys and values directly via JSON. </td></tr> </table>	Object ID	Add the Object ID	Drawer width	Define the width of the drawer.	Page ID	Select the portal page using the drop down menu.	Target	Add the target URL/path of the resource and define the request method .	Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 	Body Params/ Body Editor	<p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> • Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the trash. • Body Editor With the body editor you can create/edit the keys and values directly via JSON.
Object ID	Add the Object ID												
Drawer width	Define the width of the drawer.												
Page ID	Select the portal page using the drop down menu.												
Target	Add the target URL/path of the resource and define the request method .												
Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 												
Body Params/ Body Editor	<p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> • Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the trash. • Body Editor With the body editor you can create/edit the keys and values directly via JSON. 												
Clickable on devices	<p>Defines on which device the resource is clickable.</p> <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE 												
Enabled on devices	<p>Defines on which device the resource is enabled.</p> <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE 												

DateField

General settings

In this tab you have the following general configuration options:

Value	Define the value of the component.
Label	<p>Select the Language using the dropdown menu. Add the corresponding Translation of the component.</p> <p>Confirm your entry with + Add.</p> <p>You can delete your translation by clicking on trash.</p>

Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled on device	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Form

Using the form component you have the opportunity to configure it individually.

To do this, you use the editor and create your configuration via JSON.



Changes in this component should be done only by expert user.

ItemListComponent

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Pageable	Activate the pageability using the toggle.
Page Size	Define the page size.
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Resource

In this tab you have the following configuration options:

Target	Add the target URL/path of the resource and define the request method .
Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method.

Body Params/ Body Editor	<p>i The field is only available when the target method <code>POST</code> is selected.</p> <ul style="list-style-type: none"> • Body Params Click on <code>+</code> to add a key and avalue. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON.
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Item templates

In this tab you have the following configuration options:

Header	<p>As a header you can choose between two types:</p> <ul style="list-style-type: none"> • Title • TextField <p>Depending on the selected type you have the following attributes available:</p>
Value	<p>Define the value of the component.</p>
Label	<p>Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with <code>+</code> Add. You can delete your translation by clicking on .</p>
Body	<p>To add a component to the body click on <code>+</code> Add. You can add different components to the item body:</p> <ul style="list-style-type: none"> • Badge (page 65) • TextField (page 72) • Title (page 72) • LineBreak (page 71) <p>You have the following options for the contents of the body:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Rearrage Rearrage the components via drag and drop.</p> <p> Edit Opens the edit menu for the component.</p> <p> Delete Deletes the component.</p> </div>

KCenterDocumentRenderer

General settings

In this tab you have the following general configuration options:

Allowed roles	<p>The roles entered define who can see the component. These two roles are always available by default:</p> <ul style="list-style-type: none"> • <code>USU:PORTAL:USER</code> • <code>USU:PORTAL:ADMIN</code> <p>The ADMIN role contains the USER role.</p>
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Enabled on devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE
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Component specific settings

In this tab you have the following configuration options:

Icon	Select a Icon using the dropdown menu. This icon will be shown in front of the label.												
Type	Defines the appearance of the component: <ul style="list-style-type: none"> • primary: Highlighted in color • secondary: Solid colored frame • tertiary: no highlighting 												
Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .												
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.												
Button type	Select the Type using the drop down menu. Depending on the selected type you have to define additional attributes. <ul style="list-style-type: none"> • Drawer: <table border="1" data-bbox="403 1154 806 1221"> <tr> <td>Object ID</td> <td>Add the Object ID</td> </tr> <tr> <td>Drawer width</td> <td>Define the width of the drawer.</td> </tr> </table> • Page ID: <table border="1" data-bbox="403 1311 901 1347"> <tr> <td>Page ID</td> <td>Select the portal page using the drop down menu.</td> </tr> </table> <ul style="list-style-type: none"> • New tab or Current tab: This opens a defined target link in a new or in the current tab. • Script: This produces a runlink to USU Service Management. • Action: Depending on the selected type you have the following attributes available: <table border="1" data-bbox="382 1558 1378 1996"> <tr> <td>Target</td> <td>Add the target URL/path of the resource and define the request method.</td> </tr> <tr> <td>Method</td> <td> <ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td> </tr> <tr> <td>Body Params/ Body Editor</td> <td> <p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> • Body Params Click on + to add a key and value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON. </td> </tr> </table>	Object ID	Add the Object ID	Drawer width	Define the width of the drawer.	Page ID	Select the portal page using the drop down menu.	Target	Add the target URL/path of the resource and define the request method .	Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 	Body Params/ Body Editor	<p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> • Body Params Click on + to add a key and value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON.
Object ID	Add the Object ID												
Drawer width	Define the width of the drawer.												
Page ID	Select the portal page using the drop down menu.												
Target	Add the target URL/path of the resource and define the request method .												
Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 												
Body Params/ Body Editor	<p> The field is only available when the target method POST is selected.</p> <ul style="list-style-type: none"> • Body Params Click on + to add a key and value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON. 												

Clickable on device	Defines on which device the resource is clickable. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE
Enabled on device	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

LineBreak

No additional configuration is needed.

Markdown

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Insert the value(s) to the text field. Confirm your entry with + Add . To remove a entry click on the  next to the file type. To upload multiple files activate the toggle.
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled on device	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Component specific settings

In this tab you have the following configuration options:

Target	Target	Add the target URL/path of the resource and define the request method .
	Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method.
	Body Params/ Body Editor	 The field is only available when the target method POST is selected. Body Params <ul style="list-style-type: none"> Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the . Body Editor <ul style="list-style-type: none"> With the body editor you can create/edit the keys and values directly via JSON.

TextField

General settings

In this tab you have the following general configuration options:

Value	Define the value of the component.
Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled on device	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Title

General settings

In this tab you have the following general configuration options:

Value	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.

Enabled on devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE
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9.2. Form drawer

The form drawer is used for data input and to create new content. The form drawer is divided into header, body, and footer.

9.2.1. Components

Attachment Upload

You can upload new file attachments on drawer e. g. new file attachments of a specific ticket, with the `AttachmentsUpload` component.

We support only USU Service Management as resource so far.

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Component specific settings

In this tab you have the following configuration options:

Data Targetfield	Define the data of the targetfield.
Filename Targetfield	Define the filename of the targetfield.
Multiple	To upload multiple files activate the toggle.

Validation settings

In this tab you have the following configuration options:

Required	Activate validation using the toggle.
Allowed file types	<p>Insert the file types allowed for upload to the text field.</p> <p>Confirm your entry with + Add.</p> <p>To remove a entry click on the X next to the file type.</p>

AutoComplete

We support only USU Service Management as resource so far.

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Component specific settings

In this tab you have the following configuration options:

Source for options	For the options you have the following source types available: <ul style="list-style-type: none"> • Remote source: Dynamically fetch options from a server • Manual definition: Input the options manually Choose between the Source of options using the toggle. Depending on the selected type you have the following attributes available:
Remote source	

Value	<p>To create a value click on + Add.</p> <table border="1"> <tr> <td>Label</td><td>Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with Add. You can delete your translation by clicking on .</td></tr> <tr> <td>Value</td><td>Define the value of the component.</td></tr> </table> <p>For existing values you have the following options:</p> <table border="1"> <tr> <td> Rearrage Rearrange the components via drag and drop.</td></tr> <tr> <td> Edit Opens the edit menu for the component.</td></tr> <tr> <td> Delete Deletes the component.</td></tr> </table>	Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with Add . You can delete your translation by clicking on  .	Value	Define the value of the component.	 Rearrage Rearrange the components via drag and drop.	 Edit Opens the edit menu for the component.	 Delete Deletes the component.
Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with Add . You can delete your translation by clicking on  .							
Value	Define the value of the component.							
 Rearrage Rearrange the components via drag and drop.								
 Edit Opens the edit menu for the component.								
 Delete Deletes the component.								
Manual definition								
Resource	<table border="1"> <tr> <td>Target</td><td>Add the target URL/path of the resource and define the request method.</td></tr> <tr> <td>Method</td><td> <ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. </td></tr> <tr> <td>Body Params/ Body Editor</td><td>  The field is only available when the target method POST is selected. <ul style="list-style-type: none"> • Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON. </td></tr> </table>	Target	Add the target URL/path of the resource and define the request method .	Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 	Body Params/ Body Editor	 The field is only available when the target method POST is selected. <ul style="list-style-type: none"> • Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON. 	
Target	Add the target URL/path of the resource and define the request method .							
Method	<ul style="list-style-type: none"> • GET method retrieves data from the specified target • POST method creates/updates the specified target. The data sent to the target is stored in the Body attribute that is displayed after selecting the POST method. 							
Body Params/ Body Editor	 The field is only available when the target method POST is selected. <ul style="list-style-type: none"> • Body Params Click on + to add a key and a value. Define a key and value. Repeat the process if you want to add another key and value. Delete a key and value by clicking on the . • Body Editor With the body editor you can create/edit the keys and values directly via JSON. 							
Label	<p>Select the Language using the dropdown menu. Add the corresponding Translation of the component.</p> <p>Confirm your entry with + Add.</p> <p>You can delete your translation by clicking on .</p>							
Value	Define the value of the component.							
Multiple	If you want to use more than one source for options, activate the Multiple toggle.							

Validation settings

In this tab you have the following configuration options:

Required	Activate validation using the toggle.
-----------------	---------------------------------------

Checkbox

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.

Target Field	Define the target field of the component.
Allowed roles	<p>The roles entered define who can see the component. These two roles are always available by default:</p> <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p>
Enabled devices	<p>Defines on which device the resource is enabled.</p> <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Custom General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.
Allowed roles	<p>The roles entered define who can see the component. These two roles are always available by default:</p> <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p>
Enabled devices	<p>Defines on which device the resource is enabled.</p> <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Date General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.
Allowed roles	<p>The roles entered define who can see the component. These two roles are always available by default:</p> <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p>

Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE
------------------------	---

Email

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Validation settings

In this tab you have the following configuration options:

Required	Activate validation using the toggle.
Maximum character length	Define the maximum character length.
Minimum character length	Define the minimum character length.
Forbidden characters	Define the forbidden characters.
Forbidden characters (regex)	Define the forbidden characters (regex).

HTML Textarea

We support only USU Service Management as resource so far.

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.

Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Component specific settings

In this tab you have the following configuration options:

Enable images	Enable images using the toggle.
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Validation settings

In this tab you have the following configuration options:

Required	Activate validation using the toggle.
Maximum character length	Define the maximum character length.
Minimum character length	Define the minimum character length.
Forbidden characters	Define the forbidden characters.
Forbidden characters (regex)	Define the forbidden characters (regex).

Number

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Validation settings

In this tab you have the following configuration options:

Required	Activate validation using the toggle.
Maximum	Define the maximum of numbers.
Minimum	Define the minimum of numbers.
Exclusive Maximum	Define an exclusive maximum of numbers.
Exclusive Minimum	Define an exclusive minimum of numbers.
Multiple Of	Define a multiple of number.

Password

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Validation settings

In this tab you have the following configuration options:

Required	Activate validation using the toggle.
Maximum character length	Define the maximum character length.
Minimum character length	Define the minimum character length.
Forbidden characters	Define the forbidden characters.
Forbidden characters (regex)	Define the forbidden characters (regex).

Radiobutton

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.

Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Component specific settings

In this tab you have the following configuration options:

Value	To create a value click on + Add . <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%;">Label</td><td>Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add. You can delete your translation by clicking on </td></tr> <tr> <td>Value</td><td>Define the value of the component.</td></tr> </table> </div>	Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on	Value	Define the value of the component.	
Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on					
Value	Define the value of the component.					
For existing values you have the following options: <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%;"> Rearrange</td><td>Rearrange the components via drag and drop.</td></tr> <tr> <td> Edit</td><td>Opens the edit menu for the component.</td></tr> <tr> <td> Delete</td><td>Deletes the component.</td></tr> </table> </div>	Rearrange	Rearrange the components via drag and drop.	Edit	Opens the edit menu for the component.	Delete	Deletes the component.
Rearrange	Rearrange the components via drag and drop.					
Edit	Opens the edit menu for the component.					
Delete	Deletes the component.					

Validation settings

In this tab you have the following configuration options:

Required	Activate validation using the toggle.
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Text

We support only USU Service Management as resource so far.

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on
Value	Define the value of the component.
Target Field	Define the target field of the component.

Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Validation settings

In this tab you have the following configuration options:

Required	Activate validation using the toggle.
Maximum character length	Define the maximum character length.
Minimum character length	Define the minimum character length.
Forbidden characters	Define the forbidden characters.
Forbidden characters (regex)	Define the forbidden characters (regex).

Time

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

Toggle

General settings

In this tab you have the following general configuration options:

Label	Select the Language using the dropdown menu. Add the corresponding Translation of the component. Confirm your entry with + Add . You can delete your translation by clicking on  .
Value	Define the value of the component.
Target Field	Define the target field of the component.
Allowed roles	The roles entered define who can see the component. These two roles are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN The ADMIN role contains the USER role.
Enabled devices	Defines on which device the resource is enabled. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE

9.3. Create configuration

You can create a new dashlet and drawer configuration within the USU Portal.

1. Click on + **Create configuration**.
2. A new dialog opens.
 - a. Define a **Technical name**.
 - b. Select a **Renderer type**.
 - c. Confirm your entries with **Yes**. To cancel the process, click **No**.
3. You will be forwarded to the [edit mode \(page 82\)](#) of the drawer.
4. Edit your drawer. To save your drawer configuration, click **Save**.

Your configuration is available in the overview list.

9.4. Edit configuration

Edit configuration is divided into three main sections: the component picker, the middle part to design the drawer and the left part for component configuration. The middle part represent the drawer with a header, a body and a footer.



The components displayed depend on the selected renderer type.

1. To add a component to the drawer body, drag and drop from the component picker to the middle section.
2. Position the component.
3. Adjust the size of the component individually:
 - a. Click on the angle in the lower left corner of the component.
 - b. Scale the components to the desired size.
4. Adjust the component configuration.

- Click on **Apply** to save or **Cancel** to abort your configuration.

5. To remove a component click on the .

9.5. Delete a configuration

1. In the list of existing configurations, click on .
2. A new dialog opens. Confirm the request with **Yes**.

10. Menu configuration

You can find your global configurations via **Administration > Menu configuration**.

The menu of the portal is defined in this configuration. In the left area you find a list of existing menu configurations. In the right area an editor to edit/create configurations.

On the left you have the following options:

Drag and drop your file here or Select files

You can upload a configuration via **drag and drop** or via **Select files**.

... More

- **Download as JSON**
Download the current configuration as .JSON.
- **Download as ZIP**
Download the current configuration as .ZIP.

Sort
Sort the menu items and folders using drag and drop.

Delete
Delete a menu item or folder by clicking on the trash icon.

In the lower section you have the following options:

+ Add link
Add a new menu item.

Add Folder
Add a new folder for menu items.

10.1. Create/Edit menu item

You can open this form via **Administration > Menu configuration**.

Language + Translation	Select the language and the corresponding translation of the menu item. Confirm your entry with the + icon.
Icon	Select a icon. This icon will be shown in front of the menu item.
Enabled on the following devices	Defines on which device the portal menu item will be displayed. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE
Allowed for the following roles	The roles entered define who can see the portal menu item. These two users are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p>

Internal Link/ External Link	<p>Internal link: Add the internal Page ID. This defines to which portal page the menu item links.</p> <p>External link: Add the URL to the external target. Define how the link is opened:</p> <ul style="list-style-type: none">• Script: Opens the link in a new tab.• New tab: Opens the link in a new tab.
---	--

Enter the desired data and click **Save menu configuration**.

To cancel editing and not save the changes, click on **Discard changes**.

11. Global configuration

You can find your global configurations via **Administration > Global configuration**.

The global structure of the portal is defined in this configuration. In the left area you find a list of existing portal configurations. In the right area an editor to edit existing configurations or create a new one.

On the left you have the following options:

Drag and drop the updated JSON file or browse desktop.

You can upload a configuration via **drag and drop** or via **select files**.

On the upper right you have the following option:

... More

- **Download as JSON**

Download the current configuration as `.JSON`.

- **Download as ZIP**

Download the current configuration as `.ZIP`.

By default, the following global configurations are available:

- **Global settings (page 86)**: Basic information and configurations of the instance.
- **Page designer categories**: Defines the page designer including the dashlet catalog categories.
- **Global search (page 88)**: Defines the search bar in the top row.

The menu/sidebar navigation can be configured via **Administration > Menu configuration**.

Confirm your global configuration by clicking on the **Save** button in the lower right area.

11.1. Global settings

General information

① Version x.x.x

Information about the current Portal version

11.1.1. Instance settings

You have the following options:

Environment	Defines the application name displayed next to the logo in the header
Maximum file size in MB	Defines the maximum file size per file to be uploaded

List of allowed file types	Allow list of file types. The files with the file extensions shown in this list are accepted by the system
	<p>i The settings are valid for the USU Portal. Please synchronize the values with the connected systems. If the values in the connected systems are contradictory, the upload function may not work.</p>
	<ol style="list-style-type: none"> 1. Enter the desired file extension into the text field and click Add. 2. Delete a file type with the X.
Customize external host allowlist	To create an allowlist for external hosts, activate the toggle. With the following list you can maintain the list of allowed external URLs.
External host allowlist	Allow list of external hosts. A connection is allowed to the hosts shown in this list.
	<ol style="list-style-type: none"> 1. Enter external hosts like e.g. usu.com or www.usu.com into the text field and click Add. 2. Delete a host with the X.

11.1.2. User menu settings

You have the following options:

Show profile	Defines the visibility of the menuitem Profile in the header menu
Data privacy URL	Changes the URL of the Data privacy link in the user menu.
Legal notice URL	Changes the URL of the Legal notice link in the user menu.

Enter the desired data and click **Save**.

To cancel editing and not save the changes, click on **Discard changes**.

11.2. Page designer categories

Dashlets can have categories. In this configuration you can add your own categories or change names of existing.

Add dashlet category

ID	Define a category ID.
Language/Translation	Select the language and the corresponding translation of the category. Confirm your entry with the + icon.

Click on **Add** to create the new dashlet category.

Created dashlet categories

In the lower area you can see and edit existing dashlet categories.

You can delete an existing category by clicking on the **X**.

Confirm your global configuration by clicking on the **Save** button in the lower right area.

To cancel editing and not save the changes, click on **Discard changes**.

11.3. Global search configuration

The global search configuration is divided into three tabs.



This search configuration defines the search endpoints for the global search.

Attributes

You have the following options:

Visible	Visibility of the global search.
Auto focus	Automatically get focus when the USU Portal loads
Placeholder	<p>Placeholder of the search bar.</p> <ol style="list-style-type: none"> 1. Activate the toggle to add a placeholder. 2. Select the language and the corresponding translation of the placeholder. 3. Click on + to add the placeholder. 4. To delete a language version, click on ×.

Resources

Create new resource

You have the following options:

Language/Translation	Select the language and the corresponding translation of the category. Confirm your entry with the + icon.
Target	<p>Add the target URL/path of the resource and define the request method:</p> <ul style="list-style-type: none"> • GET: request data from the defined resource • POST: send data to create/update a resource <p>Define a key and value. Click on + to add another key and value. Delete a key and value by clicking on the </p>
Enabled on the following devices	Defines on which device the resource will be displayed. <ul style="list-style-type: none"> • ALL • DESKTOP • MOBILE
Allowed for the following roles	The roles entered define who can see the portal menu item. These two users are always available by default: <ul style="list-style-type: none"> • USU:PORTAL:USER • USU:PORTAL:ADMIN <p>The ADMIN role contains the USER role.</p>

Click on **Add** to create the new resource.

Created resources

In the lower area you can see and edit existing resources.

You can delete an existing resources by clicking on the ×.

Drawer Mappings

Create new drawer mapping

You have the following options:

Type	Define the drawer type.
Object ID	Add the Object ID
Drawer width	Define the width of the drawer.

Click on **Add** to create the new drawer mapping.

Created drawer mappings

In the lower area you can see and edit existing drawer mappings.

You can delete an existing drawer mapping by clicking on the **×**.

Confirm your global configuration by clicking on the **Save** button in the lower right area.

To cancel editing and not save the changes, click on **Discard changes**.

12. Toolkit

You can download and upload your USU Portal portal page, dashlet and drawer definitions via **Administration > Toolkit**.

- **Download ZIP**

Download all portal page, dashlet and drawer definitions in a structured ZIP archive.

- **Upload ZIP**

Upload all portal page, dashlet and drawer definitions from a structured ZIP archive.

- **Overwrite existing Data**

Select Overwrite existing Data to overwrite existing objects.



Once overwritten, objects cannot be restored.

If you do not select **Overwrite existing Data**, only new objects will be added.

- **Delete system contents**

Delete all system contents including all portal page, all dashlet, all drawer definitions and the menu is reset to the default.



The system contents will be irretrievably deleted.

- **Open object storage (MinIO)**

Open object storage (MinIO) to upload, browse or delete portal page background images.

13. User Management

You can manage your users via **Administration > User Management**.

The user administration of the USU Portal takes place via USU User Management with integrated Keycloak. You will be automatically redirected.



USU User Management is not automatically deployed with the USU Portal.

14. Instance

You can see your an overview of your connected instances via **Administration > Instance**.



Instance will be empty, when installing on Kubernetes.