

Endpoint Management Onboarding Reference

Overview

This guide is intended for users who have a subscription to use the Endpoint Management application. There are two types of persona who can use the OpenText™ Endpoint Management application:

- ♦ Tenant Administrator - The Tenant Administrator represents an organization and can manage subscriptions. They can view subscriptions for other Apps also.
- ♦ Subscription Administrator - The Subscription Administrator can access the Core Endpoint Management application. They can add users and provide them different levels of access based on the type of subscription.

This guide provides information about how a Tenant Administrator and Subscription Administrator can access the application after they receive the subscription e-mail invite, and the tasks they can perform on the Admin Center.

Onboarding

Prerequisite

To be able to access the application, you must have:

- ♦ Subscription email invite

The OpenText order fulfillment team will add the Core Endpoint Management subscription to an organization. Once the subscription is added, an email is sent out to the Tenant Administrator. This email will contain an invitation link to login to the Admin Center. When you click the link provided in the email, you will be navigated to the Admin Center login page.

Inviting Users to Core Endpoint Management Subscriptions

You can manage users and roles in the Admin Center. Each user must be assigned the appropriate Core Endpoint Management roles. To enable users for Core Endpoint Management Services, the Tenant Administrator must add them to the subscription and assign a role to them.

To add a user to a Core Endpoint Management subscription, the administrator logs in to the Admin Center, clicks Apps, and then navigates to the subscription to which the user is to be added. For more information, see [Inviting Users to Access Apps](#).

Apps

You can view all the apps for which you have purchased and also the apps for which you can activate a trial. Each app is displayed as a tile on the Apps page. For more information, see [Managing apps on the Apps page](#).

Users and Groups

Groups are a list of users to which you can assign a subscription and app roles. The Groups page displays the list of groups that the Subscription Administrator has created for the tenant. For more information about groups, see [Managing tenant groups](#).

The Users page displays the list of the users on your tenant. The status of a user account is displayed as either Invited, Enabled, Disabled, or Locked. For more information on users and groups, see [Managing Users and Groups](#).

NOTE: A Tenant Administrator can access Groups and Users at tenant level and subscription level whereas a Subscription Administrator can access Groups and Users at subscription level only.

Adding and Importing Users

You can add a user and assign a role to that user. To add a user, see [Adding tenant users one at a time](#).

You can also add multiple users at the same time, by uploading a .csv file to import the users that you want to add. For more information, see [Importing tenant users](#).

Assigning Roles to Users or Groups

Roles specify the actions that users can perform within apps. If you assign a role to a user or group to which a user belongs, the user inherits the permissions associated with that role.

You can assign roles to any user or group. For more information, see [Assigning tenant roles to users or groups](#).

App Roles

The Tenant Administrator or Subscription Administrator can assign roles to users on the Roles page in the Admin Center.

The Subscription Administrators with the Endpoint Management Administrator role are responsible for managing and overseeing all aspects of that subscription. For more information, see [Assigning App Roles to Users](#).

Admins

The Admins page displays the list of Subscription Administrators. The Subscription Administrators are responsible for managing and overseeing all aspects of the App. To add a new Subscription Admin, see [Adding a Cloud Platform tenant administrator](#).

Plan Management

The Plan Management page provides information about the available plans and the plan metrics. The Plans page displays information about the plan name, the status, and the start and end date of the plan. For more information, see [Viewing subscription plans](#).

The Plan metrics page displays information about the usage of all plans assigned to apps on your tenant. You can view the detailed information about any of the metrics listed on the Plan metrics page and can export the plan metrics data to a .csv file. For more information, see [Viewing subscription plan metrics](#) at tenant level or [Viewing subscription plan metrics](#) at subscription level.

NOTE: A Tenant Administrator can access plans at tenant level and subscription level whereas a Subscription Administrator can access plans at subscription level only.

De-boarding

The OpenText Order Fulfillment team can deboard an ongoing subscription if the subscription gets expired or the user does not want to continue with the subscription. Each subscription has a start date and an end date. When a subscription crosses the end date, the subscription is moved to the Expired Plan list and the Administrator gets notified. The OpenText Order Fulfillment team can disable the subscription for a defined time period. After this time period, they can either delete the subscription/ tenant or enable the subscription/ tenant.

Deleting User Subscription or Tenant

The OpenText Order Fulfillment team can delete an active subscription or tenant by first disabling the subscription and then deleting the subscription. Once the subscription is disabled, the user can view the application but cannot perform any task in the application.

Once the delete process is initiated for the selected subscription/ tenant, the account details will be retained for the defined grace period as per the subscription agreement. The subscription/ tenant account detail is retained till this grace period, and after this period the subscription/ tenant will be deleted.

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