



Red Hat CloudForms 4.5

Introduction to the Self Service User Interface

An overview of the Red Hat CloudForms Self Service user interface

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Abstract

This document provides an outline of the options available in the Red Hat CloudForms Self Service user interface. If you have a suggestion for improving this guide or have found an error, please submit a Bugzilla report at <http://bugzilla.redhat.com> against Red Hat CloudForms Management Engine for the Documentation component. Please provide specific details, such as the section number, guide name, and CloudForms version so we can easily locate the content.

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CHAPTER 1. RED HAT CLOUDFORMS SELF SERVICE

Red Hat CloudForms Self Service is a web-based graphical user interface for ordering and managing IT service requests. You can enable self-service tenant end users, who can easily access their services, track requests, and manage their accounts using the Self Service user interface (SSUI), which has widgets, dashboard controls and feedback. The Self Service user interface supports role-based access control (RBAC) of menus and features, similar to in the full administrative user interface.



NOTE

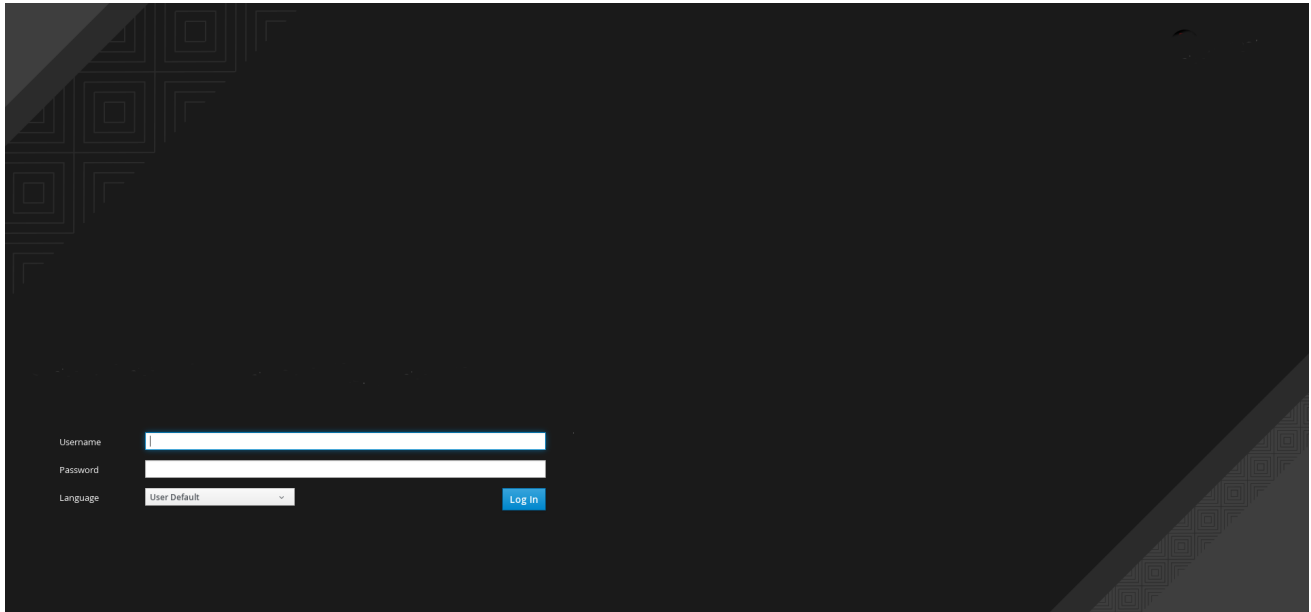
All catalog items, dialogs, buttons, icons among other items must be configured in the full administrative user interface before they are available to users in the Self Service user interface.

CHAPTER 2. ACCESSING THE SELF SERVICE USER INTERFACE

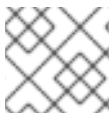
The Self Service user interface is running by default and does not need to be started or configured. To access the Self Service user interface, you must know the host name (or IP address) of the appliance, and the login credentials.

Self Service URL:

```
https://HOSTNAME/self_service/
```



You can choose your preferred language for the Self Service user interface from the options in the **Language** list available on the login screen. The language options are *English*, *Español* (Spanish), *Français* (French), *日本語* (Japanese), *Nederlands* (Dutch), *Português* (Portuguese), and *简体中文* (Simplified Chinese). Additionally, the *User Default* and *Browser Default* options default to the language already set by the user or browser respectively.



NOTE

The Self Service user interface login page has the **Administrator** user by default.

CHAPTER 3. NAVIGATING THE SELF SERVICE USER INTERFACE

The Self Service user interface has a slideout navigation menu on the left that can be minimized by clicking the menu icon (≡), like in the full administrative user interface. The slideout navigation menu comprises of the following tabs:

- **Dashboard**
- **My Services**
- **Orders**
- **Service Catalogs**


The menu bar that runs along the top of the user interface contains several options including a shopping cart, notifications feature, full administrative user interface option, and a help option. Besides that, you can see the current logged in LDAP user, for example, **Administrator**.




Shopping Cart

Click the shopping cart icon to view services that are available to order, manage your cart as required, and order all services at one time. You can read more about the shopping cart model adopted in the Self Service user interface under [Chapter 7, The Service Catalog Tab](#).

Notifications

The Self Service user interface has introduced a new notifications feature that displays messages generated by the system for various events, such adding services to the shopping cart, ordering services, provisioning, service power operations, and so on. Click the bell icon to open or close the **Notifications** drawer, which shows various notification events. You can click the double arrows () located on the upper-left of the **Notifications** drawer to expand or contract the size of the **Notifications** screen as required.

Administration User Interface Link

Clicking the menu icon () shows the **Administration UI** link, which when clicked, takes you to the full administrative user interface login page in a new window or tab of your web browser.

Help

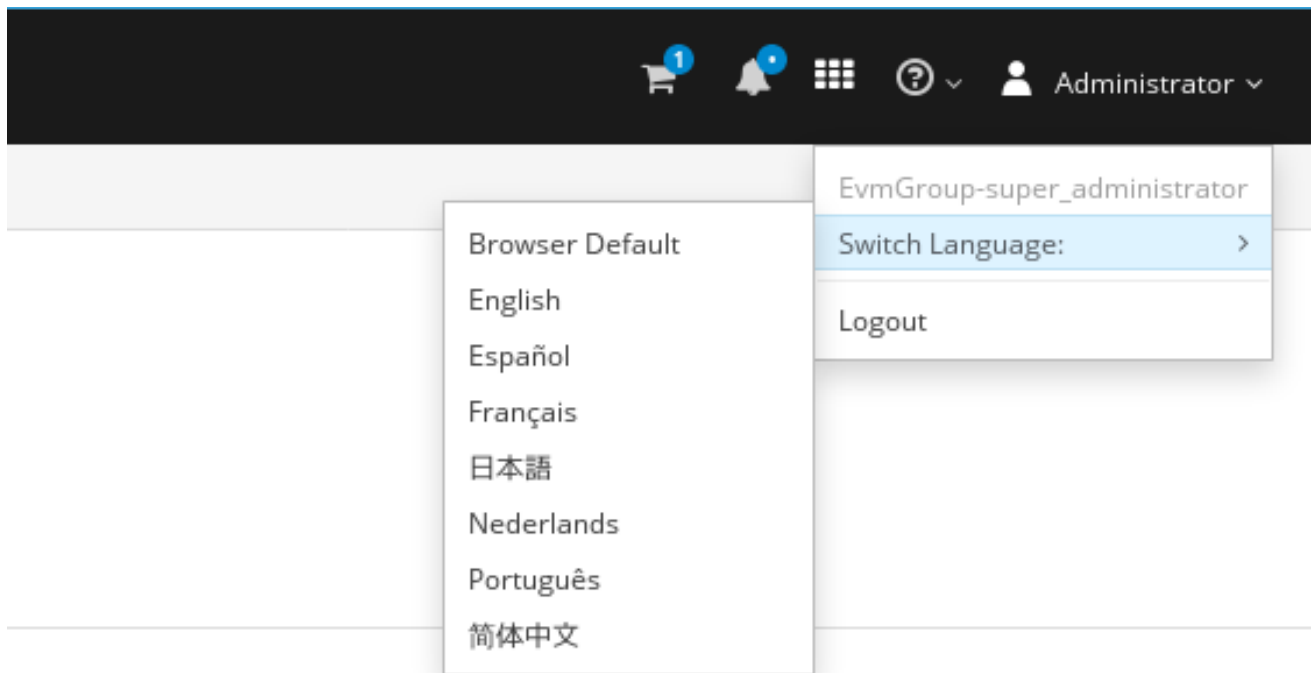
Click the help icon to access the options to open **Documentation**, **Red Hat Customer Portal**, and **About**. Click **About** to see information about your Self Service environment, such as the logged in user name and role, the browser details, and more importantly, the version number of your Self Service user interface, which can be useful for support purposes.

Role-Based Access Control

The Self Service user interface supports role-based access control of menus and features. If you are a member of multiple user groups, you can change the acting group by navigating to **Administrator** > **Change Group**, then select the new group from the available options in the list.

Switch Language

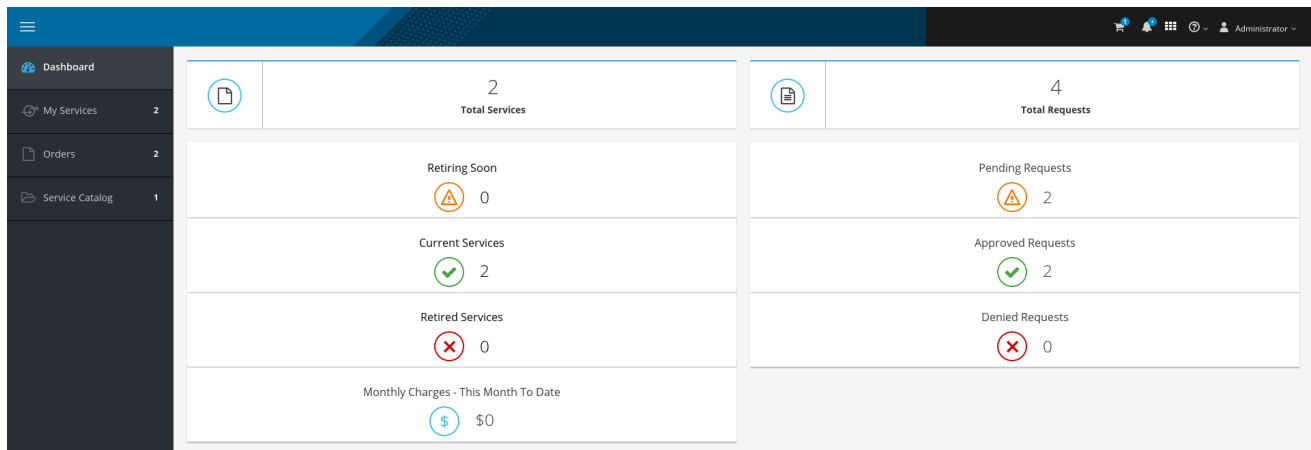
Although you can choose your preferred language for the user interface from the login screen itself, there is also an option to switch to a different language than what is currently set by navigating to **Administrator > Switch Language** within the Self Service user interface.



CHAPTER 4. THE DASHBOARD TAB

Once you log in to the Self Service user interface, you will see the dashboard screen by default. The **Dashboard** tab provides a quick summary of the services available, requests made, and their statuses as below:

- Total Services
- Current Services
- Services Retiring Soon
- Retired Services
- Total Requests
- Pending Requests
- Approved Requests
- Denied Requests



Monthly Charges - This Month To Date

The Self Service user interface has added basic support for displaying monthly chargeback data of the computing and storage cost for the use of resources, in the currencies supported by the full administrative user interface. This provides a quick summary of where you are from cost standpoint to that point in the month. For more information about configuring chargeback rates in the full administrative user interface and how Red Hat CloudForms calculates chargeback costs, see [Chargeback](#) in the *Monitoring, Alerts, and Reporting* guide.



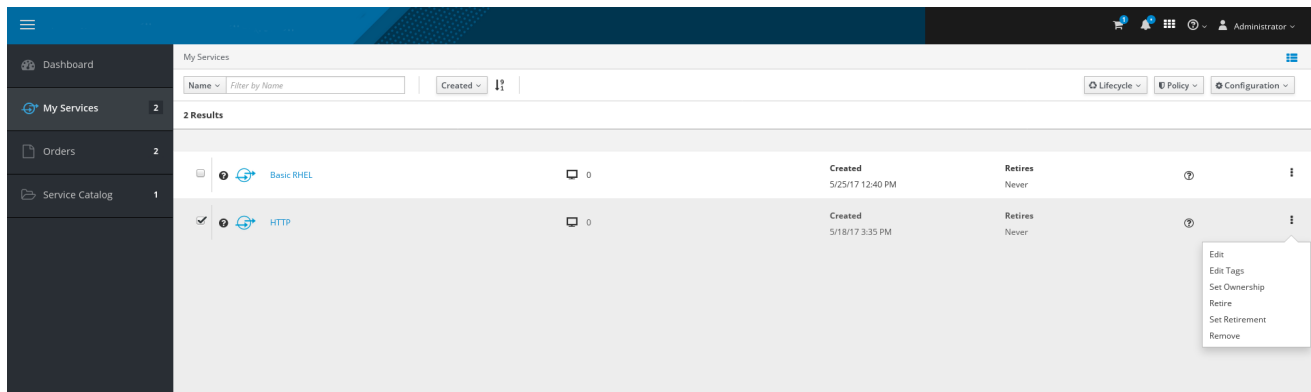
NOTE

If you are on the first day of the month, there can be no data yet therefore resulting in zero dollar amount. Also, if you have a lot of data, it might not have rolled into the new month yet, resulting in no data and dollar amount for month to date.

CHAPTER 5. THE MY SERVICES TAB


The **My Services** tab lists all available services with a summary of information associated with each service, including the **Service Name**, its current **Power State** represented by an icon, **Number of VMs**, **Owner**, date **Created**, and **Retires** date. Additionally, you can see the chargeback cost per service for a virtual machine's month-to-date usage. You can filter or sort services by those entities, and by **Relative Cost**.

On the same screen, you have the option to edit the service name and description, edit tags, set ownership, retire the service now or at a later date, or remove the service. You can also perform power operations on virtual machines by clicking more options (*represented by three dots*) next to the service.



You can perform most of these tasks in bulk (except editing service details and power operations). In order to do so, select multiple services and then click the designated button for the required task on the upper right corner of the screen.

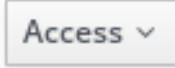
Click on a service to view more details, including information about associated virtual machines and snapshots, and its relationship data. Additionally, under **Resources**, you can click on a virtual machine's name to see its properties, and perform power operations at the resource level. Click on **Snapshots** or

the camera  icon to go to the snapshots page to see a list of available snapshots, as well as create or delete snapshots via the **Configuration** button. A snapshot is a copy of the virtual machine's disk file (VMDK) that captures the entire state of the virtual machine at a point in time. Use **Revert** under more options (*represented by three dots*) to return a virtual machine to a previous state when you took the snapshot.

5.1. ACCESSING THE HTML5 CONSOLE

Follow this procedure to get HTML5 console access to the virtual machine. The console is the remote control system that enables you to interact directly with your virtual machines.

1. From the **Services** screen, click on the required service.

- In **Resources**, click the  button next to the virtual machine and select **Open HTML5 Console**.

Services > RHEL VM

Properties

Name	RHEL VM	Created On	Apr 4, 2017 3:59:09 PM
Description	Basic RHEL VM	Retirement State	Unknown
GUID	d202ba64-18fb-11e7-88a6-001a4a81da24	Retires On	Never
Service Id	1000000000001		
Owner	Administrator		
Monthly Cost	\$0.000		
Tags	Quote - Max Memory: 1GB		

Resources

Compute (1)

Nyanko	Latest	Last Boot Apr 20, 2017 20:02:46	Access
--------	--------	---------------------------------	--------

Relationships


Basic RHEL VM Parent Catalog Item A basic RHEL virtual machine without cloud-init.

The HTML5 console will open in a new window of your web browser. Note that you may have to enable the pop-up settings in your browser to access the console.

5.2. SETTING A RETIREMENT DATE FOR A SERVICE


Follow this procedure to schedule retirement for a service at a later date. For retiring a service immediately, see [Section 5.3, “Retiring a Service”](#).

- From the **Services** screen, click on the required service you want to schedule retirement for.


- Click the  button located on the upper-right corner of the screen, then select **Set Retirement Dates**. The **Schedule Service Retirement** window will appear.

Schedule Service Retirement ✕

Retirement Warning

Retirement Date 

Affected Services




RHEL VM

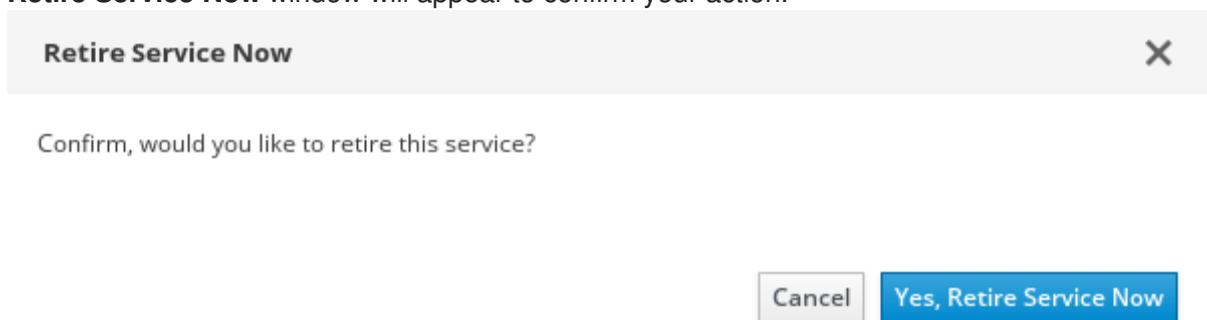
3. Set the **Retirement Date**.
4. Select the **Retirement Warning** from the list.
5. Click **Save**.

5.3. RETIRING A SERVICE

Follow this procedure to retire a service immediately. For retiring a service at a later date, see [Section 5.2, "Setting a Retirement Date for a Service"](#).

1. From the **Services** screen, click on the service you want to retire now.


2. Click the  button located on the upper right corner of the screen, then select **Retire**. The **Retire Service Now** window will appear to confirm your action.



3. Click **Yes, Retire Service Now**.

5.4. SETTING OWNERSHIP OF A SERVICE

Follow this procedure to set ownership of a service.


1. From the **Services** screen, click on the more options button next to the service you want set ownership for, then click **Set Ownership**. Alternatively, click on the service. Click the  button located on the upper-right corner of the screen, then select **Set Ownership**.

Set Service Ownership
✕

Select an Owner

Select a Group

Affected Services




RHEL VM

2. Select an owner from the list.
3. Select a group from the list.
4. Click **Save**.

5.5. ADDING AND EDITING TAGS

Follow this procedure to add or edit tags for a service.

1. From the **Services** screen, click on more options next to the service you want add or edit tags

for, then click **Edit Tags**. Alternatively, click on the service. Click the  button located on the upper-right corner of the screen, then select **Edit Tags**.

Edit Tags
✕

Tags

Quota - Max Memory ▼

1GB ▼


+

Auto Approve - Max CPU: Auto Approve - Max CPU ✕

Cost Center: Cost Center 002 ✕

Quota - Max Memory: 1GB ✕

Affected Services



RHEL VM

Cancel


Reset

Save

2. To add a tag, select the tag category and value from the lists, then click the blue plus (+) sign as shown in the screen capture.
3. To edit tags, simply change the value assigned to a category, or click on the cross sign in the tag to delete an existing tag.
4. Click **Save**.


5.6. REMOVING A SERVICE

Follow this procedure to remove a service.

1. From the **Services** screen, click on more options next to the service you want to remove, then click **Remove**. Alternatively, click on the service. Click the  button located on the upper-right corner of the screen, then select **Remove**. A confirmation window appears.
2. Click **Yes, Remove Service**.

5.7. EDITING A SERVICE

Follow this procedure to edit the name and description of a service.

1. From the **Services** screen, click on more options next to the service you want to edit, then click **Edit**. Alternatively, click on the service. Click the  button located on the upper-right corner of the screen, then select **Edit**. An **Edit Service** screen appears.

2. Edit the name and description of the service as required.

Edit Service
✕

Name

Description

3. Click **Save**.

5.8. COCKPIT INTEGRATION

Cockpit is an interactive Linux server administrative interface. You can perform simple administration tasks such as starting containers, storage administration, network configuration, and inspecting logs. While Cockpit allows you to monitor and administer several servers at the same time, your browser connects to a primary server that runs the Cockpit web service through which connections to additional servers can be established.

The Red Hat CloudForms full administrative user interface and the Self Service user interface have enabled for users to access the Cockpit interface for a given virtual machine.

5.8.1. Accessing the Cockpit Interface



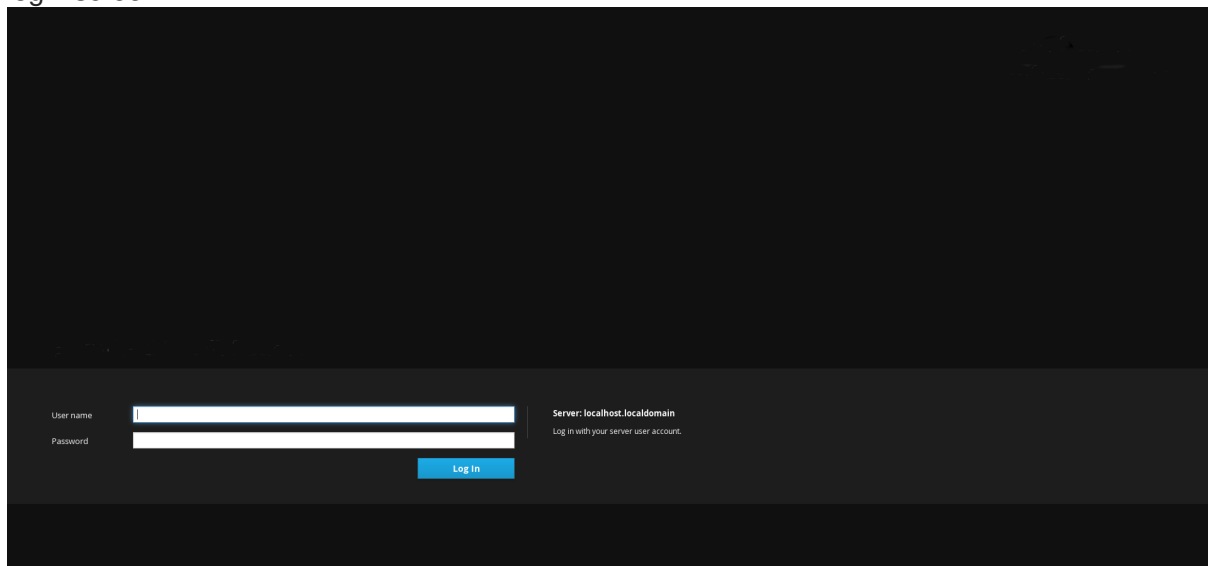
NOTE

Cockpit must be pre-configured and running on the virtual machine.

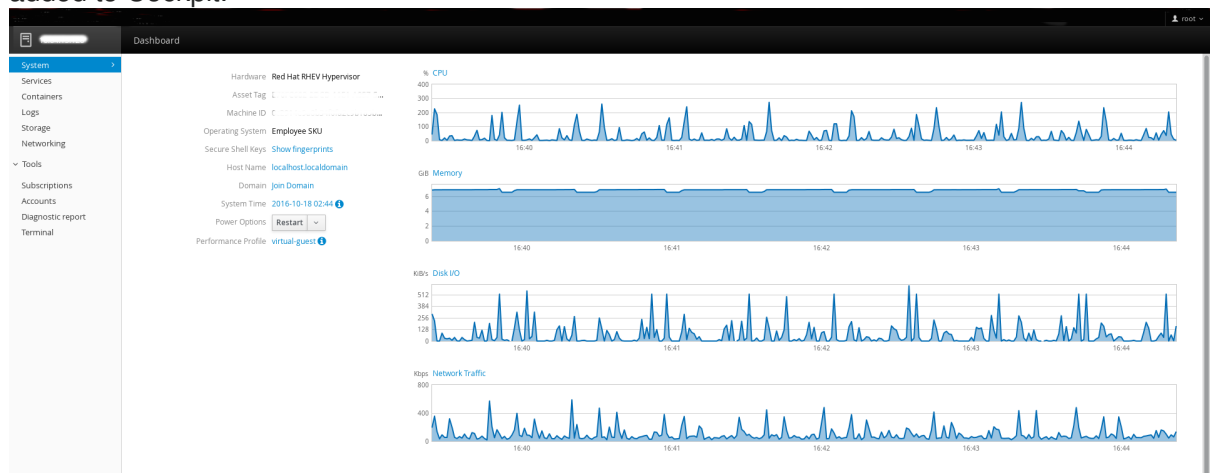
You can open the Cockpit console for a virtual machine from the  button.

1. From the **Services** screen, click on the service associated with the virtual machine you want to open the Cockpit console for.
2. In **Resources**, click **Access** next to the virtual machine and select **Open Cockpit Console**. A notification will appear to show the Cockpit interface is loading.
3. The Cockpit interface for the virtual machine will open in a new browser window. If you get a security warning by the browser, you will need to add this connection to the security exceptions. Click **Advanced** → **Add Exception** → **Confirm Security Exception**. After that, you will see the

login screen.



4. Once you have logged in, you will see the tabs for the dashboard and the individual machines added to Cockpit.



CHAPTER 6. THE ORDERS TAB

The **Orders** tab lists all shopping cart orders of services added from the **Service Catalog**. The tab shows a summary of each order, including the order number, requester, order date, and the number of items. Click on the arrow next to an order number to further expand and see the request associated with the order, and additional details including the request ID, whether it is approved or denied, and the current state of the request. You can filter or sort the orders listed on the page using the buttons at the top of the screen.

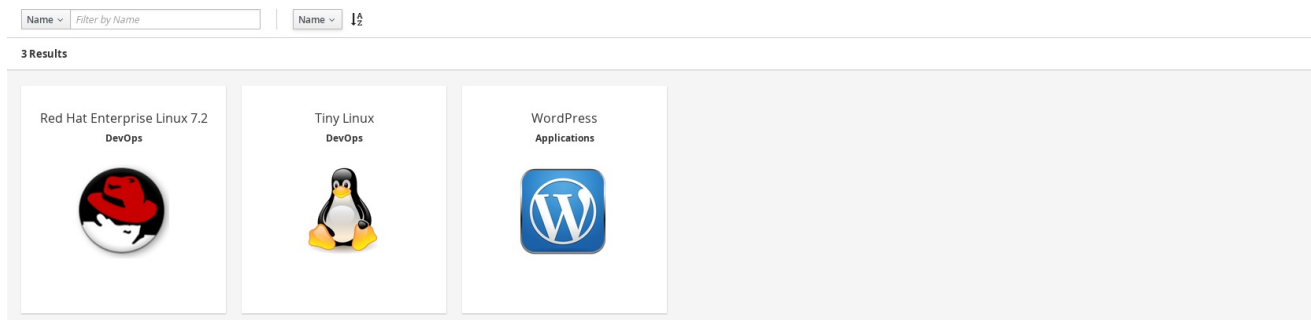
Order #	Requester	Status	Date	Items	Actions
Order # 10000000000002	Administrator	Ordered	5/25/17 12:40 PM	1 item	⋮
Order # 10000000000001	Administrator	Ordered	5/18/17 3:34 PM	1 item	⋮

Service	Request ID	Request State
Provisioning Service [Basic RHEL Server] from [Basic RHEL Ser...	10000000000002	Approved

You can click on more options (*represented by three dots*) next to an order to **Duplicate** or **Remove** the order.

CHAPTER 7. THE SERVICE CATALOG TAB

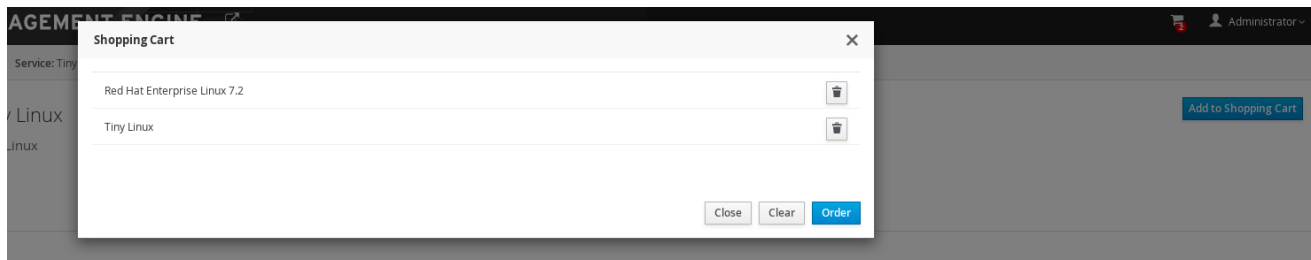
The **Service Catalog** tab lists all service catalog items, displayed as tiles. These items must be configured on the administrative user interface before they will be accessible to the user here. You can filter or sort the service catalog items by **Name**, **Description** and **Catalog Name**.



Click on a service to go to the page where you can enter the requested information in the dialog fields under **Service and VM Name** and **VM Characteristics** associated with the service. Note that there is now an ability to add dynamic dialog elements within the Self Service user interface, meaning you can include a particular dialog field where Red Hat CloudForms will communicate to the instance and method, obtain the required information, and enter the value in the field dynamically. After you have entered all information in the dialog fields, click **Add to Shopping Cart**.

Shopping Cart Model:

The Self Service user interface has adopted a shopping cart model for ordering services, instead of ordering them immediately. Click on the shopping cart icon at the top to view all services added to the shopping cart that are available to order. You can delete a particular service from the cart if required, and order the services in the cart all at one time. Or, you can even choose to clear all the services in the cart and exit.



If you click **Add to Shopping Cart** for the same item, you will see a pop up window alerting you that there is an identical item in the cart but if you want to add it anyway.

