Red Hat CloudForms 5.0

Self Service User Interface Guide

An overview of the Red Hat CloudForms Self Service user interface

Last Updated: 2020-03-06

Red Hat CloudForms 5.0 Self Service User Interface Guide

An overview of the Red Hat CloudForms Self Service user interface

Red Hat CloudForms Documentation Team
cloudforms-docs@redhat.com

Legal Notice

Copyright © 2020 Red Hat, Inc.

The text of and illustrations in this document are licensed by Red Hat under a Creative Commons Attribution–Share Alike 3.0 Unported license ("CC-BY-SA"). An explanation of CC-BY-SA is available at
http://creativecommons.org/licenses/by-sa/3.0/
. In accordance with CC-BY-SA, if you distribute this document or an adaptation of it, you must provide the URL for the original version.

Red Hat, as the licensor of this document, waives the right to enforce, and agrees not to assert, Section 4d of CC-BY-SA to the fullest extent permitted by applicable law.

Red Hat, Red Hat Enterprise Linux, the Shadowman logo, the Red Hat logo, JBoss, OpenShift, Fedora, the Infinity logo, and RHCE are trademarks of Red Hat, Inc., registered in the United States and other countries.

Linux ® is the registered trademark of Linus Torvalds in the United States and other countries.

Java ® is a registered trademark of Oracle and/or its affiliates.

XFS ® is a trademark of Silicon Graphics International Corp. or its subsidiaries in the United States and/or other countries.

MySQL ® is a registered trademark of MySQL AB in the United States, the European Union and other countries.

Node.js ® is an official trademark of Joyent. Red Hat is not formally related to or endorsed by the official Joyent Node.js open source or commercial project.

The OpenStack ® Word Mark and OpenStack logo are either registered trademarks/service marks or trademarks/service marks of the OpenStack Foundation, in the United States and other countries and are used with the OpenStack Foundation's permission. We are not affiliated with, endorsed or sponsored by the OpenStack Foundation, or the OpenStack community.

All other trademarks are the property of their respective owners.

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.

Table of Contents

CHAPTER 1. RED HAT CLOUDFORMS SELF SERVICE 3

CHAPTER 2. ACCESSING THE SELF SERVICE USER INTERFACE 4

CHAPTER 3. NAVIGATING THE SELF SERVICE USER INTERFACE 5

CHAPTER 4. DASHBOARD TAB 7

CHAPTER 5. MY SERVICES TAB 8
5.1. SETTING A RETIREMENT DATE FOR A SERVICE 9
5.2. RETIRING A SERVICE 9
5.3. SETTING OWNERSHIP OF A SERVICE 10
5.4. ADDING AND EDITING TAGS 11
5.5. REMOVING A SERVICE 11
5.6. EDITING A SERVICE 11
5.7. CONTROLLING VIRTUAL MACHINE POWER STATES 12
5.8. CREATING VIRTUAL MACHINE SNAPSHOTS 12
5.9. VIEWING VIRTUAL MACHINE SNAPSHOTS 13
5.10. ACCESSING THE VIRTUAL MACHINE CONSOLE 13
5.11. WEB CONSOLE (COCKPIT) INTEGRATION 13
5.11.1. Accessing the Web Console 14

CHAPTER 6. MY ORDERS TAB 16

CHAPTER 7. SERVICE CATALOG TAB 17

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 following languages are supported:

- English
- Español (Spanish)
- Français (French)
- 日本語 (Japanese)
- 한국어 (Korean)
- Nederlands (Dutch)
- Português (Portuguese)
- Português do Brasil (Brazilian Portuguese)
- 简体中文 (Simplified Chinese)
- Traditional Chinese

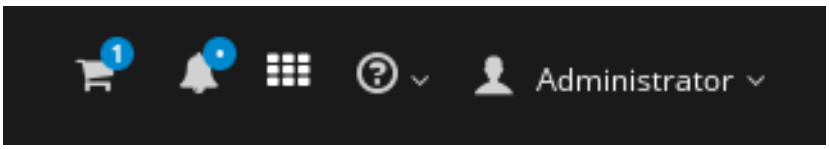
Additionally, the *User Default* and *Browser Default* options default to the language already set by the user or browser respectively.

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**
- **My 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, *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 importantly, the Self Service user interface version number, which can be useful for support purposes.

NOTE

The resources linked to in the help icon will be, by default, the ones listed above. System administrators can change them to other resources as required for the logged in user.

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.

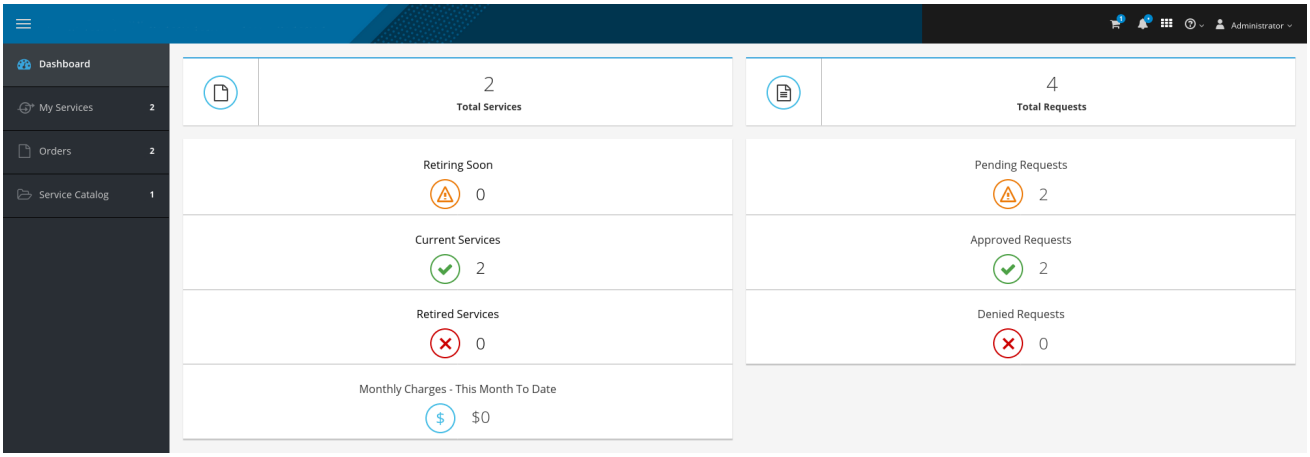
Switch Language

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

CHAPTER 4. DASHBOARD TAB

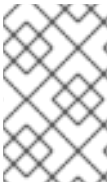
Once you log in to the Self Service user interface, you will see the dashboard screen by default. The **Dashboard** tab provides a quick summary of the services available, requests made, and their statuses as below:

- 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.



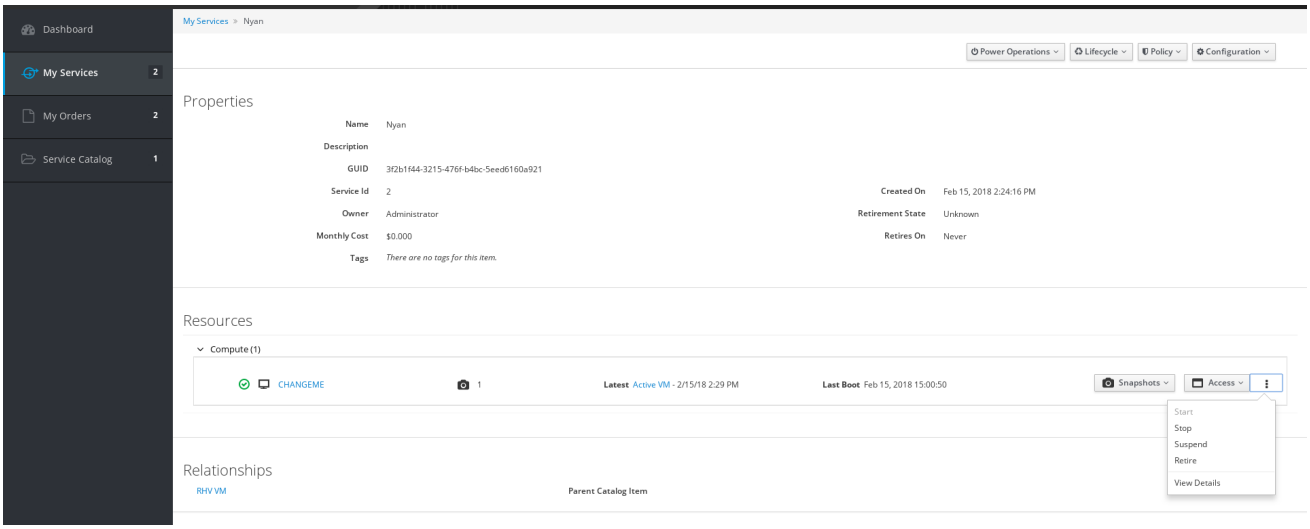
NOTE

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. MY SERVICES TAB

The **My Services** tab lists all service requests individually 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 by clicking more options *(represented by three dots)* next to the service. You also have options to perform power operations, that is start, stop, or suspend, at the service level. You can choose to click on a service where you can perform all of these actions at the service level using the designated buttons located at the top of the screen, as well as access the virtual machine dashboard, manage snapshots, and open the virtual machine and web console from under the **Resources** section. You can also control power operations and life cycle of virtual machine resources via more options *(represented by three dots)* .



Virtual Machine Dashboard:

From the **My Services** screen, click on a service and then on the virtual machine name or **View Details** under more options *(represented by three dots)* to access the virtual machine dashboard. The dashboard displays the following information about the virtual machine resource:

- Compliance
- Retirement
- Snapshots
- Timeline of power events

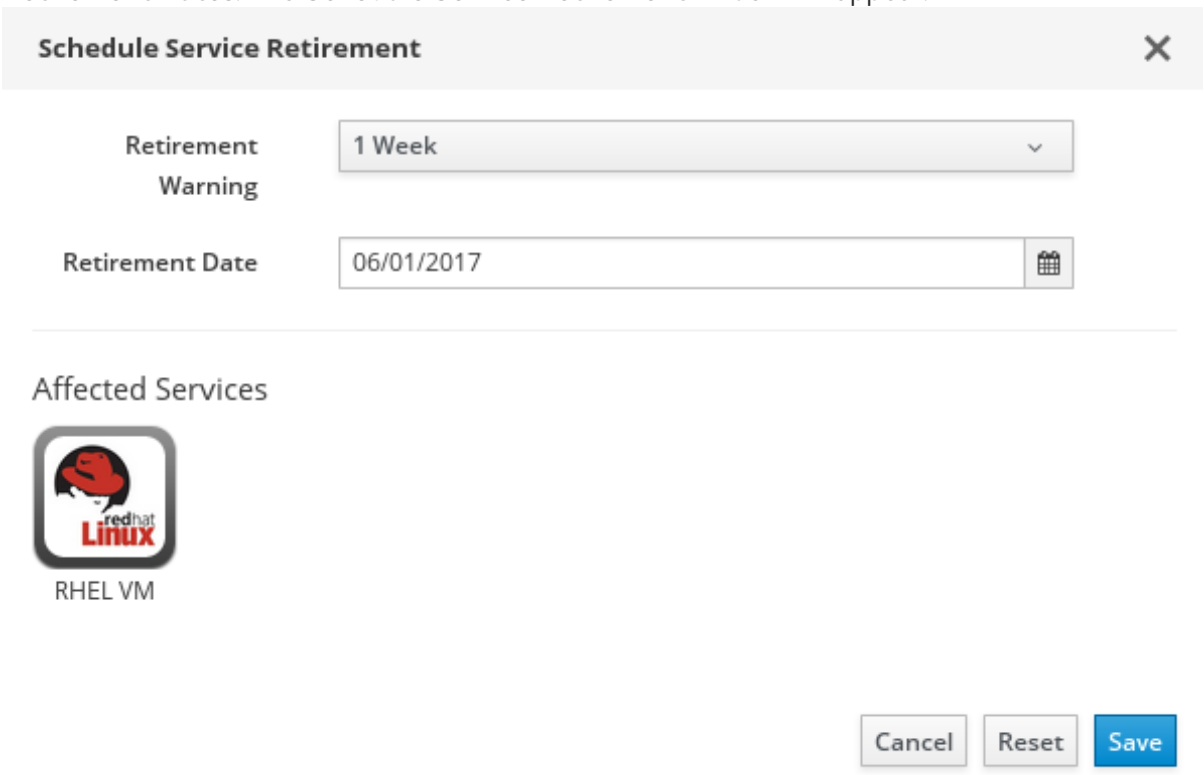
- Utilization of CPU, Memory, and Storage
- Smart State analysis
- Tags
- Custom attributes
- Disk usage

Additionally, you can also control the virtual machine power operations, and manage snapshots from the dashboard. 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.

5.1. 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 5.2, "Retiring a Service" .

1. From the **Services** screen, click on the required service you want to schedule retirement for.
2. Click the button located on the upper-right corner of the screen, then select **Set Retirement Dates**. The **Schedule Service Retirement** window will appear.

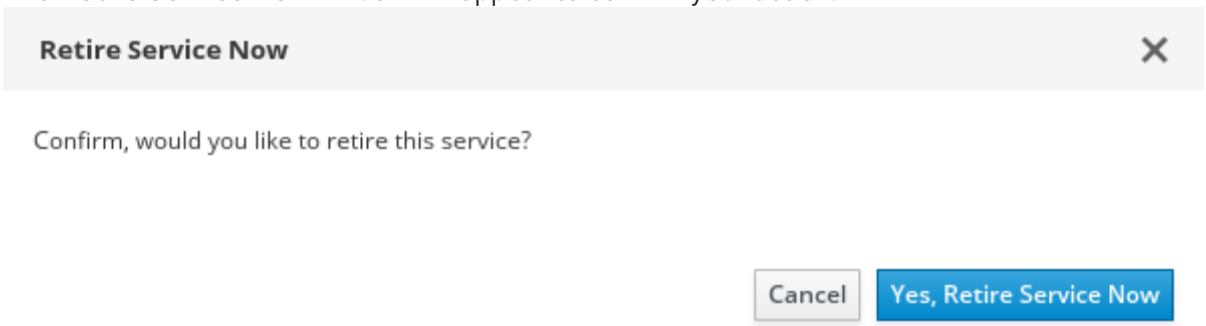


3. Set the **Retirement Date**.
4. Select the **Retirement Warning** from the list.
5. Click **Save**.

5.2. RETIRING A SERVICE

Follow this procedure to retire a service immediately. For retiring a service at a later date, see Section 5.1, “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.

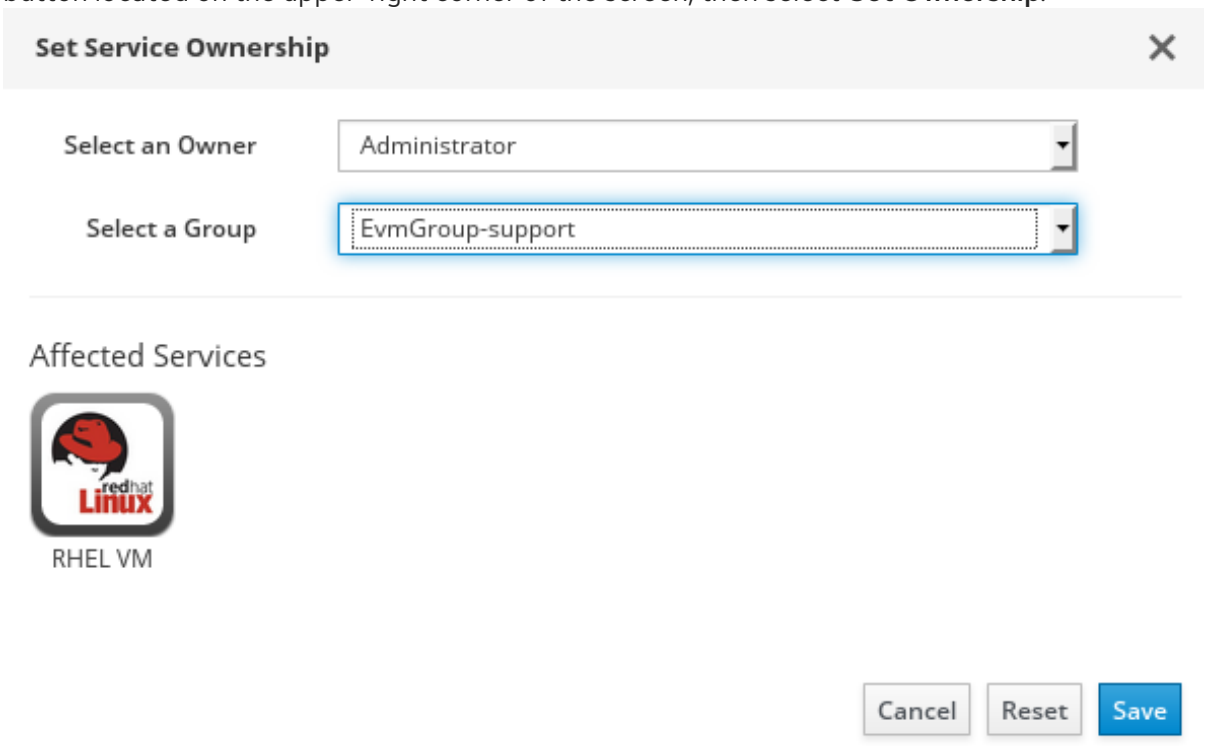


3. Click **Yes, Retire Service Now**.

5.3. 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**.



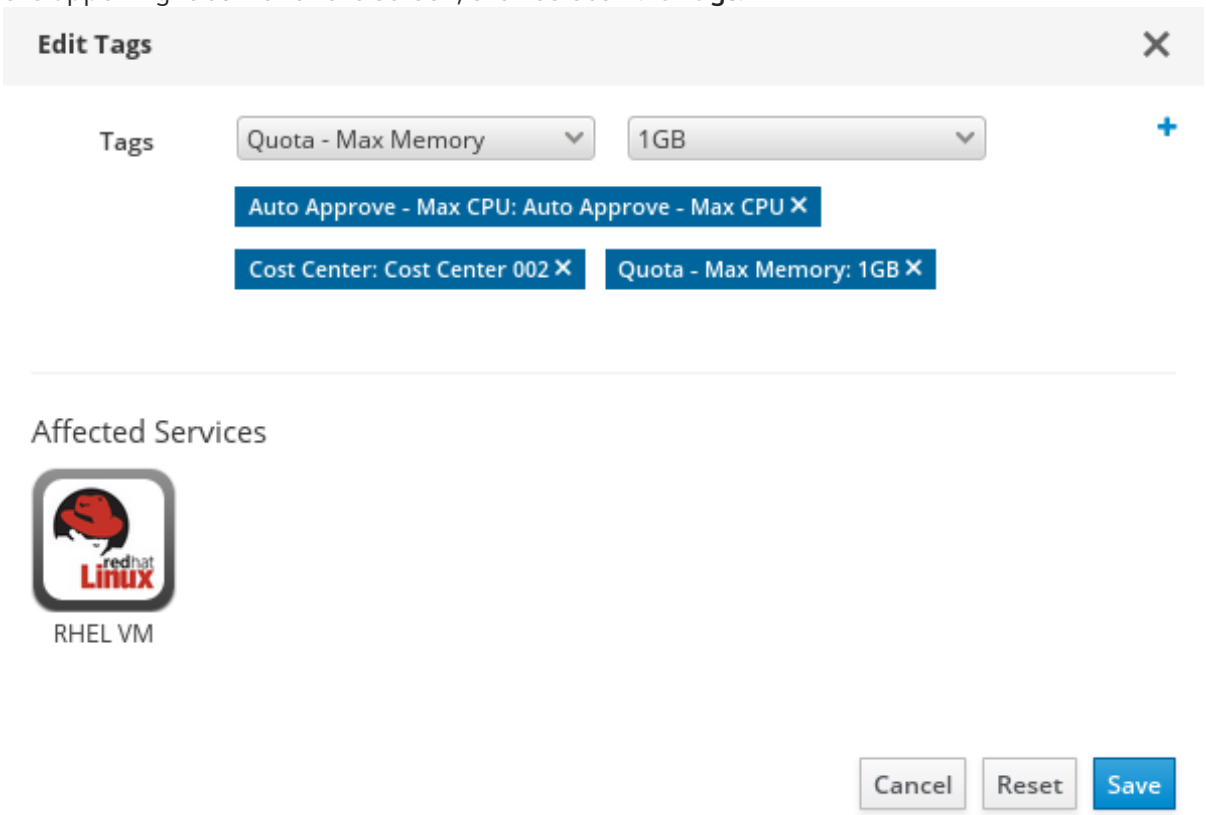
2. Select an owner from the list.
3. Select a group from the list.

4. Click **Save**.

5.4. 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**.



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**.

5.5. REMOVING A SERVICE

Follow this procedure to remove a service.

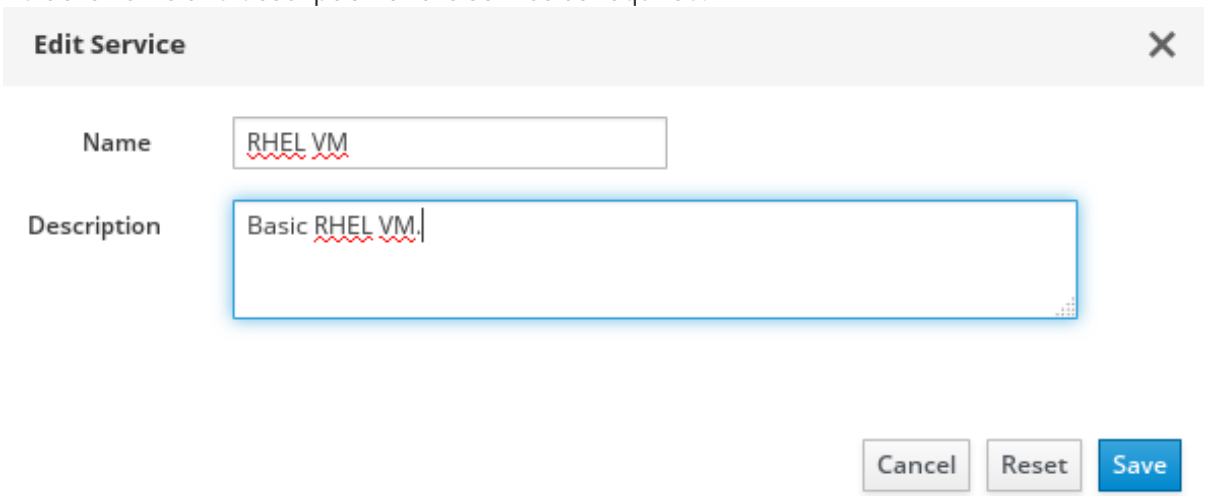
1. From the **Services** screen, click on more options next to the service you want to remove, then click **Remove**. Alternatively, click on the service. Click the button located on the upper-right corner of the screen, then select **Remove**. A confirmation window appears.

2. Click **Yes, Remove Service**.

5.6. EDITING A SERVICE

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

1. From the **My 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.



3. Click **Save**.

5.7. CONTROLLING VIRTUAL MACHINE POWER STATES

Follow this procedure to perform power operations on virtual machines, such as start, stop, or suspend, depending on the current state of the virtual machine.

1. From the **My Services** screen, click on the required service.
2. Under **Resources**, click more options *(represented by three dots)* where you have the option to start, stop, or suspend the virtual machine. Alternatively, click on the virtual machine name to see more details about the resource, including the **Power Operations** button.

5.8. CREATING VIRTUAL MACHINE SNAPSHOTS

To create a snapshot from the Services screen:

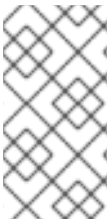
1. From the **My Services** screen, click on the service associated with the virtual machine you want to create a snapshot for.
2. In **Resources**, click **Snapshots** next to the virtual machine you want to create a snapshot for, then select **Create** to create a snapshot. The **Create Snapshot** window appears.
3. Enter a name for the snapshot.
4. Optional: Select **Memory** if you want to capture the state of the virtual machine's memory.
5. Optional: Enter a **Description**.
6. Click **Create**.

To create a snapshot from the Resources screen:

1. From the **My Services** screen, click on the service associated with the virtual machine you want to create a snapshot for.
2. In **Resources**, click on the virtual machine you want to create a snapshot for.
3. On the virtual machine dashboard, click the **Snapshots** button, then select **Create**. The **Create Snapshot** window appears.
4. Enter a name for the snapshot.
5. Optional: Select **Memory** if you want to capture the state of the virtual machine's memory.
6. Optional: Enter a **Description**.
7. Click **Create**.

5.9. VIEWING VIRTUAL MACHINE SNAPSHOTS

1. From the **My Services** screen, click on the service associated with the virtual machine you want to view snapshots for.
2. In **Resources**, click **Snapshots** next to the virtual machine and select **View** to view available snapshots. Alternatively, click on the virtual machine, then click **Snapshots** to view available snapshots.



NOTE

You can revert or delete a snapshot only from the snapshot summary screen. To do so, navigate to **Snapshots** > **View**, click more options *(represented by three dots)* next to the snapshot you want to revert or delete, and then click **Revert** or **Delete** as required. Revert returns a virtual machine to a previous state when you took the snapshot.

5.10. ACCESSING THE VIRTUAL MACHINE CONSOLE

Follow this procedure to open a console window 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.
2. In **Resources**, click the

button next to the virtual machine and select **VM Console**.

The virtual machine 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.

5.11. WEB CONSOLE (COCKPIT) INTEGRATION

The Web console (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 Web console (Cockpit interface) for a given virtual machine.

5.11.1. Accessing the Web Console

NOTE

Launching of Cockpit requires as IP address for the virtual machine. It must be pre-configured and running on the virtual machine.

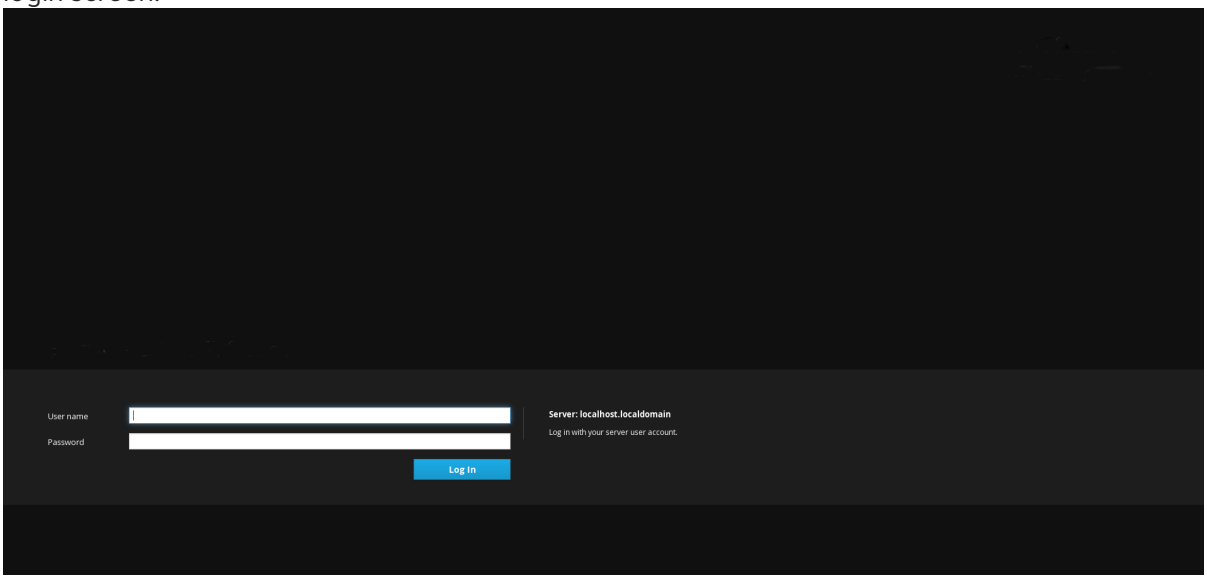
You can open the Web console (Cockpit) for a virtual machine from the

button.

1. From the **My Services** screen, click on the service associated with the virtual machine you want to open the Web console for.

2. In **Resources**, click **Access** next to the virtual machine and select **Web 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.

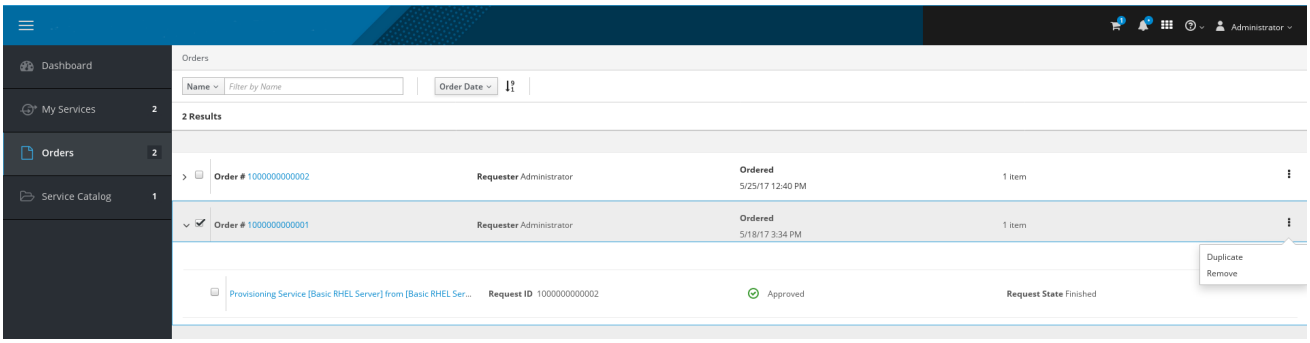


4. Once you have logged in, you will see the tabs for the dashboard and the individual machines added to Cockpit.

CHAPTER 6. MY ORDERS TAB

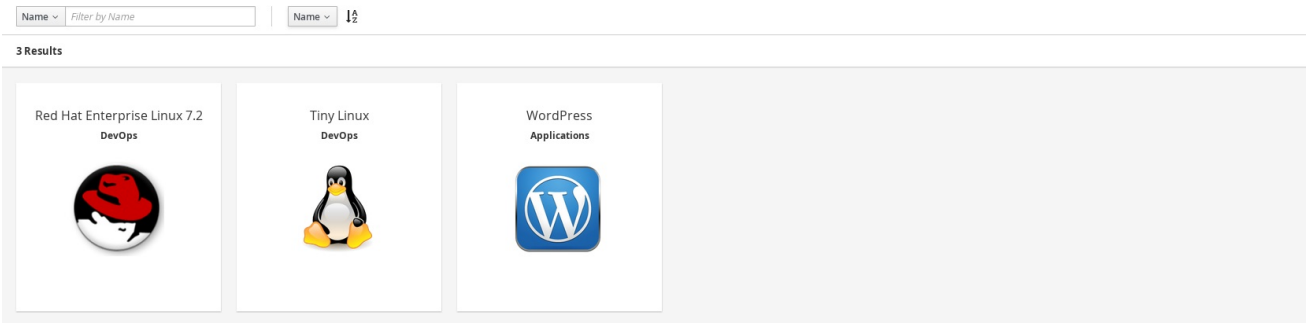
The **My Orders** tab lists all shopping cart orders which contain service requests added from the **Service Catalog**.

Click on the tab to see a summary of each order, including the order number, requester, order date, and the number of items. Click the arrow next to an order number to see more details such as the requests associated with the order, request ID, whether it is approved or denied, and the current state of the request. You can reorder a request by clicking the **Reorder** button, then enter the options associated with the order, and add to shopping cart. You can click on more options *(represented by three dots)* next to an order to **Remove** the order.



CHAPTER 7. SERVICE CATALOG TAB

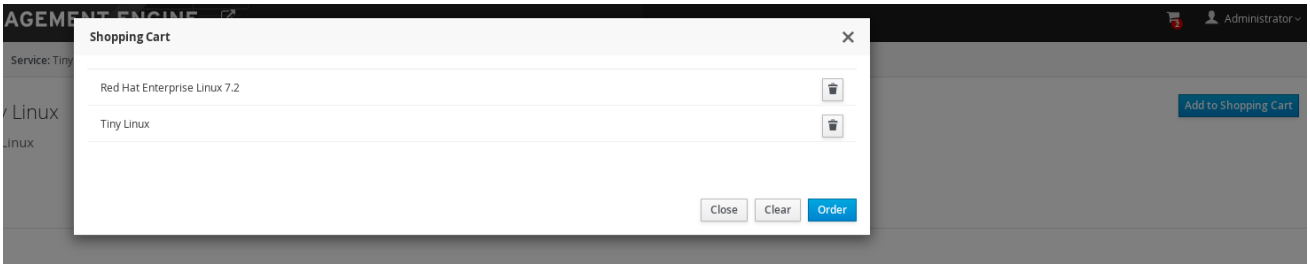
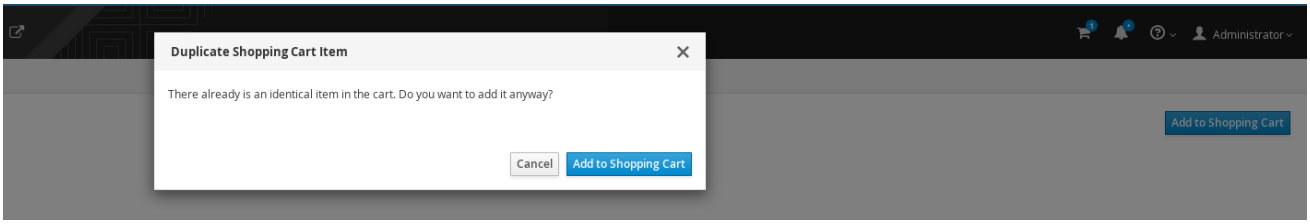
The **Service Catalog** tab lists all service catalog items, displayed as tiles. These items must be configured on the administrative user interface before they will be accessible to the user here. You can filter or sort the service catalog items by **Name**, **Description** and **Catalog Name**.



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:

The Self Service user interface has adopted a shopping cart model for ordering services, instead of ordering them individually. 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.