IBM Tivoli Service Automation Manager version 7.2.2

Creating and managing customers

In this training module, you learn how to create customers, assign customer resources, and remove customers.

Objectives

When you complete this training module, you can accomplish these tasks:

- Create customers by using the self-service user interface
- Use the administrative interface to configure customer resources
- Remove customer entries

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When you complete this training module, you can use the self-service user interface to create customers, configure resources for customers, and remove customer entries.
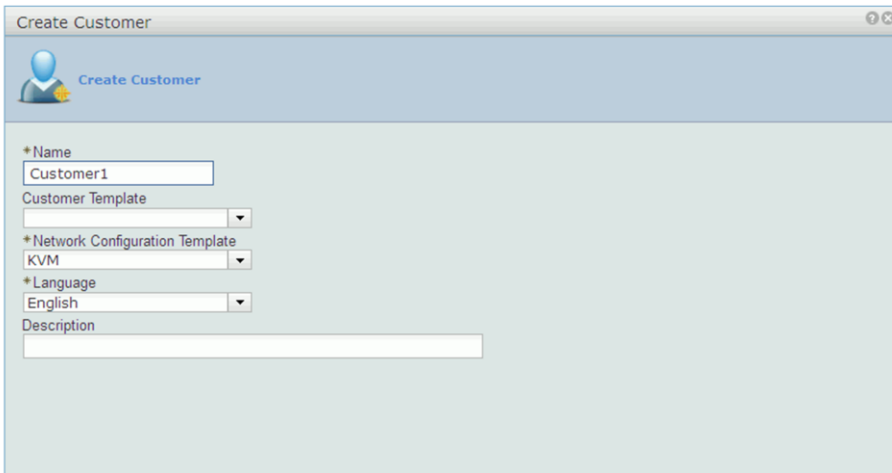
Creating customers

- Create a customer from a customer template or the self-service user interface
- Create a customer by performing these steps:
  1. Log on to the self-service user interface as a cloud administrator
  2. From the Home page, select **Request a New Service > Virtual Server Management > Manage Customers > Create Customer**

The highest category of user in the self-service user interface is Customer. In the Customer category, you can manage your cloud environment resources. Each user and team is associated with a specific customer. Each customer is assigned to a single cloud customer administrator, who can perform several tasks for the customer. There is one predefined global customer: PMRDPCUST. Each new user is assigned to this customer if no other customers are defined and specified when the user is created. The customer assignment defines which resources a user can access. To create customers in the self-service user interface, you log in and navigate to the Create Customer page.

You can create a customer in two ways:

- From a customer template, which does not require customer resources to be assigned in the administrative interface, because they are already assigned.

- From the self-service user interface. You can create a customer and assign resources to that customer by using the administrative interface. To create a new customer, log on to the self-service interface as a cloud administrator. From the Home page, select Request a New Service > Virtual Server Management > Manage Customers > Create Customer.

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Create Customer page

Create Customer

Create Customer

*Name
Customer1

Customer Template

*Network Configuration Template
KVM

*Language
English

Description

The fields on the Create Customer page are Name, Customer Template, Network Configuration Template, Language and Description. The fields with an asterisk are required for each new customer.

Adding customer information

1. Enter a name for the customer
   – The name can have up to 12 characters
   – The name must be unique; for example, Customer1
2. Select the **Network Configuration** template from the list
3. Select the language for all users that are created for this customer
4. (Optional) Add a text description of the customer in the **Customer Description** field
5. Click **OK** to submit the request

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To create a customer, enter a unique customer name of up to 12 characters. Choose one of the network configuration templates. Select the language for all users under this customer. Add a brief description of the customer, if you want. A description is not required. To finish and submit the new customer request, click OK.

Verifying that a customer is created

In the My Requests section, you see that you created a customer and that the request is **Resolved**

My Requests

| Resolved (15) | Failed (5) |

Recent Activity
Create Customer Customer 1   Resolved
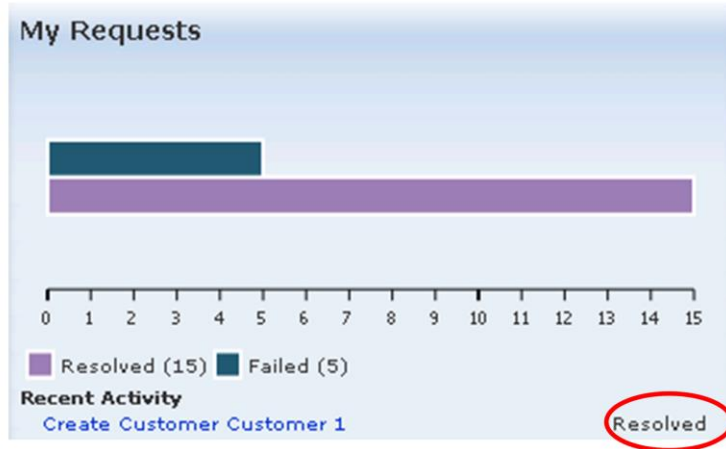
When you see the word Resolved in the My Requests section on the right side of the main panel, you know that you successfully created the new customer. In the next few slides, you learn about assigning resources to the new customer.

Customer resources

- You can assign several resources to a customer
- Customers can use only the resources that are associated with them or marked as customer-independent

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Before you assign customer resources, ensure that resources are configured in the administrative user interface. You can assign several resources to a customer. They are associated to a customer by the administrative user. The customers can use only the resources that are either associated with them or that are marked as customer-independent.

Locating the customer information

To locate the customer, perform these steps:
1. Log in to the administrative interface
2. Select **Go To > Service Automation > Configuration > Cloud Customer Administration**
3. Click the **List** tab
4. In the **Customer** filter, find the customer name

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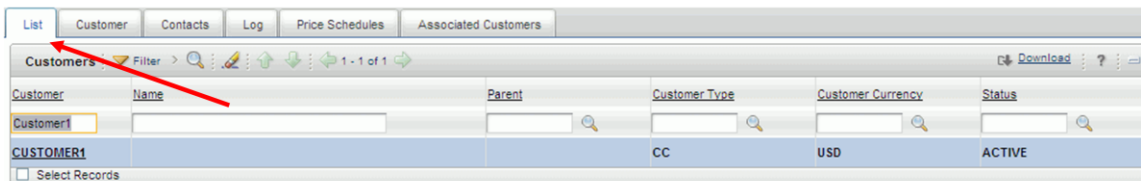
To locate the customer information:

Log in and select Go To > Service Automation > Configuration > Cloud Customer Administration.

Click the List tab.

In the Customer list, filter for the specific customer name.

Click the name of the customer.

Verifying the customer information

Click the **Customer** tab, and view the entry for the customer

Click the Customer tab to display information about the customer; in this case, for CUSTOMER1.

Associating customer resources

In the Associated Resources section, click the tab for the resource type that you want to assign to the customer

The following resource types are required:
- – Cloud Server Pools
- – Image Library Master Images
- – Cloud Network Configuration

Associated Resources

The table shows the associated resources of this customer.

| Cloud Server Pools | Cloud Storage Pool | IL Master Images | Software Modules | Cloud Network Configuration |

Cloud Server Pools ▶ Filter > 🔍 ✏️ ⬆️ ⬇️ ⬅️ 1 - 1 of 1 ➡️   📥 Download

	Id	Cloud Server Pool Name	Description	Hypervisor Type	Maximum Memory in MB	Maximum Number of Virtual CPUs	Is Global?
	1 ≫	VMware System x		VMware	8,192	8	☑

Assign Cloud Se

In the Associated Resources section, click one of the tabs for the resource types that you want to assign. Required resource types for customer configuration are Cloud Server Pools, Image Library Master Images, and Cloud Network Configuration.

Resource definitions

- Cloud Server Pools
  - Cloud server pools specify the network configuration
  - The pools are configured in the Cloud Server Pool Administration application
  - A cloud server pool or storage pool can be shared among multiple customers, and you can define quotas and limits for these resources

- Image Library Master Images
  - You can assign a master image to a customer from the list of available master images
  - You must ensure that the master images are discovered correctly

- Cloud Network Configuration
  - You can assign cloud network configuration only through a cloud customer template
  - Several default network configurations are available

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The required resource types are defined as follows:

- Cloud Server Pools: The cloud server pools are used to specify the network configuration. The pools are configured in the Cloud Server Pool Administration application. Multiple customers can share a cloud server pool or storage pool, and you can define quotas and limits for these resources.

- Image Library Master Images: You can assign a master image to a customer from the list of available master images. Ensure that the master images are discovered correctly.

- Cloud Network Configuration: You can assign cloud network configuration only through a cloud customer template. Several default network configurations are available.

Assigning customer resources

Use these steps to assign customer resources:

1. Click the **Assign Cloud Server Pool** button in the Cloud Server Pool
2. Select the check box for the resource and click the **Assign Cloud Server Pools** button
3. Assign any other resources to the customer by using the tabs in the Associated Resources section
4. Assign any optional resources to the customer, and click **Save**
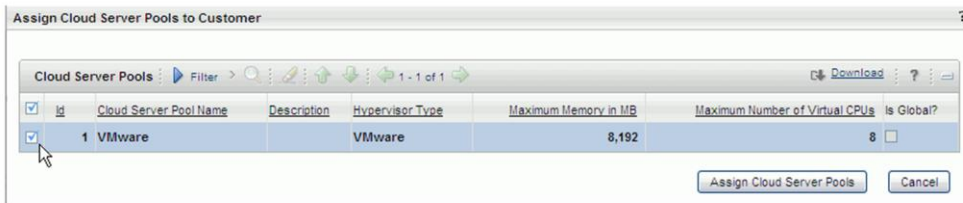
To assign customer resources:

Click the Assign Cloud Server Pool button in the Cloud Server Pool tab. A window with resource options opens.

Select the check box for the resources that you want to assign. Click the Assign Cloud Server Pools button to confirm the assignment.
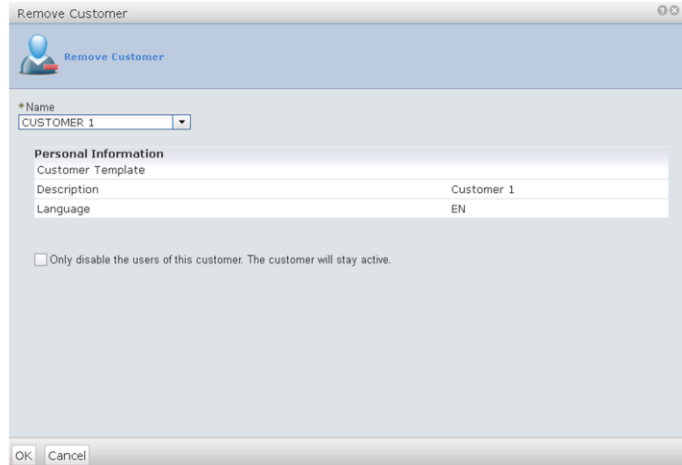
Assign any other resources to the customer by using the tabs in the Associated Resources section. Follow the same procedure as you do for the Cloud Server Pools. You can also assign optional resources to the customer.

Click Save.

Removing customers

You can remove customers in the self-service user interface

1. In the Home panel, click **Request a New Service > Virtual Server Management > Manage Customers > Remove Customer**

2. Select the customer from the list, and click **OK**

Remove Customer

Remove Customer

* Name
CUSTOMER 1

Personal Information

Customer Template	
Description	Customer 1
Language	EN

☐ Only disable the users of this customer. The customer will stay active.

OK   Cancel

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To remove customers in the self-service user interface:

On the Home page, click Request a New Service > Virtual Server Management > Manage Customers > Remove Customer.

Select the customer from the list.

Click OK to remove the customer.

Removed customers (1 of 2)

- The customer is changed to inactive state, and all user accounts related to this customer are deactivated
  - The users can no longer log on to the self-service user interface
- By default, the state of the projects and resources does not change automatically
  - Projects are decommissioned according to their schedules
  - Cloud administrators can cancel the projects and delete any saved images manually

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The customer is changed to inactive state, and all user accounts related to this customer are deactivated. The users cannot log on to the self-service user interface. By default, the state of the projects and resources does not change automatically. Projects are decommissioned according to their schedules. Cloud administrators can also cancel the projects and delete any saved images manually.

Removed customers (2 of 2)

- You cannot reuse the name of the removed customer
- You cannot reactivate a customer that was removed with the Remove Customer offering in the self-service user interface
- If a customer is not yet removed, you can change the status of this customer to INACTIVE in the administrative user interface.
  - This customer cannot perform any actions in Tivoli® Service Automation Manager
  - You can change the status of the customer back to ACTIVE, and then the customer can work with Tivoli Service Automation Manager

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You cannot reuse the name of the removed customer, and you cannot reactivate a customer that you removed with the Remove Customer option. If a customer is not yet removed, you can change the status of this customer to INACTIVE in the administrative user interface. This customer cannot perform any actions in Tivoli Service Automation Manager. You can change the status back to ACTIVE status afterward, and the customer can work with Tivoli Service Automation Manager again.

Summary

Now that you have completed this training module, you can accomplish these tasks:

- Create customer entries by using the self-service user interface
- Use the administrative interface to configure customer resources
- Remove customer entries

Creating and managing customers

Now that you have completed this training module, you can use the self-service user interface to create customers, configure resources for customers, and remove customers.

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