CA Automation Suite for Clouds Base Configuration

Service Consumer Guide

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ca technologies

CA Technologies Product References

This documentation set references the following CA Technologies products and components:

- CA Service Catalog

- CA Process Automation

- CA Embedded Entitlements Manager (CA EEM)

- CA Server Automation

- CA Business Intelligence

- CA IT Client Manager

Contact CA Technologies

Contact CA Support

For your convenience, CA Technologies provides one site where you can access the information that you need for your Home Office, Small Business, and Enterprise CA Technologies products. At http://ca.com/support, you can access the following resources:

- Online and telephone contact information for technical assistance and customer services

- Information about user communities and forums

- Product and documentation downloads

- CA Support policies and guidelines

- Other helpful resources appropriate for your product

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Contents

Chapter 1: Introduction

This guide describes the responsibilities of a Service Consumer. Your responsibilities require you to:

- Manage the life cycle of virtual machines such as Hyper-V, VMware, and applications such as AppLogic

- Request access to the service groups

- Access reports

Chapter 2: Reserve and Manage Applications with CA AppLogic

As a Service Consumer, your responsibilities require you to work with virtual machines. The self-service portal allows you to reserve virtual machines with CA AppLogic and manage their lifecycles. Use the self-service portal to:

- Request the provisioning of an application

- Manage your reserved virtual machines

    - Change AppLogic Reservation

    - Use AppLogic Power Functions

    - Return AppLogic Reservation

Reservations and management requests are subject to approval by your service provider or administrator. You receive emails informing you of how to access your virtual machines and the status of your requests.

The following diagram illustrates how to reserve and manage applications with AppLogic.

Reserve and Manage Applications with AppLogic
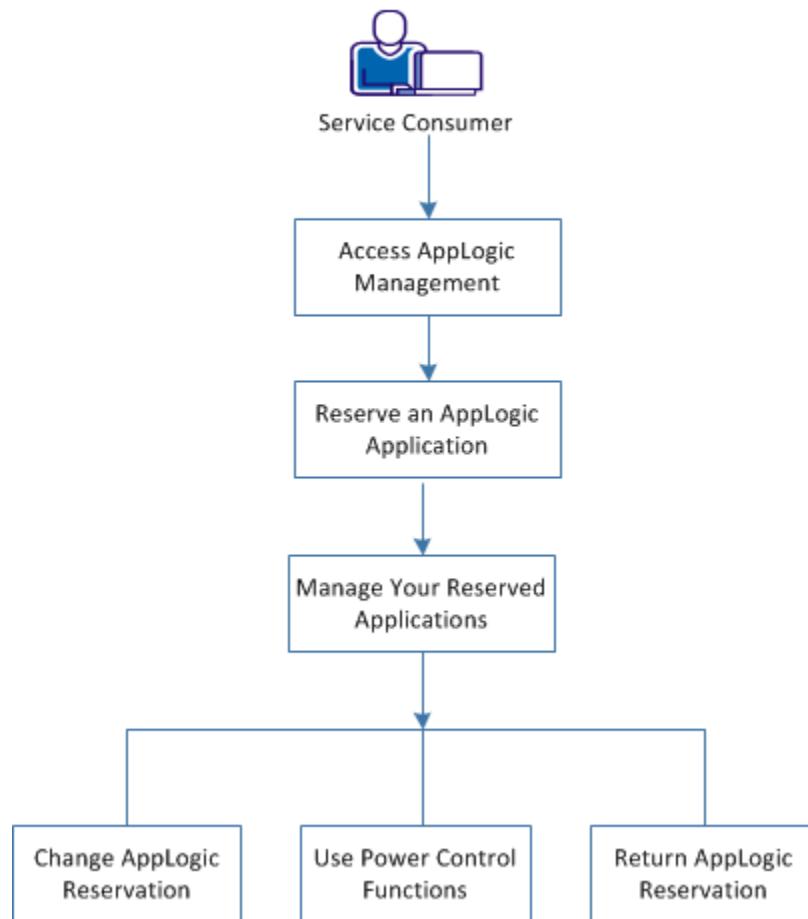
Perform the following tasks to reserve and manage applications:

1. Access CA AppLogic Management (see page 11)

2. Reserve an AppLogic Application (see page 11)

3. Manage Applications with CA AppLogic (see page 12)

   ■ Configure Applications (see page 12)

   ■ Use AppLogic Power Functions (see page 12)

   ■ Return Applications (see page 13)

Access CA AppLogic Management

The self-service portal is a web page from which you can request and manage applications. The portal centralizes, expedites, and automates virtual-machine requests. The portal is accessible from CA Service Catalog with the URL and credentials that your Service Provider provides.

Follow these steps:

1. Log in to CA Service Catalog.

2. Click Requests.

   The available services list opens.

3. Click Server Automation Services.

4. Click AppLogic Management.

The AppLogic Management page opens. You can use the page to request virtual machines and manage their lifecycles.

Reserve an AppLogic Application

You request an application according to your project or business needs. You can request an application based on a selected virtual machine template. Configuration options include:

- Application-specific parameters

- Application bandwidth

- Amount of memory

Important! Invalid data entered in the General Properties and Configuration Boundaries section can lead to failure of requests.

Follow these steps:

1. Access AppLogic Management.

2. Click Reserve AppLogic Application.

   A web form opens with fields for defining the request.

3. Complete the required form fields.

   Additional form fields populate.

4. Modify the populated fields and remaining fields as needed.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

A confirmation message displays. Your request is processed. An Approving Manager reviews your request. You receive an email indicating whether your request was approved or declined. If approved, the email includes information about how to access your resources.

Manage Applications with CA AppLogic

After successful reservation of virtual machines, you can manage their lifecycles from the self-service portal too. You can:

- Change an AppLogic Reservation
- Use the AppLogic Power Functions
- Return Applications

Change AppLogic Reservation

You can change the CPU, memory, bandwidth, and configuration boundaries (for example, host name) for your virtual application.

Follow these steps:

1. Access AppLogic Management.
2. Click Change AppLogic Reservation.

   A web form opens.
3. Complete the required form fields.

   Additional form fields populate.
4. Modify the populated fields and remaining fields as needed.
5. Click Add to Cart and Check Out.
6. Review your request details, and click Save and Submit Cart.

A confirmation message displays. Your request is processed. An Approving Manager reviews your request. You receive an email indicating whether your request was approved or declined. If approved, the email includes information about how to access your resources.

Use AppLogic Power Functions

You can start, stop, or restart your applications.

Follow these steps:

1. Access AppLogic Management.

2. Click AppLogic Power Functions

   A web form opens.

3. Complete the required form fields.

   Additional form fields populate.

4. Modify the populated fields and remaining fields as needed.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

   A confirmation displays indicating that your request was submitted successfully.

The Power Functions request does not require approval from your Approving Manager.

Return Applications

You can return an application that you no longer require.

Follow these steps:

1. Access AppLogic Management.

2. Click Server Automation Services, AppLogic Management.

3. Click Return AppLogic Reservation.

   A web form opens.

4. Complete the required form fields.

   Additional form fields populate.

5. Modify the populated fields and remaining fields as needed.

6. Click Add to Cart and Check Out.

7. Review your request details, and click Save and Submit Cart.

   A confirmation message displays. Your request is processed. Returned reservations are available in the resource pool.

Now you know how to manage applications with CA AppLogic. You can reserve machines, alter hardware configurations, use power functions, or return the machines that you reserved.

Chapter 3: Reserve and Manage Virtual Machines with Hyper-V

As a Service Consumer, your responsibilities require you to work with virtual machines. The self-service portal allows you to reserve virtual machines with Hyper-V, and manage their lifecycles. Use the self-service portal to:

- Reserve a virtual machine based on an available template.

- Manage your reserved virtual machines.

    - Change Hyper-V virtual machine

    - Use Hyper-V power functions

    - Extend or return Hyper-V reservation

Reservations and management requests are subject to approval by your service provider or administrator. You receive emails informing you on how to access your virtual machines and the status of your requests.

The following diagram illustrates how to reserve and manage virtual machines with Hyper-V.

Reserve and Manage Virtual Machines with Hyper-V
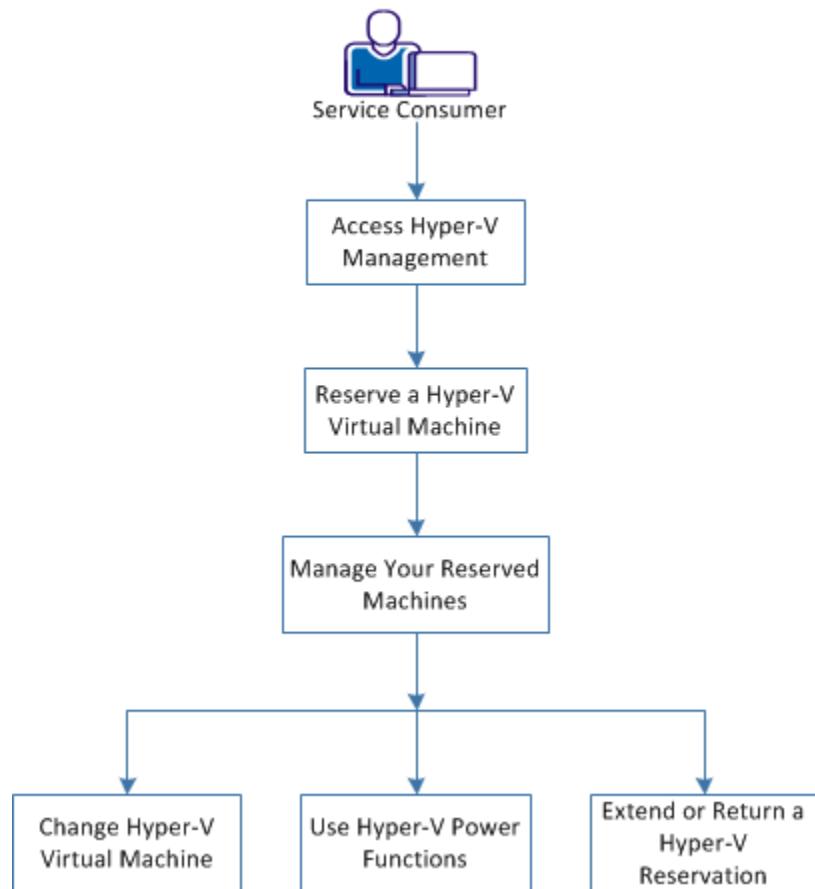
Perform the following tasks to reserve and manage a virtual machine:

1. Access Hyper-V Management (see page 17)

2. Reserve a Hyper-V Virtual Machine (see page 17)

3. Manage Your Reserved Machines (see page 18)

   ■ Change Hyper-V Virtual Machine (see page 18)

   ■ Use Hyper-V Power Functions (see page 19)

   ■ Extend or Return a Virtual Machine Reservation (see page 20)

Access Hyper-V Management

The self-service portal is a web page from which you can reserve and manage virtual machines. The portal centralizes, expedites, and automates virtual-machine requests. The portal is accessible from CA Service Catalog with the URL and credentials that your Service Provider provides.

Follow these steps:

1. Log in to the CA Service Catalog.

2. Click Requests.

    The available services list opens.

3. Click Server Automation Services.

4. Click Hyper-V Management.

    The Hyper-V Management page opens. You can use the page to request virtual machines and manage their lifecycles.

Reserve a Hyper-V Virtual Machine

You reserve virtual machines based on your project or business requirements. Reserving a Hyper-V virtual machine provides the flexibility to select and deploy virtual machines automatically and add additional software packages. You also can request a virtual machine that is based on a selected virtual machine template. Configuration options include:

■   Operating system

■   Installed applications

■   Quantity of CPUs

■   Amount of memory

You can reserve the appropriate resource allocation for a specified period on one or more virtual machines. Ensure that you provide a unique reservation name as the system does not support duplicate names.

Follow these steps:

1. Access Hyper-V Management.

2. Click Reserve Hyper-V Virtual Machine.

    A web form opens with fields for defining the request.

3. Complete the required form fields.

   Additional form fields populate.

4. Modify the populated fields and remaining fields as needed.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

A confirmation message displays. Your request is processed. You receive an email indicating whether your request was approved or declined. If approved, the email includes information about how to access your resources.

Manage Your Reserved Machines

After successful reservation of virtual machines, you can manage their lifecycles from the self-service portal. You can:

- Change hardware configurations (see page 18)

  You can request to increase or decrease the quantity of CPUs or amounts of memory.

- Use Hyper-V power functions (see page 19)

  You can request to power on, power off, or can reset the virtual machine to its original configuration.

- Extend or return reservations (see page 20)

  If you need a machine longer than you originally requested, you can request to extend your reservation. If you no longer need a machine, you can return it back to the resource pool.

Change Hyper-V Virtual Machine

Your virtual machine requirements can change after your machine is available. You can increase or decrease the quantity of CPUs and amount of memory on the virtual machines you reserved. Your Service Provider sets the available configuration options. Additionally, configuration change requests are subject to approval by your Service Provider or Administrator.

Follow these steps:

1. Access Hyper-V Management.

2. Click Change Hyper-V Virtual Machine.

   A web form opens.

3. Complete the required form fields.

   Additional form fields populate.

4. Modify the populated fields and remaining fields as needed.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

A confirmation message displays. Your request is processed. An Approving Manager reviews your reservation. You receive an email indicating whether your request was approved or rejected.

Use Hyper-V Power Functions

You can request to have your virtual machine powered on, powered off, or can reset the virtual machine to its original configuration.

Follow these steps:

1. Access Hyper-V Management.

2. Click Hyper-V Power Functions.

   A web form opens.

3. Complete the required form fields.

   Additional form fields populate.

4. Modify the populated fields and remaining fields as needed.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

A confirmation displays indicating that your request was submitted successfully. The My Recent Requests pane updates showing your new and previous reservations.

This request does not require approval from your Approving Manager.

Extend or Return a Hyper-V Reservation

As your project and business requirements change, you can modify the durations of your virtual machine reservations. You can:

■ Extend a reservation date.

■ Return a reservation.

Extensions are subject to approval from your Service Provider or Administrator. Returning an unneeded reservation provides resources for new reservation requests.

Follow these steps:

1. Access Hyper-V Management.

2. Click one of the following options:

   ■ Extend Hyper-V Reservation.

   ■ Return Hyper-V Reservation.

   A web form opens.

3. Complete the required form fields.

   Additional form fields populate.

4. Modify the populated fields and remaining fields as needed.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

A confirmation message displays. Your request is processed. An Approving Manager reviews your reservation for extension. You receive an email indicating whether your request was approved or rejected.

Returned reservations are available in the resource pool.

Now you know how to reserve and manage virtual machines with Hyper-V. You can reserve machines, alter hardware configurations, and extend, or return the machines that you reserved.

Chapter 4: Manage the Lifecycle of VMware ESX Virtual Machines

As a Service Consumer, your responsibilities require you to work with virtual machines. The self-service portal allows you to reserve VMware ESX virtual machines and manage their lifecycles. Use the self-service portal to perform the following tasks:

- Reserve a virtual machine for a specified period on one or more virtual machines.

- Manage your reserved virtual machines.

  - Change, extend, or return the virtual machine reservation.

  - Create, restore, or delete a virtual machine snapshot.

Reservations and management requests are subject to approval by your Service Provider or administrator. You receive emails with information about how to access your virtual machines and the status of your requests.

The following diagram illustrates how to reserve and manage VMware ESX Virtual Machines.

Reserve and Manage VMware ESX Virtual Machines
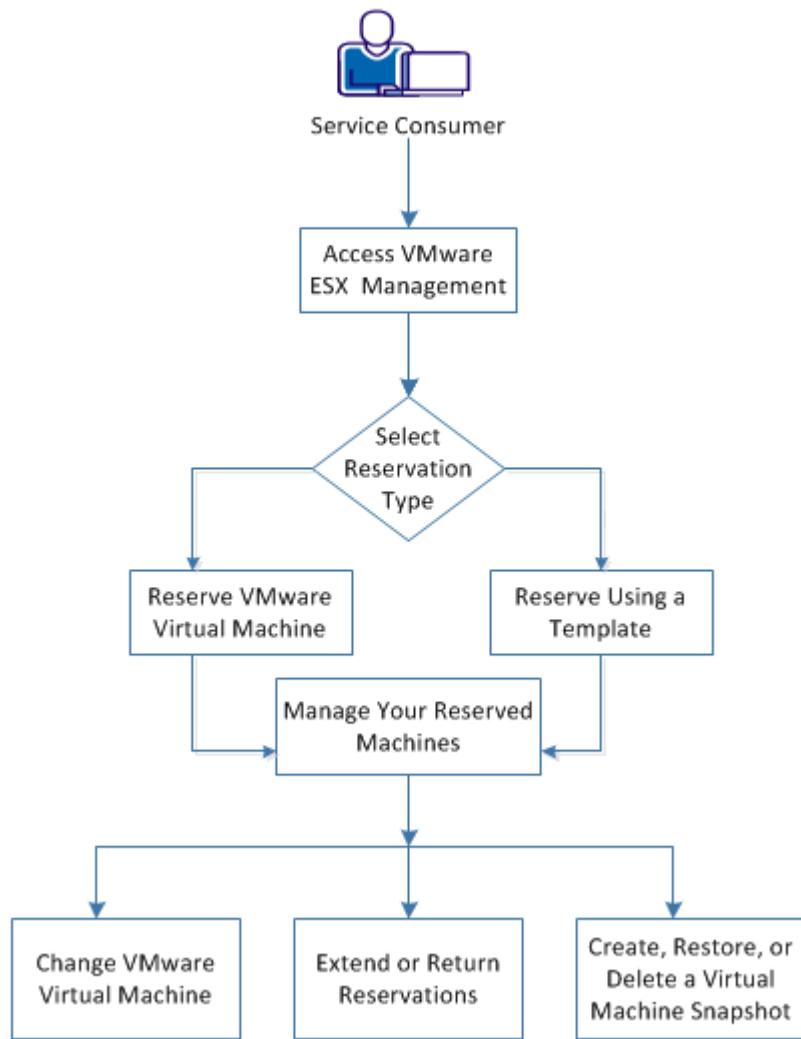
Perform the following tasks to reserve and manage a virtual machine:

1. Access VMware ESX Management (see page 23)

2. Select Reservation Type (see page 23)

    ■ Reserve VMware Virtual Machine (see page 24)

    ■ Reserve Using a Template (see page 24)

3. Manage Your Reserved Machines (see page 18)

    ■ Extend or Return Reservations (see page 26)

■   [Create, Restore, or Delete a Virtual Machine Snapshot](see page 27) (see page 27)

Access VMware ESX Management

The self-service portal lets you reserve and manage virtual machines. The portal centralizes, expedites, and automates virtual-machine requests. The portal is accessible from CA Service Catalog with the URL and credentials that your Service Provider provides.

Follow these steps:

1.   Log in to CA Service Catalog.

2.   Click Requests.

The available services list opens.

3.   Click Server Automation Services, VMware ESX Management.

The VMware ESX Management page opens. You can use the page to request VMware ESX machines and manage their lifecycles.

Select Reservation Type

You can reserve a virtual machine (or machines) in the following ways:

■   [Reserve VMware Virtual Machine](see page 24) (see page 24)

■   [Reserve Using a Template](see page 24) (see page 24)

You can reserve virtual machines according to your project or business requirements. Configuration options include:

■   Operating system

■   Installed applications

■   Quantity of CPUs

■   Amount of memory

You can reserve the appropriate resource allocation for a specified period on one or more virtual machines. Ensure that you:

■   Provide a unique reservation name as the system does not support duplicate names.

■   Modify the default value in the Primary Disk (GB) to extend the primary disk space. The new value that you add must be greater than the default value. Contact your Service Provider if you have any issues modifying the value.

Note: The Administrator Password field is visible only if you are requesting Windows virtual machines. For the Linux virtual machines request, this field is hidden. Contact your Service Provider for the root password after the virtual machine is provisioned.

Reserve VMware Virtual Machine

Perform the following procedure for requesting uncommon configurations or for reserving a single machine.

Follow these steps:

1. Access VMware ESX Management.

2. Click Reserve VMware Virtual Machine.

    A web form opens with fields for defining the request.

3. Complete the required form fields.

    Additional form fields populate.

4. Modify the populated fields as required.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

A confirmation message displays. Your request is processed. An Approving Manager reviews your reservation. You receive an email indicating whether your request was approved or declined. If approved, the email includes information about how to access your resources.

Reserve Using a Template

You can create a virtual machine (or machines) based on a reservation template with predefined resources. A reservation template provides the flexibility to select and deploy virtual machines automatically. You can add additional software packages to the base operating system after it is deployed.

Follow these steps:

1. Access VMware ESX Management.

2. Click Reserve Using a Template.

    A web form opens with fields for defining the request.

3. Complete the required form fields.

    Additional form fields populate.

4. Modify the populated fields as required.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

A confirmation message displays. Your request is processed. An Approving Manager reviews your reservation. You receive an email indicating whether your request was approved or declined. If approved, the email includes information about how to access your resources.

Manage Your Reserved Machines

After successful reservation of virtual machines, you can manage their lifecycles from the self-service portal. You can:

■   Change hardware configurations. (see page 25) You can request to increase or decrease the quantity of CPUs or amounts of memory.

■   Extend or return reservations (see page 26). If you require a machine longer than you originally requested, you can request to extend your reservation. If you no longer require a machine, you can return it back to the resource pool.

Create and manage snapshots. Snapshots are ideal for capturing complex configurations and rapidly returning machines to a previous state.

Change VMware Virtual Machine

Your virtual machine requirements can change after your machine is available. You can increase or decrease the quantity of CPUs and amount of memory on the virtual machines you reserved. Your Service Provider sets the available configuration options. Additionally, configuration change requests are subject to approval by your service provider or administrator.

Follow these steps:

1. Access VMware ESX Management.

2. Click Change VMware Virtual Machine.

    A web form opens.

3. Complete the required form fields.

    Additional form fields populate.

4. Modify the populated fields as required.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

A confirmation message displays. Your request is processed. You receive an email indicating whether your request was approved or rejected.

Extend or Return Reservations

As your project and business requirements change, you can modify the durations of your virtual machine reservations.

Note: Your Approving Manager determines the latest date to which you can extend a reservation. You cannot edit the value.

You can return an entire reservation, which lets you restore the unneeded allocated capacity and performance to the resource pool. Before you return a reservation, consider creating a snapshot of your virtual environment in case you require it again later.

You cannot cancel a reservation that is approved and in the Pending Fulfillment status. Wait until the virtual machine is provisioned, and then cancel the reservation.

Follow these steps:

1. Access VMware ESX Management.

2. Click one of the following options:

   ■   Extend VMware Reservation.

   ■   Return VMware Reservation.

   A web form opens.

3. Complete the required form fields.

   Additional form fields populate.

4. Modify the populated fields as required.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

A confirmation message displays. Your request is processed. You receive an email indicating whether your request was approved or rejected.

Create, Restore, or Delete a Virtual Machine Snapshot

Snapshots are ideal for rapid, time-saving back-ups and restorations. You typically use snapshots to:

- Duplicate an original configuration.

- Capture a complex configuration.

- Capture a configuration before your reservation date expires.

- Back up data.

You can create, delete, and restore snapshots from the self-service portal. When working with snapshots, note the following important information:

- New snapshots are subject to approval by a Service Provider or Administrator.

- You can only work with snapshots you created or to which you have access.

- Create a snapshot to capture a complex setup or to save data.

- Snapshots are valid for the lifecycle of the machine you create them for. You cannot create a snapshot of one machine and then deploy it to another machine.

- By default, you can create three snapshots per machine; the fourth snapshot overwrites the first snapshot. However, your Service Provider or Administrator can adjust the maximum number of snapshots you can create.

- Before you restore a snapshot, verify that the restored snapshot is accurate.

- If a snapshot becomes obsolete, delete the snapshot to avoid restoring an incorrect configuration.

- You cannot cancel a snapshot reservation that is approved and in the Pending Fulfillment status. Wait until the snapshot is created and then delete the snapshot.

Follow these steps:

1. Access VMware ESX Management.

2. Click Snapshots.

3. Click one of the following options:

   - Create Snapshot

   - Restore Snapshot

   - Delete Snapshot

   A web form opens.

4. Complete the required form fields.

   Additional form fields populate.

5. Modify the optional form fields as required.

6. Click Add to Cart and Check Out.

7. Review your request details, and click Save and Submit Cart.

A confirmation message displays. Your request is processed. For new snapshots, you receive an email indicating if your request was approved or rejected along with important information about working with your snapshot too.

Now you know how to reserve and manage VMware ESX virtual machines. You can reserve machines, alter hardware configurations, extend, or return the machines that you reserved, and create and manage snapshots.

Chapter 5: User and Access Management

As a Service Consumer, your responsibilities require you to manage the services offered by CA Automation Suite for Clouds. The self-service portal allows you to use and manage the services. Use the self-service portal to request access to service groups.

Request Access to Service Groups

Service groups determine the services that users in that service group can access. You can request access to add a user to one or more service groups.

Follow these steps:

1. Log in to CA Service Catalog.

2. Click Foundation Management Services, User and Access Management.

3. Click Request Access to Service Group.

   A web form opens with your ID and the groups to which you currently belong.

4. Add or remove yourself from service groups using the arrows.

5. Click Add to Cart and Check Out.

6. Review your request details, and click Save and Submit Cart.

   A confirmation message appears indicating that your request was submitted successfully.

   Your Approving Manager reviews your service group access request and, if approved, adds you to the requested user-groups. The My Recent Requests pane updates showing your new and previous reservations.

Chapter 6: View and Run Reports

Reports can assist with request approvals by giving you a picture of resource usage and availability. You can also generate service accounting reports and querying data in a specified range. You can generate specific reports for stakeholders or verify compliance with Service Level Agreements.

The self-service portal allows you to generate and view reports. The portal is accessible from CA Service Catalog with the URL and credentials that your Service Provider provides.

Follow these steps:

1. Log in to CA Service Catalog.

2. Click Reports.

3. Click InfoView.

   The BusinessObjects InfoView page opens.

4. Click Document List and navigate to Public Folders, CA Reports, CA SLCM.

   The CA SLCM folder contains two folders:

   Admin Reports

   Provides reports of interest to Approving Managers and Service Providers.

   User Reports

   Provides reports of interest to service consumers, such as the User Requests report. This report provides details about requests that were opened, approved, or fulfilled within specific time periods.

   Note: Your access to folders and reports depends on your access privileges.

5. Double-click a report.

   The Prompt dialog opens.

6. Enter the specific parameters to generate the report.

7. Click Run Query.

   The report generates and opens.