



Using Self-Service Provisioning

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Self-Service Provisioning

You can provision virtual machines (VMs) or applications through self-service provisioning. To provision a VM or an application using self-service provisioning, you must first create a service request. This action initiates a VM-creation workflow that includes the following:

- Budget validation
- Dynamic resource allocation
- Approval
- Provisioning
- Lifecycle setup
- Notification about the status of service requests

Service Requests

You can use the self-service provisioning feature to create a service request to provision virtual machines (VMs), services, or applications. The service request process produces a provisioning workflow for VM creation that includes the following actions:

- Budget validation
- Dynamic resource allocation
- Approvals
- Provisioning
- Lifecycle setup and notification



Note

If you change the number of CPU Cores or memory allocation while in the **Deployment Configuration** pane, the total cost is automatically updated and displayed.

To provision a VM or execute an orchestration workflow, you must first create a service request. If desired, you can require approval from one or two administrators or designated users before the VM is provisioned or the workflow executed. VMs can be immediately approved or scheduled to be approved within a maximum of 90 days from the original request.

Creating a Service Request with Catalog Type—Standard

- Step 1** On the menu bar, choose **Organizations > Service Requests**.
- Step 2** Choose the **Service Request** tab.
- Step 3** Click **Create Request**.
- Step 4** In the **Create Request** dialog box, choose **Standard**.
- Step 5** Click **Submit**.
- Step 6** In the **Create Service Request** dialog box, complete the following fields:

Name	Description
Catalog Selection Request Pane	
VM Ownership	
Customer Organizations radio button	Select this radio button to choose the customer organizations for which a VM is provisioned.

Name	Description
Customer Organizations field	<p>Click Select to choose the customer organizations for which you want to provision the VM.</p> <p>Customer organizations that have valid vDCs are displayed.</p> <p>Note This field is visible only when you select the Customer Organizations radio button.</p> <p>If you chose Create Service Request from the Catalog page, then the group list that is displayed is dependent on the user groups you select in the left pane</p>
User radio button	Select this radio button to choose the users to whom you want a VM is provisioned.
User field	<p>Click Select to choose the users to whom you want to provision the VM. This list is populated with users from groups which allow resource assignment to users.</p> <p>Note Currently, only VMs that are in a VMware cloud can be assigned to a specific end user.</p> <p>If you chose Create Service Request from the Catalog page, then the user list that is displayed is dependent on the user groups you select in the left pane.</p>
VM Access Sharing	
Users with Access Privilege field	<p>Click Select to choose users who can only access VM information.</p> <p>The selected users can only access the VM. They cannot perform any administrative tasks.</p>
Users with Manage Privilege field	<p>Click Select to choose users who can only manage the VM.</p> <p>The selected users can perform administrative tasks on the VM.</p>
Catalog Type drop-down list	<p>Displays the catalog type. It can be one of the following:</p> <ul style="list-style-type: none"> • Standard • Advanced • Service Container • VDI <p>Note Advanced is used for Orchestration Workflow.</p>

Name	Description
Select Catalog drop-down list	Choose the catalog that is used for VM provisioning. If you chose Create Service Request from the Catalog page, then you cannot select a catalog.
Perform deployment assessment check box	Check this check box to perform an assessment of the budget allocation, resource limits and resource availability prior to submitting a service request. After you check this check box, the summary of the assessment is displayed in the Deployment Assessment pane. Important This option is visible only for VMware catalogs, and for catalogs that are not ISO-based.

Step 7 Click **Next**.

Step 8 In the **Provisioning Configuration** pane, complete the following fields:

Name	Description
Select vDC drop-down list	Choose a vDC for the service request.
VM Name field	Specify a name for the VM. If you do not specify a name, the system will automatically generate a VM name.
Guest OS field	Click Select to choose a Guest OS for the service request.
Number of vCPUs drop-down list	Choose the number of vCPUs from the drop-down list. This field is populated and editable only if you checked the Allow Resizing of VM check box while creating the VMware computing policy.
Memory drop-down list	Choose the memory capacity from the drop-down list. This field is populated and editable only if you checked the Allow Resizing of VM check box while creating the VMware computing policy.
Category field	Click Select to choose an application category that is different from the one specified while creating the catalog.

Step 9 Click **Next**.

Step 10 In the **Deployment Configuration** pane, complete the following fields:

Name	Description
Select VDC drop-down list	The VDC on which the VM is provisioned. VDCs are defined by the administrator.
VM Name or VM Prefix field	The VM name or prefix.
Comment field	Any comments relating to the deployment configuration.
Provision drop-down list	Choose either Now or Later . Choose Now to set provisioning for any time within the next 90 days. When you choose Later , a calendar for the Day, drop-down lists for the Hour and Minute, and radio buttons for AM or PM appear.
Days calendar	The number of days after which the VM is terminated. Note This option appears when the Power OFF the VM After check box is checked.
Hours drop-down list	Choose the number of hours after which the VM is terminated. Note This option appears when the Power OFF the VM After check box is checked.
Minutes drop-down list	Choose the number of minutes after which the VM is terminated. Note This option appears when the Power OFF the VM After check box is checked.
Lease Time check box	Check this check box to indicate that a lease time is configured for the VM.
Default Cost Computation Period Settings	
Charge Duration drop-down list	Choose a duration for which the cost is calculated. By default, this duration is set to Monthly .
Month field	Specify the number of months to be included in the cost computation Note This field is displayed only when you select Monthly in the Charge Duration drop-down list.
Day field	Specify the number of days to be included in the cost computation Note This field is displayed only when you select Daily in the Charge Duration drop-down list.

Name	Description
Hours field	Specify the number of hours to be included in the cost computation. Note This field is displayed only when you select Hourly in the Charge Duration drop-down list.

Step 11 Click **Next**.

Step 12 In the **Custom Specification** pane, complete the following fields:

Name	Description
CPU Cores drop-down list	Choose the CPU cores for the VM being provisioned. Note This list opens if the resizing option is chosen in the Computing Policy dialog box.
Memory drop-down list	Choose the amount of memory for the VM being provisioned. Note This list opens if the resizing option is chosen in the Computing Policy dialog box.
Approximate SR Cost Estimate field	Displays an approximate SR cost based on the values you provided in the Default Cost Computation Period Settings fields.
Storage Tier drop-down list	Choose an option to customize storage entries for the VM being provisioned. Note This custom list opens if the Virtual Storage Catalog was enabled when the chosen catalog was created. See more information about the creation of a virtual storage catalog in Policies . See more information about enabling this option during catalog creation in About Managing Catalogs .
Disk Datastores table	Choose the preferred hard disk size for VM provisioning. The list of available datastores depends upon the scope conditions specified in the storage policy. You can enable or disable this option in the storage policy. Choose a disk from the table, and click the pencil icon to select a datastore. Note You can edit the size of the disk if you have enabled the Allow Resizing of Disk check box in the storage policy.

- Step 13** To choose a datastore for a disk, choose a disk from the list and click the Pencil icon.
- Step 14** Click **Select** to view available datastores.
- Step 15** Choose a datastore from the list and click **Select**.
- Step 16** Click **Submit**.
- Step 17** (Optional) For templates with multiple disks, you must choose a datastore for each disk.
- Step 18** In the **Custom Specification** pane, click **Select** to view available VM Networks.
- Note** This option is available only if the **Allow end user to select optional NICs** check box or the **Allow end user to choose portgroups** check box is checked in the network policy associated with the VDC selected for this VM provisioning service request. For more information, see [Adding a Network Policy](#).
- Step 19** Choose a VM Network from the list and click **Select**.
- Step 20** Click **Next**.
- Step 21** Complete the details in the **Custom Workflow** pane.
- Note** Custom workflow inputs apply if the catalog chosen for VM provisioning has Post Provisioning Custom Actions enabled. In this procedure, the post-provisioning workflow allows users to specify custom inputs.
- Step 22** Click **Next**.
- Note** The list of available datastores depends upon the scope conditions specified in the storage policy. You can choose only one datastore for each disk category (System, Data, Database, Swap, and Log).
- Step 23** If you checked the **Perform deployment assessment** check box, then review the report of the assessment displayed in the **Deployment Assessment** pane.
- If this assessment report identifies errors, then you must return to the previous panes and rectify the errors before submitting the request. If the assessment report shows no errors, then click **Next**.
- Step 24** Review the summary for the service request.
- Step 25** Click **Submit**.
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Creating a Service Request with Catalog Type—Advanced

By choosing the advanced catalog type during the creation of a service request, you can execute orchestration workflows. The steps for creating an advanced catalog are much the same as those for creating a standard catalog.

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| Step 1 | On the menu bar, choose Organizations > Service Requests . |
| Step 2 | Choose the Service Requests tab. |
| Step 3 | Click Create Request . |
| Step 4 | In the Catalog Selection section of the Create Service Request dialog box, choose the Group , Catalog Type (Advanced), and the Catalog (workflow). |
| Step 5 | Click Next . |
| Step 6 | In the Custom Workflow section of the Create Service Request dialog box, provide the custom workflow input values. |
| Step 7 | Click Next . |
| Step 8 | Review the summary of the service request. |
| Step 9 | Click Submit . |
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Service Request Workflow and Details

After you create a service request, you can check its status and workflow, cancel the request, resubmit the request, and so on. These actions are controlled by the toolbar buttons at the top of the service request lists.

Service Request Workflow

The **Workflow Status** box displays details about the service request and the workflow steps. A typical service request workflow to provision a VM includes the following steps:

- 1 Initiation—Service request is initiated by the user.
- 2 Resource Allocation—Required resources, such as virtual compute, are allocated to the VM.
- 3 Approval—VM provisioning is approved, if required. During this step, an email is sent to the approvers defined in the catalog chosen for VM provisioning.
- 4 Provision—VM is created and provisioned.
- 5 Set Up Lifecycle Schedule—Lifecycle scheduling is configured with the setup, scheduled times, and termination times.
- 6 Notify—User is notified by email that the VM has been created and provisioned.

Optional service request workflow steps include Budget Watch and Check Resource Limits:

- Budget Watch—An administrator has to enable budgeting for a group. This step determines if a sufficient budget is available for provisioning a new VM in that group.

- **Check Resource Limits**—Resource limits for a group must be enabled by an administrator. This step determines if sufficient resources are available for provisioning a new VM in that group.

Any user who has been assigned the **Read-Group Service Request** permission can view the progress of a service request.

Service Request Details

Service Request details include items under Overview, Ownership, Catalog Information, and the Current Status of the service request, as follows:

Name	Description
Overview	
Request ID	The service request ID number.
Request Type	The type of request (in this case, creating a VM).
VDC	The VDC where the VM is provisioned.
Image	The image from which the VM is provisioned.
Request Time	The time of the service request creation.
Request Status	The status of the service request as Complete, Canceled, Failed, and so on.
Comments	Any comments.
Ownership	
Group	The group to which the service request initiating user belongs.
Initiating User	The user who has initiated the service request.
Duration Hours	The amount of time that the VM is active. If this time is defined, the VM is deleted after the specified time.
Scheduled Time	The time at which the VM is provisioned. If defined, the VM is provisioned at 6 a.m. on the scheduled date. If not defined, the VM is provisioned when the workflow steps for the service request are complete.
Catalog Information	
VDC Owner Email	The email ID provided by the administrator when creating a VDC.

Name	Description
Approving Users	The user (if defined) who must approve the service request for VM provisioning.
Catalog Name	The catalog item name from which the VM is provisioned.
Catalog Description	The catalog item description.
Service Request Cost	The cost (projected) of provisioning the VM. This cost is determined based on the Cost Model that is defined for the catalog item.

You can view the status of each workflow step. Details such as warning or error messages and the time of the request are also displayed. The workflow steps are color-coded to indicate their status:

Color Code	Description
Gray	The step is incomplete.
Green	The step completed successfully.
Red	The step failed. The reason for failure is also described.
Blue	More input is required for the step to complete. For example, an approver was defined for a service request, and until the request is approved, this step is incomplete.

**Note**

Approvers may look under the **Approvals** tab to see their assigned service requests.

Viewing the Workflow Status of a Service Request

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- Step 1** On the menu bar, choose **Organizations > Service Requests**.
- Step 2** From the left panel, choose a user group.
The default is **All User Groups**, which lists all service requests.

- Step 3** Choose the **Service Request** tab.
 - Step 4** Choose a service request.
 - Step 5** Click **View Details** to see the details and status of the service request. By default, the **Workflow Status** tab appears in the dialog box.
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Viewing Log Details for a Service Request

- Step 1** On the menu bar, choose **Organizations > Service Requests**.
 - Step 2** From the left panel, choose a user group.
The default is **All User Groups**, which lists all service requests.
 - Step 3** Choose the **Service Request** tab.
 - Step 4** Choose a service request.
 - Step 5** Click **View Details**, and choose the **Log** tab.
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About Scheduling a Service Request

You can schedule VM provisioning for a later date using Deferred Provisioning. The default provisioning is at 8.30 a.m. on the date of scheduling. Once a new date is set, the VM provisioning status in the workflow displays the change.

Scheduling Service Requests

- Step 1** On the menu bar, choose **Organizations > Service Requests**.
 - Step 2** Choose the **Service Request** tab.
 - Step 3** Click **Create Request**.
 - Step 4** Choose the group, catalog type, and catalog. See [Creating a Service Request with Catalog Type—Standard](#), on page 2.
 - Step 5** Click **Next**.
 - Step 6** Choose the **Later** option for the **Provision** field, and the provisioning date in the **Service Request** dialog box.
 - Step 7** Click **Next** until the **Summary** window appears.
 - Step 8** Click **Submit**.
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About Resubmitting a Service Request

You can resubmit a failed service request. A service request could fail for the following reasons:

- Budget limit (if defined by administrator) is exceeded for the group under which the VM is being provisioned.
- Resource limits (if defined by administrator) are exceeded for the group under which the VM is being provisioned.
- Provisioning could fail if a service request lacks relevant information.

When a service request is resubmitted, the process starts again from the workflow step that failed in the earlier submissions. For example, if a service request fails in the Resource Allocation workflow (Step 2), when this service request is resubmitted, the process is re-initiated from that step.

Resubmitting a Service Request

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| Step 1 | On the menu bar, choose Organizations > Service Requests . |
| Step 2 | From the left panel, choose a user group.
The default is All User Groups , which lists all service requests. |
| Step 3 | Choose the Service Request tab. |
| Step 4 | Choose the service request to resubmit. |
| Step 5 | Click Resubmit Request . |
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Other Service Request Functions

Canceling a Service Request

As an administrator in the system, you can cancel any service request that has been created. If you are an MSP admin, or a group admin, you can cancel service requests that you have created, and those created by users in member groups that you manage.

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| Step 1 | On the menu bar, choose Organizations > Service Requests . |
| Step 2 | From the left panel, choose a user group.
The default is All User Groups , which lists all service requests. |

- Step 3** Choose the **Service Request** tab.
 - Step 4** Choose the service request entry to cancel.
 - Step 5** Click **Cancel Request**.
 - Step 6** Click **Submit** to cancel the service request.
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Rolling Back a Service Request

You can roll back a service request when a service request is created using orchestration workflow or fenced container deployment.

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- Step 1** On the menu bar, choose **Organizations > Service Requests**.
 - Step 2** From the left panel, choose a user group.
The default is **All User Groups**, which lists all service requests.
 - Step 3** Choose the **Service Request** tab.
 - Step 4** Choose the service request to roll back.
 - Step 5** Right-click and select **Rollback Request**.
 - Step 6** In the **Rollback Service Request** dialog box, select the tasks in the service requests that must be rolled back.
By default, check boxes of all tasks in the service request are checked.
 - Step 7** (Optional) Check the **Abort rollback, if any rollback task fails** check box.
 - Step 8** Click **Submit**.
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Archiving a Service Request

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- Step 1** On the menu bar, choose **Organizations > Service Requests**.
 - Step 2** From the left panel, choose a user group.
The default is **All User Groups**, which lists all service requests.
 - Step 3** Choose the **Service Request** tab.
 - Step 4** Choose the service request to archive.
 - Step 5** Click **Archive**.
 - Step 6** In the **Archive Request** dialog box, click **Archive**.
Choose the **Archived Service Requests** tab to view all the archived requests.
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What to Do Next

If you need to use this archived service request at a later time, you can re-instate it. For more information, see [Reinstating an Archived Service Request](#), on page 16.

Deleting Service Requests

You can delete archived service requests from Cisco UCS Director. The deleted service requests are removed permanently from Cisco UCS Director.

You can enter archived service requests to delete in one of two ways:

- By selecting the service requests on the **Archived Service Requests** page and clicking the **Delete Requests** action.
- By selecting the **Purge Requests** action and typing the IDs of the archived service requests.

Both methods result in the permanent removal of the specified service requests. The only difference is the method of data entry.

You can delete only archived service requests. For information about archiving service requests, see the current release of the [Cisco UCS Director Administration Guide](#). Because active service requests cannot be archived, you cannot delete service requests that are in progress, or that contain child service requests that are in progress.

You also cannot delete a service request that has a rollback that is in progress or that has failed. For example, say that you submit a rollback for service request (SR) 100 that generates a rollback service request SR 101. You cannot delete SR 100 while SR 101 is in progress. Furthermore, you cannot delete SR 100 if SR 101 failed.

To delete service requests, do the following:

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- Step 1** Navigate to **Organizations > Service Requests**.
- Step 2** Click the **Archived Service Requests** tab.
- Step 3** You can either enter service request IDs using the keyboard or choose service requests from the **Archived Service Requests** report.
To enter service request IDs, skip to the next step. To choose service requests instead, do the following:
- Choose all the service requests that you want to delete.
Note Select multiple items as you would in any other application on your system. For example, in Windows, hold down the **Ctrl** key to choose more items or **Shift** to choose a range of items.
When you choose one or more service requests, the **Delete Request** action appears.
 - Click the **Delete Request** action.
 - In the **Delete Request** dialog, click **Delete**.
- Step 4** To enter service requests, do the following:
- Click **Purge Requests**.
 - In the **Delete Request** dialog, type the IDs of the service requests that you want to delete in the **SR IDs** text field. Use hyphens to indicate ranges of IDs and commas to separate ranges or individual IDs; for example: 101-111, 113, 116-118.
 - Click **Delete**.
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Viewing Service Requests for a Particular Group

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- Step 1** On the menu bar, choose **Organizations > Service Requests**.
- Step 2** From the left panel, choose a user group.
The default is **All User Groups**, which lists all service requests.
- Step 3** Choose the **Service Request** tab.
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Searching the Records of Service Requests for a Group

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- Step 1** On the menu bar, choose **Organizations > Service Requests**.
- Step 2** Choose the **Service Request** tab.
- Step 3** On the toolbar, click **Search and Replace**.
- Step 4** In the **Search and Replace** dialog box, enter the search terms in the search fields. You must enter the following information:
- Asset Identity
 - Asset Type
 - New Asset Identity
 - Selected SRs
- Step 5** Click **Submit**.
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Exporting a Report of Service Requests for a Group

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- Step 1** On the menu bar, choose **Organizations > Service Requests**.
- Step 2** From the left panel, choose a group name.
- Step 3** Choose the **Service Request** tab.
- Step 4** On the right of the toolbar, click the **Export Report** icon.
- Step 5** In the **Export Report** dialog box, choose the report format.

The report format can be PDF, CSV, or XLS.

- Step 6** Click **Generate Report**.
After the report is generated, the **Download** option appears.
- Step 7** Click **Download** to open the report and to save it on your system.
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Reinstating an Archived Service Request

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- Step 1** On the menu bar, choose **Organizations > Service Requests**.
- Step 2** Choose the **Archived Service Requests** tab.
- Step 3** Choose the service request that you want to reinstate.
- Step 4** Click **Unarchive**.
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Service Request Approval Process

Before the VM is provisioned, a service request must be approved by a specified approver or approvers named in the VDC. You have an option to define one or two approvers for a group.

- Once created, the service request workflow has a step requiring VM approval that displays the name of the approver.
- A service request notification email is sent to the approvers. Approvers may view all pending requests under the **Approvals** tab.
- Once approved is granted, VM provisioning is initiated.



Note

For more information about defining approvers, see [Virtual Data Centers](#).

Approving a Service Request

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- Step 1** On the menu bar, choose **Organizations > My Approvals**.
- Step 2** Choose the **My Approvals** tab.
- Step 3** Choose the service request entry to approve.
- Step 4** (Optional) To verify the details, click **View Details**.

You can view the Workflow and Input/Output information and click **Close**.

- Step 5** Click **Approve**.
- Step 6** Add comments in the **Service Request** dialog box if necessary.
- Step 7** Click **Approve**.
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Rejecting a Service Request

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- Step 1** On the menu bar, choose **Organizations > My Approvals**.
- Step 2** Choose the **My Approvals** tab.
- Step 3** Choose the service request entry to reject.
- Step 4** (Optional) Verify the details by clicking **View Details** and then click **Close**.
- Step 5** Click **Reject**.
- Step 6** Add comments in the **Service Request** dialog box if necessary.
- Step 7** Click **Reject**.
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Viewing Approval Information on Service Requests

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- Step 1** On the menu bar, choose **Organizations > My Approvals**.
- Step 2** Choose the **My Approvals** tab.
All approvals that are either already approved or pending approval are listed.
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Searching the Records of Service Request Approvals

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- Step 1** On the menu bar, choose **Organizations > My Approvals**.
- Step 2** Choose the **My Approvals** tab.
All approvals that are either already approved or pending approval are listed.
- Step 3** In the **Search** field, enter your search term.
The service requests that match the search criteria are displayed.
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Exporting a Report of Service Request Approvals

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- Step 1** On the menu bar, choose **Organizations > My Approvals**.
- Step 2** Choose the **My Approvals** tab.
- Step 3** From the list, choose a group name.
- Step 4** On the right of the toolbar, click the **Export Report** icon.
- Step 5** In the **Export Report** dialog box, choose the report format.
The report format can be PDF, CSV, or XLS.
- Step 6** Click **Generate Report**.
After the report is generated, the **Download** option appears.
- Step 7** Click **Download** to open the report and to save it on your system.
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Service Request Budgeting

Viewing the Current Month Budget Availability

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- Step 1** On the menu bar, choose **Organizations > Service Requests**.
- Step 2** From the left panel, choose either **All User Groups** or a specific user group.
- Step 3** Choose the **Current Month Budget Availability** tab.
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Viewing Budget Entries

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- Step 1** On the menu bar, choose **Organizations > Service Requests**.
- Step 2** From the left panel, choose a user group.
- Step 3** Choose the **Budget Entries** tab.
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Adding a Budget Entry

Step 1 On the menu bar, choose **Organizations > Summary**.

Step 2 From the left panel, choose a user group.

Step 3 Choose the Budget Entries tab.

Step 4 Click **Add (+)**.

Step 5 In the **Add Budget Entry** dialog box, complete the following fields:

Name	Description
Entry Name field	The name of the budget entry.
Budget Amount field	The amount of the budget per month.
Year drop-down list	Choose the year.
Month drop-down list	Choose the month.
Repeat Entries drop-down list	Choose the number of months for the same amount of budget to repeat.

Step 6 Click **Add**.

