# 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** screen, 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

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** On the **Service Requests** page, click **Service Requests**.

**Step 3** Click **Create Request**.

**Step 4** On the **Create Request** screen, choose **Standard** as the catalog type.

**Step 5** Click **Submit**.

**Step 6** On the **Create Service Request** screen, complete the following fields:

| Name | Description |
|---|---|
| **Catalog Selection Request Screen** | |
| **VM Ownership** | |
| **Customer Organization** radio button | Select this radio button to choose the customer organization for which a VM is provisioned. |

| Name | Description |
|---|---|
| **Customer Organizations** field | Click **Select** to choose the customer organizations for which you want to provision the VM.<br>Customer organizations that have valid vDCs are displayed.<br>**Note** This field is visible only when you select the **Customer Organizations** radio button.<br>If you chose **Create Service Request** from the **Catalog** screen, then the group list that is displayed is dependent on the user groups you select in the left pane |
| **User** radio button | Select this radio button to choose the users to whom you want a VM is provisioned. |
| **User** field | 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.<br>**Note** Currently, only VMs that are in a VMware cloud can be assigned to a specific end user.<br>If you chose **Create Service Request** from the **Catalog** screen, then the user list that is displayed is dependent on the user groups you select in the left pane. |
| **VM Access Sharing** | |
| **Users with Access Privilege** field | Click **Select** to choose users who can only access VM information.<br>The selected users can only access the VM. They cannot perform any administrative tasks. |
| **Users with Manage Privilege** field | Click **Select** to choose users who can only manage the VM.<br>The selected users can perform administrative tasks on the VM. |

| Name | Description |
|---|---|
| **Catalog Type** drop-down list | Displays the catalog type. It can be one of the following:<br>• **Standard**<br>• **Advanced**<br>• **Service Container**<br>• **VDI**<br>**Note** **Advanced** is used for Orchestration Workflow. |
| **Select Catalog** drop-down list | Choose the catalog that is used for VM provisioning.<br>If you chose **Create Service Request** from the **Catalog** screen, 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.<br>**Important** This option is visible only for VMware catalogs, and for catalogs that are not ISO-based. |

**Step 7** Click **Next**.

**Step 8** On the **Provisioning Configuration** screen, 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.<br>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.<br>This field is populated and editable only if you checked **Allow Resizing of VM** while creating the VMware computing policy. |

| Name | Description |
|---|---|
| **Memory** drop-down list | Choose the memory capacity from the drop-down list.<br>This field is populated and editable only if you checked **Allow Resizing of VM** 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** On the **Deployment Configuration** screen, complete the following fields:

| Name | Description |
|---|---|
| **Select VDC** drop-down list | The VDC on which the VM is provisioned.<br>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**.<br>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.<br>**Note** This option appears when **Power OFF the VM After** is checked. |
| **Hours** drop-down list | Choose the number of hours after which the VM is terminated.<br>**Note** This option appears when **Power OFF the VM After** is checked. |
| **Minutes** drop-down list | Choose the number of minutes after which the VM is terminated.<br>**Note** This option appears when **Power OFF the VM After** is checked. |
| **Lease Time** check box | Check to indicate that a lease time is configured for the VM. |

| Name | Description |
|---|---|
| **Default Cost Computation Period Settings**<br>**Important** If you checked the **Disable displaying cost details** check box while adding or modifying the VDC, then this information is not displayed. | |
| **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<br>**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<br>**Note** This field is displayed only when you select **Daily** in the **Charge Duration** drop-down list. |
| **Hours** field | Specify the number of hours to be included in the cost computation<br>**Note** This field is displayed only when you select **Hourly** in the **Charge Duration** drop-down list. |

**Step 11** Click **Next**.

**Step 12** On the **Custom Specification** screen, complete the following fields:

| Name | Description |
|---|---|
| **CPU Cores** drop-down list | Choose the CPU cores for the VM being provisioned.<br>**Note** This list opens if the resizing option is chosen on the **Computing Policy** screen. |

| Name | Description |
|---|---|
| **Cores Per Socket** drop-down list | Choose the cores per socket for the VM being provisioned. The number of cores per socket available is specified in the VM computing policy.<br><br>The values displayed are based on the VM computing policy and the CPU count selected. The values in the **Cores Per Socket** drop-down list are divisors of the CPU count. For example, if the CPU count is 4, and the allowed sockets per core specified in the VM computing policy are 1, 2, 3, and 4, the **Cores Per Socket** drop-down list displays 1, 2, and 4 as available options. |
| **Memory** drop-down list | Choose the amount of memory for the VM being provisioned.<br><br>**Note** This list opens if the resizing option is chosen on the **Computing Policy** sreen. |
| **Approximate SR Cost Estimate** field | Displays an approximate SR cost based on the values you provided in the **Default Cost Computation Period Settings** fields.<br><br>**Important** If you checked **Disable displaying cost details** while adding or modifying the VDC, then this information is not displayed. |
| **Storage Tier** drop-down list | Choose an option to customize storage entries for the VM being provisioned.<br><br>**Note** This custom list opens if the Virtual Storage Catalog was enabled when the chosen catalog was created.<br><br>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. |

| Name | Description |
|---|---|
| **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.<br>Choose a disk from the table, and click the pencil icon to select a datastore.<br>**Note** You can edit the size of the disk if you have enabled the **Allow Resizing of Disk** option 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** On the **Custom Specification** screen, click **Select** to view available VM Networks.

**Note** This option is available only if **Allow end user to select optional NICs** or **Allow end user to choose portgroups** are 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 on the **Custom Workflow** screen.

**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** Required: If you checked **Perform deployment assessment**, then review the report of the assessment displayed on the **Deployment Assessment** screen.

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**.

# 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.

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** On the **Service Requests** page, click **Service Requests**.

**Step 3** Click **Create Request**.

**Step 4** In the **Create Request** screen, choose **Advanced** as the catalog type.

**Step 5** Click **Submit**.

**Step 6** On the **Catalog Selection** screen, choose the **Group**, **Catalog Type** (Advanced), and the **Catalog** (workflow).

**Step 7** Click **Next**.

**Step 8** On the **Custom Workflow** screen, provide the custom workflow input values.

If you want to provision a VM using this service request, then you must select a standard catalog in this screen. If you select an advanced catalog, then VM provisioning will fail.

**Step 9** Click **Next**.

**Step 10** Review the summary of the service request.

All information that you entered in the previous screens is displayed in this summary screen.

**Note** While provisioning a VM with a service request using an advanced catalog, be sure to have included the following information while creating the service request:

- Include the following workflow tasks in the VM provisioning workflow:
  - VMware VM Provision Inputs
  - Resource Allocation Configuration
  - VM Provision Engine
- Include the following custom workflow inputs of respective input types:
  - vDC
  - Catalog or image
- The **Disable displaying cost details** check box is not checked.

If all of these conditions are met, the summary screen of the service request will display the approximate service request cost.

**Step 11** Click **Submit**.

# Creating a Service Request with Catalog Type—Bare Metal

### Before you begin

You should have created a bare metal catalog, and a provisioning policy.

### Procedure

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** On the **Service Requests** page, click **Service Requests**.

**Step 3** Click **Create Request**.

**Step 4** On the **Create Request** screen, choose **Bare Metal** as the catalog type.

**Step 5** Click **Submit**.

**Step 6** On the **Create Service Request** screen, complete the required fields, including the following:

| Name | Description |
|---|---|
| **Catalog Selection** pane | |
| **Select Group** drop-down list | Select a user group from the list of groups that already exist in the system. |
| **Catalog Type** drop-down list | You cannot edit this field. It displays Bare Metal. |
| **Select Catalog** drop-down list | Select a catalog from the drop-down list. It displays the list of bare metal catalogs you created. |
| **Perform Deployment Assessment** check box | Check to run a deployment assessment with the specified information. |

**Step 7** Click **Next**.

**Step 8** On the **Bare Metal Deployment Configuration** screen, complete the required fields, including the following:

The following table lists the fields displayed for Cisco UCS Manager accounts.

| Name | Description |
|---|---|
| **Server** drop-down list | While creating the bare metal provisioning policy, if you checked **Allow Users to Select Servers**, then you can use this drop-down list to choose the servers on which you want the server provisioned.<br>After you select a server, resource information such as CPU, memory and Storage details displayed. This information is displayed only if you checked **Show Server Resources to User** while creating the bare metal server provisioning policy.<br>**Note** If you did not check **Allow Users to Select Servers**, then this field is not editable. It is populated with the server name that matches the criteria specified in the provisioning policy. |
| **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.<br>**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.<br>**Note** This field is displayed only when you select **Daily** in the **Charge Duration** drop-down list. |
| **Hours** field | Specify the number of hours to be included in the cost computation.<br>**Note** This field is displayed only when you select **Hourly** in the **Charge Duration** drop-down list. |
| **Approximate SR Cost Estimate** field | Click the **Compute SR Cost Estimate** option to view the cost estimate. This cost estimate calculated based on the information that you have entered on this screen. |

**Attention** If a cost model is not associated with the provisioning policy, then all cost-related fields such as **Charge Duration**, and the **Approximate SR Cost Estimate** fields are not displayed. If a cost model is associated with the policy, then these fields are displayed.

If you are creating a service request for Cisco UCS Central accounts, complete the required fields, including the following:

| Name | Description |
|---|---|
| **Domain Group** drop-down list | You can choose a domain group. The available groups are determined by the domain groups selected in the bare metal server provisioning policy. |
| **Domain Name** drop-down list | This list displays the domain names that were selected in the bare metal server provisioning policy. |
| **Server** drop-down list | This list displays the servers that are available in the chosen domain name. |
| **CPU** field | Displays the CPU details. |
| **Memory** field | Displays memory information. |
| **Storage** field | Displays storage-related information.<br>This field is not editable. |
| **OS image** drop-down list | Choose an OS image from the drop-down list.<br>This field is populated based on the domain mapping parameters specified in the bare metal server provisioning policy. By default, Target BMA and OS Image selected in the policy are used for provisioning. However, if you have specified any domain mapping parameters in the policy, then the OS image selected in the mapped domains takes preference over the default images. |

**Step 9** On the **Custom Workflow** screen, specify a Service Profile name.

**Step 10** Click **Next**.

**Step 11** Review the deployment assessment summary for the service request.

This information is displayed only if you checked **Perform deployment assessment** on the **Catalog Selection** screen.

**Step 12** Review the summary for the service request.

**Step 13** Click **Submit**.

### What to do next

After you click **Submit**, the workflow is triggered, and the bare metal servers are provisioned. After the workflow is completed, the bare metal server is displayed in the selected group. In addition, the chargeback cycles are initiated for the servers.

If you want to change the cost model for the server, then you must edit the cost model selection in the bare metal provisioning policy.

# 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.

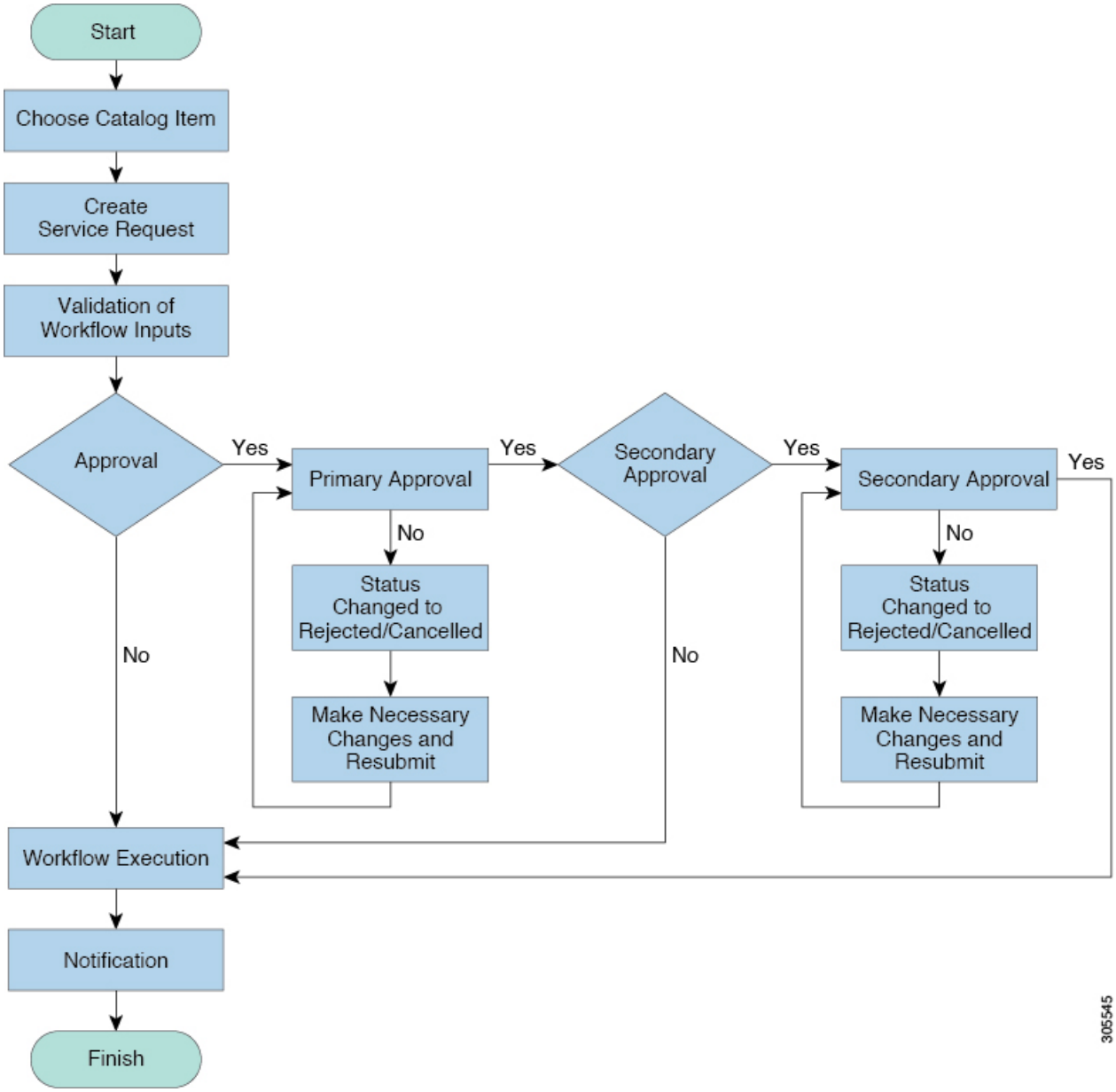
## Service Request Workflow

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. If you selected user groups for approval, then an email is sent to all users in the selected groups.
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.

Following is a graphical representation of the workflow.

*Figure 1: Catalog Service Request Workflow*




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. |
| 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

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** Choose a user group.

The default is **All User Groups**, which lists all service requests.

**Step 3** On the **Service Requests** page, click **Service Requests**.

**Step 4** Click the row with the service request for which you want to view the workflow status.

**Step 5** Click **View Details** and click **Workflow Status** to see the details and status of the service request.

# Viewing Log Details for a Service Request

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** Choose a user group.

The default is **All User Groups**, which lists all service requests.

**Step 3** On the **Service Requests** page, click **Service Requests**.

**Step 4** Click the row with the service request for which you want to view the service request log.

**Step 5** Click **View Details**, and click **Log**.

# 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

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** On the **Service Requests** page, click **Service Requests**.

**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 on the **Service Request** screen.

**Step 7** Click **Next** until the **Summary** screen appears.

**Step 8** Click **Submit**.

# 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

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** Choose a user group.

The default is **All User Groups**, which lists all service requests.

**Step 3** On the **Service Requests** page, click **Service Requests**.

**Step 4** Click the row with the service request to that you want to resubmit.

**Step 5** Click **Resubmit Request**.

# 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.

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** Choose a user group.

The default is **All User Groups**, which lists all service requests.

**Step 3** On the **Service Requests** page, click **Service Requests**.

**Step 4** Click the row with the service request that you want to cancel.

**Step 5** Click **Cancel Request**.

**Step 6** Click **Submit** to cancel the service request.

## 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.

### Procedure

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** Choose a user group.

The default is **All User Groups**, which lists all service requests.

**Step 3** On the **Service Requests** page, click **Service Requests**.

**Step 4** Click the row with the service request that you want to roll back.

**Step 5** From the **More Actions** drop-down list, choose **Rollback Request**.

**Step 6** On the **Rollback Service Request** screen, select the tasks in the service requests that must be rolled back.

By default, all of the tasks in the service request are checked.

**Step 7** (Optional) Check **Abort rollback, if any rollback task fails**.

**Step 8** Click **Submit**.

# Archiving a Service Request

### Procedure

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** Choose a user group.

The default is **All User Groups**, which lists all service requests.

**Step 3** On the **Service Requests** page, click **Service Requests**.

**Step 4** Click the row with the service request that you want to archive.

**Step 5** Click **Archive**.

**Step 6** On the **Archive Request** screen, click **Archive**.

On the **Service Requests** page, you can click **Archived Service Requests** to view all the archived requests.

### 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 23.

# Bulk Archiving Service Requests

### Procedure

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** Choose a user group.

The default is **All User Groups**, which lists all service requests.

**Step 3** On the **Service Requests** page, click **Service Requests**.

**Step 4** Click **Bulk Archive**.

**Important** Service requests with locked and in-progress state cannot be archived.

**Step 5** On the **Bulk Archive** page, select the required option from the **Bulk Archive** drop-down list. The options include:

- Service Request Range: Specify the service request IDs separated by a comma, in one of the following:
  - Individual SR IDs, for example, 8, 9, 15, 77
  - Range of SR IDs, for example, 44-68, 108-332
  - Combination of a range and individual SR IDs, for example, 23-44, 55-90, 66, 8
- Date: All the services requests which have been triggered before the selected date are archived.
- Status: Service requests are archived based on the status selected. You can select any of the following status:
  - Completed Service Requests
  - Failed Service Requests
  - Canceled Service Requests
- Status with Range: Service requests are archived based on the status selected and the service request IDs specified.

  You can select any of the following status:
  - Completed Service Requests
  - Failed Service Requests
  - Canceled Service Requests

  You can specify the service request IDs separated by a comma, in one of the following:
  - Individual SR IDs, for example, 8, 9, 15, 77
  - Range of SR IDs, for example, 44-68, 108-332
  - Combination of a range and individual SR IDs, for example, 23-44, 55-90, 66, 8
- Date with Range: Service requests are archived based on the date selected and the service request IDs specified. All the services requests which have been triggered before the selected date are archived.

  You can specify the service request IDs separated by a comma, in one of the following:
  - Individual SR IDs, for example, 8, 9, 15, 77
  - Range of SR IDs, for example, 44-68, 108-332
  - Combination of a range and individual SR IDs, for example, 23-44, 55-90, 66, 8

Based on the option selected, the input field is displayed.

**Step 6** Specify the field.

A message screen, that shows the total number of service requests to be archived, appears.

**Step 7** Click **Archive**.

A confirmation message that the service requests archived successfully appears on top of the screen.

### What to do next

You can view archived service requests in the **Archived Service Request** page. You can use the **Unarchive** option if you want to reinstate a service request back to the **Service Request** screen.

# 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** screen and clicking **Delete Requests**.
- By clicking **Purge Requests** and entering 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 fails.

To delete service requests, do the following:

### Procedure

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** On the **Service Requests** page, click **Archived Service Requests**.

**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:

a) 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** icon appears.

b) Click **Delete Request**.
c) On the **Delete Request** screen, click **Delete**.

**Step 4** To enter service requests, do the following:

a) Click **Purge Requests**.
b) In **SR IDs** on the **Delete Request** screen, enter the IDs of the service requests that you want to delete . Use hyphens to indicate ranges of IDs and commas to separate ranges or individual IDs; for example: `101-111, 113, 116-118`.
c) Click **Delete**.

# Viewing Service Requests for a Particular Group

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** Choose a user group.

The default is **All User Groups**, which lists all service requests.

**Step 3** On the **Service Requests** page, click **Service Requests**.

All of the service requests for the selected user group are displayed.

# Searching the Records of Service Requests for a Group

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** On the **Service Requests** page, click **Service Requests**.

**Step 3** Click **Search and Replace**.

**Step 4** On the **Search and Replace** screen, 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**.

# Exporting a Report of Service Requests for a Group

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** On the **Service Requests** page, choose the user group.

**Step 3** On the **Service Requests** page, click **Service Requests**.

**Step 4** Click **Export Report**.

**Step 5** On the **Export Report** screen, 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.

# Reinstating an Archived Service Request

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** On the **Service Requests** page, click **Archived Service Requests**.

**Step 3** Click the row with the service request that you want to reinstate.

**Step 4** Click **Unarchive**.

# Launching the Service Request Quick View

The header pane of the Cisco UCS Director graphical user interface displays an icon that launches the Quick View panel for service requests. This **Service Request Quick View** panel includes sections which display 25 of the most recent service requests that are in the following states:

- In-Progress
- Completed Successfully
- Failed

If there are no service requests for a particular status in the system, then that section is not displayed in the **Service Request Quick View** panel. For example, if there are no failed service requests in the system, then the **Service Request Quick View** panel does not display the **Failed Service Requests** section. Also, if there are no service requests that are either in the running, completed, or failed state, then the icon to launch the **Service Request Quick View** panel is not displayed on the header pane.

**Note** This feature is not available in Cisco UCS Director instances that have been cross-launched from Cisco Intersight.

**Procedure**

**Step 1** On the header pane, click the icon to launch the **Service Request Quick View** panel.

The **Service Request Quick View** panel is displayed on the far right of the screen.

**Step 2** Click on any of the following panels to view details of the service requests:

- Recent In-Progress Service Requests
- Recent Completed Service Requests
- Recent Failed Service Requests

**Step 3** (Optional) Click on any service request within a panel to view additional details.

**Step 4** Click the icon again or on any other area of the screen to close the **Service Request Quick View** panel.

# 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

**Procedure**

**Step 1** Choose **Organizations** > **My Approvals**.

**Step 2** Click the row with the service request that you want to approve.

**Step 3** (Optional) To verify the details, click **View Details**.

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

**Step 4** Click **Approve**.

**Step 5** Add comments on the **Service Request** screen if necessary.

**Step 6** Click **Approve**.

# Rejecting a Service Request

**Procedure**

**Step 1** Choose **Organizations** > **My Approvals**.

**Step 2** Click the row with the service request that you want to reject.

**Step 3** (Optional) Verify the details by clicking **View Details** and then click **Close**.

**Step 4** Click **Reject**.

**Step 5** Add comments on the **Service Request** screen if necessary.

**Step 6** Click **Reject**.

# Viewing Approval Information on Service Requests

**Procedure**

**Step 1** Choose **Organizations** > **My Approvals**.

**Step 2** Click **My Approvals**.

All approvals that are either already approved or pending approval are listed.

# Searching the Records of Service Request Approvals

**Procedure**

**Step 1** Choose **Organizations** > **My Approvals**.

**Step 2** Click **My Approvals**.

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.

## Exporting a Report of Service Request Approvals

**Procedure**

**Step 1** Choose **Organizations** > **My Approvals**.

**Step 2** Click the row with the service request for which you want to export a report..

**Step 3** Click **Export Report**.

**Step 4** On the **Export Report** screen, choose the report format.

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

**Step 5** Click **Generate Report**.

After the report is generated, the **Download** option appears.

**Step 6** Click **Download** to open the report and to save it on your system.

# Service Request Budgeting

## Viewing the Current Month Budget Availability

**Procedure**

**Step 1** Choose **Organizations** > **Service Requests**.

**Step 2** On the **Service Requests** page, choose the user group.

**Step 3** On the **Service Requests** page, click **Current Month Budget Availability**.

## Viewing Budget Entries

**Procedure**

**Step 1** Choose **Organizations** > **Summary**.

**Step 2** On the **Summary** page, choose the user group.

**Step 3** On the **Summary** page, click **Budget Entries**.

# Adding a Budget Entry

**Procedure**

**Step 1** Choose **Organizations** > **Summary**.

**Step 2** On the **Summary** page, choose the user group.

**Step 3** On the **Summary** page, click **Budget Entries**.

**Step 4** Click **Add**.

**Step 5** On the **Add Budget Entry** screen, 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**.