

Customer On-boarding Guide

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Step-1: Sales Handover

Ensure that the handover from Sales has been completed with all necessary details:

The responses are available in this sheet:

<https://drive.google.com/open?id=1fmEnAH1VeA6drCB5ak-eXSSq5AtUW3lulq5nxJ7wxtA>

Step-2: On-boarding Questionnaire

Get the On-boarding Questionnaire filled by the customer. If the customer has NOT filled it upfront, you can fill this up over a call or in a meeting with the customer.

Form URL: <https://goo.gl/forms/4gle2qbPPTQDITIF2>

The responses are available in this sheet:

<https://drive.google.com/open?id=1POH05PkZ9ceen-ZBTGNID9joC2xI6Lx2suwnRKUrazk>

Step-3: Define High Level Scope for On-boarding

Set-up one/more meetings with the customer to discuss the following:

1. Review the questionnaire and details provided by the customer. Discuss and understand current IT infrastructure landscape, the tools used, the current pain points and challenges faced.
2. Agree on the Deployment Model (this is usually decided during Sales itself) as either SaaS / Dedicated set-up in Public Cloud / On-Premises set-up
3. Agree on Platforms, Tools and related accounts that will be on-boarded to CoreStack
 - a. Identify specific requirements for on-boarding new platform / tool
 - b. This has to be separately estimated and tracked
4. Agree on list of initial use cases that are to be realized using CoreStack
 - a. You may have to provide a demo of CoreStack Capabilities to the extended team to help them understand it better
 - b. Walk-thru some of the below resources as required:
 - i. Capabilities: <https://www.cloudenablers.com/capabilities/>
 - ii. Customer Case Studies: <https://www.cloudenablers.com/resources/>
 - iii. Use cases: <http://docs.corestack.io/corestack-use-cases/>
5. Document success criteria for completion of the on-boarding process

Note: It is important to pick up specific use cases as samples to showcase during on-boarding. Customer is expected to take care of similar use cases by themselves in future with minimal support from our side.

Step-4: Initiate Deployment

Based on the deployment model agreed to, following have to be done:

1. **SaaS:**
 - a. Request customer to sign up if NOT already done.
 - b. Upgrade the subscription to Professional / Enterprise as per contract.
 - c. Extend the subscription validity till contract end date.
2. **Dedicated set-up in Public Cloud:**
 - a. Launching the Instance
 - i. Agree on the Public Cloud to be used
 - ii. Agree on which account to use (Customer's or Internal - as per contract)
 - iii. Confirm that we will have remote access to the instance for support
 - iv. Communicate Image-ID of respective cloud to be used to launch instance and the recommended flavour to be used
 - v. If required, request for the customer cloud account's number or subscription and share the image id to that account
 - vi. Launch (or request customer to) Instance with the provided image id. Ensure that the instance type / flavour is same or higher than the recommended size.

- vii. Access the instance, get necessary information (MAC id) for license generation and apply license for the set-up.
- b. Validate the set-up
 - i. Share default username, password to be used for login. Ensure Login works.
 - ii. Check the health of the machine in terms of CPU/RAM/Disk metrics
 - iii. Go to Supervisor page and check if all services are up and running
 - iv. Ensure we have Security Group settings in such a way that Customer premises and CloudEnablers US/Chennai offices have access to the VM
 - v. Ensure that the VM has an associated Static IP to avoid issues with IP changing while restart
 - vi. Ensure that the VM has been configured for monitoring the Host Metrics and Services
 - vii. Ensure that we have daily back-ups scheduled for the VM, DB
 - viii. Have automated sanity tests executed for this set-up to confirm its stability

3. On-Premises Set-up:

- a. Launching the Instance
 - i. Agree on the Private Cloud Platform to be used
 - ii. Confirm that we will have remote access to the instance for support
 - iii. Provide an S3 URL to download the CoreStack Image of respective cloud platform.
 - iv. This image must be used to launch the instance. Also recommended flavour to be used.
 - v. Request customer to launch the Instance with the provided image. Ensure that the instance type / flavour is same or higher than the recommended size.
 - vi. Access the instance, get necessary information (MAC id) for license generation and apply license for the set-up.
- b. Validate the set-up
 - i. Share default username, password to be used for login. Ensure Login works.
 - ii. Check the health of the machine in terms of CPU/RAM/Disk metrics
 - iii. Go to Supervisor page and check if all services are up and running
 - iv. Ensure that the VM has an associated Static IP to avoid issues with IP changing while restart
 - v. Ensure that the VM has been configured for monitoring the Host Metrics and Services
 - vi. Ensure that we have daily back-ups scheduled for the VM, DB
 - vii. Have automated sanity tests executed for this set-up to confirm its stability

Step-5: Define Account Structure

Discuss the following with the customer and define how it should be set-up:

1. Which departments / teams within the organization will be using CoreStack?
 - a. Should we have a separate Tenant in CoreStack for each team?
 - b. Create the necessary Tenants and keep them ready.
2. What roles will be required in each Tenant?
 - a. Explain about the standard roles and find out if any custom roles will be required.
 - b. Create custom roles as required and keep them ready.
3. If this is an Enterprise Edition
 - a. Check if Self-Service is required for specific tenant users
 - b. What will be the nature of use for each team? What kind of Catalogs may be required?
4. Do NOT add any users yet
 - a. Adding Users will be the last step. We do NOT want users to login to the system till it is ready.
 - b. Let the Admin to decide when is the right time to bring in users to the system

Step-6: On-board Existing Assets

Work with the customer in on-boarding existing assets to CoreStack:

1. **Cloud Accounts**
 - a. Based on the agreed scope, help the customer to add necessary Cloud Accounts to CoreStack
 - b. For each Tenant created, we need to manually add the necessary Cloud Accounts. Once added, ensure that the resource discovery is working and the Cloud Inventory Dashboard is populated for all the accounts.
 - c. Note that you can add accounts using IAM users that have specific levels of access. Check with customer on the access levels required for each Tenant/Role and accordingly help adding multiple accounts
 - d. Enable AWS Inspector, Azure Security Center in their accounts and help with the configuration. Ensure that they are able to see security findings from the Dashboard.
 - e. Enable Billing reports for connected AWS accounts and ensure that the Cost Analytics Dashboard is fetching this data.
2. **Integrated Tools**
 - a. Based on the agreed scope, help the customer to add necessary Tools
 - b. For each Tenant created, we need to manually add the Tool accounts required
3. **Existing artifacts (Templates, Scripts):**

- a. Identify Templates /Scripts that they already have which they would like to move into CoreStack
- b. Consolidate list of Templates in one place (folder/S3 bucket) so that they can be on-boarded in one-shot
- c. Consolidate list of Scripts in one place (folder / S3 bucket) for uploading into CoreStack
- d. If the count is <25, we can directly upload them from the UI. If it is more than that work with the DevOps team to have a script that would do the upload.

4. Inventory:

- a. The Inventory module is yet to be enhanced to discover and add resources from connected Cloud Accounts. This will be available by Oct-Nov 2017. Till then, we will have to add the VMs manually into CoreStack using UI / csv upload.
- b. If there are Physical/Virtual machines that need to be added to CoreStack, we can collect the list of machines in a csv file and upload them into CoreStack.

Step-7: Automation & Orchestration Use Cases

Discuss with the customer to understand how they manage various infrastructure lifecycle activities. Based on that, define the use case requirements for automation and orchestration.

S No	Discuss about how the following are done
01	Provisioning of Cloud Infrastructure: <ol style="list-style-type: none"> 1. What actions follow provisioned infrastructure as part of their standards? 2. Examples: Schedule Back-ups, Security Settings, Set-up Monitoring, Log Mgmt 3. Scale-in / Scale-out requirements
02	Backup & Recovery: <ol style="list-style-type: none"> 1. Backups for VMs, Storage, DBs etc. 2. Recovery Procedure from Back-ups
03	Utilization <ol style="list-style-type: none"> 1. Track unused VMs, Storage, IPs etc., 2. Re-claim unused / obsolete infrastructure
04	Security <ol style="list-style-type: none"> 1. Periodic vulnerability scans (if applicable) 2. Security Policy violations tracking 3. SSL Configuration & Expiry

05	Monitoring & Remediation: <ol style="list-style-type: none"> 1. Configure Host Monitoring 2. Monitoring Services within hosts 3. Any automated remedial actions based on monitoring alerts
06	Log Management: <ol style="list-style-type: none"> 1. Periodic Log rotations for applicable services 2. Log shipping (backup) in the cloud 3. Purging of aged logs 4. Log Analytics

Consolidate list of automation / orchestration needs in a sheet:

1. Analyse each requirement and if we have an existing Template / Script that can cater to that need, map that as the reference
 - a. *Provide the list of available Templates/Scripts to the customer and have them test it for their use cases in their environments. Help with issues/questions if any.*
 - b. *Note that some use cases may require “Scheduling” of Template/Script*
 - c. *Also, some use cases may require configuring “Alarms” for event triggered actions*

2. If we can reuse an existing template / script from Marketplace or from similar use cases built for other customers, add those comments and map re-usable artefacts.
 - a. *Include the effort to build templates/scripts by reusing existing assets, as part of the scope. Send the list to DevOps team and take their help to have that done. Make them available as “My Templates” for the customer and have them use it.*

3. If the use case is new, map them as fresh use case to be built. Arrive at a tentative estimate to build the required template/script/blueprint.
 - a. *Communicate the effort estimate to the customer and confirm the priority for such artifacts and their acceptance for professional services.*

4. If there is a need to support different tool / platform to enable some of the artifacts to be executed, this must be highlighted. The effort involved is to be estimated separately.
 - a. *Communicate the effort estimate to the customer and confirm the priority for such integrations and their acceptance for professional services.*

5. For complex orchestration requirements, we can also create Blueprints for the customer and help them use it. But, we need to ensure that the necessary templates are available for chaining.
 - a. *Note: The Blueprint module is going thru enhancements and will be available in Oct-Nov 2017.*

Step-8 Self Service Catalog (Enterprise)

Note: This step is applicable for Enterprise Edition customers only.

Work with the customer and help define the Self Service Catalog:

1. The preferred OS Types are to be set for each Tenant
2. The Cloud Accounts to be used for Self Service are to be configured with the default values to be used for Self Service
3. The required OS Versions are to be selected from the target Clouds to create the Catalog
 - a. Mention that both Public & Private Images can be added.
 - b. Recommend Private Images since there will NOT be any availability issues.
 - c. Private Images which contain pre-bundled apps or hardened/optimized OS is better suited for end user consumption.
4. The Instance Types or VM Sizes that will be used are to be added to Catalog
5. The App Catalog can be defined by selecting custom apps from “My Scripts”
6. The “Workloads” Catalog can be defined by selecting custom templates from “My Templates”
7. Educate customer on building scripts/templates for frequent requests from end-user and about building self service catalog for such requests.

Step-9 On-board Users

As part of defining the account structure, we would have already added the required Tenants, custom roles if any etc. in the set-up.

1. Collect information from the customer, on the no. of users under each Tenant & each role. These set of users are to be on-boarded into CoreStack.
2. If the no. of users within the customer is <25, they would be able to add them directly from the UI.
3. If the users are > 25, get the list of users and have them added thru a script. Take help from DevOps on this.
 - a. The data can be collected in a simple matrix (csv/excel) as shown below
 - b. Please note that same user can have different roles in different tenants. Hence there can be multiple rows for the same user (1 row per tenant).

S No	First Name	Last Name	Email Address	Tenant Name	Roles in this Tenant
01	<to be filled>				Ops Admin, Ops Team, Consumer, Approver, Finance, Custom Role-1

02					
03					

Step-10 Validation & Sign-off

Given below are some of the validation criteria before we complete the process:

1. All Cloud Accounts used by the customer have been added to one/more tenants
 - a. The Cloud Inventory Dashboard shows resources from all these accounts. And we are able to drill down using the resource listing page.
 - b. Policy Violations Dashboard lists violations from all connected accounts
 - c. Security Dashboards brings up findings for AWS & Azure accounts
 - d. Cost Analytics Dashboard shows the billing data for all accounts
2. All Integrated Tools used have been added to one/more tenants
 - a. Monitoring Dashboard shows the Hosts, Services from connected tools
 - b. Builds Dashboard shows the build jobs chart from connected Jenkins account
3. Templates / Scripts from the sheet created have been included as part of “My Templates” and “My Scripts” (cases #1, #2 which involved artifacts available or reusable)
 - a. **Note:** Templates/Scripts taken up as Professional Services can be out of scope and can be tracked separately.
4. Schedules for backup, log rotation etc. have been set-up and able to see them in the Calendar view.
5. Alarms have been configured for remediation use cases
6. Inventory has the list the Physical/Virtual/Cloud resources collected from customer and on-boarded. Checking for the total counts.
7. Self Service (For Enterprise Edition):
 - a. App Catalog has the list of custom apps, custom workloads getting listed, apart from marketplace apps/workloads.
 - b. Also ensure that the Base OS catalog items are available for use. If they show as “Unavailable” it may require the relevant OS Versions & VM Sizes to be added.
 - c. Perform a sample order workflow to ensure the cycle works correctly.
 - d. Self Service Dashboard is showing up metrics based on orders created
 - e. Chargeback Summary Report is showing up details of users, orders correctly
8. Account Information & Set-up
 - a. The subscription information shows up correctly, esp the Edition & End-date are as per the contract
 - b. The required tenants have been added
 - c. The right set of roles are mapped to the tenants and each role has the right no. of users added
9. Audit Log is showing up the log entries right from initial set-up date.

10. Help section is configured correctly
 - a. User is able to create support tickets
 - b. User Guide & FAQ sections are accessible

Note: It is recommended to have our QA team to validate the set-up after the process is completed, before requesting customer to sign-off.

Step-11 Communicate Support Information

Ensure that the customer is aware of the following. Also have this communicated to the list of users who are on-boarded into CoreStack.

1. User Guide is available integrated with the solution
2. Support Tickets can be created and managed within the solution
3. Email for Support: support@cloudenablers.com
4. Escalation contacts have been provided
 - a. Tony Ryland: tony.rylands@cloudenablers.com | Skype: tony.rylands
 - b. Kk Narayanan: kk.narayanan@cloudenablers.com | Skype: kk.narayanan
5. Response SLAs based on severity as agreed in the SoW / Contract.