CloudSME Platform

Registration and Login Guide

Version 2.0.13.0

CloudSME contact information:
http://www.cloudsme-apps.com

Technology provided by CloudBroker

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Table of Contents

Glossary

CBP	CloudBroker Platform
Admin	Administrator (user with the broadest level of access)

Introduction

The "CloudSME Platform Registration and Login Guide" has been designed to assist you during the registration process, logging in, navigation through the CloudSME Platform (hereinafter referred to as CloudBroker Platform) and user creation. The guide consists of two chapters, i.e.

- Registration (step-by-step instruction)

- Login (including navigation and new user creation description)

You will learn how to successfully register within the platform, create your organization and a user of this organization, log in and navigate through the platform to reach the desired pages and add new users to your organization.

Each chapter consists of a detailed description of the subject matter, visualized with screenshots.

Registration

Please follow the steps below to successfully complete your registration and obtain an account on the CloudBroker Platform.

Please note that on the public CloudBroker Platform under https://platform.cloudbroker.com all users are thoroughly checked before they are permitted to use our system. These checks can take some time, and as part of the procedure we may also contact you directly. If you have any questions, please contact us via platform@cloudbroker.com.

In case you use a private installation of the CloudBroker Platform under a different URL, please contact the person responsible for your platform installation for more information about the registration process.

Step 1: Starting the Registration

In order to start the registration process on the public CBP, navigate to the https://platform.cloudbroker.com website. For a private platform installation, please use the corresponding web address.

Once the "Login" page is opened, click on the "Register" link below the "Login" button.

Please see the figure below:
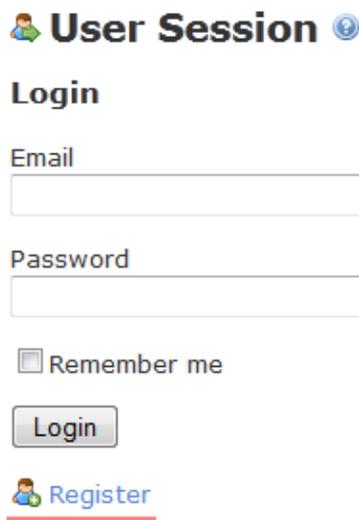
Figure 1.1: Login page

Note: If your organization already exists in the platform, please contact your organization admin asking to create an account for you.

Step 2: User Verification

Congratulations, you have just got one step closer to getting registered on the CBP! If turned on by the platform admin, the next step to take is user verification.

There are two types of user verification on the CBP: email verification and captcha verification. If you see neither of the pages below after pressing "Register", this means that user verification has been turned off. In this case please directly proceed with step 3.

Captcha Verification

For the captcha check, type the characters you see in the picture displayed on the webpage into the text field and then click on the "Proceed" button.

Please see the figure below:

Figure 1.2: Captcha Verification page

Email Verification

For the email check, enter the same email address with which you contacted CloudBroker or the person responsible for your private platform installation into the text field and then click on the "Proceed" button.
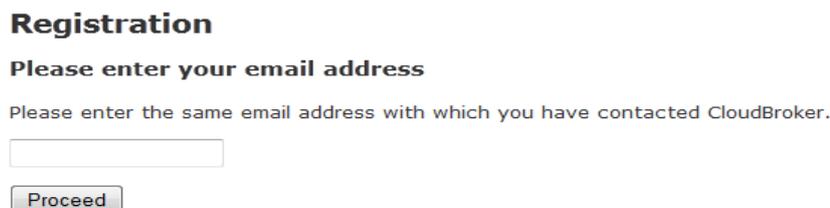
Please see the figure below:

Figure 1.3: Email Verification page

In case you have entered the correct data, you are promoted to the next step of the CBP registration process – creation of a new user and a new organization.

Step 3: New User and Organization Creation

The central units in the CBP are organizations. Each organization consists of at least one admin user, i.e. manager of the organization, and any number of advanced or standard users (see detailed description of user roles on page 13).

By filling out the form at step 3 a new user (initially assigned with the admin user role) and a new organization are created.

User Creation

To create a new user, fill in the following mandatory fields:

- "Salutation" by selecting either Mr. or Ms. option

- "First name" with your first name

- "Last name" with your last name

- "Phone" with your phone number in the following format: +country code phone number

- "Email" with your organizational email address

- "Password" with your password

- "Password confirmation" with your password entered once again

- "Subscribe to optional e-mails" check-box allows you subscribe to optional e-mails. If you want to unsubscribe from optional e-mails after registration you should go to the User Profile Page, click on "Actions" and select "Edit" to edit you profile, then enter the "Expert Options" sub-sub-tab and uncheck "Subscribe to optional e-mails" box.

"Title", "Function" and "Department" fields can be filled in optionally.

After you are done filling in the mandatory user information, please proceed to your organization information.

Organization Creation

To create a new organization, the following mandatory fields need to be filled in:

- "Organization name" with the name of your organization

- "Organization type" by selecting either the commercial or non-commercial organization type

- "Responsible" by specifying your organization's responsible person (to be further used for invoicing)

- "Address" with your organization's address

- "Postal code" with your organization's postal code

- "City" with your organization's city

- "Country" by selecting your organization's country

- "Motivation" with short description why you or your organization would like to use the CloudBroker Platform and what you would like to use it for. Information, that you specify in this field will allow administrators to assess - add your account or not to the platform.

"State" and "Website" fields can be filled in optionally.

Please see the figure below:

Figure 1.4: New User and Organization page

Once you have your user and organization information filled in, please carefully read the "Terms of Service" defining the conditions for using the CloudBroker Platform. In case you agree to them, confirm your agreement by clicking on the "I agree" button.

Note: In case you do not agree to the "Terms of Service", please click on the "Back" button. Your registration will be cancelled then.
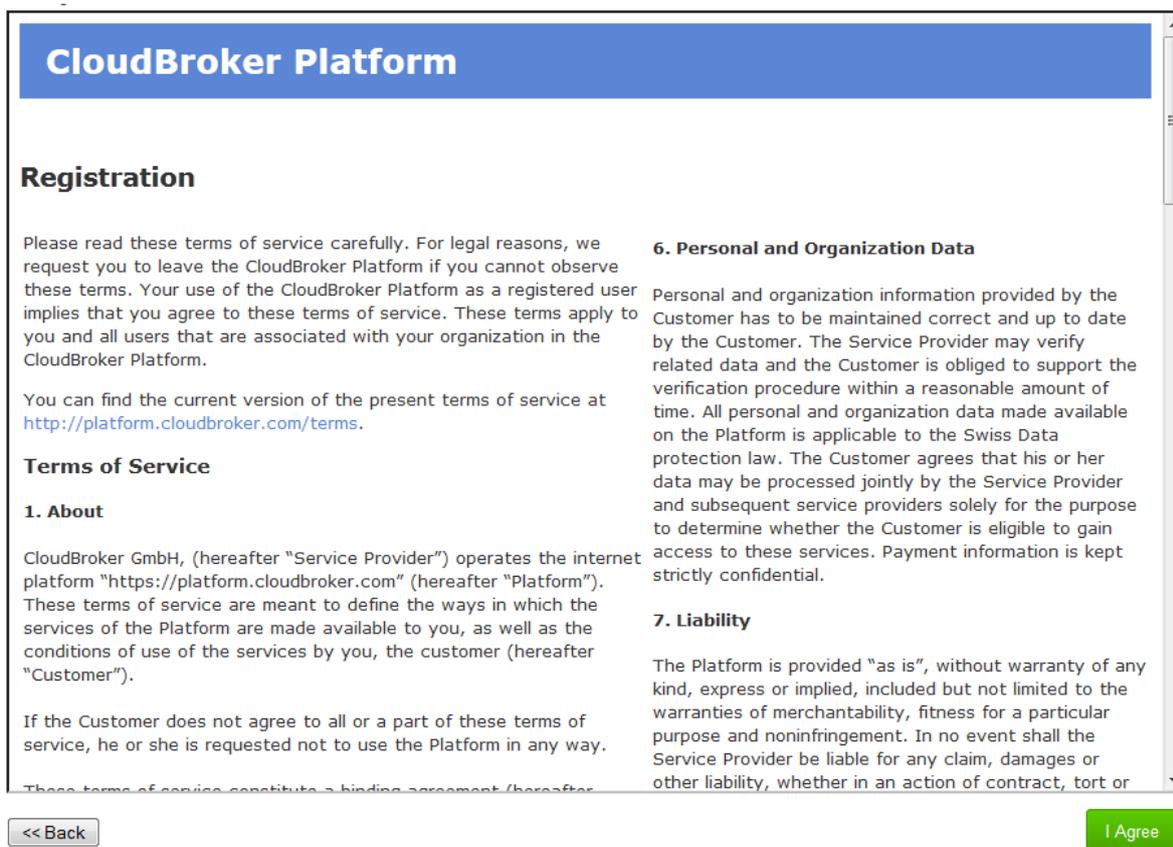
Please see the figure below:

Figure 1.5: Terms of Service

Step 3 accomplished, moving on to Step 4!

Step 4: Platform Price Conditions

The last remaining step is to familiarize yourself with the platform price conditions. Each organization has a certain monthly payment amount based on the following items:

- Monthly organization cost ("Per month")

- Monthly cost for each user in the organization ("Per user per month").

The prices on the above mentioned items may vary depending on the organization type selected at step 3.

In case the corresponding prices are set to zero, this means that you can register a new user and organization in the platform for free! No platform price conditions page is displayed, and you can directly continue with step 5.

If a page with CBP price conditions is displayed and you agree to the conditions, click on the "I agree" button to proceed to the final step of your registration.

Please see the figure below:

Registration

According to the data entered, you can access the platform under the following conditions:

Cost per month: €100.00
Cost per user per month: €1.00

[<< Back] [I agree]

Figure 1.6: Platform Price Conditions page

Step 5: Registration Confirmation

The final step of the registration process is the registration confirmation. Shortly after that you will receive an email notification that your registration request is being reviewed.

Please see the figure below:

Registration

Thank you very much for registering on the CloudBroker Platform! A confirmation email will be sent to you shortly. Please follow the link in the email to complete your registration and to login to the platform. For more information please contact us via platform@cloudbroker.com.

[<< Back]

Figure 1.7: Registration Confirmation page

Once your registration request has been approved, you will receive a confirmation email. Please follow the link in the email to activate your CBP account.

When you click on the activation link, you are directly logged into the platform for the first time. For all further logins, an overview about the CBP web interface and how to create a new user, please follow the descriptions in the next chapter.

Login

Welcome to the CloudBroker Platform! Now that your account is activated, you can log into the platform using your user credentials, i.e. email address and password specified at step 3.

Note: In case you have forgotten your email or password, please contact your organization admin or platform@cloudbroker.com for the public CBP, or the person responsible for your platform installation in case you use a private CBP.

Please see the figure below:
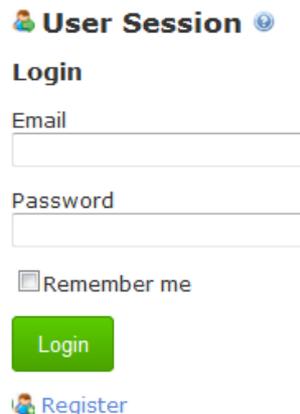
Figure 2.1: Login page

Dashboard and Navigation

After logging in, you are redirected to the "Home" page of the CloudBroker Platform. On the "Home" page you can see a Dashboard that provides information on statuses and activities regarding your account, your organization, and your platform.

You can navigate through the website using either the Dashboard or the navigation bar. The latter is tab-based (there are main tabs and sub-tabs) and is located above the dashboard.

Please see the figure below:

Figure 2.2: Home page

Main Tabs

Here is what you can find under the main tabs of the CloudBroker Platform:

- "Home": As described above, the home page contains the Dashboard, as well as sub-tabs to items such as the platform prices and the logs of your activities on the CBP.

- "Users": Here you can find everything to view and manage user and organization accounts, as well as associated licenses for application software and accesses for cloud resources.

- "Software": The Software tab gives an entry to the application software you can use on the platform, as well as associated prices, executables, deployments etc.

- "Resources": Under the Resources tab you find the cloud resources you can use on the platform, as well as associated resource accounts, instance types, regions, storages and price information.

- "Jobs": The Jobs tab leads to the compute jobs you have or want to run via the CBP, as well as associated data files, machine instances in the cloud and used slots on the machines.

- "Invoices" (only visible for admin users): Here you find everything related to CBP's financial aspects, including your monthly invoices, as well as any tags you set, the individual billing items and payment information.

- "Information": The information tab is your source for all platform documentation and tools, as well as frequently asked questions and the terms of service.

12

Page Structure under Each Tab

You will quickly find out that the whole CloudBroker Platform is structured quite systematically. For each tab or sub-tab, there are usually:

- An "Index" List page of corresponding items, with a "New" button on top in case you can add new items to the list, and "+" and "-" icons to display or hide each item's children

- A Details page of each item you can reach when you click on an item's name, separating between "Entry Options" and "Expert Options" sub-sub-tabs, and listing any children of the corresponding item

- A menu with "Actions" such as "Edit" you can perform on an item at the end of each item line or on the item's Details page

- Links to quickly jump between the Detail's pages of related items

- "?" icons which provide instantaneous help when you hover over them with your mouse pointer

Please feel free to navigate through the different tabs, sub-tabs and items to get an overview about the CloudBroker Platform!

Creating a New User

The next thing you might want to learn is adding a new user to your existing organization. For this you do not need to go through the registration process again. You can easily add a new user through the CBP user interface: Simply navigate to the Users tab or click on the "Users" link under the "My Organization" section of the Dashboard. Once the Users List page is opened click on the "New" button.

Please see the figure below:

Figure 2.3: Users List page

You will see a form for creating a new user with the following mandatory fields on the "Entry Options" sub-sub-tab:

- "Email", "Password", "Password confirmation", "Salutation", "First name", "Last name", "Phone" (fields description can be found on page 7 in step 3 of the registration process), and

- "User role" by selecting one of three available user roles:

- o "admin" to create a user with the broadest level of access within the organization, who can

  - create new users

  - run jobs

  - deploy own software

  - register own resources

  - manage accesses/licenses for organization users

  - edit user and organization information

  - handle billing information, invoices and payments

  - have access to everything that the other users in the organization do

- o "advanced", who can

  - run jobs

  - create accesses/licenses for him/herself

  - edit own user information

- o "standard", who can

  - run jobs

  - edit own user information

You can also fill in the optional fields on the "Expert Options" sub-sub-tab.

When you have filled in all the necessary user information, click on the "Save" button, okay any cost information if applicable, and a new user will be created.

Please see the figure below:

Figure 2.4: Create New User page

Now you can move on to submitting your first job, adding your own application software or registering a cloud resource you have access to!

More Information

In case you need detailed information about the job submission, software deployment or resource registration procedures, please refer to the "CloudBroker Platform Job Submission Guide", the "CloudBroker Platform Software Deployment Guide" or the "CloudBroker Platform Resource Registration Guide", "Resource Account Registration and Usage Guide" respectively that can be found under the "Information" tab.

If you need further help with the CloudBroker Platform, please contact our help desk under platform@cloudbroker.com.

Acknowledgement