Configure account and Invite Users

Configure account for use – step 1 (account setup)

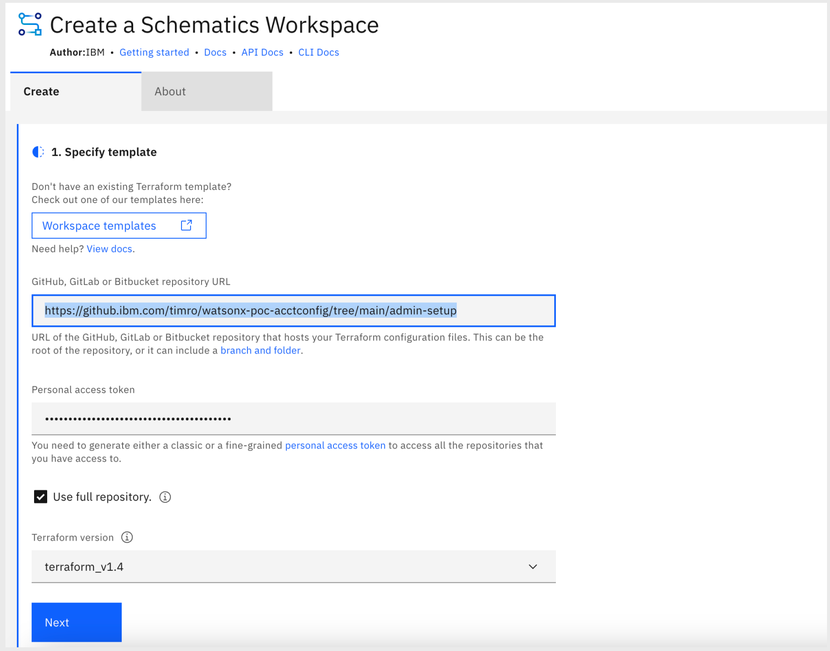
Terraform code has been created that you can use to automate the setup of the PoC account – this will result in a reasonable set of guardrails for account access by both IBMers supporting the PoC and also partners to be invited to the account.

Using the IBM Cloud Schematics service – create a workspace for setting up the account:

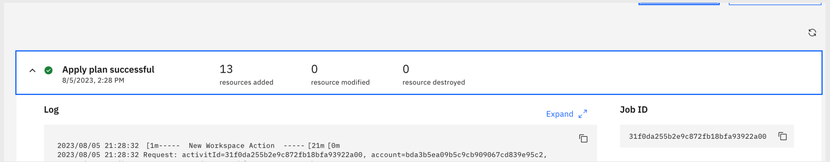
1. Open https://cloud.ibm.com/schematics/workspaces and click the **Create Workspace** button.

2. On the Specify template screen enter:
   GitHub Url: https://github.com/ibm-build-lab/watsonx-poc-acctconfig/tree/main/admin-setup

   leave remaining options at default



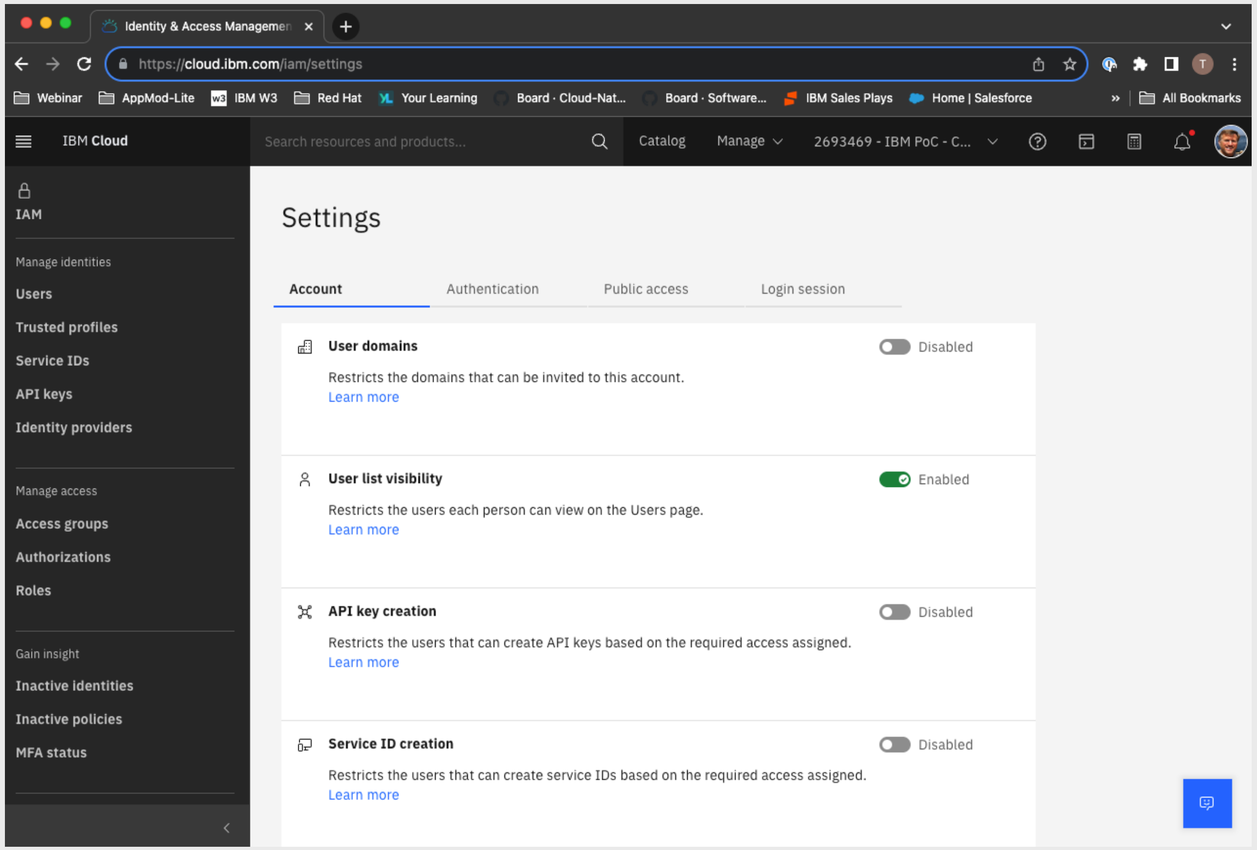
3. Click the **Next** button to go to the Workspace details panel
4. Assign a meaningful workspace name, ex: “configure-account-for-watsonx”
5. Leave remaining options at default and click **Next**
6. Review values and click **Create workspace** to create the workspace
7. Update the expected list of IBM collaborators that will need access to all watsonx environments in the account. Use Terraform list syntax:
   ["alice@example.com", "bob@example.com", "mallory@example.com"]
8. Click on **Generate plan**
9. If the plan generates without errors, click on **Apply Plan**
10. Wait for the job to complete. For any users in the list above that are not in the account, an email invitation to the account will be sent. Users will have to accept the invitation to perform setup of watsonx.ai team environment instances (step 2)



Configure account for use – step 2 (account iam setup)

The terraform code run in step 1 configures an "admin" group in the account. The account default settings should be adjusted so that only members of this group are able to see the users in the account.

Open the URL: https://cloud.ibm.com/iam/settings



1. For the User list visibility item – set to **Enabled**
2. When prompted for the change, confirm the change by selecting **Yes**
3. Verify that the settings match the screenshot to the left

Configure account for use – step 3 (environment setup)

Terraform code has been created that you can use to automate the setup watsonx.ai environments. The code can be run from multiple Schematics workspaces to create multiple environments (e.g. for different teams) in the same account.

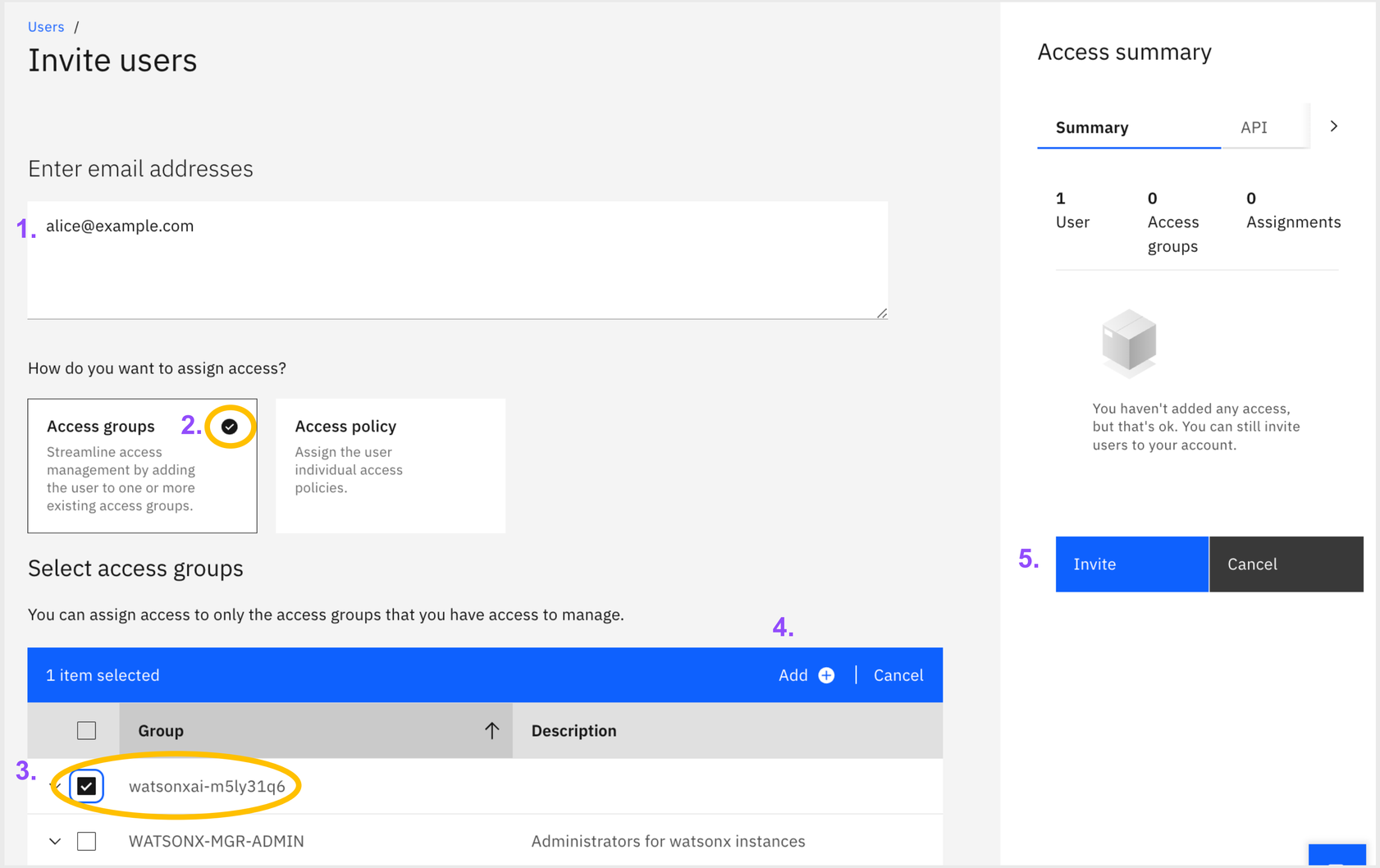
Using the IBM Cloud Schematics service – create a workspace for setting up the environment:

1. Open https://cloud.ibm.com/schematics/workspaces and click the **Create Workspace** button.
2. On the Specify template screen enter:
   GitHub Url: https://github.com/ibm-build-lab/watsonx-poc-acctconfig/tree/main/watsonxai-env-setup

   leave remaining options at default
3. Click the **Next** button to go to the Workspace details panel
4. Assign a meaningful workspace name, ex: “configure-watsonxai-env1”
5. Leave remaining options at default and click **Next**
6. Review values and click **Create workspace** to create the workspace
7. All variable defaults should be kept as set in the input terraform
8. Click on **Generate plan**
9. If the plan generates without errors, click on **Apply Plan**
10. Wait for the job to complete
11. After completion, the job log will list and environment name like "watsonxai-m5ly31q6”, Use this as the Access Group name when inviting users to the account/environment (step 3)

Invite Partner/Client collaborators – step 3

Open https://cloud.ibm.com/iam/users/invite_users



1. Enter one or more existing user IBMids. You can add multiple users and the subsequent settings apply to all of them.

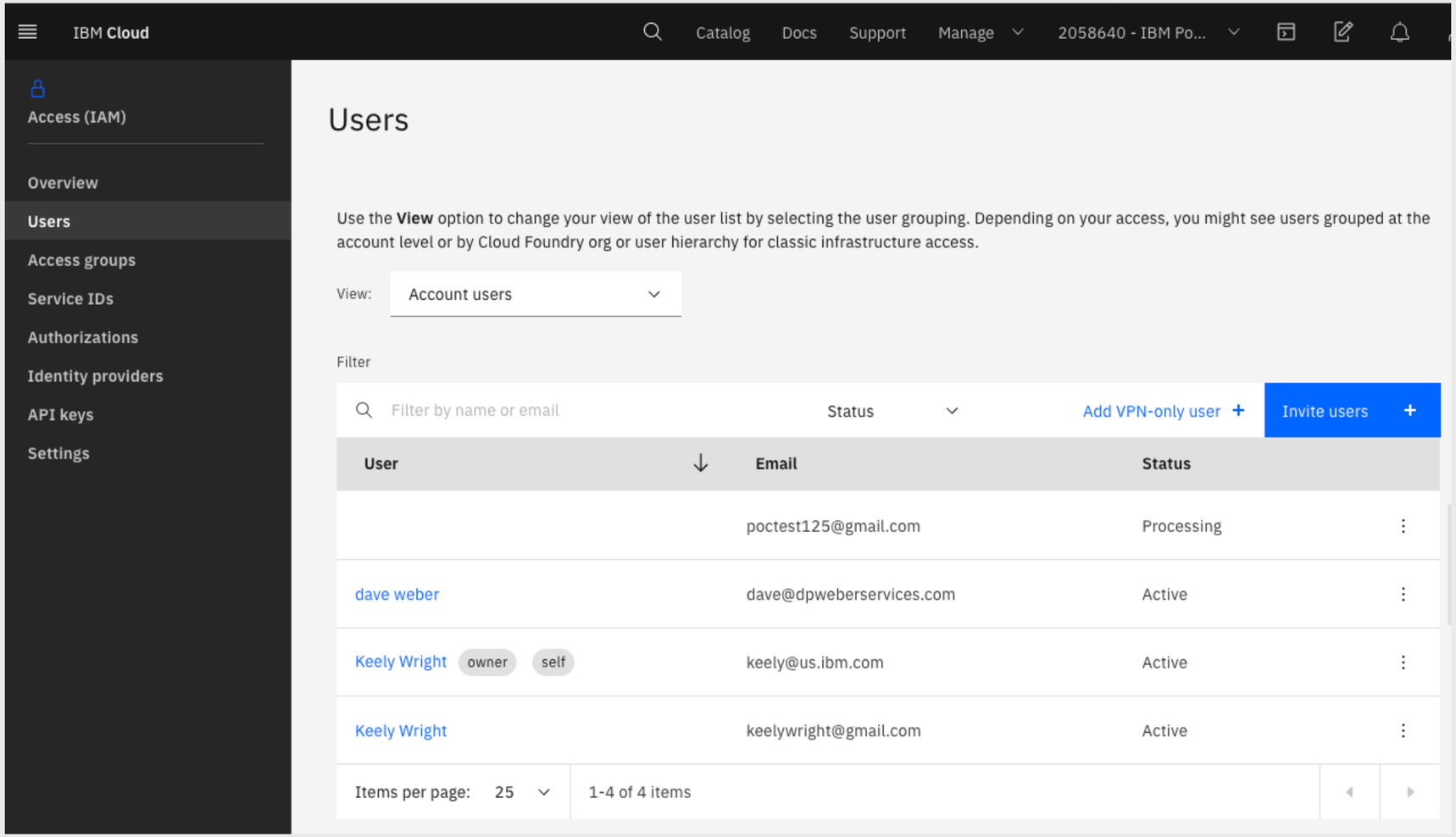
2. Select Access groups option

3. Select the access group shown after the environment was created (tip: inverting the Group sort list should bring the interesting groups to the top)

4. Click **Add**

4. The access group will be added to the profile for users (not shown). Click on **Invite**

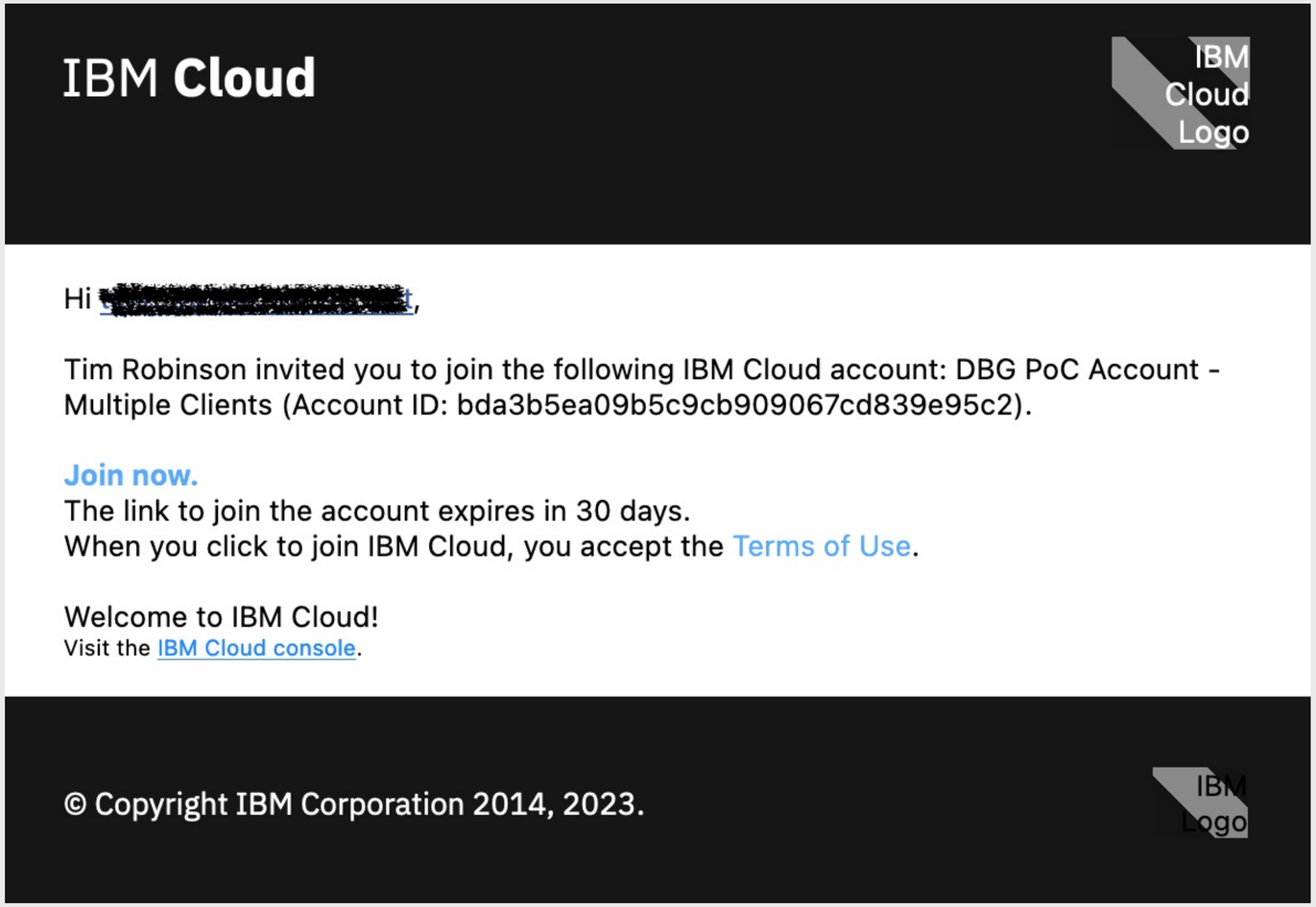
Users with existing IBM Cloud accounts will have Active status, while others will say Processing



Watsonx.ai Getting Started

User Sign-Up Process – Part 1

- When the user is invited to the POC environment, they will get an email similar to the one below
- Click on **Join Now** and follow the steps in the next page (first for new IBMid, second for existing)



IBM **Cloud**

IBM Cloud Logo

Hi [redacted],

Tim Robinson invited you to join the following IBM Cloud account: DBG PoC Account - Multiple Clients (Account ID: bda3b5ea09b5c9cb909067cd839e95c2).

Join now.
The link to join the account expires in 30 days.
When you click to join IBM Cloud, you accept the Terms of Use.

Welcome to IBM Cloud!
Visit the IBM Cloud console.

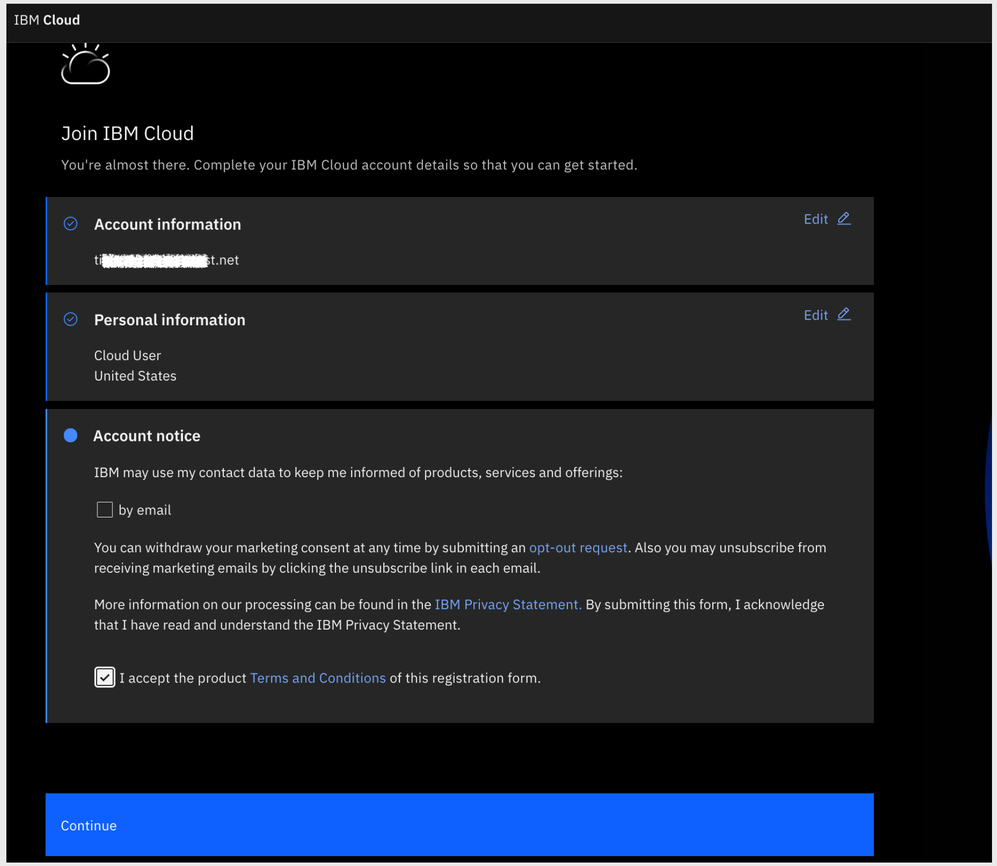
© Copyright IBM Corporation 2014, 2023.

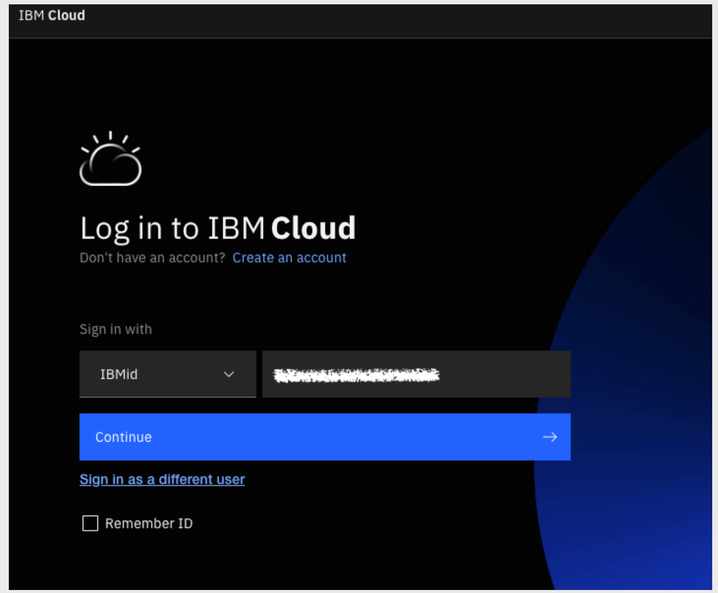
IBM Logo

User Sign-Up Process – Part 2a (user does not have an IBMid)

User goes to Cloud account sign-up:

1. Create Password 2. Enter Name 3. Accept terms 4. Click **Continue** to confirm IBMid and join account



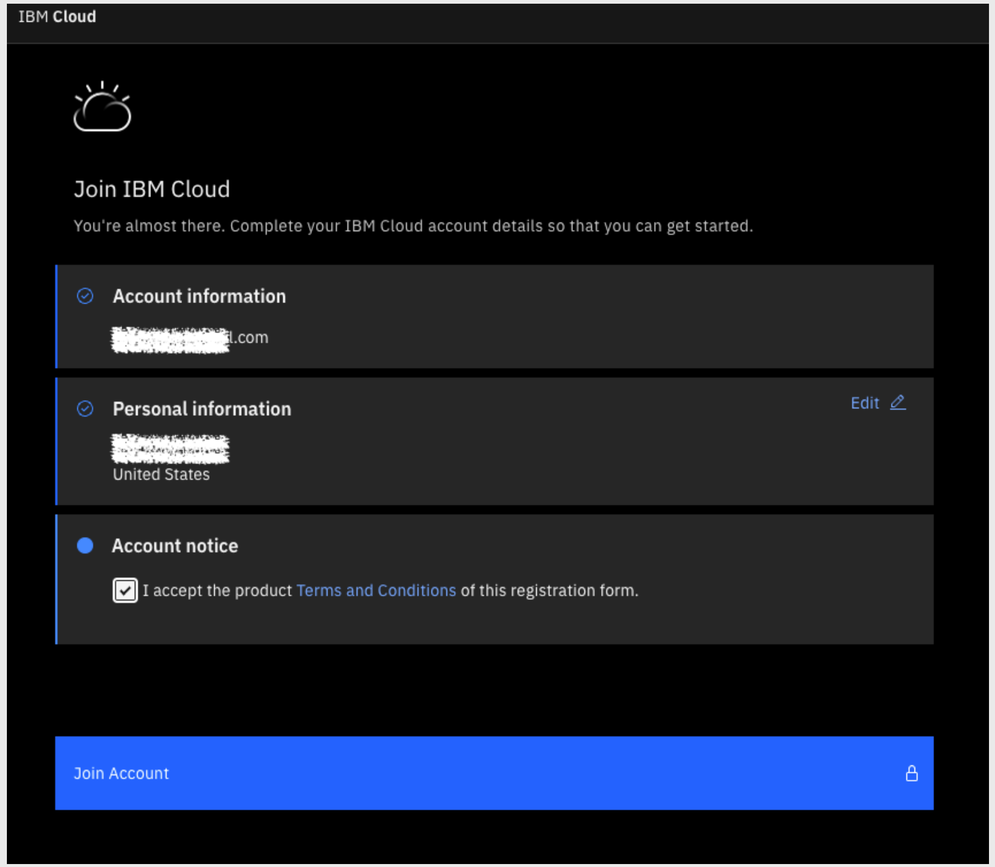


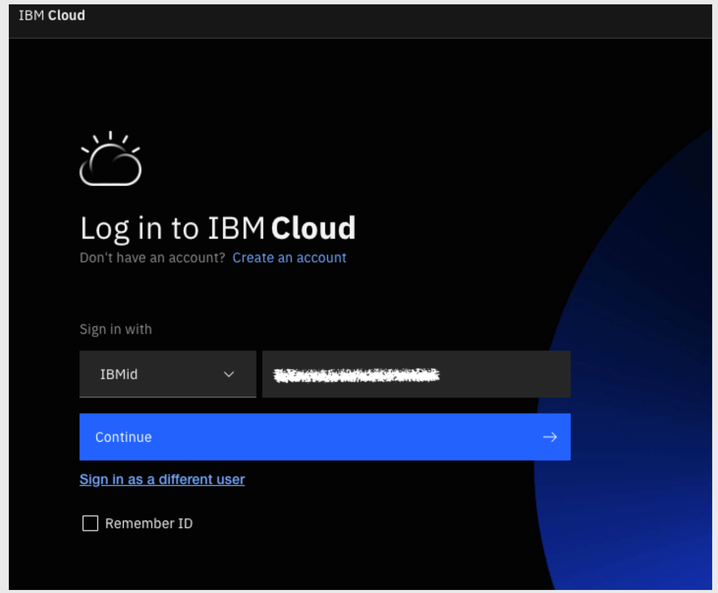
IBM Cloud login is shown – it's not required to sign in, see log in to watsonx.ai instructions on following page

User Sign-Up Process – Part 2b (user already has an IBMid)

User goes to Cloud account sign-up:

1. Accept terms 2. Click **Join Account**

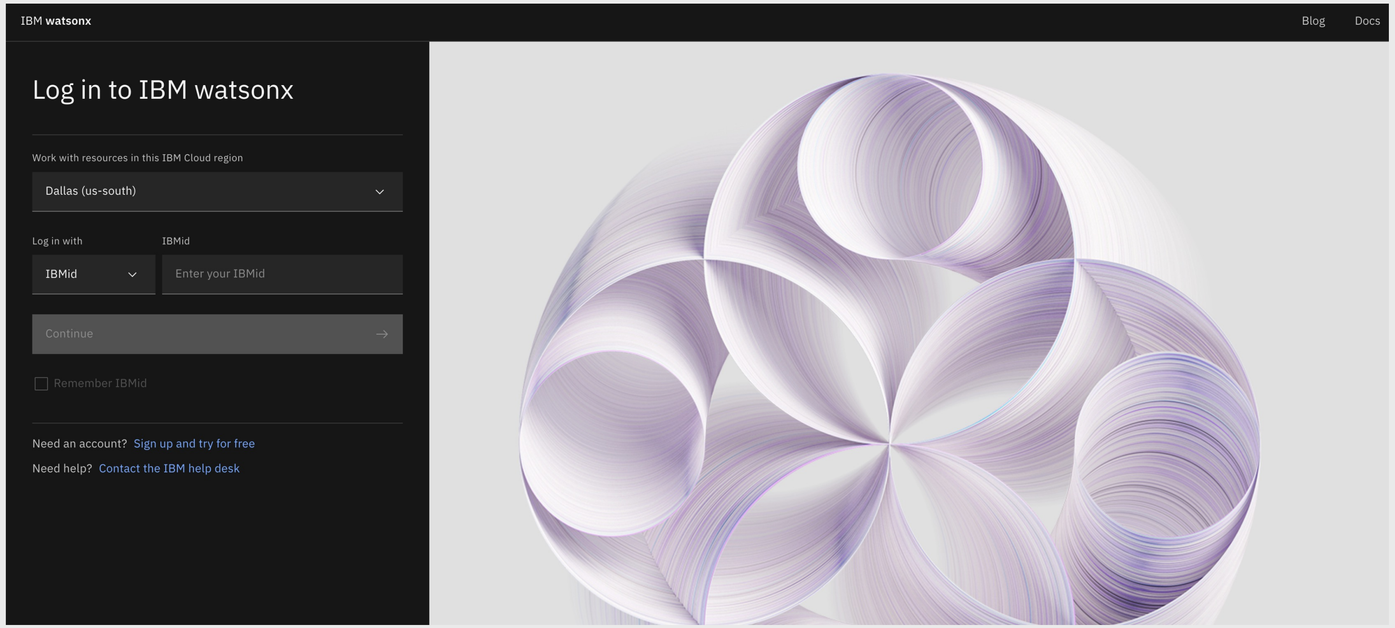




IBM Cloud login is shown – it's not required to sign in, see log in to watsonx.ai instructions on following page

Log in to IBM watsonx.ai

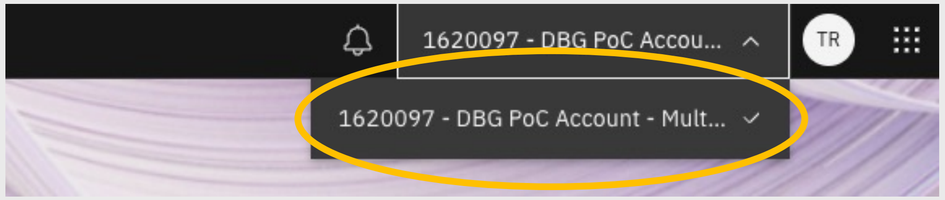
1. Go to https://dataplatform.cloud.ibm.com/wx



2. Log in using user email address (keep the us-south region selected)

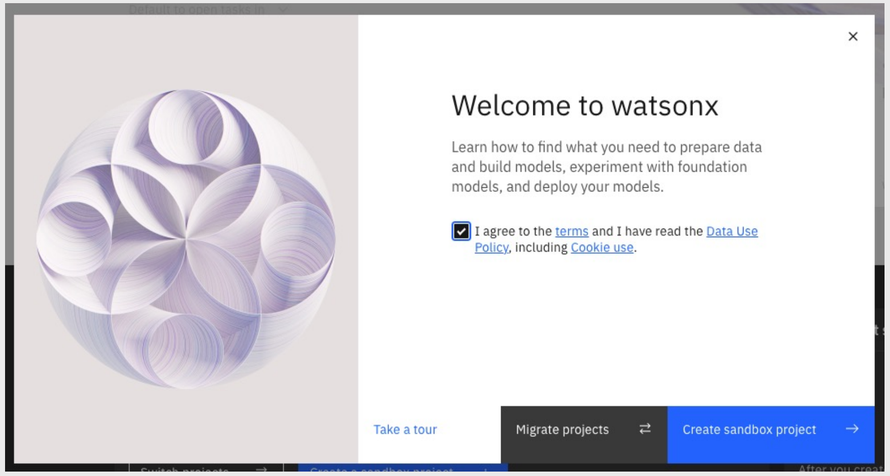
3. Select the new IBM POC from the list of Orgs on the watsonx.ai home page (the name and number will differ)

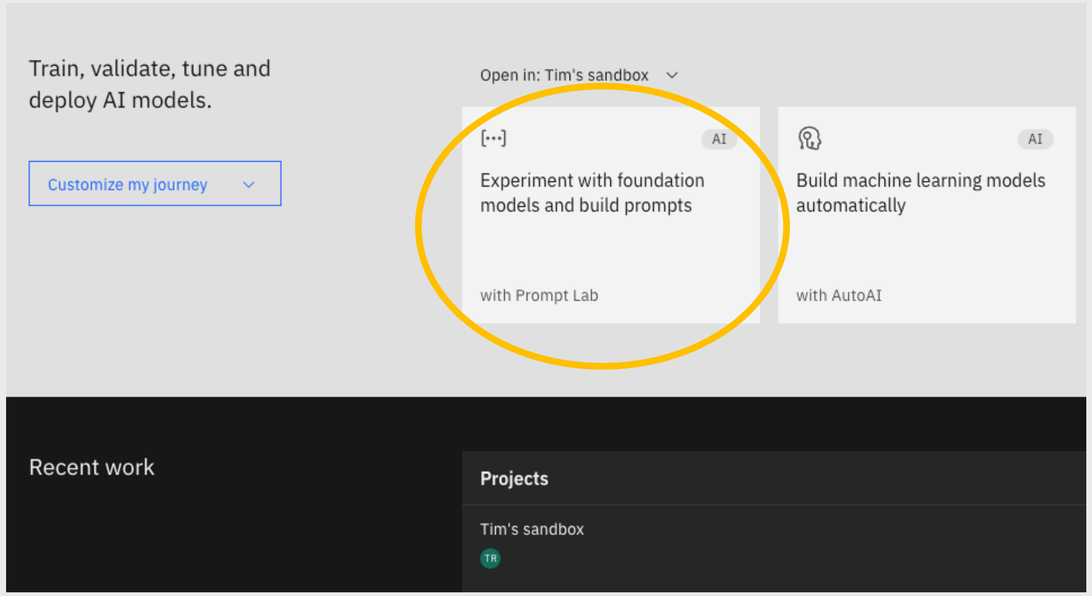
- new users to IBM Cloud will have the correct Organization automatically selected



Getting started with watsonx.ai

Welcome page – accept terms and click on **Take a tour** or to skip ahead click on **Create sandbox project**
(after the tour completes, click on **Create sandbox project)**



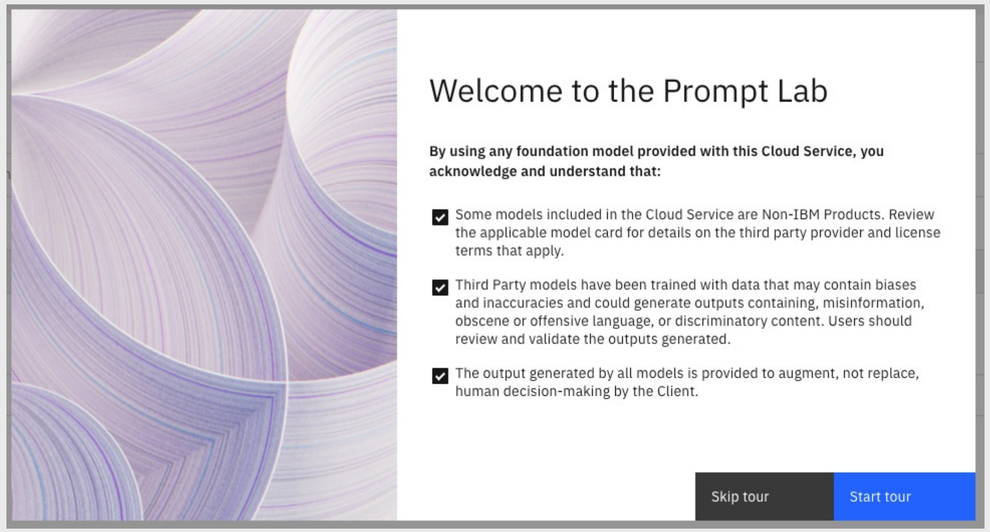


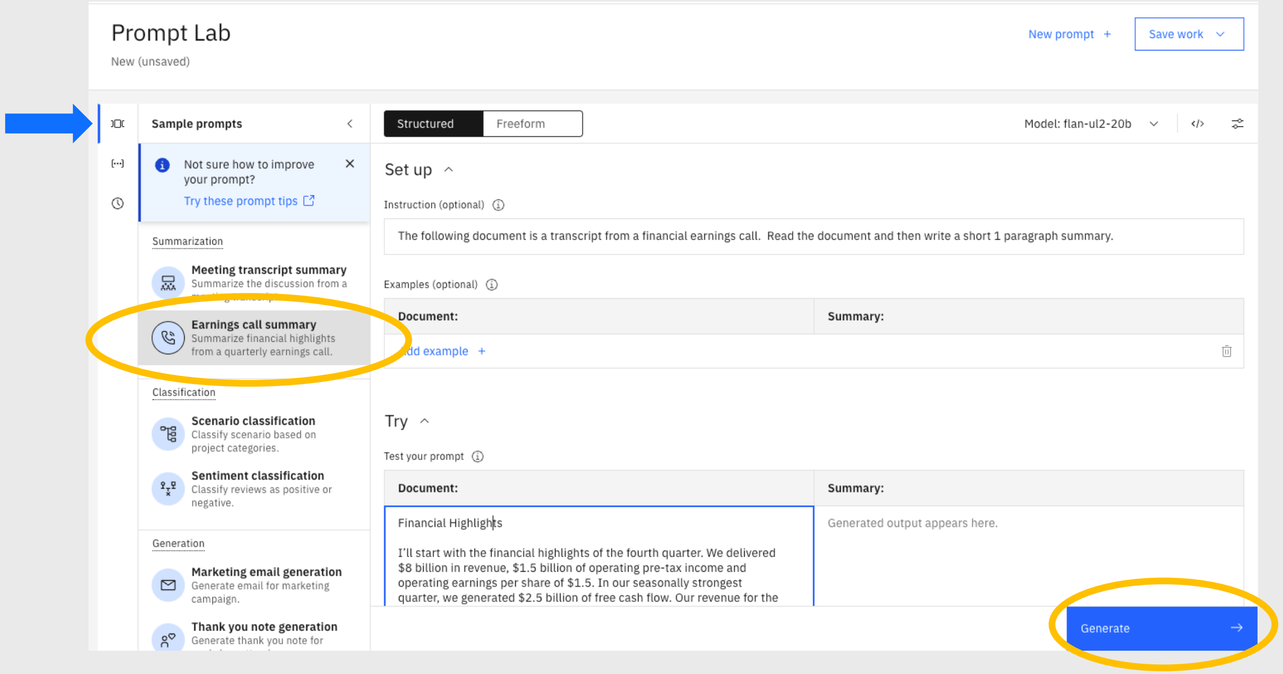
Click on the **Prompt Lab** tile to get started with prompt engineering in watsonx.ai

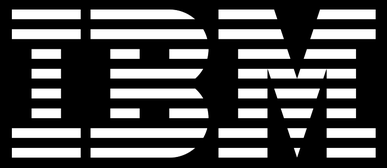
Learn more about watsonx.ai models: https://dataplatform.cloud.ibm.com/docs/content/wsj/analyze-data/fm-models.html?context=wx&audience=wdp
All documentation: https://dataplatform.cloud.ibm.com/docs/content/wsj/getting-started/welcome-main.html?context=wx&audience=wdp

Using the Prompt Lab

When opening the Prompt Lab for the first time, additional requirements about IBM foundation models is provided, accept and click **Start tour** to get an introduction to Prompt Lab





After the tour, start by exploring one of the sample prompts – select the prompt and then click on **Generate** to see the output

Learn more about watsonx.ai models: https://dataplatform.cloud.ibm.com/docs/content/wsj/analyze-data/fm-models.html?context=wx&audience=wdp
All documentation: https://dataplatform.cloud.ibm.com/docs/content/wsj/getting-started/welcome-main.html?context=wx&audience=wdp