

# 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

Create a Schematics Workspace

Author:IBM • [Getting started](#) • [Docs](#) • [API Docs](#) • [CLI Docs](#)

Create

About

1. Specify template

Don't have an existing Terraform template?  
Check out one of our templates here:

Workspace templates

Need help? [View docs](#).

GitHub, GitLab or Bitbucket repository URL

https://github.ibm.com/timro/watsonx-poc-acctconfig/tree/main/admin-setup

URL of the GitHub, GitLab or Bitbucket repository that hosts your Terraform configuration files. This can be the root of the repository, or it can include a [branch and folder](#).

Personal access token

.....

You need to generate either a classic or a fine-grained [personal access token](#) to access all the repositories that you have access to.

☒ Use full repository. ⓘ

Terraform version ⓘ

terraform\_v1.4

Next

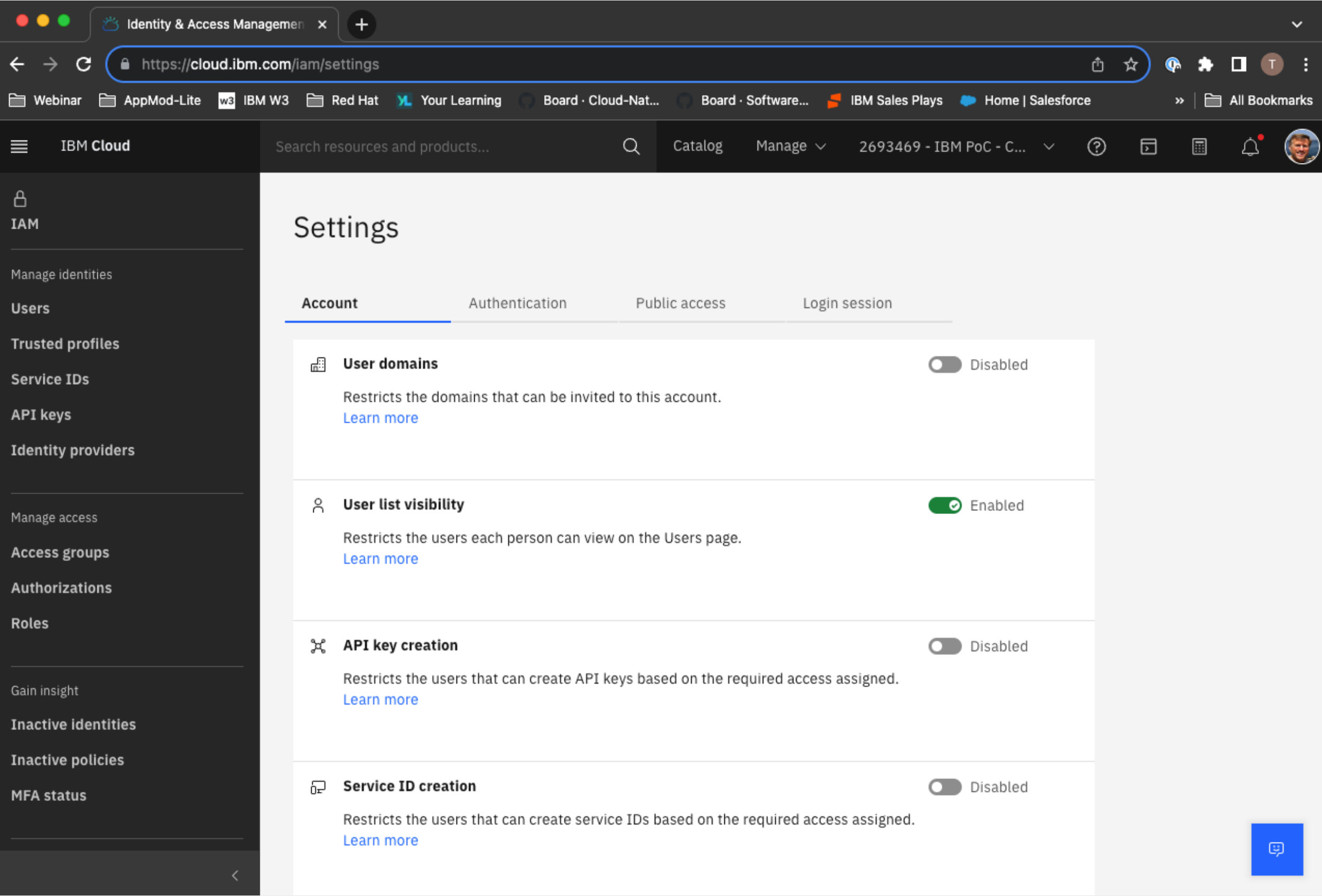
3. Click the **Next** button to go to the Workspace details panel
4. Assign a meaningful workspace name, ex: “configure-account-for-watsonx”
5. Leave remaining options at default and click **Next**
6. Review values and click **Create workspace** to create the workspace
7. Update the expected list of 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)

Apply plan successful 8/5/2023, 2:26 PM			
	13 resources added	0 resource modified	0 resource destroyed
Log		Expand	Job ID
2023/08/05 21:28:32 [1m----- New Workspace Action ----- [21m [0m 2023/08/05 21:28:32 Request: activitiId=31f0da255b2e9c872fb18bfa93922a00, account=bda3b5ea89b5c9cb909067cd839e95c2,			31f0da255b2e9c872fb18bfa93922a00

# 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 an 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](https://cloud.ibm.com/iam/users/invite_users)

Users /

Invite users

Enter email addresses

1.

How do you want to assign access?

Access groups

2. ☒

Streamline access management by adding the user to one or more existing access groups.

Access policy

Assign the user individual access policies.

Select access groups

You can assign access to only the access groups that you have access to manage.

4. 

1 item selected

Add + | Cancel

<input type="checkbox"/>	Group	Description
3. <input checked="" type="checkbox"/>	watsonxai-m5ly31q6	
<input type="checkbox"/>	WATSONX-MGR-ADMIN	Administrators for watsonx instances

Access summary

Summary

API

>

1

User

0

Access groups

0

Assignments

You haven't added any access, but that's ok. You can still invite users to your account.

5. 

Invite

Cancel

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

IBM Cloud

Access (IAM)

Overview

Users

Access groups

Service IDs

Authorizations

Identity providers

API keys

Settings

Users

Use the **View** option to change your view of the user list by selecting the user grouping. Depending on your access, you might see users grouped at the account level or by Cloud Foundry org or user hierarchy for classic infrastructure access.

View: Account users

Filter

Filter by name or email

Status

Add VPN-only user +

Invite users +

User	Email	Status
	pocctest125@gmail.com	Processing
dave weber	dave@dpweberservices.com	Active
Keely Wright owner self	keely@us.ibm.com	Active
Keely Wright	keelywright@gmail.com	Active

Items per page: 25

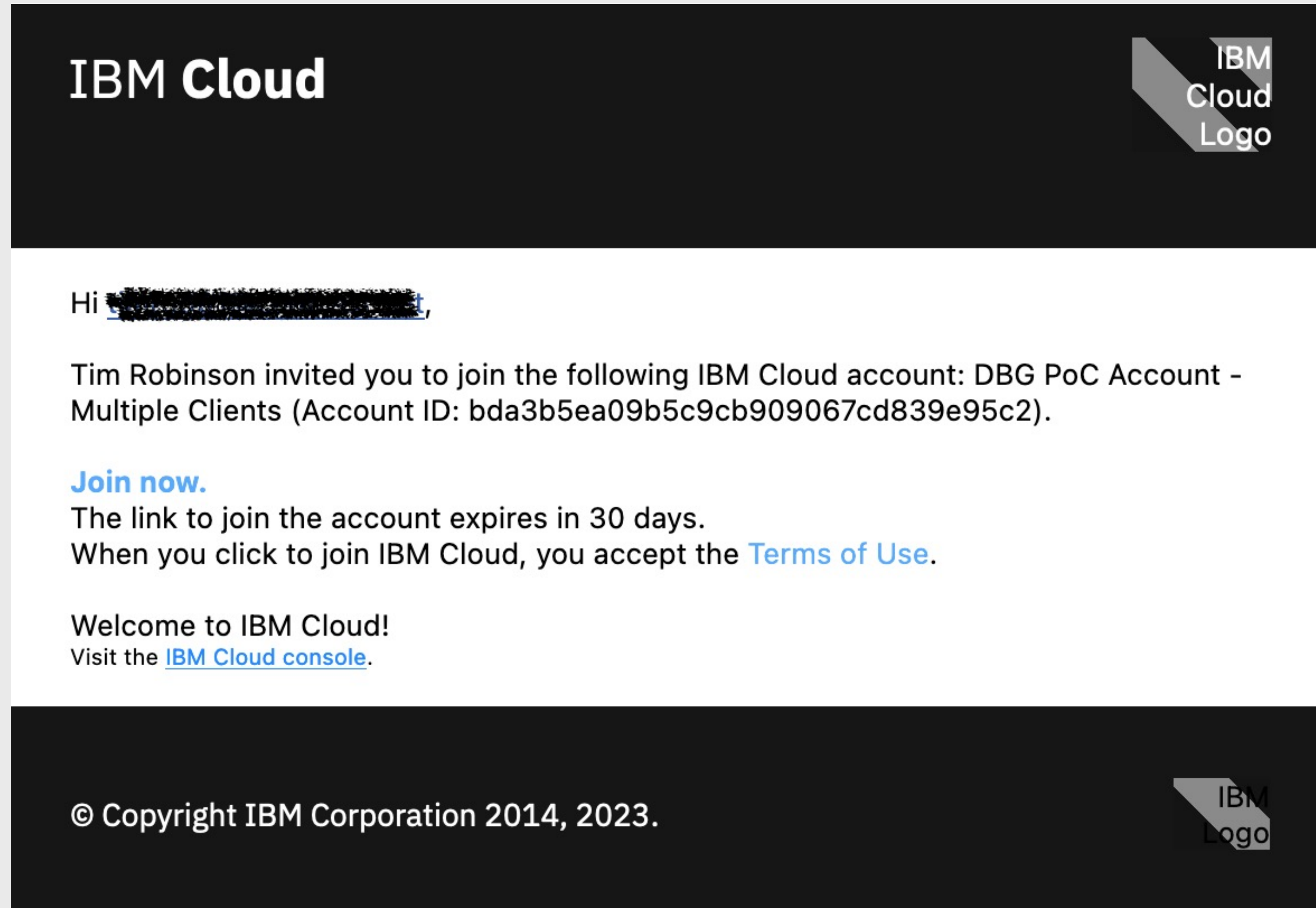
1-4 of 4 items



# 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)





# 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


1.

2.

3.

4.

IBM Cloud




Join IBM Cloud

You're almost there. Complete your IBM Cloud account details so that you can get started.

✔ Account information


ti[REDACTED]st.net

Edit 

✔ Personal information

Cloud User

United States

Edit 

● Account notice

IBM may use my contact data to keep me informed of products, services and offerings:

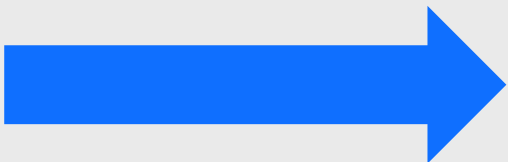
☐ by email

You can withdraw your marketing consent at any time by submitting an [opt-out request](#). Also you may unsubscribe from receiving marketing emails by clicking the unsubscribe link in each email.


More information on our processing can be found in the [IBM Privacy Statement](#). By submitting this form, I acknowledge that I have read and understand the IBM Privacy Statement.

☒ I accept the product [Terms and Conditions](#) of this registration form.

Continue



IBM Cloud




Log in to IBM Cloud


Don't have an account? [Create an account](#)

Sign in with

IBMid



[REDACTED]

Continue 

[Sign in as a different user](#)

☐ Remember ID


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



### Join IBM Cloud


You're almost there. Complete your IBM Cloud account details so that you can get started.

Account information

l.com

Personal information

United States


Edit 

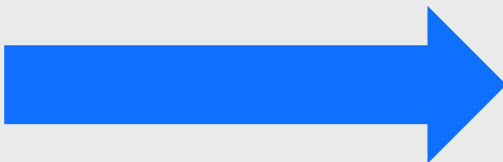
Account notice

☒


I accept the product [Terms and Conditions](#) of this registration form.

Join Account





IBM Cloud




### Log in to IBM Cloud

Don't have an account? [Create an account](#)

Sign in with

IBMid

Continue



[Sign in as a different user](#)

☐

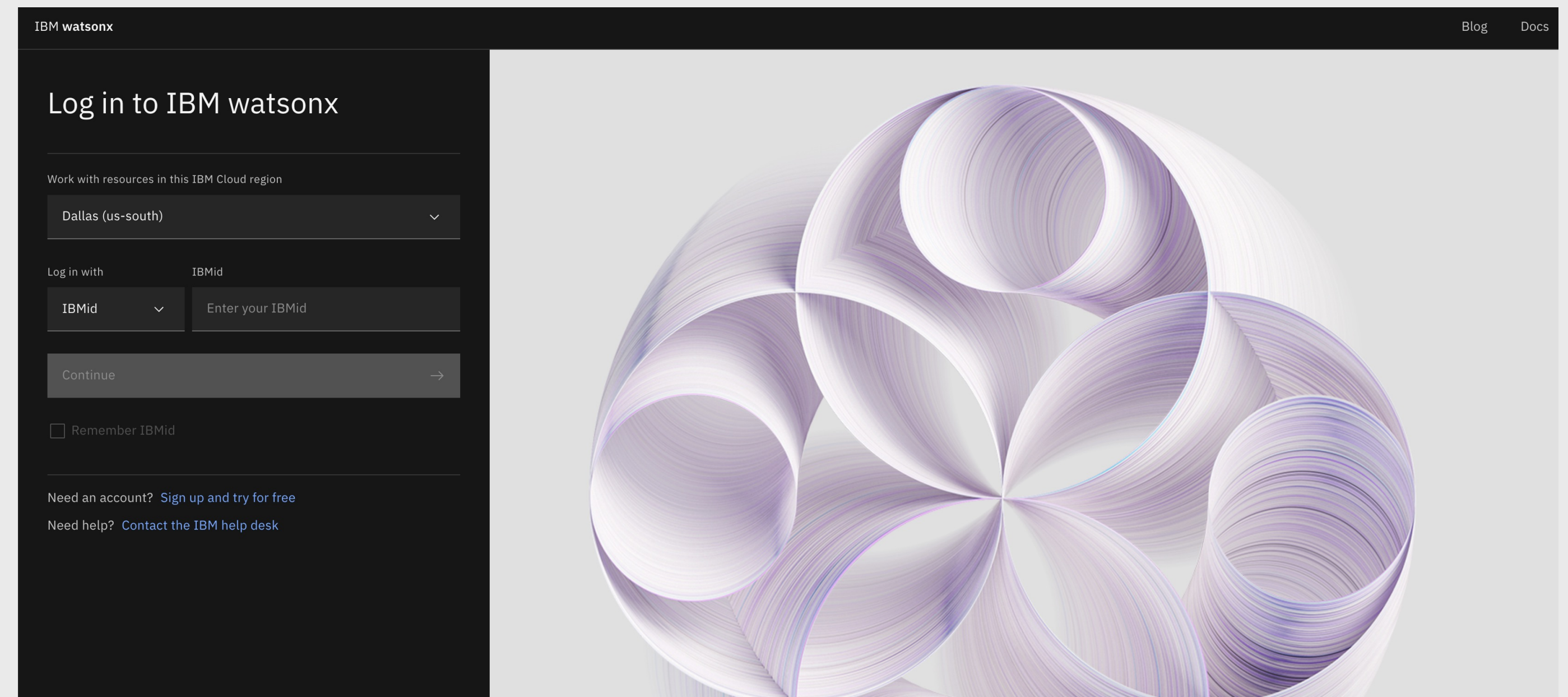
Remember ID

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

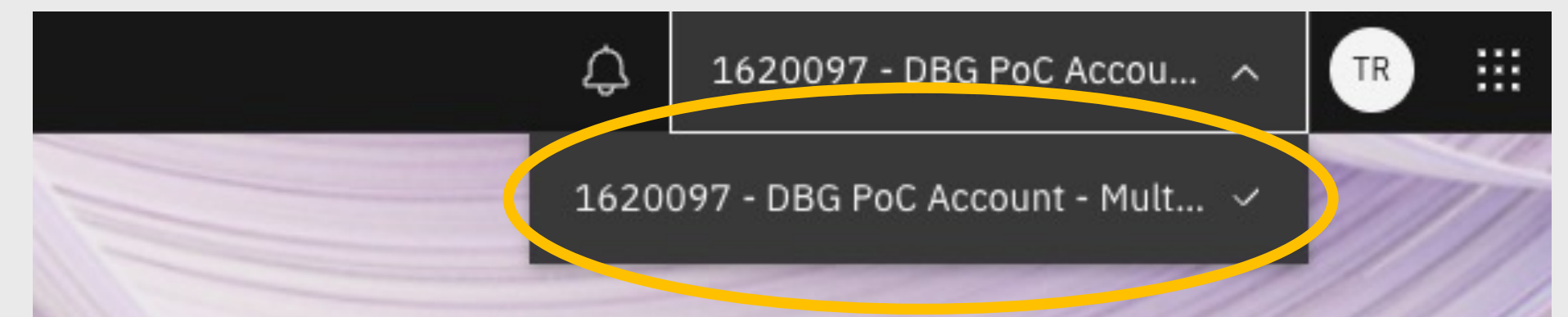
1. Go to  
<https://dataplatform.cloud.ibm.com/wx>

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)

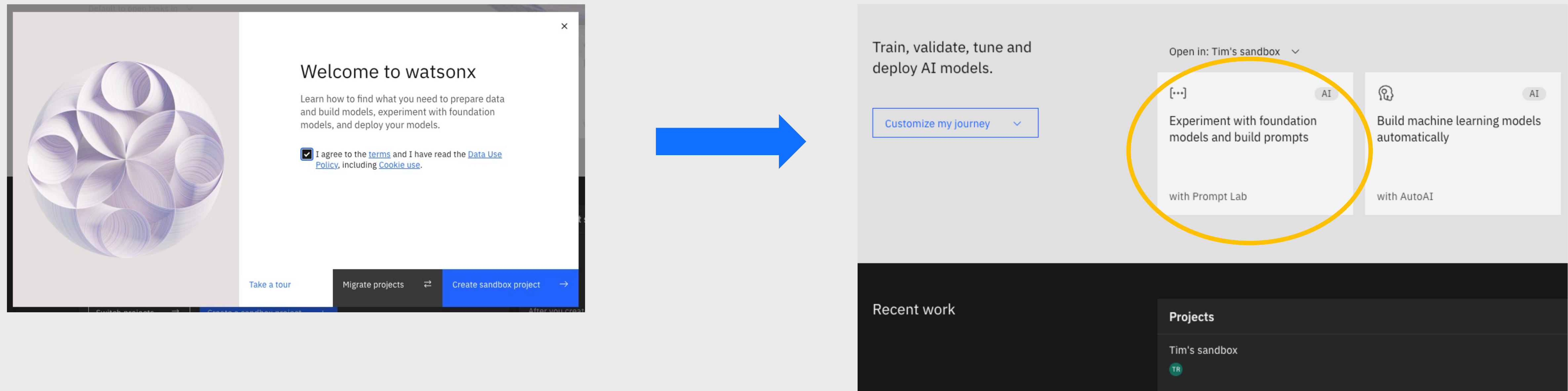
- new users to IBM Cloud will have the correct Organization automatically selected





# 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**)

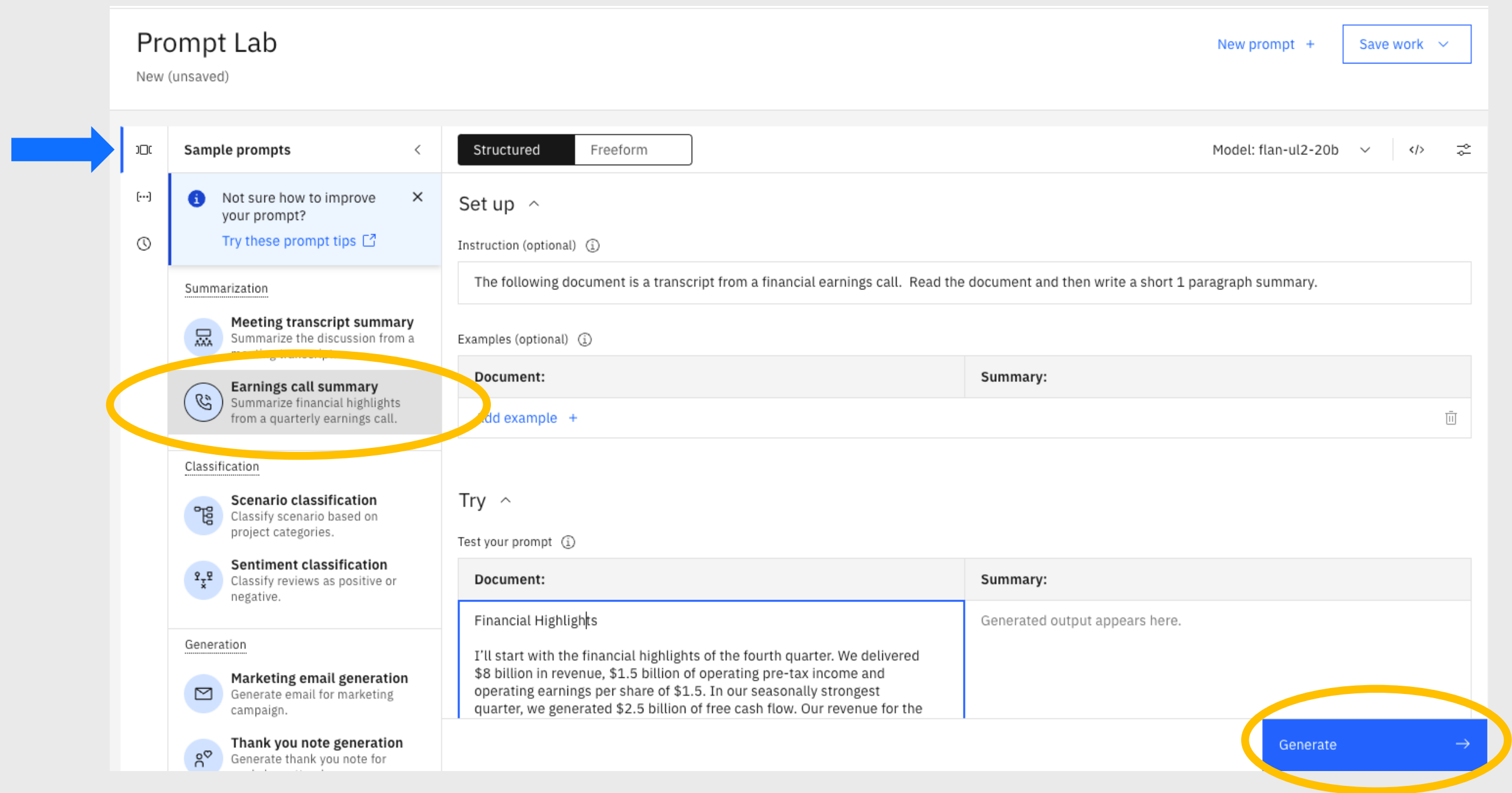
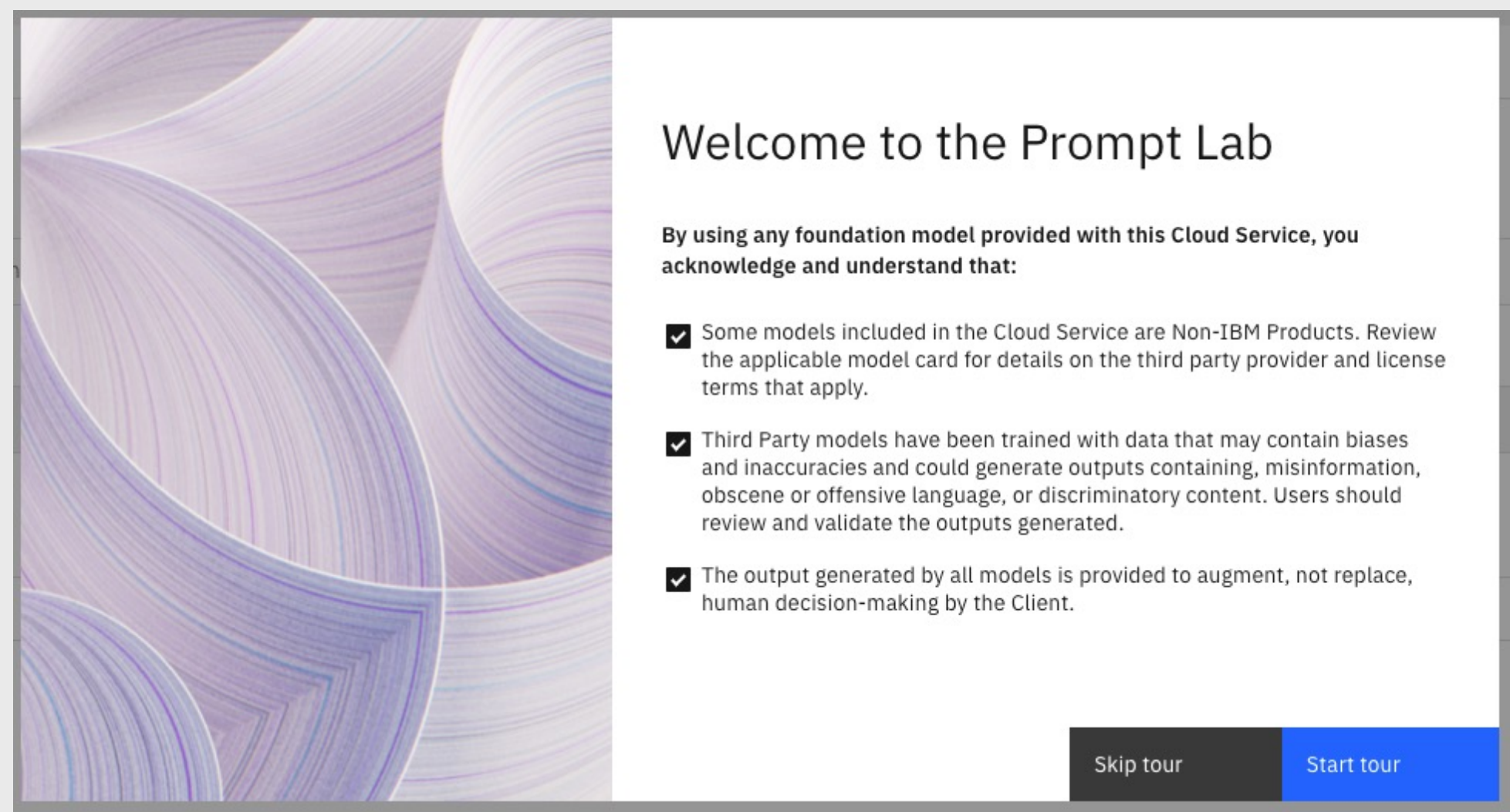


Click on the **Prompt Lab** tile to get started with prompt engineering in watsonx.ai

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>

