

x-config General Purpose Configure

Cluster Support OFF

To Order (CTO)

To Order Bill Luken (wluken@Lenovo.com) January 9, 2015 Training v2

#### x-config Configure To Order (CTO) - (Cluster support OFF)

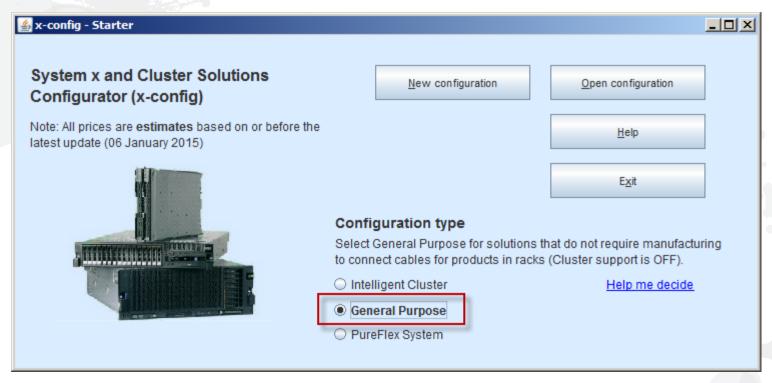
- In this training module you will learn how to build a Flex System and BladeCenter Configure to Order (CTO) general purpose solution and then generate the different output formats.
- We will not cover the Intelligent Cluster (Cluster support ON) function of x-config in this module.
- In the following screen shots you will notice a series of A, B, C, or D designators with the Servers and Options. As part of a continued effort to improve our supply chain and subsequently serviceability and customer satisfaction levels, Lenovo has moved to a parts categorization model that allows for more accurate lead time projections on all products and faster shipments on our most popular products, called the Lenovo HVSC ABCD Classification. The "A" through "D" designators, as described below, indicate how soon your configured solution will be available to ship. The configuration availability aligns with the availability of the component feature that will require the most time to ship. Only features with known availability are considered when assessing the configuration availability.
  - "A" Readily available; up to 7 business days order to ship
  - "B" Standard availability; up to 12 business days order to ship
  - "C" Special order; up to 15 business days order to ship
  - "D" Extended lead time / limited availability
  - " " (blank, no code) Availability is not provided
- In October 2014 we added the PureFlex System solutions to x-config.
- If you need to do a Build to Order (BTO) solution using pre-configured models, then refer to the <u>SSCT</u>.

# x-config – Starter Screen with "Intelligent Cluster" selected (Cluster support ON) – not the focus for this training



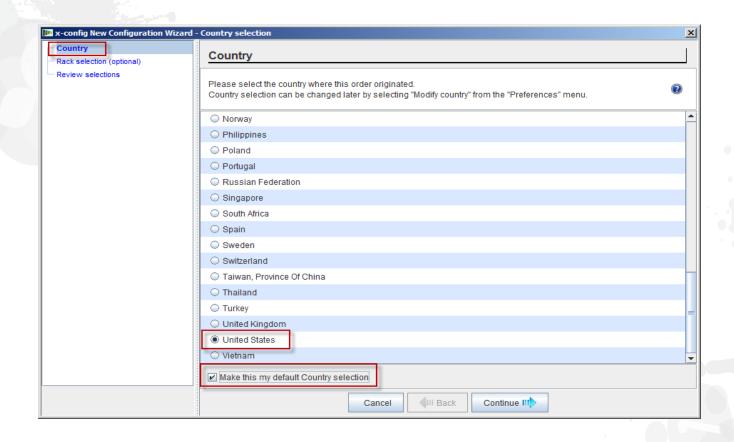
 This is the Starter Screen with Cluster support ON, as you can see you have many more options to allow for configuration of iDataPlex, Intelligent Clusters and other complex Integrated Solutions. (Not our education focus for this module)

# x-config – Starter Screen with "General Purpose" selected (Cluster support OFF)



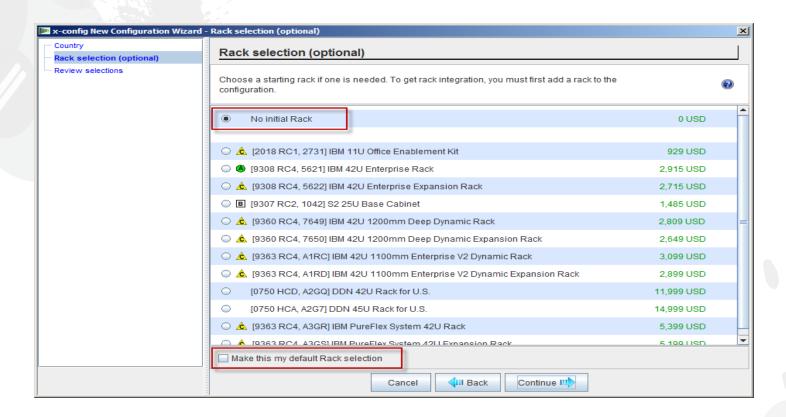
- This is the Starter screen where you can select configuration type ("General Purpose" or "PureFlex System" are the Cluster support OFF options), then build a "New Configuration" or "Open Configuration" (using .CSE file). This is the System x and Flex CTO mode.
  - This is the view when Cluster support is OFF
  - For the purpose of this training module I will only cover "Cluster support OFF"

#### x-config – "New Configuration" Country Selection



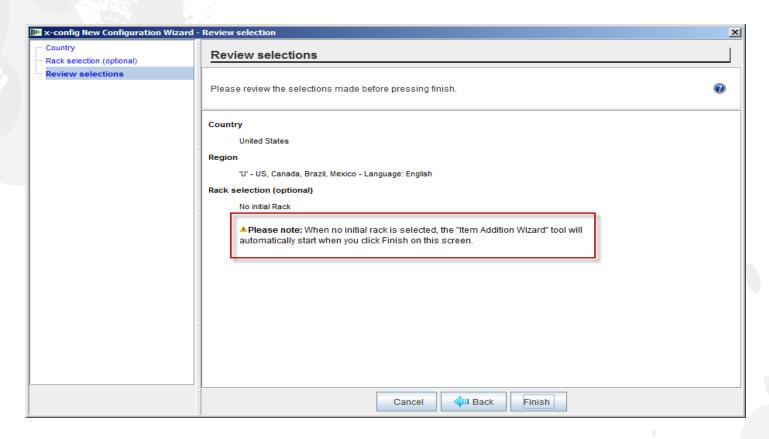
 After selecting "New configuration" from the Starter Screen, I will now select my Country. You can also check "Make this my default Country selection", so x-config will always default to United States or the country you selected.

# x-config – "New Configuration" Rack Selection



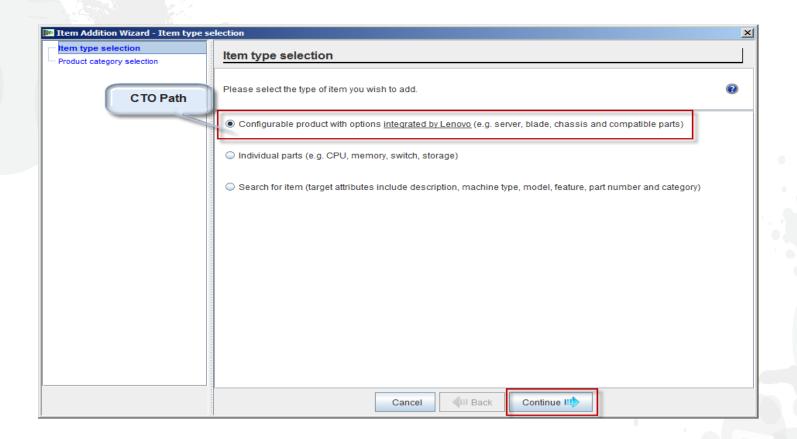
 Next you select whether you require a Rack solution or you will just configure Standalone products. You can also check "Make this my default Rack selection", so x-config will always default to "No initial Rack".

# x-config – "New Configuration" Review Selections



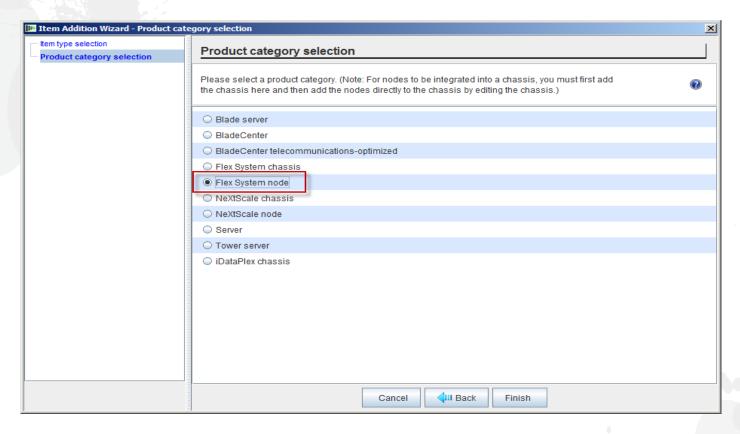
Next is "Review selections". I chose "No Initial Rack" from the previous screen. When you choose "No initial Rack" the "Add new item" Wizard will automatically start after clicking "Finish".

#### x-config - "Item type selection"



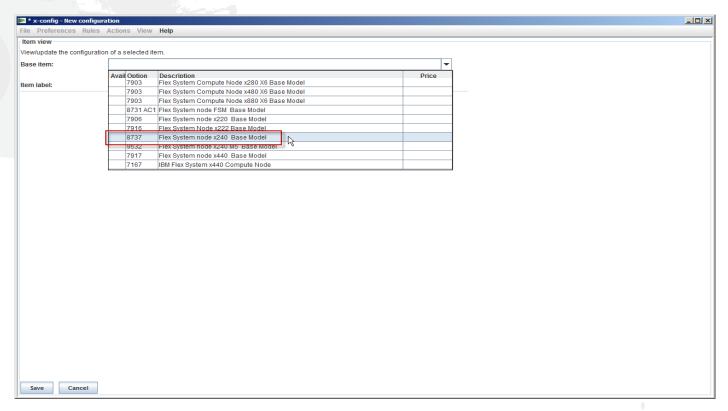
Here is the "Item Addition Wizard" screen. From here I will select "Configurable product with options integrated by Lenovo" (CTO path). Prior to March 2013 x-config was enabled to support building GAV (Generally Announced Variants) models similar to the SSCT, but this function is now removed. Click "Continue".

# x-config - "Product category selection"



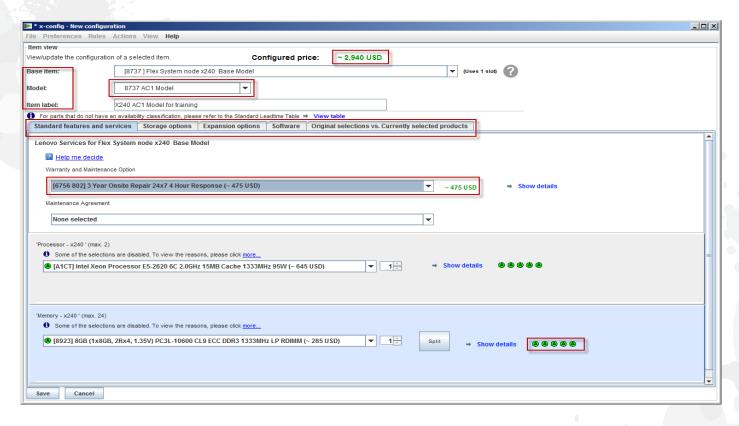
Here is the "Product category selection" screen. From here I will select "Flex System node", but have the options for "Blade server", "BladeCenter", "BladeCenter Tele", "Flex System chassis", "Server", "Tower Server", "NeXtScale chassis", "NeXtScale node" or "iDataPlex chassis". Make your selection then click "Finish".

#### x-config - "New configuration" Pick Base Item



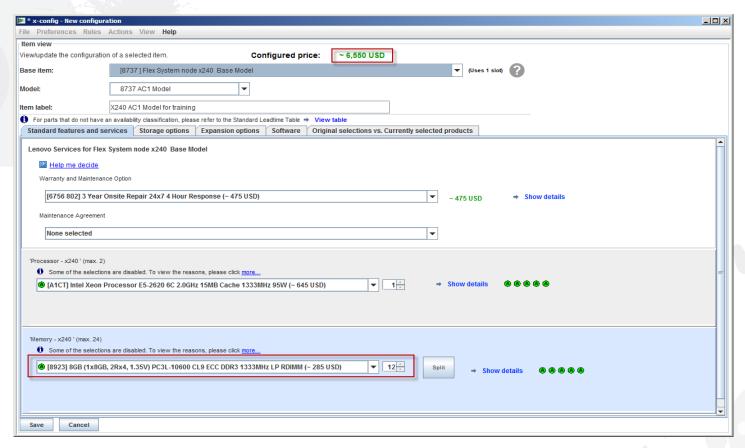
Here is a screen shot of the "New configuration" Flex System node products. Here I selected the "8737, Flex System node x240 Base Model" from the "Base Item" drop-down. I can also configure the FSM or the Flex System V7000. Once I make my selection the configuration Wizard will populate the screen with the attributes so I can further configure the x240.

# x-config – "New configuration" Standard features and services tab



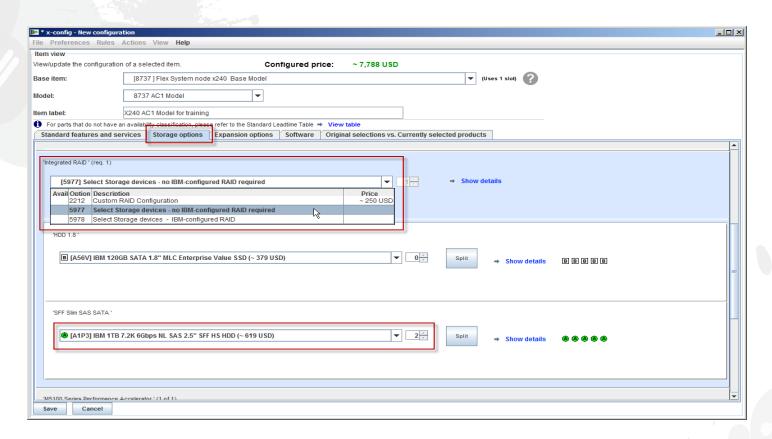
From this configuration screen you can change your "Base Item", "Model" and provide an "Item label". You can now configure the options for the x240 AC1, using the tabs in the middle of the screen. As you add options to the configuration you will see the price update on the top of the screen. Here I selected a warranty upgrade. Also, you will see ABCD codes for the options. In this case the Processor I chose is a code A, which is readily available. I could have chosen 8737 MC1 Model in the "Model" drop-down. The MC1 model is used for solutions that require Microsoft OS. From the new configuration screen you would move from tab to tab.

#### x-config - "New configuration" Standard features and services tab



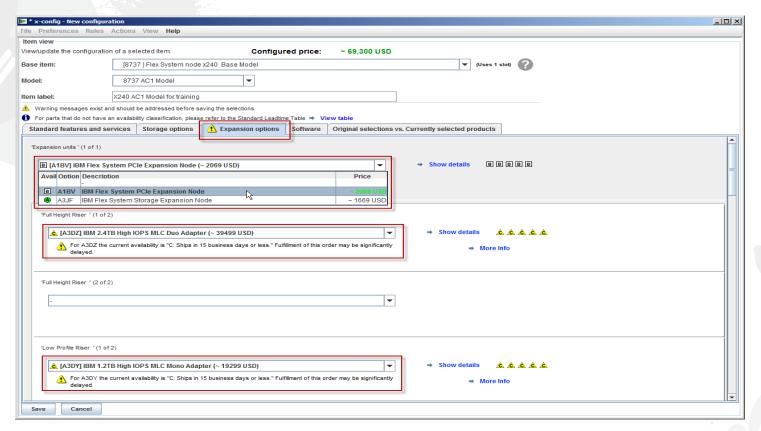
 From the "Standard features and services" tab, I changed the memory to "FC 8923 8GB LP RDIMM" from the drop down box, selecting quantity 12. Also notice the configured price has changed based on my selections.

#### x-config – "New configuration" Storage options tab



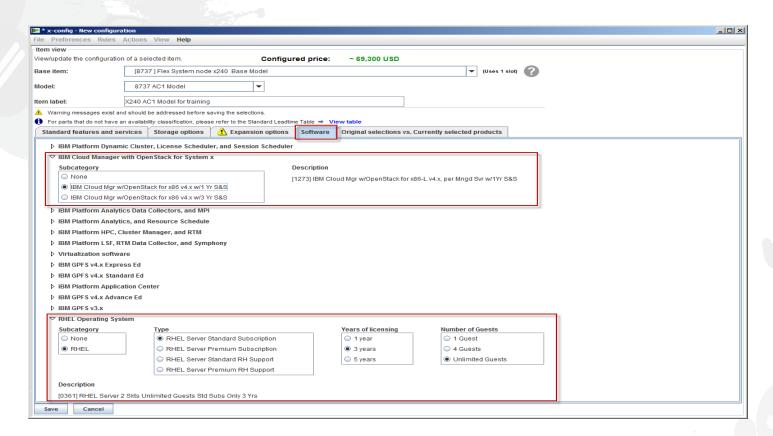
From the "Storage options" tab, I selected "FC 5977 No IBM-configured RAID required". There are other selections I could have made, for instance one is "FC 2212 Custom RAID Configuration". Then I selected my HDDs.

#### x-config – "New configuration" Expansion options tab



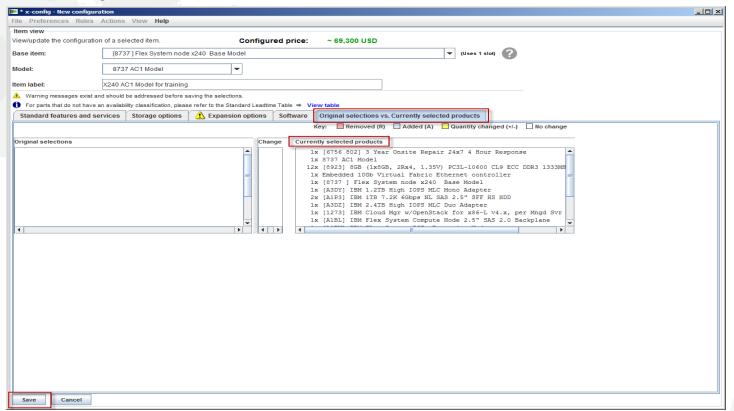
From the "Expansion options" tab, I selected "IBM Flex System PCIe Expansion Node" for my "Expansion unit", but could have selected "IBM Flex System Storage Expansion Node" as my selection. I also added the "FC A3DZ IBM 2.4TB High IOPS MLC Duo Adapter" and "FC A3DY IBM 1.2TB High IOPS MLC Mono Adapter. If you scroll down further you will find some "VAO Services" selections and the System Documentation for US as Country selection will only be "US English" but will allow other selections based on your Country selection.

#### x-config – "New configuration" Software tab



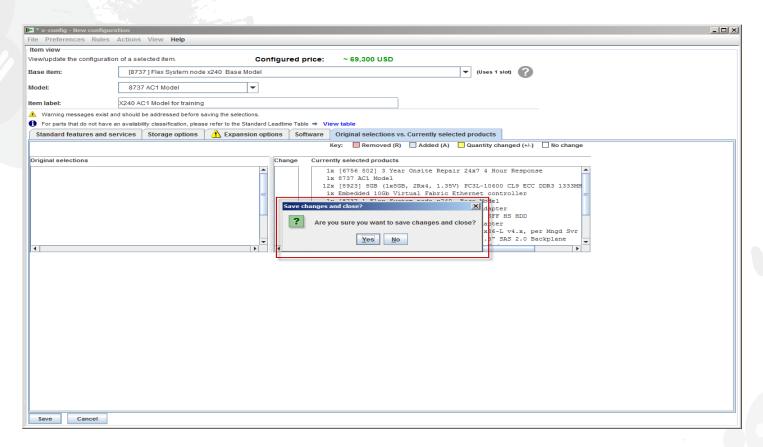
From the "Software" tab, I selected the "IBM Cloud Manager w/OpenStack for x86 v4x w/1 Yr S&S" and the "RHEL Operating system". There are many other options available for Flex System compatible software.

# x-config – "New configuration" Original selections vs. Currently selected products tab



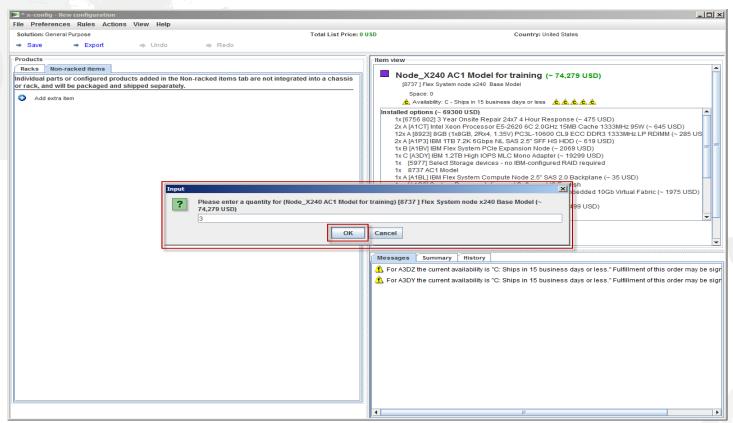
From the "Original selections vs. Currently selected products" tab you can see what you selected for options during the configuration, you will not see any changes until you save and then reopen and make some configuration changes. Once you have all your required option/product configuration selections, click "Save" to exit the Wizard.

#### x-config – "New configuration" Save



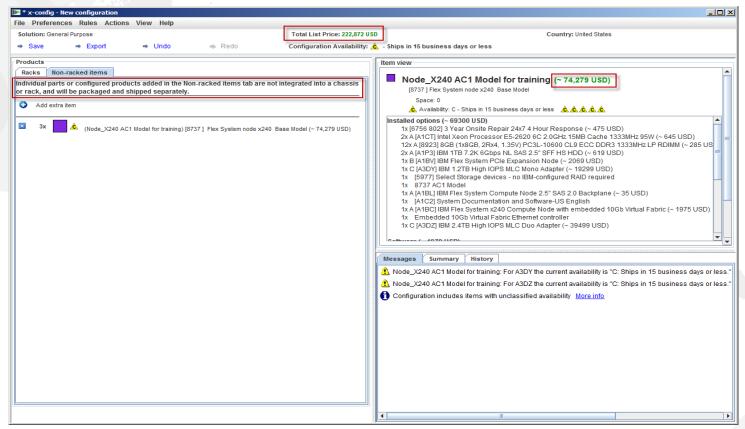
After clicking "Save" you will either get a pop-up that indicates there are some errors and you need to go back and fix or you will get the pop-up box that asks you to "Save changes and close?" the Wizard. Click "Yes".

# x-config – "New configuration" Input Quantity



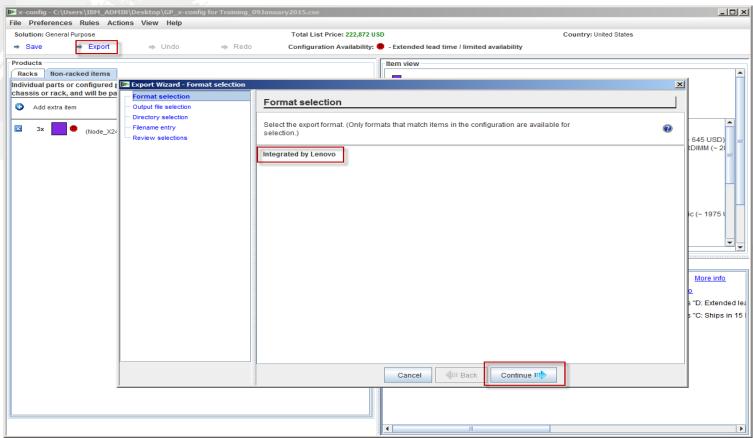
 After clicking "Yes" on the previous screen you will get a pop-up box asking for "Input" on the quantity for this product configuration. Here I changed the default of 1 to 3, then clicked "OK".

# x-config - "New configuration" Main configuration screen



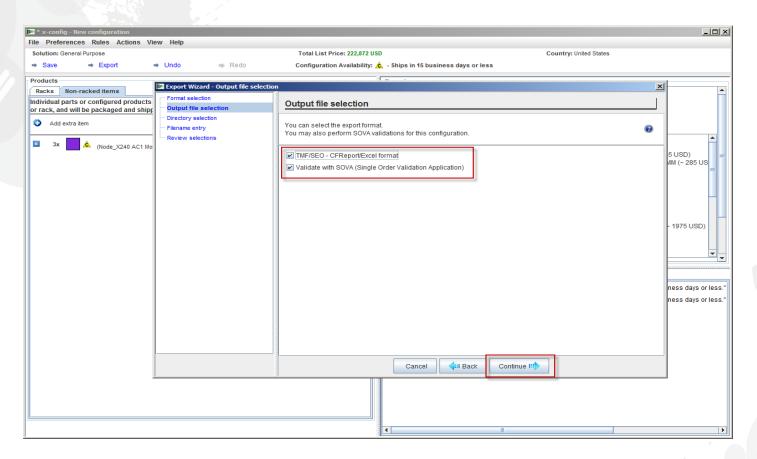
After exiting the configuration Wizard you will be at the main configuration screen. From here you can see the "Total List Price", which is 3 times the single Blade cost of "~74,279 USD". There is also a message explaining that "Individual parts and configured products added here are not ordered in a rack and ship separately". From here you can "Save" or "Export" the configuration or Add another item, and other menu selections.

# x-config – "Export Configuration Wizard" Format selection



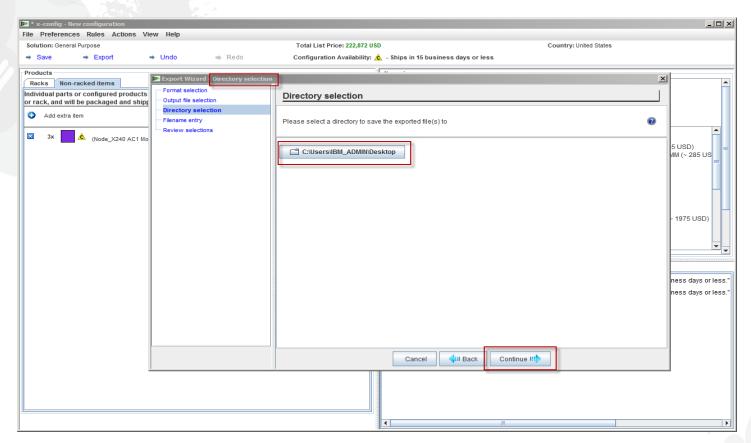
• From the main configuration Wizard I selected "Export". You will get a pop-up for the "Export Configuration Wizard – Format selection" alerting you to that this configuration path will be "Integrated by Lenovo" (CTO). Click "Continue".

#### x-config - "Export Wizard" - Output file selection



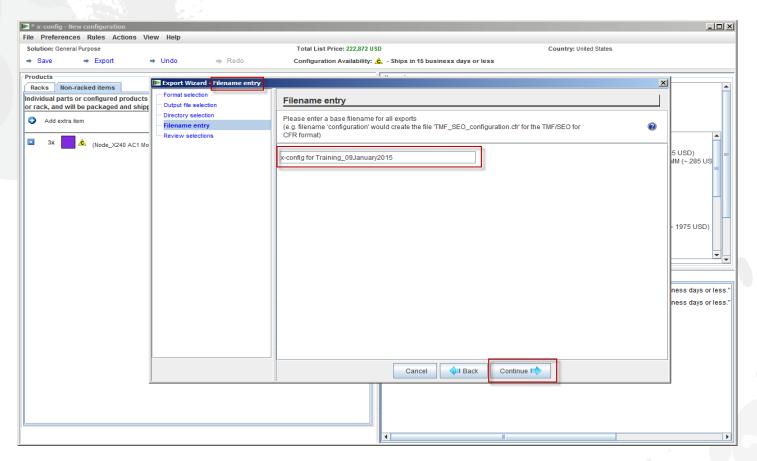
From the main configuration Wizard I selected "Export". You will get a pop-up for the "Export Wizard – Output file selection". By default for Country US you will have checkboxes for "TMF/SEO - CFReport/Excel format" and "Validate with SOVA". By default "Validate with SOVA" is checked. SOVA (Single Order Validation Application) is a Web-based tool that validates that the configuration can be manufactured and does not contain any errors. Click "Continue".

#### x-config - "Export Wizard" - Directory selection



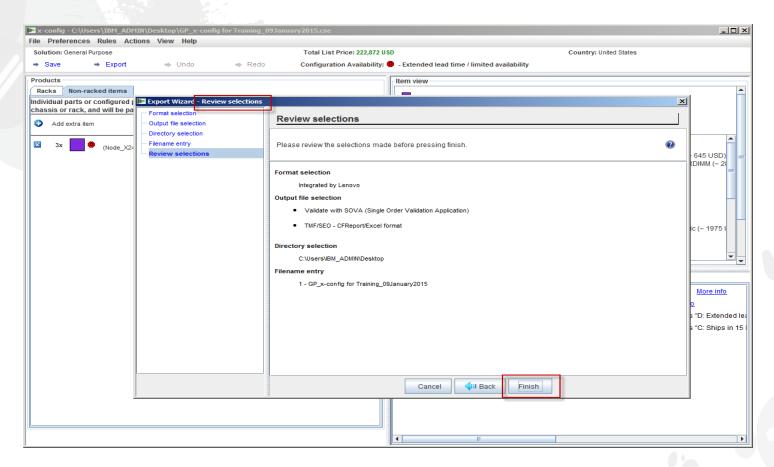
On the previous screen I clicked "Continue" and the next selection is the "Directory selection". By default your files will be placed in the "C:\Users\xxxxx", where xxxxx is User name. You can change this in the settings utility to any other directory. Here I have set to export to my Desktop. Click "Continue".

#### x-config – "Export Wizard" - Filename entry



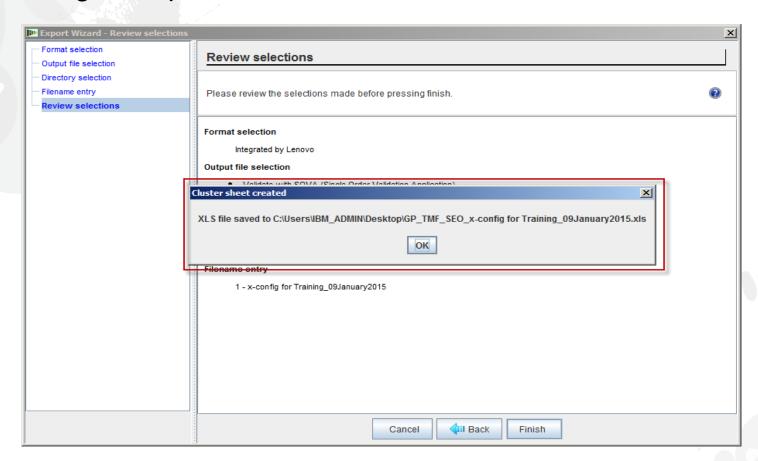
On the previous screen I clicked "Continue" and next is the Filename entry screen. By default x-config puts in the date and time stamp for the file name, I changed to "x-config for Training\_09January2015" file name. Next I clicked "Continue".

#### x-config – "Export Wizard" - Review selections



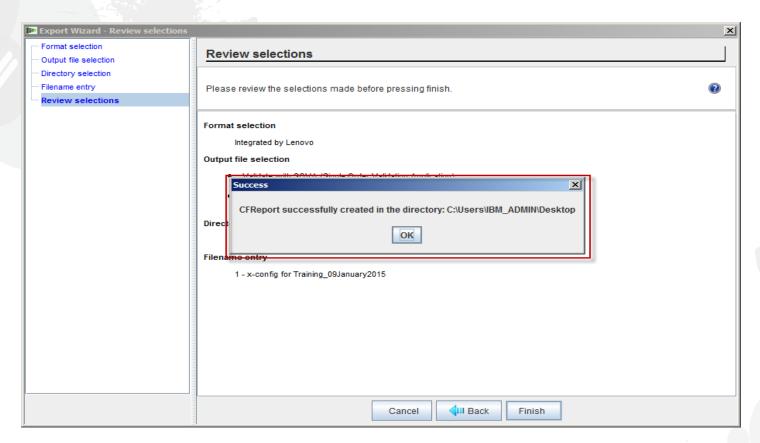
 On the previous screen I clicked "Continue" and next is the "Review selections" screen. Click "Finish".

#### x-config - "Export Wizard" - Review selections



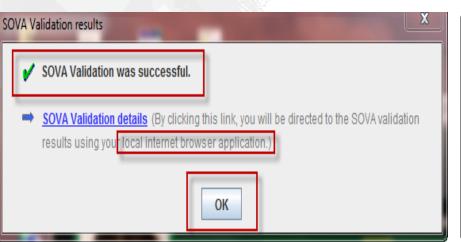
 On the previous screen I clicked "Finish". Next you will get a pop-up screen showing that the XLS file was created successfully in your directory that you chose. Click "OK".

#### x-config – "Export Wizard" - Review selections



 On the previous screen I clicked "Finish". Next you will get a pop-up screen showing that the CFReport file was created successfully in your directory that you chose. Click "OK".

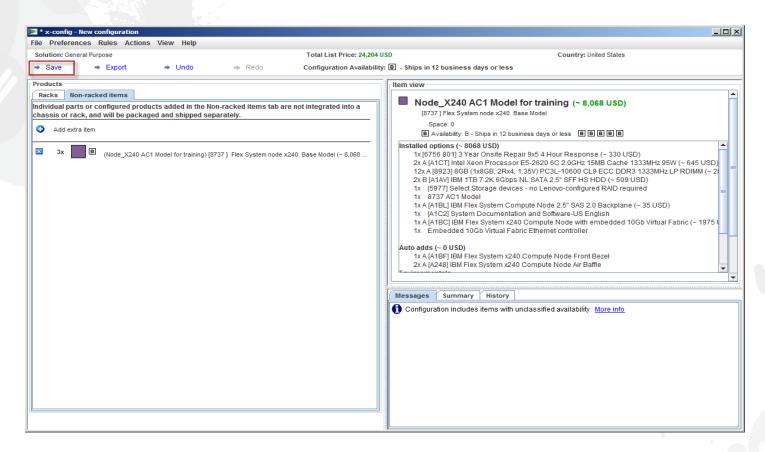
#### x-config – "Export Configuration Wizard" Review selections





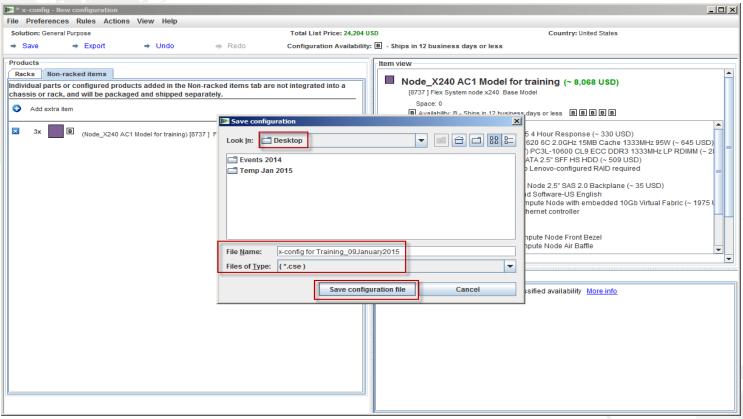
On the previous screen I clicked "Finish". Next you should get two pop-up screens showing that SOVA Validation was successful or it failed. You can click on the link to view the results, but you need to be connected to the Internet to view the report. The other pop-up screen confirms again that your Export has been successful. You can view the files by clicking on the "Open the folder in the file browser" link. If you would rather not see this pop-up again, check "Do not show this dialog again" box. In both pop-up screens click "OK".

# x-config - Main configuration screen "Save"



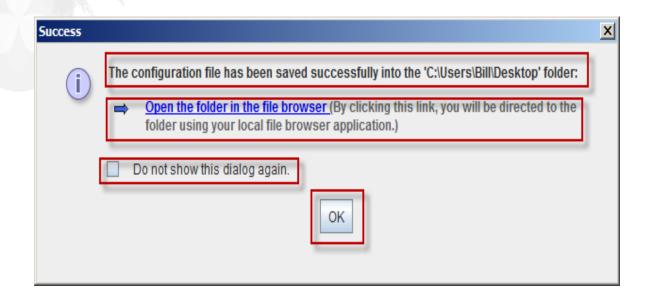
After clicking "OK" on the previous pop-ups you will be brought back to the Main configuration screen. From here you want to click "Save" the configuration so you can make future modifications if needed. The default import format for x-config is ".CSE".

# x-config - Main configuration screen "Save Configuration"



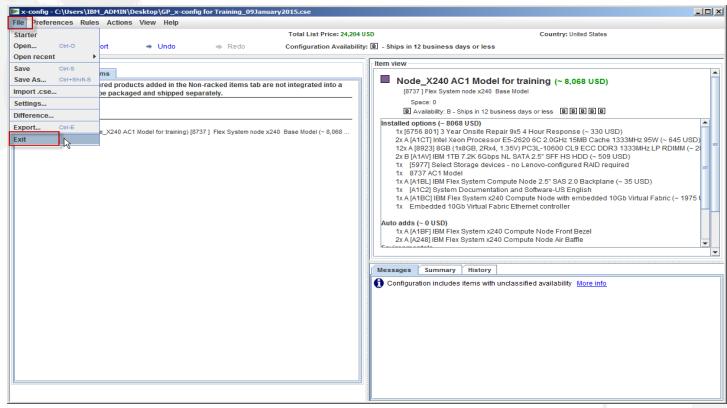
• After clicking "Save" on the previous screen you will get a pop-up box, "Save configuration", where you can select the default directory or put the .CSE file into another directory. You need to create a "File Name" for the .CSE file. Then click "Save configuration file".

#### x-config - Main configuration screen "Success"



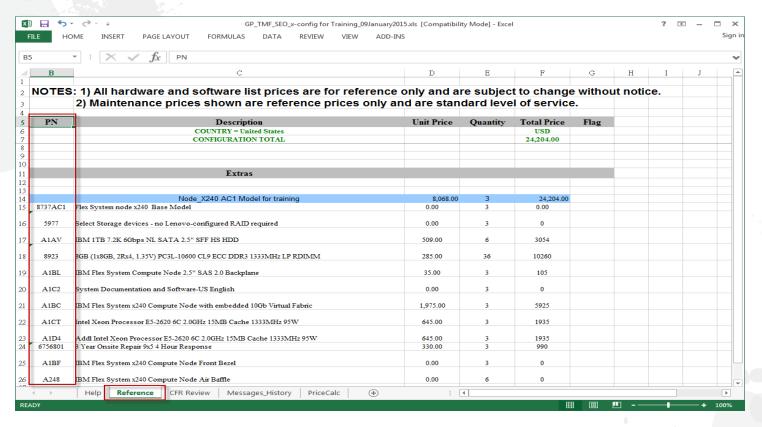
After clicking "Save configuration file" you will get another pop-up box showing "Success" and the directory in which the file was saved. As with Export, you have the ability to "Open the folder in the file browser". Also you can chose not to show this dialog again by checking the box. Click "OK".

# x-config - Main configuration screen "Exit"



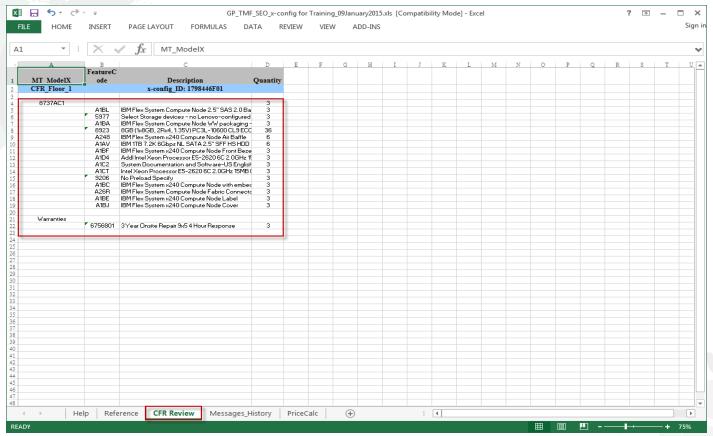
 After clicking "OK", you will be brought back to the Main configuration screen. If complete, you can click "Exit" from the "File" drop-down menu.

# x-config - Feature Code (FC) XLS Output



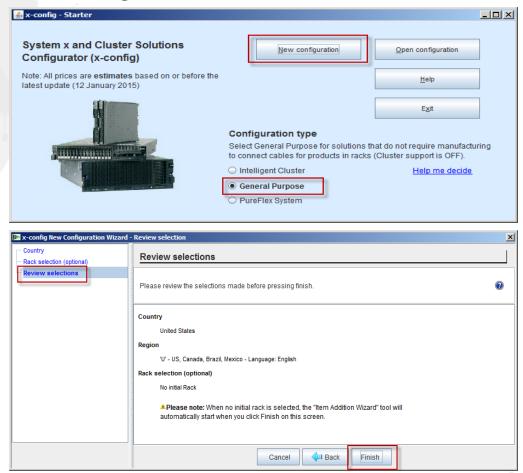
Here is a view of the "Reference" tab from the Feature Code (FC) XLS output file. Feature Codes (FC) are used in System x in the Americas for products and solutions to be fulfilled by Lenovo. You also need the CFR from the "Export" for Lenovo fulfillment. You can use this XLS output for your customer proposal.

# x-config - Feature Code (FC) XLS Output



 Here is a view of the "CFR Review" tab from the Feature Code (FC) XLS output file. This can be used to verify your solution.

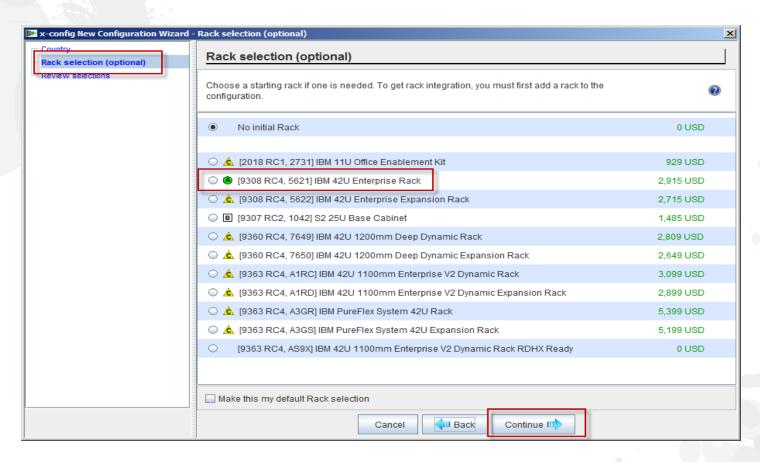
#### x-config – New Configuration



Now we will restart x-config so we can select a different configuration path. Here I selected "New Configuration" from the Starter screen. Based on my previous selections I will skip right to the review selections page. I can change the assigned values by clicking "Back". Or complete the configuration by clicking "Finish".

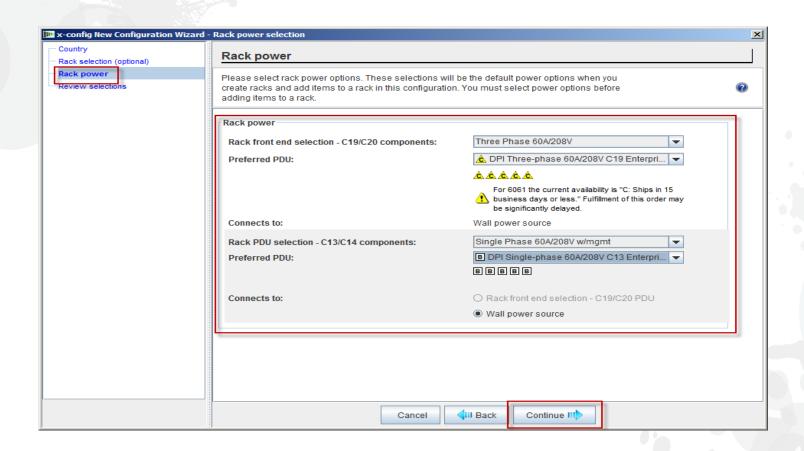
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#### x-config - New Configuration Wizard - Rack selection



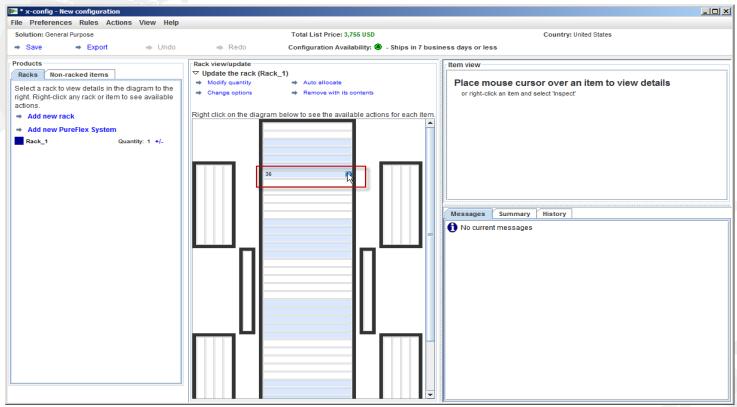
 From the New Configuration Wizard I went back to the "Rack selection" screen and chose the "9308 RC4, 5621 IBM 42U Enterprise Rack". Click "Continue".

#### x-config - New Configuration Wizard - Rack power selection



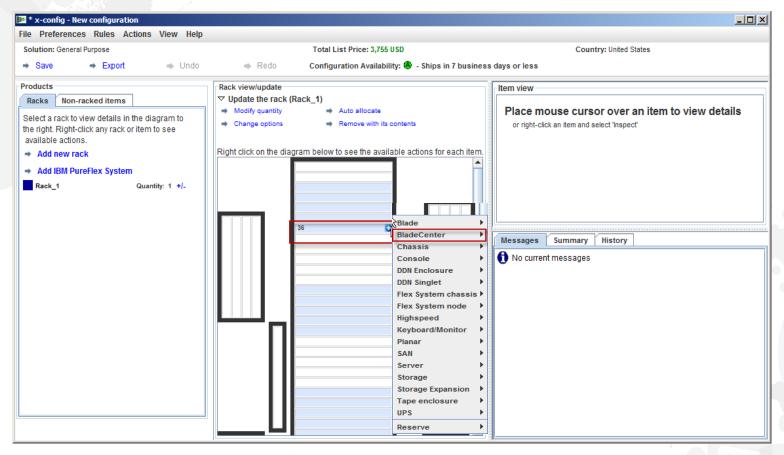
Next you will need to choose your Rack power. Click "Continue".

#### x-config – New Configuration Main configuration screen



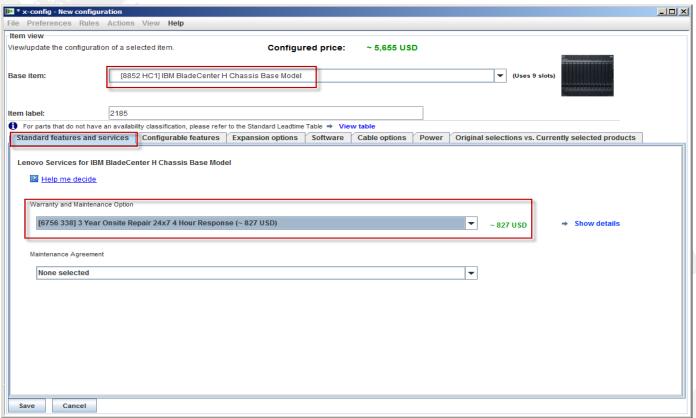
After clicking "Finish" in the New configuration Wizard I am brought to Main configuration screen. Now I can add product(s) to the Rack by placing my cursor over any empty slot (number) in the Rack. In this example I chose position "36".

# x-config – New Configuration Product selection



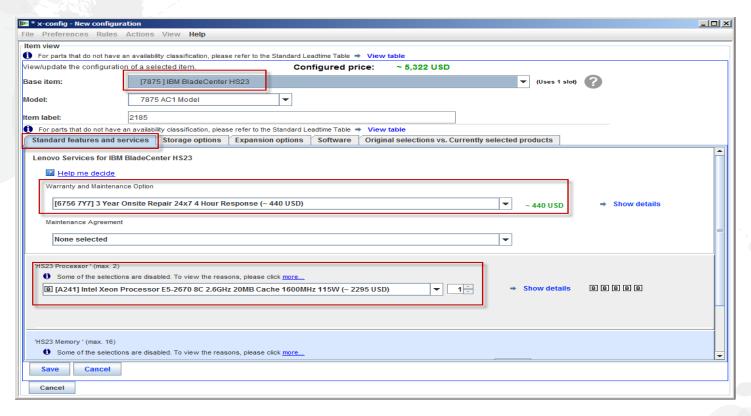
Now you would left-click on the plus sign in slot "36" (could be any open slot position) to add a product. For this module I am going to select a BladeCenter chassis by continuing to move the cursor down to "BladeCenter" and then click "New BladeCenter".

#### x-config – New Configuration Product configuration



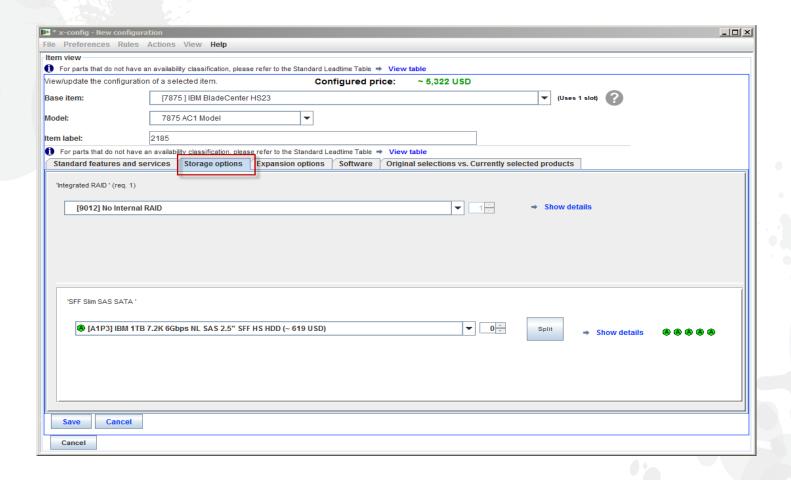
For this training module I selected the BCH for my "Base Item". Now I can go through the tabs and configure the options as needed. Here I selected a warranty support upgrade on the "Standard features and services" tab.

## x-config - Product Configuration "Standard features and services"



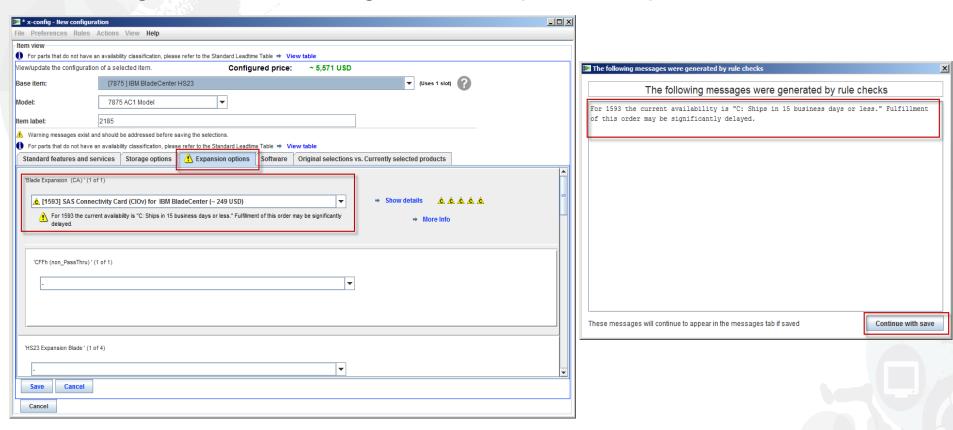
On the previous screen using the "Configurable features" tab I chose "Auto Fill" the Blades into the Blade Chassis, by selecting "New Blade". Then on this screen I selected the "7875 HS23 Base Model" under the "Base item" drop down menu. Next on the "Standard features and services" tab I selected the warranty upgrade for the Blades that matches the Chassis warranty. Next I changed to "Intel Xeon Processor E5-2670..." for my Processor. Make sure to add/change the memory as needed.

# x-config – Product Configuration "Storage options"



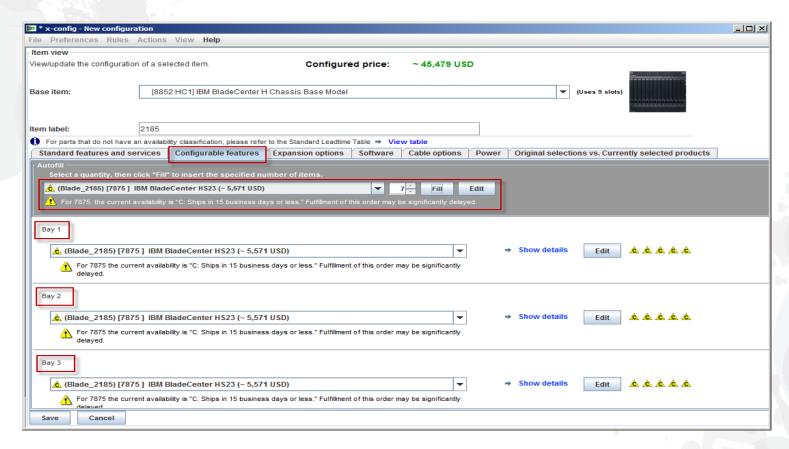
On the "Storage options" tab, I left the defaults.

# x-config - Product Configuration "Expansion options"



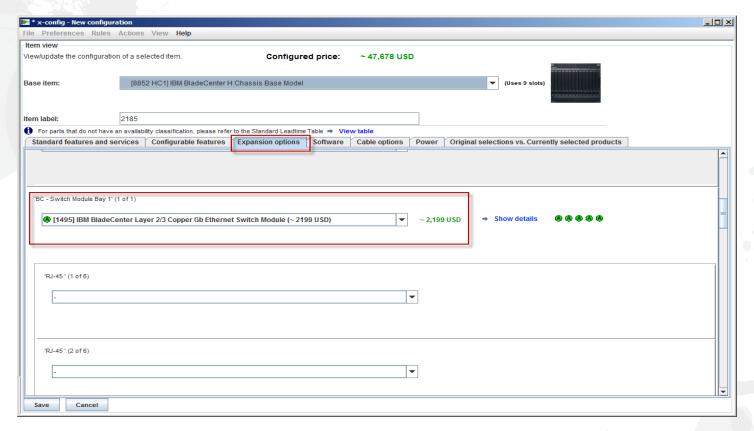
On this screen, "Expansion options" I added the "1593 SAS Connectivity Card (CIOv) for IBM BladeCenter". Next, I clicked "Save". I then received a pop-up window warning about the availability of FC 1593. It is labeled as a "C" part, meaning it will ships in 15 business days or less.

## x-config – Product Configuration "Configurable features"



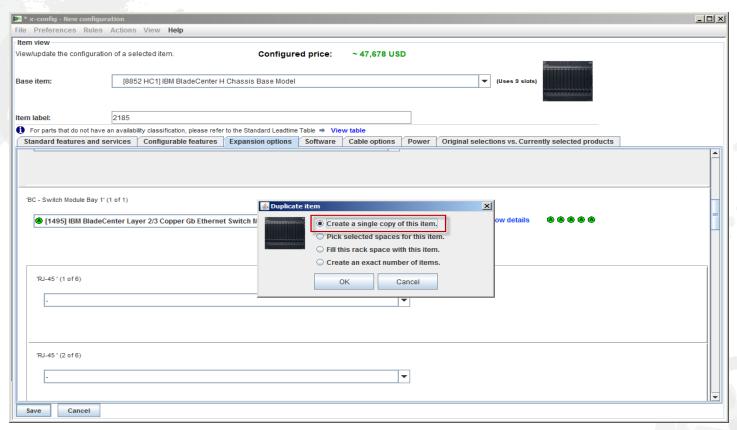
After clicking "Save" on the previous HS23 Blade configuration Wizard, I can now choose amount of Blades to fill, I selected 7. Then I clicked "Fill". This will automatically populate Blades in Blade bay positions 1-7.

## x-config - Product Configuration "Expansion options"



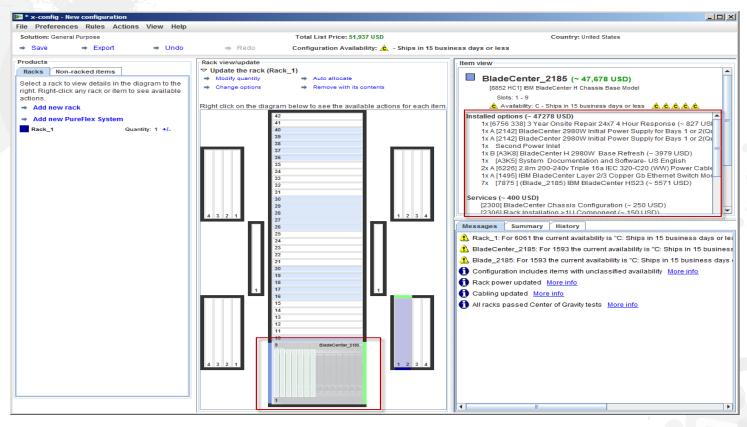
Next I went to the "Expansion options" tab, adding "1495 IBM BladeCenter Layer 2/3 Copper Gb Ethernet Switch Module". I will not go through all the Expansion options selections. From here I click "Save", as the rest of the configuration will be similar to the Flex product covered earlier.

# x-config - Product Configuration "Save"



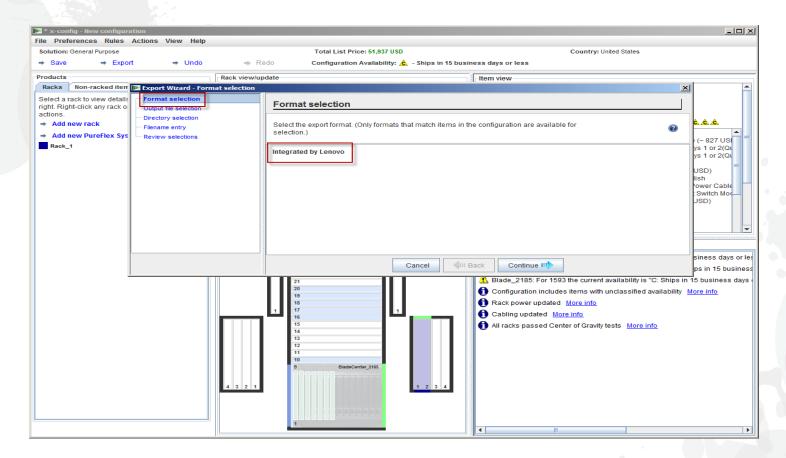
Now when I clicked "Save" I received this pop-up, "Duplicate item" where I chose "Create a single copy of this item". Then I clicked "OK".

## x-config - Main configuration screen



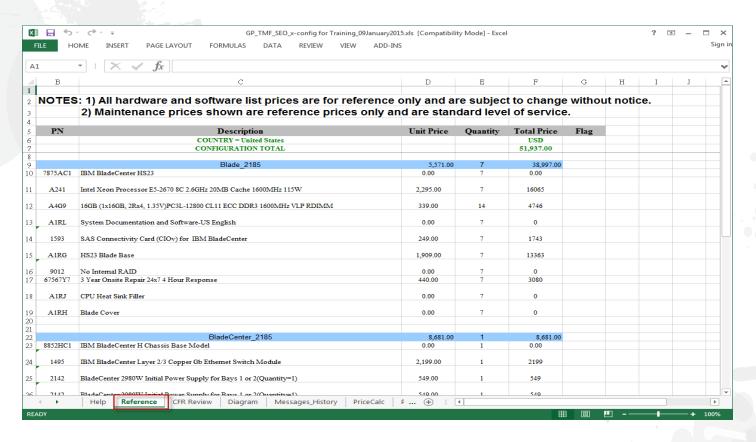
Notice that x-config automatically populated the BladeCenter (BC) chassis at the bottom of the Rack. When you move the cursor over the BC chassis you will see the information populate in the top right of the screen, showing "Installed options" and "Services". I could scroll down and see more. From here I could add another product following the same process as I used adding the BC Chassis and Blades, or I can now "Export" and "Save" following the same process as used in the previous configurations.

#### x-config - "Export Configuration Wizard" Format selection



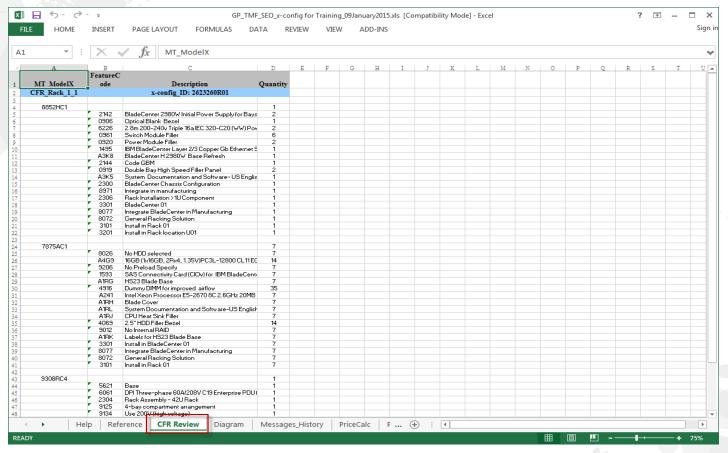
From the main configuration Wizard I selected "Export". You will get a pop-up for the "Export Configuration Wizard – Format selection" alerting you to that this configuration path will be "Integrated by Lenovo". From here I click "Continue".

# x-config - Feature Code (FC) XLS output



Here is a view of the "Reference" tab from the Feature Code (FC) XLS output file. Currently this FC output is used for products to be fulfilled by Lenovo. You also need the CFR from the "Export" for Lenovo fulfillment. You can use this XLS output for your customer proposal.

## x-config – XCC XLS output



Here is a view of the "CFR Review" tab from the XCC XLS output file. This
can be used to verify your solution.

#### Acronyms

- CTO Configure To Order
- GAV Generally Announced Variant
- SOVA Single Order Validation Application
- FC Feature Code
- PN Part Number
- HVEC High Volume Easily Configured Pipeline
- XCC XCCelerator Pipeline
- SBB Sales Building Block

#### x-config resources

- All Users: System x and Cluster Solutions configurator (x-config)
- Training contact: <u>wluken@lenovo.com</u>
- Report errors and suggest improvements: <a href="mailto:erchelp@ca.ibm.com">erchelp@ca.ibm.com</a>
- Link to x-config install
  - https://www.ibm.com/products/hardware/configurat or/americas/bhui/asit/

# Thank you