

STEP BY STEP GUIDE:

Creating Multi Account Views in CloudCheckr CMx

Multi Account View, or MAVs, allows you to view the resources of *multiple accounts* in a single view for easier reporting and analysis.

There two ways to create a MAV

1. From Account Families page: this method is efficient for when you want the MAV to mirror your Account Family
2. From the Accounts Hierarchy page: This method is useful when you are creating a MAV that contains a subset of accounts within your account families

How to Create a MAV from the Account Families page

This method of creating MAVS is the easiest way when you want a MAV to mirror your Account Family. Whenever you add a new account to the Account family, it will automatically add the account to your MAV.

- From the Select Account page, enter a Payer Account. To narrow your search results or if you are unsure which accounts are “Payer” accounts, you can use the “search Accounts” field to filter for “Payer”

Customers

Ingram Micro Internal - GBI - DEMO

Accounts MAVs

Search Accounts

Name	Provider	Type	Sub Type
Demo Payer Placeholder	AWS	Payer	
Legacy	AWS	Payee	
Payer-Company X	AWS	Payer	
Project A Prod	AWS		
Project A Test	AWS		
Project B Prod	AWS		
Project B Test	AWS	Payee	

Manage Accounts

Creating Multi Account Views in CloudCheckr

- Once you click on your Payer Account, you will see the following page where you will click on **Billing > Configure > Account Families**

The screenshot shows the CloudCheckr interface. In the left sidebar, the 'Billing' menu is expanded, and 'Account Families' is highlighted with a red circle and the number 3. In the top navigation bar, 'Configure' is highlighted with a red circle and the number 2. In the main content area, a red circle and the number 1 points to the 'Billing' link in the sidebar. The main content area also displays a 'Welcome to the new CloudCheckr UI!' message and a 'Cost Analysis' bar chart showing daily costs over a period of 21 days.

- You will land on the screen below where you will click on the Account family name for which you want to create a MAV

The screenshot shows the 'Account Families' page in CloudCheckr. At the top, there is a summary section with three columns: 'Total Account Families' (3), 'Total Mapped Accounts' (4), and 'Accounts Not in a Family' (0). Below this is a table with three columns: 'Account Family Name', 'Project Code', and 'Child Accounts'. The table lists three account families: 'Customer 1', 'Customer 2', and 'Customer 3'. Red annotations highlight the 'Customer 1' account family name in the table, with a red arrow pointing to it and the text 'Choose one of the account family for which you want to create the MAV'.

Account Family Name	Project Code	Child Accounts
> Customer 1		1
> Customer 2		2
> Customer 3		1

Creating Multi Account Views in CloudCheckr

- Once you click on an account family, it will expand, and you will be able to see the following:

The screenshot shows the CloudCheckr interface. At the top, there's a search bar and a user profile for 'Payer-Company X'. Below this is a summary table for 'Account Families'.

Total Account Families	Total Mapped Accounts	Accounts Not in a Family
3	4	0

Below the summary table is a table of account families. The first row is 'Customer 1' with 1 child account. The second row is 'Customer 2' with 2 child accounts. The third row is 'Customer 3' with 1 child account.

The 'Customer 2' row is expanded, showing a form for editing the account family. The form includes fields for Name, Address, Additional Info, Email, Project Code, Payment Terms, and Invoice ID. There is also a section for 'Add Custom Charges' and a link to 'Configure AWS Accounts'. A red arrow points to the 'Configure AWS Accounts' link with the text 'Click here to expand'.

At the bottom of the form are 'Update' and 'Cancel' buttons.

- When you click on "Configure AWS Accounts" it will expand and you will see the option to "Create a Multi-Account View to mirror this Account Family." Once you have checked the box, click on "Update."

Creating Multi Account Views in CloudCheckr

Customer 2

Name: Customer 2

Address: [Empty Field]

Additional Info: [Empty Field]

Email: [Empty Field]

Project Code: [Empty Field]

Payment Terms: NET ?

Invoice ID: [Empty Field]

Add Custom Charges ?
Select custom charges

Configure AWS Accounts [^](#)

☐ Create a Multi - Account View to mirror this Account Family

AWS Accounts tied to this Account Family [+ Add account to this Family](#)

089753618136 (Liang Xu) [Remove](#)

115783089165 (Ingram Micro GBI Development) [Remove](#)

Payee Support Charges [v](#)

Copy Billing Report [v](#)

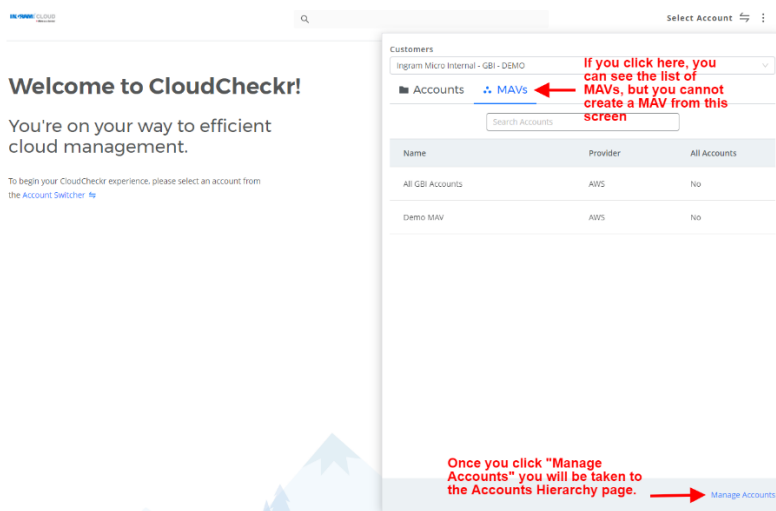
Advanced [v](#)

[Update](#) [Cancel](#)

This will create a MAV that mirrors your Account Family. This means that when you add or remove an account from your Account Family, the MAV will change accordingly.

How to Create a MAV from the Account Hierarchy Page

- From the "Select Account" page, select desired account. Once you select an account, you will see the screen shown below. MAVs previously created in your account are visible from the tab on this screen; however, you cannot create or edit from this view.



- To create or modify a MAV, you must be in the Accounts Hierarchy page. To get to this page, click on "Managed Accounts" at the bottom of the screen, as shown above.

Creating Multi Account Views in CloudCheckr

- Before you can create a MAV from the Accounts Hierarchy page, you must create **Attributes**. Attributes are key/value pairs that help organize and categorize your accounts in CloudCheckr CMx. You can create attributes for: End user, Department, Project, Country or however you want to organize your accounts.
- **How To create an Attribute:**
 1. From the "Managed Accounts" page, click on "Attributes"
 2. Click on "New"
 3. Then enter the name of the "Attribute" and then "OK"

CloudCheckr

Customers Accounts MAVs Attributes

Ingram Micro Internal - G... + NEW

Country OK CANCEL

Legacy Tags

Showing 1

- You will then be prompted to add values. Click on "NEW" to add values.

CloudCheckr

Customers Accounts MAVs Attributes

Ingram Micro Internal... + NEW

Country Legacy Tags Project

Showing

Edit Country

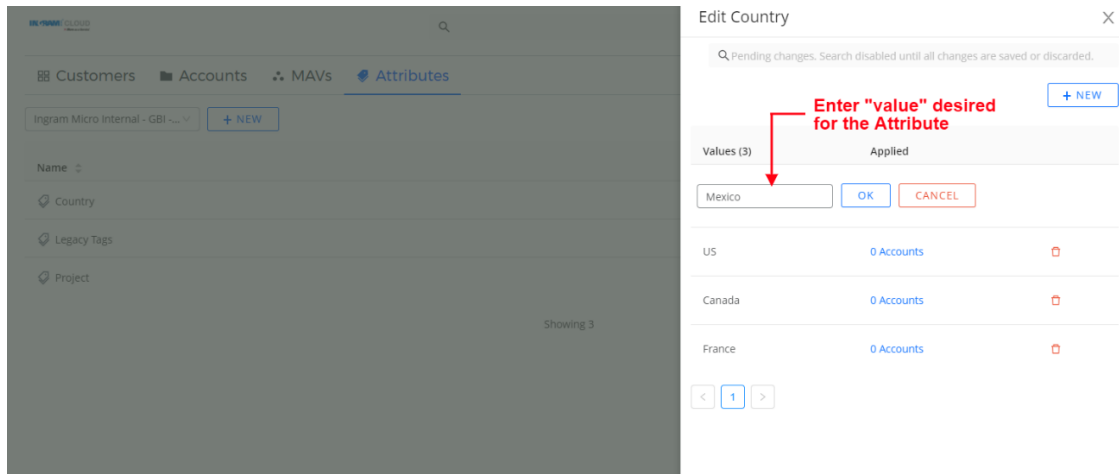
Click Here + NEW

Values (0) Applied

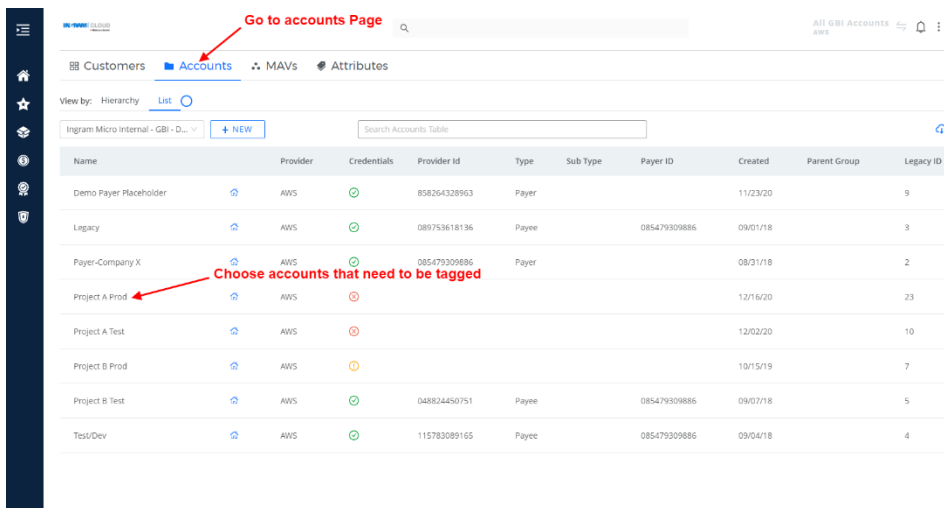
No Data

DELETE CLOSE

Creating Multi Account Views in CloudCheckr



- **Tagging your Accounts:** Once you have created attributes, you can tag your existing accounts with the newly created attributes.
- To tag an account, start by going to the "Accounts" page. Then choose an account that needs the new tag added to it. Once you click on the account name, a screen will pop out to "Edit Account." Under "Attributes" you can search for the tags you wish to add. Once you have tagged the account, remember to save your selections.



Creating Multi Account Views in CloudCheckr

The screenshot shows the CloudCheckr interface. On the left, a sidebar contains navigation icons. The main area displays the 'Accounts' tab with a table of accounts. The 'Edit Account' modal is open on the right, showing fields for Name, Location, Payee Organization, and Attributes. The 'Attributes' field is highlighted with a red box, and a red arrow points to it with the text: "Once you click in this field, you will see the attributes and available tags". Another red arrow points to the 'SAVE' button with the text: "Remember to click save once you have tagged your account".

- Once Attributes have been created and accounts have been tagged, you can create a MAV. From the Accounts Hierarchy Page, first make sure to click the "MAV" tab and then click "+NEW"

The screenshot shows the CloudCheckr interface with the 'MAVs' tab selected. The 'MAVs' tab is highlighted with a red box, and the '+ NEW' button is also highlighted with a red box.

- Create a name for your MAV
- Select the Cloud Provider
- In the Filters field, begin to type the name(s) of the attribute(s) you want to include in the MAV. CloudCheckr will automatically update to show a list of accounts associated with your filter(s). Please note that the "Include all AWS accounts in this MAV" must be unchecked in order to add filters.
- Click "SAVE"

Creating Multi Account Views in CloudCheckr

Create MAV

Name

Demo MAV

Cloud Provider

AWS

Filters ☒ ← Select the attribute you want to include in the MAV

concatenated by OR

☐ Include all AWS accounts in this MAV ← To filter your choices, make sure this box is unchecked

Accounts (0)

CANCEL SAVE

- Moving forward, each time you create a new account and add tags to it, CloudCheckr will automatically add it to the MAV with the matching attributes.

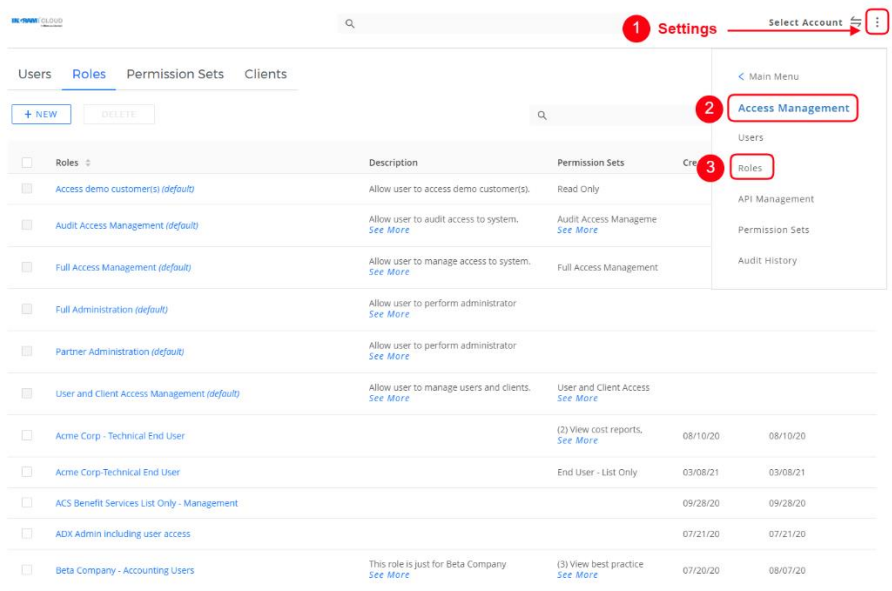
Some scenarios where creating MAVs can be very useful include:

- When you have multiple end users in your consolidated billing account and want to group their accounts together for reporting
- When you want to run reports on a specific department or project that spans multiple accounts
- Aggregating Best Practice alerts from multiple accounts at once

Creating Multi Account Views in CloudCheckr

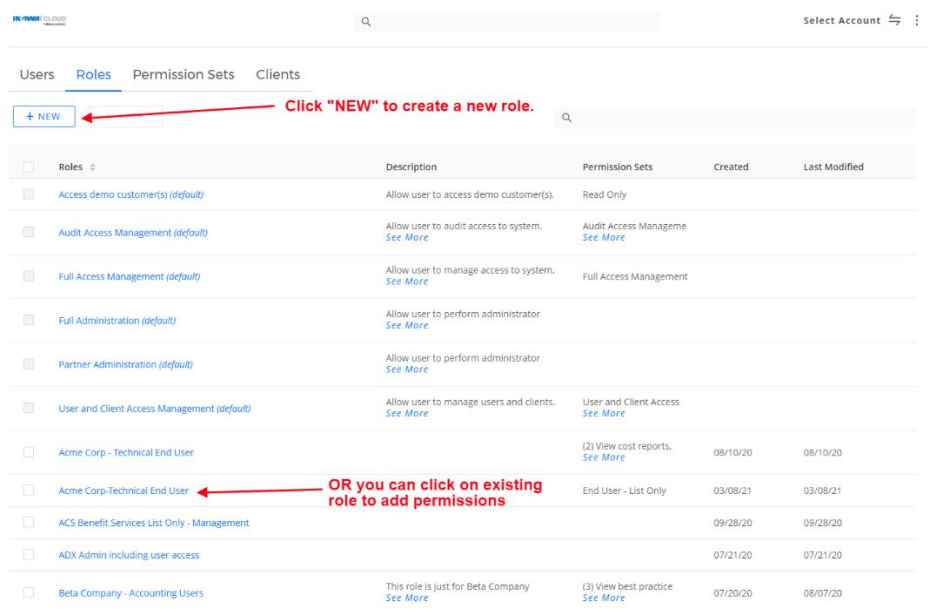
Adding MAVs to User Permission

If you want to grant permission to your end-user to access the MAV for their accounts only, you can do this by creating or editing a Role in CloudCheckr. First, go to **Settings > Access Management > Roles**



To create a new Role, click **“NEW.”**

To edit an existing Role, click on that role to add permissions to it.



If you are creating a new Role, enter the Name of the role and then click **“SAVE.”**

Creating Multi Account Views in CloudCheckr

Role Management

Create New Role

SAVE CANCEL

Name required

Company A End User

Created

Last Modified

Description (500 character limit)

Assets

Users Permission Sets Accounts Clients

0 User(s) Selected [User Management](#)

Now you can add permissions for the New Role you just created or edit the permissions of the existing role by clicking on the **“Accounts”** tab. Click in the text box, you will see a list of accounts to choose from. Once you have selected the desired accounts for the role, click **“SAVE”** again

Role Management

Acme Corp-Technical End User

SAVE DELETE

Name required

Acme Corp-Technical End User

Created

03/08/2021, 06:08:14 PM

Last Modified

03/22/2021, 05:54:48 PM

Description (500 character limit)

Assets

Users Permission Sets **Accounts** Clients

2 Account(s) Selected

All GBI Accounts x Company A x

Select All Accounts

Account Hierarchy

Next, click on the **“Users”** tab to enter the names of the users that you want to inherit the permissions of this Role. Remember to **“SAVE”** your changes.

Creating Multi Account Views in CloudCheckr

The screenshot shows the AWS IAM console interface for managing a role named "Acme Corp-Technical End User". The interface includes a "Role Management" header, a search bar, and a "Select Account" dropdown. The role's details are displayed, including its name, creation date, and last modified date. A "SAVE" button is highlighted with a red box and a red arrow pointing to it, with a red circle containing the number "3" and the text "SAVE your changes". Below the role details, there is a "Description" field. A red arrow points to the "Users" tab, which is highlighted with a red box and a red circle containing the number "1", with the text "Click on the 'Users' tab". Below the "Users" tab, there is a "User Management" section showing a list of users. A red arrow points to the "testcustomer@ingrammicro.com" user, which is highlighted with a red box and a red circle containing the number "2", with the text "Click in the text box to enter the email address of the users that will assume this role".

Role Management

Acme Corp-Technical End User

SAVE DELETE 3 SAVE your changes

Name required
Acme Corp-Technical End User

Created
03/08/2021, 06:08:14 PM

Last Modified
03/22/2021, 05:54:48 PM

Description
(500 character limit)

Assets

1 Click on the "Users" tab

Users Permission Sets Accounts Clients

1 User(s) Selected User Management

testcustomer@ingrammicro.com X 2 Click in the text box to enter the email address of the users that will assume this role