

CloudPlatform (powered by Apache CloudStack) 4.2.1 Maintenance 3 Administrator's Guide

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Citrix CloudPlatform

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Author

Citrix CloudPlatform

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Administration Guide for CloudPlatform 4.2.1 Maintenance Release 3. If you have already installed CloudPlatform or you want to learn more about the ongoing operation and maintenance of a CloudPlatform-powered cloud, read this documentation. It will help you start using, configuring, and managing the ongoing operation of your cloud.

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Getting More Information and Help

1.1. Additional Documentation Available

The following guides are available:

- Installation Guide — Covers initial installation of CloudPlatform. It aims to cover in full detail all the steps and requirements to obtain a functioning cloud deployment.

At times, this guide mentions additional topics in the context of installation tasks, but does not give full details on every topic. Additional details on many of these topics can be found in the CloudPlatform Administration Guide. For example, security groups, firewall and load balancing rules, IP address allocation, and virtual routers are covered in more detail in the Administration Guide.

- Administration Guide — Discusses how to set up services for the end users of your cloud. Also covers ongoing runtime management and maintenance. This guide discusses topics like domains, accounts, service offerings, projects, guest networks, administrator alerts, virtual machines, storage, and measuring resource usage.
- Developer's Guide — How to use the API to interact with CloudPlatform programmatically.

1.2. Citrix Knowledge Center

Troubleshooting articles by the Citrix support team are available in the Citrix Knowledge Center, at support.citrix.com/product/cs/¹.

1.3. Contacting Support

The support team is available to help customers plan and execute their installations. To contact the support team, log in to the support portal at support.citrix.com/cloudsupport² by using the account credentials you received when you purchased your support contract.

¹ <http://support.citrix.com/product/cs/>

² <http://support.citrix.com/cloudsupport>

Concepts

2.1. What Is CloudPlatform?

CloudPlatform is a software platform that pools computing resources to build public, private, and hybrid Infrastructure as a Service (IaaS) clouds. CloudPlatform manages the network, storage, and compute nodes that make up a cloud infrastructure. Use CloudPlatform to deploy, manage, and configure cloud computing environments.

Typical users are service providers and enterprises. With CloudPlatform, you can:

- Set up an on-demand, elastic cloud computing service. Service providers can sell self-service virtual machine instances, storage volumes, and networking configurations over the Internet.
- Set up an on-premise private cloud for use by employees. Rather than managing virtual machines in the same way as physical machines, with CloudPlatform an enterprise can offer self-service virtual machines to users without involving IT departments.



2.2. What Can CloudPlatform Do?

Multiple Hypervisor Support

CloudPlatform works with a variety of hypervisors. A single cloud deployment can contain multiple hypervisor implementations. You have the complete freedom to choose the right hypervisor for your workload.

CloudPlatform is designed to work with open source Xen and KVM hypervisors as well as enterprise-grade hypervisors such as Citrix XenServer, VMware vSphere, and Oracle VM (OVM).

Massively Scalable Infrastructure Management

CloudPlatform can manage tens of thousands of servers installed in multiple geographically distributed datacenters. The centralized management server scales linearly, eliminating the need for intermediate cluster-level management servers. No single component failure can cause cloud-wide outage. Periodic maintenance of the management server can be performed without affecting the functioning of virtual machines running in the cloud.

Automatic Configuration Management

CloudPlatform automatically configures each guest virtual machine's networking and storage settings.

CloudPlatform internally manages a pool of virtual appliances to support the cloud itself. These appliances offer services such as firewalling, routing, DHCP, VPN access, console proxy, storage access, and storage replication. The extensive use of virtual appliances simplifies the installation, configuration, and ongoing management of a cloud deployment.

Graphical User Interface

CloudPlatform offers an administrator's Web interface, used for provisioning and managing the cloud, as well as an end-user's Web interface, used for running VMs and managing VM templates. The UI can be customized to reflect the desired service provider or enterprise look and feel.

API and Extensibility

CloudPlatform provides an API that gives programmatic access to all the management features available in the UI. This API enables the creation of command line tools and new user interfaces to suit particular needs.

The CloudPlatform pluggable allocation architecture allows the creation of new types of allocators for the selection of storage and hosts.

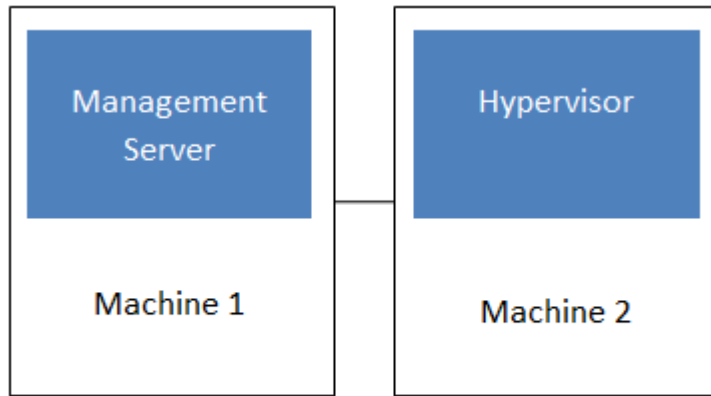
High Availability

CloudPlatform has a number of features to increase the availability of the system. The Management Server itself, which is the main controlling software at the heart of CloudPlatform, may be deployed in a multi-node installation where the servers are load balanced. MySQL may be configured to use replication to provide for a manual failover in the event of database loss. For the hosts, CloudPlatform supports NIC bonding and the use of separate networks for storage as well as iSCSI Multipath.

2.3. Deployment Architecture Overview

A CloudPlatform installation consists of two parts: the Management Server and the cloud infrastructure that it manages. When you set up and manage a CloudPlatform cloud, you provision resources such as hosts, storage devices, and IP addresses into the Management Server, and the Management Server manages those resources.

The minimum production installation consists of one machine running the CloudPlatform Management Server and another machine to act as the cloud infrastructure (in this case, a very simple infrastructure consisting of one host running hypervisor software). In a trial installation, a single machine can act as both the Management Server and the hypervisor host (using the KVM hypervisor).



Simplified view of a basic deployment

A more full-featured installation consists of a highly-available multi-node Management Server installation and up to thousands of hosts using any of several advanced networking setups. For information about deployment options, see [Choosing a Deployment Architecture](#) in the [Installation Guide](#).

2.3.1. Management Server Overview

The Management Server is the CloudPlatform software that manages cloud resources. By interacting with the Management Server through its UI or API, you can configure and manage your cloud infrastructure.

The Management Server runs on a dedicated server or VM. It controls allocation of virtual machines to hosts and assigns storage and IP addresses to the virtual machine instances. The Management Server runs in a Tomcat container and uses a MySQL database for persistence.

The machine where the Management Server runs must meet the system requirements described in [Minimum System Requirements](#) in the [Installation Guide](#).

The Management Server:

- Provides the web user interface for the administrator and a reference user interface for end users.
- Provides the APIs for CloudPlatform.
- Manages the assignment of guest VMs to particular hosts.
- Manages the assignment of public and private IP addresses to particular accounts.
- Manages the allocation of storage to guests as virtual disks.
- Manages snapshots, templates, and ISO images, possibly replicating them across data centers.
- Provides a single point of configuration for the cloud.

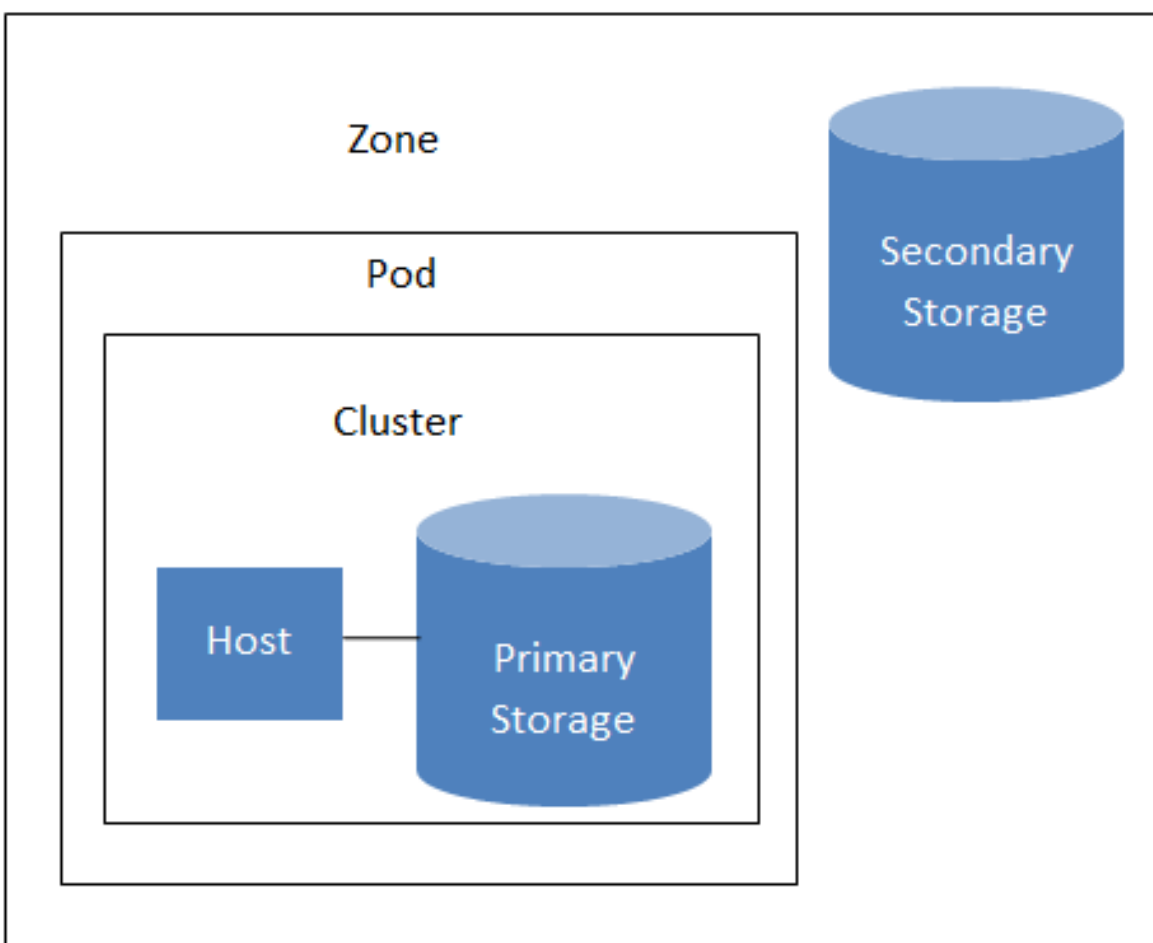
2.3.2. Cloud Infrastructure Overview

The Management Server manages one or more zones (typically, datacenters) containing host computers where guest virtual machines will run. The cloud infrastructure is organized as follows:

- **Region:** To increase reliability of the cloud, you can optionally group resources into multiple geographic regions. A region consists of one or more zones.

Chapter 2. Concepts

- Zone: Typically, a zone is equivalent to a single datacenter. A zone consists of one or more pods and secondary storage.
- Pod: A pod is usually one rack of hardware that includes a layer-2 switch and one or more clusters.
- Cluster: A cluster consists of one or more hosts and primary storage.
- Host: A single compute node within a cluster. The hosts are where the actual cloud services run in the form of guest virtual machines.
- Primary storage is associated with a cluster, and it can also be provisioned on a zone-wide basis. It stores the disk volumes for all the VMs running on hosts in that cluster.
- Secondary storage is associated with a zone, and it can also be provisioned as object storage that is available throughout the cloud. It stores templates, ISO images, and disk volume snapshots.



Nested organization of a zone

More Information

For more information, see [Chapter 3, Cloud Infrastructure Concepts](#).

2.3.3. Networking Overview

CloudPlatform offers two types of networking scenario:

- Basic. Provides a single network where guest isolation can be provided through layer-3 means such as security groups (IP address source filtering).
- Advanced. For more sophisticated network topologies. This network model provides the most flexibility in defining guest networks and providing guest isolation.

For more details, see Network Setup in the Installation Guide.

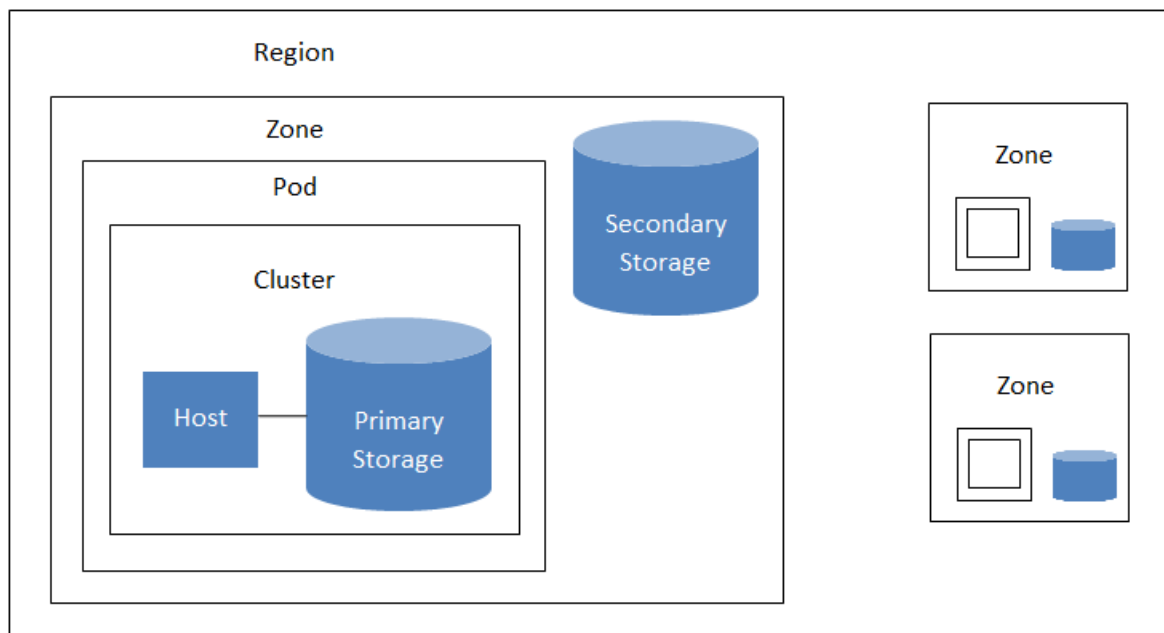
Cloud Infrastructure Concepts

3.1. About Regions

To increase reliability of the cloud, you can optionally group resources into multiple geographic regions. A region is the largest available organizational unit within a CloudPlatform deployment. A region is made up of several availability zones, where each zone is equivalent to a datacenter. Each region is controlled by its own cluster of Management Servers, running in one of the zones. The zones in a region are typically located in close geographical proximity. Regions are a useful technique for providing fault tolerance and disaster recovery.

By grouping zones into regions, the cloud can achieve higher availability and scalability. User accounts can span regions, so that users can deploy VMs in multiple, widely-dispersed regions. Even if one of the regions becomes unavailable, the services are still available to the end-user through VMs deployed in another region. And by grouping communities of zones under their own nearby Management Servers, the latency of communications within the cloud is reduced compared to managing widely-dispersed zones from a single central Management Server.

Usage records can also be consolidated and tracked at the region level, creating reports or invoices for each geographic region.



A region with multiple zones

Regions are visible to the end user. When a user starts a guest VM on a particular CloudPlatform Management Server, the user is implicitly selecting that region for their guest. Users might also be required to copy their private templates to additional regions to enable creation of guest VMs using their templates in those regions.

3.2. About Zones

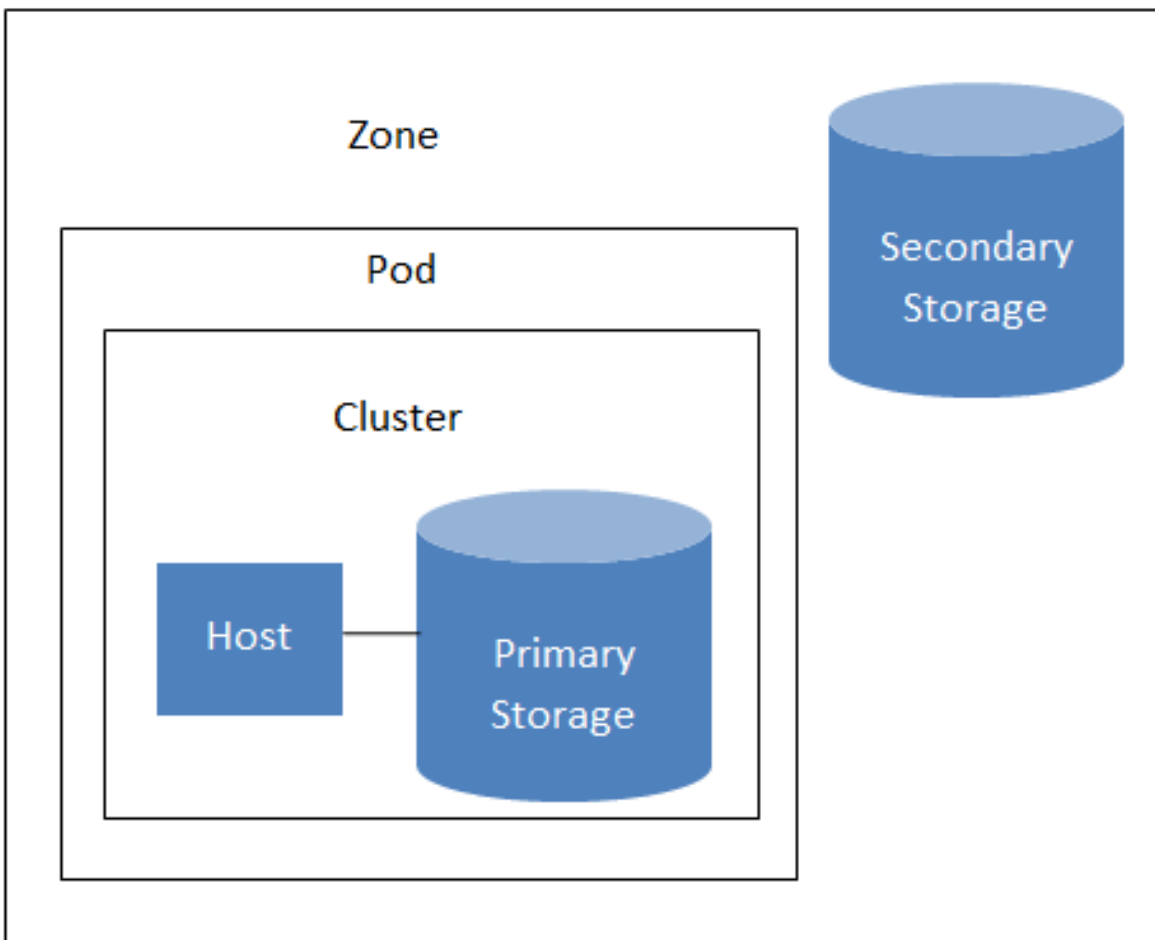
A zone is the second largest organizational unit within a CloudPlatform deployment. A zone typically corresponds to a single datacenter, although it is permissible to have multiple zones in a datacenter.

Chapter 3. Cloud Infrastructure Concepts

The benefit of organizing infrastructure into zones is to provide physical isolation and redundancy. For example, each zone can have its own power supply and network uplink, and the zones can be widely separated geographically (though this is not required).

A zone consists of:

- One or more pods. Each pod contains one or more clusters of hosts and one or more primary storage servers.
- (Optional) If zone-wide primary storage is desired, a zone may contain one or more primary storage servers, which are shared by all the pods in the zone. (Supported for KVM and VMware hosts)
- Secondary storage, which is shared by all the pods in the zone.



Nested organization of a zone

Zones are visible to the end user. When a user starts a guest VM, the user must select a zone for their guest. Users might also be required to copy their private templates to additional zones to enable creation of guest VMs using their templates in those zones.

Zones can be public or private. Public zones are visible to all users. This means that any user may create a guest in that zone. Private zones are reserved for a specific domain. Only users in that domain or its subdomains may create guests in that zone.

Hosts in the same zone are directly accessible to each other without having to go through a firewall. Hosts in different zones can access each other through statically configured VPN tunnels.

For each zone, the administrator must decide the following.

- How many pods to place in a zone.
- How many clusters to place in each pod.
- How many hosts to place in each cluster.
- (Optional) If zone-wide primary storage is being used, decide how many primary storage servers to place in each zone and total capacity for these storage servers. (Supported for KVM and VMware hosts)
- How many primary storage servers to place in each cluster and total capacity for these storage servers.
- How much secondary storage to deploy in a zone.

When you add a new zone, you will be prompted to configure the zone's physical network and add the first pod, cluster, host, primary storage, and secondary storage.

(VMware) In order to support zone-wide functions for VMware, CloudPlatform is aware of VMware Datacenters and can map each Datacenter to a CloudPlatform zone. To enable features like storage live migration and zone-wide primary storage for VMware hosts, CloudPlatform has to make sure that a zone contains only a single VMware Datacenter. Therefore, when you are creating a new CloudPlatform zone, you can select a VMware Datacenter for the zone. If you are provisioning multiple VMware Datacenters, each one will be set up as a single zone in CloudPlatform.

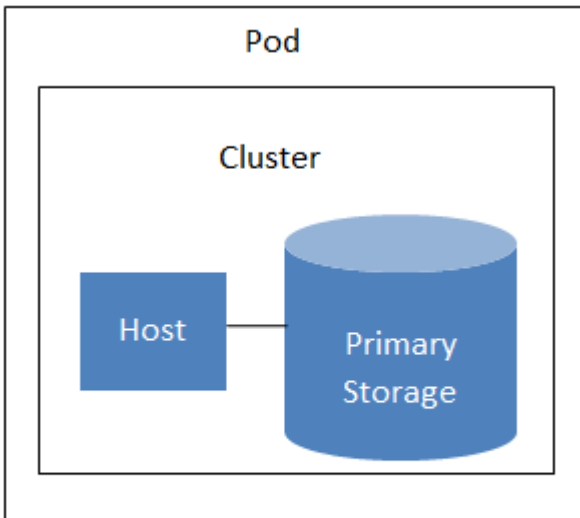


Note

If you are upgrading from a previous CloudPlatform version, and your existing deployment contains a zone with clusters from multiple VMware Datacenters, that zone will not be forcibly migrated to the new model. It will continue to function as before. However, any new zone-wide operations introduced in CloudPlatform 4.2, such as zone-wide primary storage and live storage migration, will not be available in that zone.

3.3. About Pods

A pod often represents a single rack. Hosts in the same pod are in the same subnet. A pod is the third-largest organizational unit within a CloudPlatform deployment. Pods are contained within zones, and zones can be contained within regions. Each zone can contain one or more pods. A pod consists of one or more clusters of hosts and one or more primary storage servers. Pods are not visible to the end user.



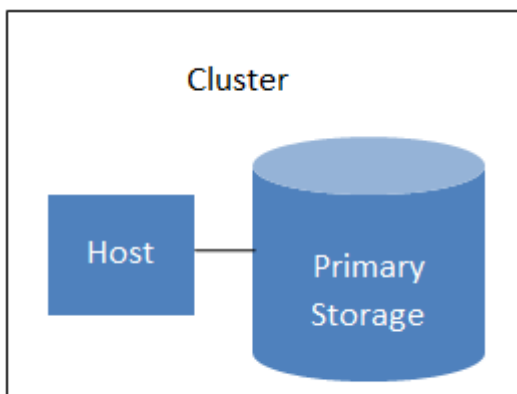
A simple pod

3.4. About Clusters

A cluster provides a way to group hosts. To be precise, a cluster is a XenServer server pool, a set of KVM servers, a set of OVM hosts, or a VMware cluster preconfigured in vCenter. The hosts in a cluster all have identical hardware, run the same hypervisor, are on the same subnet, and access the same shared primary storage. Virtual machine instances (VMs) can be live-migrated from one host to another within the same cluster without interrupting service to the user.

A cluster is the fourth-largest organizational unit within a CloudPlatform deployment. Clusters are contained within pods, pods are contained within zones, and zones can be contained within regions. Size of the cluster is only limited by the underlying hypervisor, although the CloudPlatform recommends you stay below the theoretically allowed maximum cluster size in most cases.

A cluster consists of one or more hosts and one or more primary storage servers.



A simple cluster

Even when local storage is used, clusters are still required. In this case, there is just one host per cluster.

(VMware) If you use VMware hypervisor hosts in your CloudPlatform deployment, each VMware cluster is managed by a vCenter server. The CloudPlatform administrator must register the vCenter

server with CloudPlatform. There may be multiple vCenter servers per zone. Each vCenter server may manage multiple VMware clusters.

3.5. About Hosts

A host is a single computer. Hosts provide the computing resources that run guest virtual machines. Each host has hypervisor software installed on it to manage the guest VMs. For example, a host can be a Citrix XenServer server, a Linux KVM-enabled server, or an ESXi server.

The host is the smallest organizational unit within a CloudPlatform deployment. Hosts are contained within clusters, clusters are contained within pods, pods are contained within zones, and zones can be contained within regions.

Hosts in a CloudPlatform deployment:

- Provide the CPU, memory, storage, and networking resources needed to host the virtual machines
- Interconnect using a high bandwidth TCP/IP network and connect to the Internet
- May reside in multiple data centers across different geographic locations
- May have different capacities (different CPU speeds, different amounts of RAM, etc.), although the hosts within a cluster must all be homogeneous

Additional hosts can be added at any time to provide more capacity for guest VMs.

CloudPlatform automatically detects the amount of CPU and memory resources provided by the hosts.

Hosts are not visible to the end user. An end user cannot determine which host their guest has been assigned to.

For a host to function in CloudPlatform, you must do the following:

- Install hypervisor software on the host
- Assign an IP address to the host
- Ensure the host is connected to the CloudPlatform Management Server.

3.6. About Primary Storage

Primary storage is associated with a cluster or (in KVM and VMware) a zone, and it stores the disk volumes for all the VMs running on hosts.

You can add multiple primary storage servers to a cluster or zone. At least one is required. It is typically located close to the hosts for increased performance. CloudPlatform manages the allocation of guest virtual disks to particular primary storage devices.

It is useful to set up zone-wide primary storage when you want to avoid extra data copy operations. With cluster-based primary storage, data in the primary storage is directly available only to VMs within that cluster. If a VM in a different cluster needs some of the data, it must be copied from one cluster to another, using the zone's secondary storage as an intermediate step. This operation can be unnecessarily time-consuming.

CloudPlatform is designed to work with all standards-compliant iSCSI and NFS servers that are supported by the underlying hypervisor, including, for example:

- Dell EqualLogic™ for iSCSI
- Network Appliances filers for NFS and iSCSI
- Scale Computing for NFS

If you intend to use only local disk for your installation, you can skip adding separate primary storage.

3.7. About Secondary Storage

Secondary storage stores the following:

- Templates — OS images that can be used to boot VMs and can include additional configuration information, such as installed applications
- ISO images — disc images containing data or bootable media for operating systems
- Disk volume snapshots — saved copies of VM data which can be used for data recovery or to create new templates

The items in secondary storage are available to all hosts in the scope of the secondary storage, which may be defined as per zone or per region.

CloudPlatform manages the allocation of guest virtual disks to particular primary storage devices.

To make items in secondary storage available to all hosts throughout the cloud, you can add object storage in addition to the zone-based NFS Secondary Staging Store. It is not necessary to copy templates and snapshots from one zone to another, as would be required when using zone NFS alone. Everything is available everywhere.

Object storage is provided through third-party software such as Amazon Simple Storage Service (S3) or any other object storage that supports the S3 interface. Additional third party object storages can be integrated with CloudPlatform by writing plugin software that uses the object storage plugin capability.

CloudPlatform provides some plugins which we have already written for you using this storage plugin capability. The provided plugins are for OpenStack Object Storage (Swift, swift.openstack.org¹) and Amazon Simple Storage Service (S3) object storage. The S3 plugin can be used for any object storage that supports the Amazon S3 interface. When using one of these storage plugins, you configure Swift or S3 storage for the entire CloudPlatform, then set up the NFS Secondary Staging Store for each zone. The NFS storage in each zone acts as a staging area through which all templates and other secondary storage data pass before being forwarded to Swift or S3. The backing object storage acts as a cloud-wide resource, making templates and other data available to any zone in the cloud.

There is no hierarchy in the Swift storage, just one Swift container per storage object. Any secondary storage in the whole cloud can pull a container from Swift at need.

3.8. About Physical Networks

Part of adding a zone is setting up the physical network. One or (in an advanced zone) more physical networks can be associated with each zone. The network corresponds to a NIC on the hypervisor host. Each physical network can carry one or more types of network traffic. The choices of traffic

¹ <http://swift.openstack.org>

type for each network vary depending on whether you are creating a zone with basic networking or advanced networking.

A physical network is the actual network hardware and wiring in a zone. A zone can have multiple physical networks. An administrator can:

- Add/Remove/Update physical networks in a zone
- Configure VLANs on the physical network
- Configure a name so the network can be recognized by hypervisors
- Configure the service providers (firewalls, load balancers, etc.) available on a physical network
- Configure the IP addresses trunked to a physical network
- Specify what type of traffic is carried on the physical network, as well as other properties like network speed

3.8.1. Basic Zone Network Traffic Types

When basic networking is used, there can be only one physical network in the zone. That physical network carries the following traffic types:

- **Guest.** When end users run VMs, they generate guest traffic. The guest VMs communicate with each other over a network that can be referred to as the guest network. Each pod in a basic zone is a broadcast domain, and therefore each pod has a different IP range for the guest network. The administrator must configure the IP range for each pod.
- **Management.** When CloudPlatform's internal resources communicate with each other, they generate management traffic. This includes communication between hosts, system VMs (VMs used by CloudPlatform to perform various tasks in the cloud), and any other component that communicates directly with the CloudPlatform Management Server. You must configure the IP range for the system VMs to use.



Note

We strongly recommend the use of separate NICs for management traffic and guest traffic.

- **Public.** Public traffic is generated when VMs in the cloud access the Internet. Publicly accessible IPs must be allocated for this purpose. End users can use the CloudPlatform UI to acquire these IPs to implement NAT between their guest network and the public network, as described in [Acquiring a New IP Address](#). Public traffic is generated only in EIP-enabled basic zones. For information on Elastic IP, see [Section 16.18, "About Elastic IP"](#).
- **Storage.** Traffic such as VM templates and snapshots, which is sent between the secondary storage VM and secondary storage servers. CloudPlatform uses a separate Network Interface Controller (NIC) named storage NIC for storage network traffic. Use of a storage NIC that always operates on a high bandwidth network allows fast template and snapshot copying. You must configure the IP range to use for the storage network.

In a basic network, configuring the physical network is fairly straightforward. In most cases, you only need to configure one guest network to carry traffic that is generated by guest VMs. If you use a NetScaler load balancer and enable its elastic IP and elastic load balancing (EIP and ELB) features,

you must also configure a network to carry public traffic. CloudPlatform takes care of presenting the necessary network configuration steps to you in the UI when you add a new zone.

3.8.2. Basic Zone Guest IP Addresses

When basic networking is used, CloudPlatform will assign IP addresses in the CIDR of the pod to the guests in that pod. The administrator must add a direct IP range on the pod for this purpose. These IPs are in the same VLAN as the hosts.

3.8.3. Advanced Zone Network Traffic Types

When advanced networking is used, there can be multiple physical networks in the zone. Each physical network can carry one or more traffic types, and you need to let CloudPlatform know which type of network traffic you want each network to carry. The traffic types in an advanced zone are:

- **Guest.** When end users run VMs, they generate guest traffic. The guest VMs communicate with each other over a network that can be referred to as the guest network. This network can be isolated or shared. In an isolated guest network, the administrator needs to reserve VLAN ranges to provide isolation for each CloudPlatform account's network (potentially a large number of VLANs). In a shared guest network, all guest VMs share a single network.
- **Management.** When CloudPlatform's internal resources communicate with each other, they generate management traffic. This includes communication between hosts, system VMs (VMs used by CloudPlatform to perform various tasks in the cloud), and any other component that communicates directly with the CloudPlatform Management Server. You must configure the IP range for the system VMs to use.
- **Public.** Public traffic is generated when VMs in the cloud access the Internet. Publicly accessible IPs must be allocated for this purpose. End users can use the CloudPlatform UI to acquire these IPs to implement NAT between their guest network and the public network, as described in "Acquiring a New IP Address" in the Administration Guide.
- **Storage.** Traffic such as VM templates and snapshots, which is sent between the secondary storage VM and secondary storage servers. CloudPlatform uses a separate Network Interface Controller (NIC) named storage NIC for storage network traffic. Use of a storage NIC that always operates on a high bandwidth network allows fast template and snapshot copying. You must configure the IP range to use for the storage network.

These traffic types can each be on a separate physical network, or they can be combined with certain restrictions. When you use the Add Zone wizard in the UI to create a new zone, you are guided into making only valid choices.

3.8.4. Advanced Zone Guest IP Addresses

When advanced networking is used, the administrator can create additional networks for use by the guests. These networks can span the zone and be available to all accounts, or they can be scoped to a single account, in which case only the named account may create guests that attach to these networks. The networks are defined by a VLAN ID, IP range, and gateway. The administrator may provision thousands of these networks if desired. Additionally, the administrator can reserve a part of the IP address space for non-CloudPlatform VMs and servers (see [Section 16.15, "IP Reservation in Isolated Guest Networks"](#)).

3.8.5. Advanced Zone Public IP Addresses

When advanced networking is used, the administrator can create additional networks for use by the guests. These networks can span the zone and be available to all accounts, or they can be scoped to a single account, in which case only the named account may create guests that attach to these networks. The networks are defined by a VLAN ID, IP range, and gateway. The administrator may provision thousands of these networks if desired.

3.8.6. System Reserved IP Addresses

In each zone, you need to configure a range of reserved IP addresses for the management network. This network carries communication between the CloudPlatform Management Server and various system VMs, such as Secondary Storage VMs, Console Proxy VMs, and DHCP.

The reserved IP addresses must be unique across the cloud. You cannot, for example, have a host in one zone which has the same private IP address as a host in another zone.

The hosts in a pod are assigned private IP addresses. These are typically RFC1918 addresses. The Console Proxy and Secondary Storage system VMs are also allocated private IP addresses in the CIDR of the pod that they are created in.

Make sure computing servers and Management Servers use IP addresses outside of the System Reserved IP range. For example, suppose the System Reserved IP range starts at 192.168.154.2 and ends at 192.168.154.7. CloudPlatform can use .2 to .7 for System VMs. This leaves the rest of the pod CIDR, from .8 to .254, for the Management Server and hypervisor hosts.

In all zones:

Provide private IPs for the system in each pod and provision them in CloudPlatform.

For KVM and XenServer, the recommended number of private IPs per pod is one per host. If you expect a pod to grow, add enough private IPs now to accommodate the growth.

In a zone that uses advanced networking:

When advanced networking is being used, the number of private IP addresses available in each pod varies depending on which hypervisor is running on the nodes in that pod. Citrix XenServer and KVM use link-local addresses, which in theory provide more than 65,000 private IP addresses within the address block. As the pod grows over time, this should be more than enough for any reasonable number of hosts as well as IP addresses for guest virtual routers. VMWare ESXi, by contrast uses any administrator-specified subnetting scheme, and the typical administrator provides only 255 IPs per pod. Since these are shared by physical machines, the guest virtual router, and other entities, it is possible to run out of private IPs when scaling up a pod whose nodes are running ESXi.

To ensure adequate headroom to scale private IP space in an ESXi pod that uses advanced networking, use one or more of the following techniques:

- Specify a larger CIDR block for the subnet. A subnet mask with a /20 suffix will provide more than 4,000 IP addresses.
- Create multiple pods, each with its own subnet. For example, if you create 10 pods and each pod has 255 IPs, this will provide 2,550 IP addresses.

For vSphere with advanced networking, we recommend provisioning enough private IPs for your total number of customers, plus enough for the required CloudPlatform System VMs. Typically, about 10 additional IPs are required for the System VMs. For more information about System VMs, see Working with System Virtual Machines in the Administrator's Guide.

Accounts

4.1. Accounts, Users, and Domains

Accounts

An account typically represents a customer of the service provider or a department in a large organization. Multiple users can exist in an account.

Domains

Accounts are grouped by domains. Domains usually contain multiple accounts that have some logical relationship to each other and a set of delegated administrators with some authority over the domain and its subdomains. For example, a service provider with several resellers could create a domain for each reseller.

For each account created, the Cloud installation creates three different types of user accounts: root administrator, domain administrator, and user.

Users

Users are like aliases in the account. Users in the same account are not isolated from each other, but they are isolated from users in other accounts. Most installations need not surface the notion of users; they just have one user per account. The same user cannot belong to multiple accounts.

Username is unique in a domain across accounts in that domain. The same username can exist in other domains, including sub-domains. Domain name can repeat only if the full pathname from root is unique. For example, you can create root/d1, as well as root/foo/d1, and root/sales/d1.

Administrators are accounts with special privileges in the system. There may be multiple administrators in the system. Administrators can create or delete other administrators, and change the password for any user in the system.

Domain Administrators

Domain administrators can perform administrative operations for users who belong to that domain. Domain administrators do not have visibility into physical servers or other domains.

Root Administrator

Root administrators have complete access to the system, including managing templates, service offerings, customer care administrators, and domains

Resource Ownership

Resources belong to the account, not individual users in that account. For example, billing, resource limits, and so on are maintained by the account, not the users. A user can operate on any resource in the account provided the user has privileges for that operation. The privileges are determined by the role. A root administrator can change the ownership of any virtual machine from one account to any other account by using the assignVirtualMachine API. A domain or sub-domain administrator can do the same for VMs within the domain from one account to any other account in the domain or any of its sub-domains.

4.1.1. Dedicating Resources to Accounts and Domains

The root administrator can dedicate resources to a specific domain or account that needs private infrastructure for additional security or performance guarantees. A zone, pod, cluster, or host can be reserved by the root administrator for a specific domain or account. Only users in that domain or its subdomain may use the infrastructure. For example, only users in a given domain can create guests in a zone dedicated to that domain.

There are several types of dedication available:

- **Explicit dedication.** A zone, pod, cluster, or host is dedicated to an account or domain by the root administrator during initial deployment and configuration.
- **Strict implicit dedication.** A host will not be shared across multiple accounts. For example, strict implicit dedication is useful for deployment of certain types of applications, such as desktops, where no host can be shared between different accounts without violating the desktop software's terms of license.
- **Preferred implicit dedication.** The VM will be deployed in dedicated infrastructure if possible. Otherwise, the VM can be deployed in shared infrastructure.

4.1.1.1. How to Dedicate a Zone, Cluster, Pod, or Host to an Account or Domain

For explicit dedication: When deploying a new zone, pod, cluster, or host, the root administrator can click the Dedicated checkbox, then choose a domain or account to own the resource.

To explicitly dedicate an existing zone, pod, cluster, or host: log in as the root admin, find the resource



in the UI, and click the Dedicate button.

For implicit dedication: The administrator creates a compute service offering and in the Deployment Planner field, chooses ImplicitDedicationPlanner. Then in Planner Mode, the administrator specifies either Strict or Preferred, depending on whether it is permissible to allow some use of shared resources when dedicated resources are not available. Whenever a user creates a VM based on this service offering, it is allocated on one of the dedicated hosts.

4.1.1.2. How to Use Dedicated Hosts

To use an explicitly dedicated host, use the explicit-dedicated type of affinity group (see [Section 11.8.1, “Affinity Groups”](#)). For example, when creating a new VM, an end user can choose to place it on dedicated infrastructure. This operation will succeed only if some infrastructure has already been assigned as dedicated to the user's account or domain.

4.1.1.3. Behavior of Dedicated Hosts, Clusters, Pods, and Zones

The administrator can live migrate VMs away from dedicated hosts if desired, whether the destination is a host reserved for a different account/domain or a host that is shared (not dedicated to any particular account or domain). CloudPlatform will generate an alert, but the operation is allowed.

Dedicated hosts can be used in conjunction with host tags. If both a host tag and dedication are requested, the VM will be placed only on a host that meets both requirements. If there is no dedicated resource available to that user that also has the host tag requested by the user, then the VM will not deploy.

If you delete an account or domain, any hosts, clusters, pods, and zones that were dedicated to it are freed up. They will now be available to be shared by any account or domain, or the administrator may choose to re-dedicate them to a different account or domain.

System VMs and virtual routers affect the behavior of host dedication. System VMs and virtual routers are owned by the CloudPlatform system account, and they can be deployed on any host. They do not adhere to explicit dedication. The presence of system vms and virtual routers on a host makes it unsuitable for strict implicit dedication. The host can not be used for strict implicit dedication, because the host already has VMs of a specific account (the default system account). However, a host with system VMs or virtual routers can be used for preferred implicit dedication.

4.2. Using an LDAP Server for User Authentication

You can use an external LDAP server, such as Microsoft Active Directory or ApacheDS, to authenticate CloudPlatform end-users. Just map CloudPlatform accounts to the corresponding LDAP accounts using a query filter. The query filter is written using the query syntax of the particular LDAP server, and can include special wildcard characters provided by CloudPlatform for matching common values such as the user's email address and name. CloudPlatform will search the external LDAP directory tree starting at a specified base directory and return the distinguished name (DN) and password of the matching user. This information along with the given password is used to authenticate the user.

4.2.1. Configuring an LDAP Server

You can add or remove an LDAP server to CloudPlatform for user authentication. To set up LDAP authentication, you provide the following:

- Hostname or IP address and listening port of the LDAP server
- Base directory and query filter
- Search user DN credentials, which give CloudPlatform permission to search on the LDAP server
- SSL keystore and password, if SSL is used

4.2.1.1. Adding an LDAP Server

1. Log in to the CloudPlatform.
2. From the left navigational bar, click Global Settings.
3. From the Select view drop down, select LDAP Configuration.
4. Click Configure LDAP.

The Configure LDAP dialog is displayed.

The screenshot shows a 'Configure LDAP' dialog box with the following fields and options:

- * Bind DN: [Text Input]
- * Bind Password: [Text Input]
- * Hostname: [Text Input]
- * Query Filter: [Text Input]
- * SearchBase: [Text Input]
- SSL:
- Port: 389 [Text Input]
- * Trust Store: [Text Input]
- * Trust Store Password: [Text Input]

Buttons: Cancel, OK

5. Specify the following:

- **Bind DN:** The full distinguished name (DN), including common name (CN), of an LDAP user account that has the necessary privileges to search users.

For example:

```
cn=admin,cn=users,dc=mycom,dc=com
```

This user account must have at least domain user privileges.

- **Bind Password:** The password used in association with the Bind DN user account.
- **Hostname:** Hostname or IP address.
- **Query Filter:** Searches external LDAP directory tree for corresponding CloudPlatform accounts. The query filter is written by using the query syntax of the particular LDAP server, and can include special wild card characters provided by CloudPlatform for matching common values, such as the user's email address and name.
- **Port:** The Listening port of the LDAP server. The default is 389.
- **SSL:** Specify SSL Trust Store and password, if SSL is used.
 - **Trust Store:**
 - **Trust Store Password:**

6. Click OK.

4.2.1.2. Removing an LDAP Configuration

1. Log in to the CloudPlatform.
2. From the left navigational bar, click Global Settings.
3. From the Select view drop down, select LDAP Configuration.
4. In the Quick View, click Remove LDAP.

Alternatively, you can click Remove LDAP in the LDAP Configuration Details page.

4.2.2. Example LDAP Configuration Commands

To understand the examples in this section, you need to know the basic concepts behind calling the CloudPlatform API, which are explained in the Developer's Guide.

The following shows an example invocation of `ldapConfig` with an ApacheDS LDAP server

```
http://127.0.0.1:8080/client/api?command=ldapConfig&hostname=127.0.0.1&searchbase=ou%3Dtesting%2Co%3Dproject&queryfilter=%28%26%28uid%3D%25u%29%29&binddn=cn%3DJohn+Singh%2Co%3Dtesting%2Co%3Dproject&bindpass=secret&port=10389&ssl=true&truststore=C%3A%2Fcompany%2Finfo%2Ftrusted.ks&truststorepass=secret&response=json&apiKey=YourAPIKey&signature=YourSignatureHash
```

The command must be URL-encoded. Here is the same example without the URL encoding:

```
http://127.0.0.1:8080/client/api?command=ldapConfig
&hostname=127.0.0.1
&searchbase=ou=testing,o=project
&queryfilter=((&(%uid=%u)))
&binddn=cn=John+Singh,ou=testing,o=project
&bindpass=secret
&port=10389
&ssl=true
&truststore=C:/company/info/trusted.ks
&truststorepass=secret
&response=json
&apiKey=YourAPIKey&signature=YourSignatureHash
```

The following shows a similar command for Active Directory. Here, the search base is the testing group within a company, and the users are matched up based on email address.

```
http://127.127.0.0:8080/client/api?command=ldapConfig&hostname=127.147.28.250&searchbase=OU%3Dtesting%2CDC%3Dcompany&queryfilter=%28%26%28mail%3D%25e%29%29%29%29&binddn=CN%3DAdministrator%2COU%3Dtesting%2CDC%3Dcompany&bindpass=1111_aaaa&port=389&response=json&apiKey=YourAPIKey&signature=YourSignatureHash
```

The next few sections explain some of the concepts you will need to know when filling out the `ldapConfig` parameters.

4.2.3. Search Base

An LDAP query is relative to a given node of the LDAP directory tree, called the search base. The search base is the distinguished name (DN) of a level of the directory tree below which all users can be found. The users can be in the immediate base directory or in some subdirectory. The search base may be equivalent to the organization, group, or domain name. The syntax for writing a DN varies

depending on which LDAP server you are using. A full discussion of distinguished names is outside the scope of our documentation. The following table shows some examples of search bases to find users in the testing department..

LDAP Server	Example Search Base DN
ApacheDS	ou=testing,o=project
Active Directory	OU=testing, DC=company

4.2.4. Query Filter

The query filter is used to find a mapped user in the external LDAP server. The query filter should uniquely map the CloudPlatform user to LDAP user for a meaningful authentication. For more information about query filter syntax, consult the documentation for your LDAP server.

The CloudPlatform query filter wild cards are:

Query Filter Wildcard	Description
%u	User name
%e	Email address
%n	First and last name

4.2.4.1. Active Directory

The following examples assume that you are using Active Directory. Refer to user attributes from the Active Directory schema.

If the CloudPlatform user name is the same as the LDAP user ID:

```
(sAMAccountName=%u)
```

If the CloudPlatform user name is the LDAP display name:

```
(displayName=%u)
```

To find a user by email address:

```
(mail=%e)
```

4.2.4.2. ApacheDS

If your LDAP server is ApacheDS, consider the following examples:

If the CloudPlatform user name is the same as the LDAP user ID:

```
(uid=%u)
```

To find a user by email address:

```
(mail=%e)
```

Enter the query filters in CloudPlatform in the following format:

```
(&(sAMAccountName=%u) or (&(mail=%e)))
```

4.2.5. Search User Bind DN

The bind DN is the user on the external LDAP server permitted to search the LDAP directory within the defined search base. When the DN is returned, the DN and passed password are used to authenticate the CloudPlatform user with an LDAP bind. A full discussion of bind DN's is outside the scope of our documentation. The following table shows some examples of bind DN's.

LDAP Server	Example Bind DN
ApacheDS	cn=Administrator,dc=testing,ou=project,ou=org
Active Directory	CN=Administrator, OU=testing, DC=company, DC=com

4.2.6. SSL Keystore Path and Password

If the LDAP server requires SSL, you need to enable it in the `ldapConfig` command by setting the parameters `ssl`, `truststore`, and `truststorepass`. Before enabling SSL for `ldapConfig`, you need to get the certificate which the LDAP server is using and add it to a trusted keystore. You will need to know the path to the keystore and the password.

4.2.7. Configuring Custom Authenticator

MD5 and LDAP authenticators come configured by default in CloudPlatform. If a custom authenticator is available as a plugin it can be configured in the following file:

```
/usr/share/cloudstack-management/webapps/client/WEB-INF/classes/nonossComponentContext.xml
```

Check the following entries in this file:

```
<bean id="userPasswordEncoders" class="com.cloud.utils.component.AdapterList">
  <property name="Adapters">
    <list>
      <ref bean="SHA256SaltedUserAuthenticator"/>
      <ref bean="MD5UserAuthenticator"/>
      <ref bean="LDAPUserAuthenticator"/>
      <ref bean="PlainTextUserAuthenticator"/>
    </list>
  </property>
</bean>
```

You can remove and add the required authenticators in this section.

User Services Overview

In addition to the physical and logical infrastructure of your cloud, and the CloudPlatform software and servers, you also need a layer of user services so that people can actually make use of the cloud. This means not just a user UI, but a set of options and resources that users can choose from, such as templates for creating virtual machines, disk storage, and more. If you are running a commercial service, you will be keeping track of what services and resources users are consuming and charging them for that usage. Even if you do not charge anything for people to use your cloud – say, if the users are strictly internal to your organization, or just friends who are sharing your cloud – you can still keep track of what services they use and how much of them.

5.1. Service Offerings, Disk Offerings, Network Offerings, and Templates

A user creating a new instance can make a variety of choices about its characteristics and capabilities. CloudPlatform provides several ways to present users with choices when creating a new instance:

- Service Offerings, defined by the CloudPlatform administrator, provide a choice of CPU speed, number of CPUs, RAM size, tags on the root disk, and other choices. See [Creating a New Compute Offering](#).
- Disk Offerings, defined by the CloudPlatform administrator, provide a choice of disk size for primary data storage. See [Creating a New Disk Offering](#).
- Network Offerings, defined by the CloudPlatform administrator, describe the feature set that is available to end users from the virtual router or external networking devices on a given guest network. See [Network Offerings](#).
- Templates, defined by the CloudPlatform administrator or by any CloudPlatform user, are the base OS images that the user can choose from when creating a new instance. For example, CloudPlatform includes CentOS as a template. See [Working with Templates](#).

In addition to these choices that are provided for users, there is another type of service offering which is available only to the CloudPlatform root administrator, and is used for configuring virtual infrastructure resources. For more information, see [Upgrading a Virtual Router with System Service Offerings](#).

User Interface

6.1. Supported Browsers

The CloudPlatform web-based UI is available in the following popular browsers:

- Mozilla Firefox 22 or greater
- Apple Safari, all versions packaged with Mac OS X 10.5 (Leopard) or greater
- Google Chrome, all versions starting from the year 2012
- Microsoft Internet Explorer 9 or greater

6.2. Log In to the UI

CloudPlatform provides a web-based UI that can be used by both administrators and end users. The appropriate version of the UI is displayed depending on the credentials used to log in.

The URL to log in to CloudPlatform is: (substitute your own management server IP address)

```
http://<management-server-ip-address>:8080/client
```

On a fresh Management Server installation, a guided tour splash screen appears. On later visits, you'll see a login screen where you specify the following to proceed to your Dashboard:

Username

The user ID of your account. The default username is admin.

Password

The password associated with the user ID. The password for the default username is password.

Domain

If you are a root user, leave this field blank.

If you are a user in the sub-domains, enter the full path to the domain, excluding the root domain.

For example, suppose multiple levels are created under the root domain, such as Comp1/hr. The users in the Comp1 domain should enter Comp1 in the Domain field, whereas the users in the Comp1/sales domain should enter Comp1/sales.

For more guidance about the choices that appear when you log in to this UI, see Logging In as the Root Administrator.

6.2.1. End User's UI Overview

The CloudPlatform UI helps users of cloud infrastructure to view and use their cloud resources, including virtual machines, templates and ISOs, data volumes and snapshots, guest networks, and IP addresses. If the user is a member or administrator of one or more CloudPlatform projects, the UI can provide a project-oriented view.

6.2.2. Root Administrator's UI Overview

The CloudPlatform UI helps the CloudPlatform administrator provision, view, and manage the cloud infrastructure, domains, user accounts, projects, and configuration settings. The first time you start the UI after a fresh Management Server installation, you can choose to follow a guided tour to provision your cloud infrastructure. On subsequent logins, the dashboard of the logged-in user appears. The various links in this screen and the navigation bar on the left provide access to a variety of administrative functions. The root administrator can also use the UI to perform all the same tasks that are present in the end-user's UI.

6.2.3. Logging In as the Root Administrator

After the Management Server software is installed and running, you can run the CloudPlatform user interface. This UI is there to help you provision, view, and manage your cloud infrastructure.

1. Open your favorite Web browser and go to this URL. Substitute the IP address of your own Management Server:

```
http://<management-server-ip-address>:8080/client
```

On a fresh Management Server installation, a guided tour splash screen appears. On later visits, you'll see a login screen where you can enter a user ID and password and proceed to your Dashboard.

2. If you see the first-time splash screen, choose one of the following.
 - **Continue with basic setup.** Choose this if you're just trying CloudPlatform, and you want a guided walkthrough of the simplest possible configuration so that you can get started right away. We'll help you set up a cloud with the following features: a single machine that runs CloudPlatform software and uses NFS to provide storage; a single machine running VMs under the XenServer or KVM hypervisor; and a shared public network.

The prompts in this guided tour should give you all the information you need, but if you want just a bit more detail, you can follow along in the Trial Installation Guide.
 - **I have used CloudPlatform before.** Choose this if you have already gone through a design phase and planned a more sophisticated deployment, or you are ready to start scaling up a trial cloud that you set up earlier with the basic setup screens. In the Administrator UI, you can start using the more powerful features of CloudPlatform, such as advanced VLAN networking, high availability, additional network elements such as load balancers and firewalls, and support for multiple hypervisors including Citrix XenServer, KVM, and VMware vSphere.

The root administrator Dashboard appears.
3. You should set a new root administrator password. If you chose basic setup, you'll be prompted to create a new password right away. If you chose experienced user, use the steps in [Section 6.2.4, "Changing the Root Password"](#).



Warning


You are logging in as the root administrator. This account manages the CloudPlatform deployment, including physical infrastructure. The root administrator can modify configuration settings to change basic functionality, create or delete user accounts, and take many actions that should be performed only by an authorized person. Please change the default password to a new, unique password.

6.2.4. Changing the Root Password

During installation and ongoing cloud administration, you will need to log in to the UI as the root administrator. The root administrator account manages the CloudPlatform deployment, including physical infrastructure. The root administrator can modify configuration settings to change basic functionality, create or delete user accounts, and take many actions that should be performed only by an authorized person. When first installing CloudPlatform, be sure to change the default password to a new, unique value.

1. Open your favorite Web browser and go to this URL. Substitute the IP address of your own Management Server:

```
http://<management-server-ip-address>:8080/client
```

2. Log in to the UI using the current root user ID and password. The default is admin, password.
3. Click Accounts.
4. Click the admin account name.
5. Click View Users.
6. Click the admin user name.
7. Click the Change Password button. 
8. Type the new password, and click OK.

6.3. Using SSH Keys for Authentication

In addition to the username and password authentication, CloudPlatform supports using SSH keys to log in to the cloud infrastructure for additional security for your cloud infrastructure. You can use the createSSHKeyPair API to generate the SSH keys.

Because each cloud user has their own ssh key, one cloud user cannot log in to another cloud user's instances unless they share their ssh key files. Using a single SSH key pair, you can manage multiple instances.

6.3.1. Creating an Instance from a Template that Supports SSH Keys

Perform the following:

1. Create a new instance by using the template provided by CloudPlatform.

For more information on creating a new instance, see [Section 11.4, “Creating VMs”](#).

2. Download the script file `cloud-set-guest-sshkey` from the following link:

<http://download.cloud.com/templates/4.2/bindir/cloud-set-guest-sshkey.in>

3. Copy the file to `/etc/init.d`.
4. Give the necessary permissions on the script:

```
chmod +x /etc/init.d/cloud-set-guest-sshkey
```

5. Run the script while starting up the operating system:

```
chkconfig --add cloud-set-guest-sshkey
```

6. Stop the instance.

6.3.2. Creating the SSH Keypair

You must make a call to the `createSSHKeyPair` api method. You can either use the CloudPlatform python api library or the curl commands to make the call to the CloudPlatform api.

For example, make a call from the CloudPlatform server to create a SSH keypair called "keypair-doc" for the admin account in the root domain:



Note

Ensure that you adjust these values to meet your needs. If you are making the API call from a different server, your URL or port number will be different, and you will need to use the API keys.

1. Run the following curl command:

```
curl --globoff "http://localhost:8080/?command=createSSHKeyPair&name=keypair-doc&account=admin&domainid=1"
```

The output is something similar to what is given below:

```
<?xml version="1.0" encoding="ISO-8859-1"?><createsshkeypairresponse
  cloud-stack-version="3.0.0.20120228045507"><keypair><name>keypair-
doc</name><fingerprint>f6:77:39:d5:5e:77:02:22:6a:d8:7f:ce:ab:cd:b3:56</
fingerprint><privatekey>-----BEGIN RSA PRIVATE KEY-----
MIICXQIBAAKBgQCSydmnQ67jP6lNoXdX3noZjQdrMAWNQZ7y5SrEu4wDxplvhYci
dXYBeZVwakDVsu2MLG1/K+wefwefwefwefwefJyKJaogMKn7BperPD6nlwIDAQAB
AoGAdXaJ7uyZKeRDoy6wA0UmF0kSPbMZCR+UTIHNkS/E0/4U+6lhMokmFShtu
mfDZlkgGDYhMsdytjDBztljawfawfeawefawfawfawQQDCjEsoRdgkduTy
QpbSGDIa1lJsc+XNDx2fgRinDsxxI/zJYXTKRhSl/LIPHBw/brW8vzxh0lSorwm7
VvemkkgpAkEAwSeEw394LYziEVv395ar9MLRVTVLwpo54jC4tsOxQCBlloocK
lYaocpk0yBqqOUSBawfIiDCuLXSdvBo1Xz5ICTM19vgvEp/+kMuECQBzm
nVo8b2Gvyagqt/KEQo8wzH2THghZ1qQ1QRhIeJG2aissEacF6bGB2oZ7Igm5L14
4KR7OeEToyCLC2k+02UCQQCrniSnWktDVoVqeK/zB32JhW3Wullv5p5zUEcd
KfEEuzcCUIxtJYTahJlpvlFkQ8anpuxjSEDP8x/18bq3
-----END RSA PRIVATE KEY-----
</privatekey></keypair></createsshkeypairresponse>
```

2. Copy the key data into a file. The file looks like this:

```
-----BEGIN RSA PRIVATE KEY-----
MIICXQIBAAKBgQCSydmnQ67jP6lNoXdX3noZjQdrMAWNQZ7y5SrEu4wDxplvhYci
dXYBeZVwakDVsu2MLG1/K+wefwefwefwefwefJyKJaogMKn7BperPD6nlwIDAQAB
AoGAdXaJ7uyZKeRDoy6wA0UmF0kSPbMZCR+UTIHnks/E0/4U+6lhMokmFShtu
mfDZ1kGGDYhMsdytjDBztljawfawfeawefawfawfawQQDCjEsoRdgkduTy
QpbSGDIa11Jsc+XNDx2fgRinDsXl/zJYXTKRhSl/LIPHBw/brW8vzxh0lSOrwm7
VvemkkgpAkeAwSeEw394LYZiEVv395ar9MLRVTVLwpo54jC4tsOxQCB1loocK
lYaocpk0yBqqOUSBawfIiDCuLXSdvBo1Xz5ICTM19vgvEp/+kMuECQBzm
nVo8b2Gvyagqt/KEQo8wzH2THghZ1qQ1QRhIeJG2aissEacF6bGB2oZ7Igm5L14
4KR7OeEToyCLC2k+02UCQQCrniSnWktDVoVqeK/zB32JhW3Wullv5p5zUEcd
KfEEuzcCUixtJYTahJ1pvlFkQ8anpuxjSEdp8x/18bq3
-----END RSA PRIVATE KEY-----
```

3. Save the file.

6.3.3. Creating an Instance

Ensure that you use the same SSH key name that you created.



Note

You cannot create the instance by using the GUI at this time and associate the instance with the newly created SSH keypair.

A sample curl command to create a new instance is:

```
curl --globoff http://localhost:<port number>/?
command=deployVirtualMachine&zoneId=1&serviceOfferingId=18727021-7556-4110-9322-
d625b52e0813&templateId=e899c18a-
ce13-4bbf-98a9-625c5026e0b5&securitygroupids=ff03f02f-9e3b-48f8-834d-91b822da40c5&account=admin
&domainid=1&keypair=keypair-doc
```

Substitute the template, service offering and security group IDs (if you are using the security group feature) that are in your cloud environment.

6.3.4. Logging In Using the SSH Keypair

To test your SSH key generation is successful, check whether you can log in to the cloud setup.

For example, from a Linux OS, run:

```
ssh -i ~/.ssh/keypair-doc <ip address>
```

The `-i` parameter directs the ssh client to use a ssh key found at `~/.ssh/keypair-doc`.

6.3.5. Resetting SSH Keys

With the API command `resetSSHKeyForVirtualMachine`, a user can set or reset the SSH keypair assigned to a virtual machine. A lost or compromised SSH keypair can be changed, and the user can access the VM by using the new keypair. Just create or register a new keypair, then call `resetSSHKeyForVirtualMachine`.

Using Projects to Organize Users and Resources

7.1. Overview of Projects

Projects are used to organize people and resources. CloudPlatform users within a single domain can group themselves into project teams so they can collaborate and share virtual resources such as VMs, snapshots, templates, data disks, and IP addresses. CloudPlatform tracks resource usage per project as well as per user, so the usage can be billed to either a user account or a project. For example, a private cloud within a software company might have all members of the QA department assigned to one project, so the company can track the resources used in testing while the project members can more easily isolate their efforts from other users of the same cloud

You can configure CloudPlatform to allow any user to create a new project, or you can restrict that ability to just CloudPlatform administrators. Once you have created a project, you become that project's administrator, and you can add others within your domain to the project. CloudPlatform can be set up either so that you can add people directly to a project, or so that you have to send an invitation which the recipient must accept. Project members can view and manage all virtual resources created by anyone in the project (for example, share VMs). A user can be a member of any number of projects and can switch views in the CloudPlatform UI to show only project-related information, such as project VMs, fellow project members, project-related alerts, and so on.

The project administrator can pass on the role to another project member. The project administrator can also add more members, remove members from the project, set new resource limits (as long as they are below the global defaults set by the CloudPlatform administrator), and delete the project. When the administrator removes a member from the project, resources created by that user, such as VM instances, remain with the project. This brings us to the subject of resource ownership and which resources can be used by a project.


Resources created within a project are owned by the project, not by any particular CloudPlatform account, and they can be used only within the project. A user who belongs to one or more projects can still create resources outside of those projects, and those resources belong to the user's account; they will not be counted against the project's usage or resource limits. You can create project-level networks to isolate traffic within the project and provide network services such as port forwarding, load balancing, VPN, and static NAT. A project can also make use of certain types of resources from outside the project, if those resources are shared. For example, a shared network or public template is available to any project in the domain. A project can get access to a private template if the template's owner will grant permission. A project can use any service offering or disk offering available in its domain; however, you can not create private service and disk offerings at the project level..

7.2. Configuring Projects

Before CloudPlatform users start using projects, the CloudPlatform administrator must set up various systems to support them, including membership invitations, limits on project resources, and controls on who can create projects.

7.2.1. Setting Up Invitations

CloudPlatform can be set up either so that project administrators can add people directly to a project, or so that it is necessary to send an invitation which the recipient must accept. The invitation can be sent by email or through the user's CloudPlatform account. If you want administrators to use invitations to add members to projects, turn on and set up the invitations feature in CloudPlatform.

1. Log in as administrator to the CloudPlatform UI.
2. In the left navigation, click Global Settings.
3. In the search box, type project and click the search button. 
4. In the search results, you can see a few other parameters you need to set to control how invitations behave. The table below shows global configuration parameters related to project invitations. Click the edit button to set each parameter.

Configuration Parameters	Description
project.invite.required	Set to true to turn on the invitations feature.
project.email.sender	The email address to show in the From field of invitation emails.
project.invite.timeout	Amount of time to allow for a new member to respond to the invitation.
project.smtp.host	Name of the host that acts as an email server to handle invitations.
project.smtp.password	(Optional) Password required by the SMTP server. You must also set project.smtp.username and set project.smtp.useAuth to true.
project.smtp.port	SMTP server's listening port.
project.smtp.useAuth	Set to true if the SMTP server requires a username and password.
project.smtp.username	(Optional) User name required by the SMTP server for authentication. You must also set project.smtp.password and set project.smtp.useAuth to true..

5. Restart the Management Server:

```
service cloud-management restart
```

7.2.2. Setting Resource Limits for Projects


The CloudPlatform administrator can set global default limits to control the amount of resources that can be owned by each project in the cloud. This serves to prevent uncontrolled usage of resources such as snapshots, IP addresses, and virtual machine instances. Domain administrators can override these resource limits for individual projects with their domains, as long as the new limits are below the global defaults set by the CloudPlatform root administrator. The root administrator can also set lower resource limits for any project in the cloud

7.2.3. Setting Project Creator Permissions

You can configure CloudPlatform to allow any user to create a new project, or you can restrict that ability to just CloudPlatform administrators.

1. Log in as administrator to the CloudPlatform UI.
2. In the left navigation, click Global Settings.

3. In the search box, type `allow.user.create.projects`.

4. Click the edit button to set the parameter. 

<code>allow.user.create.projects</code>	Set to true to allow end users to create projects. Set to false if you want only the CloudPlatform root administrator and domain administrators to create projects.
---	---

5. Restart the Management Server.

```
# service cloud-management restart
```

7.3. Creating a New Project

CloudPlatform administrators and domain administrators can create projects. If the global configuration parameter `allow.user.create.projects` is set to true, end users can also create projects.

1. Log in as administrator to the CloudPlatform UI.
2. In the left navigation, click Projects.
3. In Select view, click Projects.
4. Click New Project.
5. Give the project a name and description for display to users, then click Create Project.
6. A screen appears where you can immediately add more members to the project. This is optional. Click Next when you are ready to move on.
7. Click Save.

7.4. Adding Members to a Project

New members can be added to a project by the project's administrator, the domain administrator of the domain where the project resides or any parent domain, or the CloudPlatform root administrator. There are two ways to add members in CloudPlatform, but only one way is enabled at a time:

- If invitations have been enabled, you can send invitations to new members.
- If invitations are not enabled, you can add members directly through the UI.

7.4.1. Sending Project Membership Invitations

Use these steps to add a new member to a project if the invitations feature is enabled in the cloud as described in [Section 7.2.1, "Setting Up Invitations"](#). If the invitations feature is not turned on, use the procedure in Adding Project Members From the UI.

1. Log in to the CloudPlatform UI.
2. In the left navigation, click Projects.
3. In Select View, choose Projects.
4. Click the name of the project you want to work with.

5. Click the Invitations tab.
6. In Add by, select one of the following:
 - a. Account – The invitation will appear in the user’s Invitations tab in the Project View. See Using the Project View.
 - b. Email – The invitation will be sent to the user’s email address. Each emailed invitation includes a unique code called a token which the recipient will provide back to CloudPlatform when accepting the invitation. Email invitations will work only if the global parameters related to the SMTP server have been set. See [Section 7.2.1, “Setting Up Invitations”](#).
7. Type the user name or email address of the new member you want to add, and click Invite. Type the CloudPlatform user name if you chose Account in the previous step. If you chose Email, type the email address. You can invite only people who have an account in this cloud within the same domain as the project. However, you can send the invitation to any email address.
8. To view and manage the invitations you have sent, return to this tab. When an invitation is accepted, the new member will appear in the project’s Accounts tab.

7.4.2. Adding Project Members From the UI

The steps below tell how to add a new member to a project if the invitations feature is not enabled in the cloud. If the invitations feature is enabled cloud, as described in [Section 7.2.1, “Setting Up Invitations”](#), use the procedure in [Section 7.4.1, “Sending Project Membership Invitations”](#).

1. Log in to the CloudPlatform UI.
2. In the left navigation, click Projects.
3. In Select View, choose Projects.
4. Click the name of the project you want to work with.
5. Click the Accounts tab. The current members of the project are listed.
6. Type the account name of the new member you want to add, and click Add Account. You can add only people who have an account in this cloud and within the same domain as the project.

7.5. Accepting a Membership Invitation

If you have received an invitation to join a CloudPlatform project, and you want to accept the invitation, follow these steps:

1. Log in to the CloudPlatform UI.
2. In the left navigation, click Projects.
3. In Select View, choose Invitations.
4. If you see the invitation listed onscreen, click the Accept button.

Invitations listed on screen were sent to you using your CloudPlatform account name.

5. If you received an email invitation, click the Enter Token button, and provide the project ID and unique ID code (token) from the email.


7.6. Suspending or Deleting a Project


When a project is suspended, it retains the resources it owns, but they can no longer be used. No new resources or members can be added to a suspended project.

When a project is deleted, its resources are destroyed, and member accounts are removed from the project. The project's status is shown as Disabled pending final deletion.

A project can be suspended or deleted by the project administrator, the domain administrator of the domain the project belongs to or of its parent domain, or the CloudPlatform root administrator.

1. Log in to the CloudPlatform UI.
2. In the left navigation, click Projects.
3. In Select View, choose Projects.
4. Click the name of the project.
5. Click one of the buttons:

To delete, use 

To suspend, use 

7.7. Using the Project View

If you are a member of a project, you can use CloudPlatform's project view to see project members, resources consumed, and more. The project view shows only information related to one project. It is a useful way to filter out other information so you can concentrate on a project status and resources.

1. Log in to the CloudPlatform UI.
2. Click Project View.
3. The project dashboard appears, showing the project's VMs, volumes, users, events, network settings, and more. From the dashboard, you can:
 - Click the Accounts tab to view and manage project members. If you are the project administrator, you can add new members, remove members, or change the role of a member from user to admin. Only one member at a time can have the admin role, so if you set another user's role to admin, your role will change to regular user.
 - (If invitations are enabled) Click the Invitations tab to view and manage invitations that have been sent to new project members but not yet accepted. Pending invitations will remain in this list until the new member accepts, the invitation timeout is reached, or you cancel the invitation.

Steps to Provisioning Your Cloud Infrastructure

This section tells how to add regions, zones, pods, clusters, hosts, storage, and networks to your cloud. If you are unfamiliar with these entities, please begin by looking through [Chapter 3, Cloud Infrastructure Concepts](#).

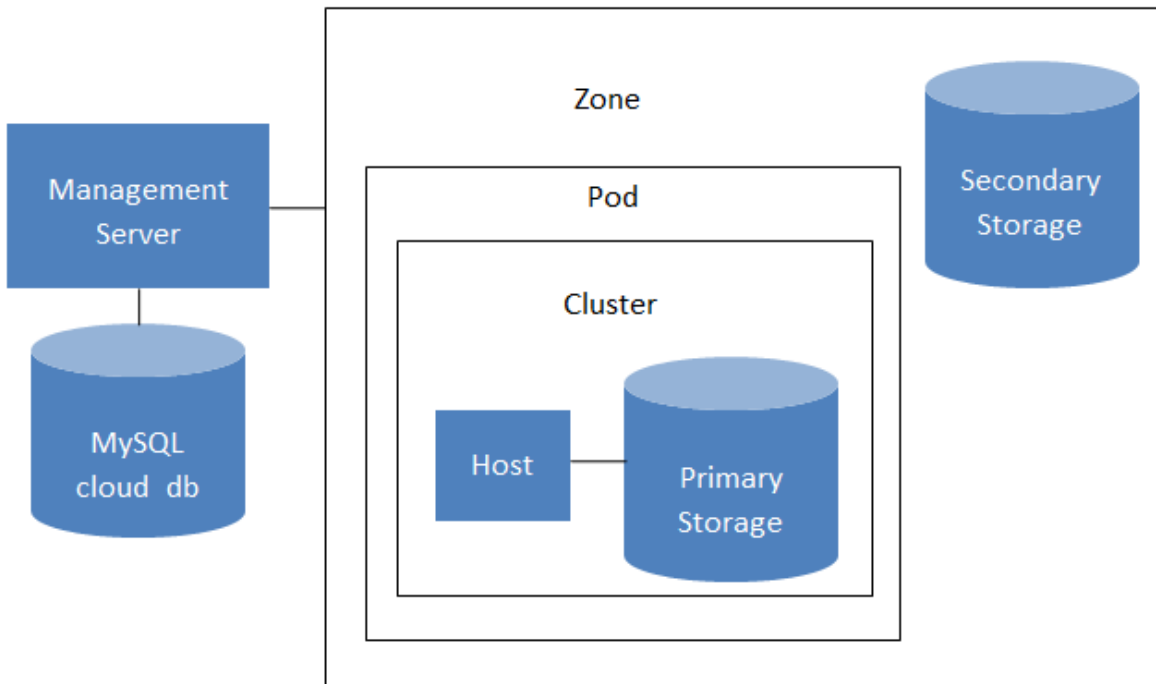
8.1. Overview of Provisioning Steps

After the Management Server is installed and running, you can add the compute resources for it to manage. For an overview of how a CloudPlatform cloud infrastructure is organized, see [Section 2.3.2, “Cloud Infrastructure Overview”](#).

To provision the cloud infrastructure, or to scale it up at any time, follow these procedures:

1. Define regions (optional). See [Section 8.2, “Adding Regions \(optional\)”](#).
2. Add a zone to the region. See [Section 8.3, “Adding a Zone”](#).
3. Add more pods to the zone (optional). See [Section 8.4, “Adding a Pod”](#).
4. Add more clusters to the pod (optional). See [Section 8.5, “Adding a Cluster”](#).
5. Add more hosts to the cluster (optional). See [Section 8.6, “Adding a Host”](#).
6. Add primary storage to the cluster. See [Section 8.7, “Adding Primary Storage”](#).
7. Add secondary storage to the zone. See [Section 8.8, “Adding Secondary Storage”](#).
8. Initialize and test the new cloud. See [Section 8.9, “Initialize and Test”](#).

When you have finished these steps, you will have a deployment with the following basic structure:



Conceptual view of a basic deployment

8.2. Adding Regions (optional)

Grouping your cloud resources into geographic regions is an optional step when provisioning the cloud. For an overview of regions, see [Section 3.1, “About Regions”](#).

8.2.1. The First Region: The Default Region

If you do not take action to define regions, then all the zones in your cloud will be automatically grouped into a single default region. This region is assigned the region ID of 1. You can change the name or URL of the default region by displaying the region in the CloudPlatform UI and clicking the Edit button.

8.2.2. Adding a Region

Use these steps to add a second region in addition to the default region.

1. Each region has its own CloudPlatform instance. Therefore, the first step of creating a new region is to install the Management Server software, on one or more nodes, in the geographic area where you want to set up the new region. Use the steps in the Installation guide. When you come to the step where you set up the database, use the additional command-line flag `-r <region_id>` to set a region ID for the new region. The default region is automatically assigned a region ID of 1, so your first additional region might be region 2.

```
cloudstack-setup-databases cloud:<dbpassword>@localhost --deploy-as=root:<password> -e  
<encryption_type> -m <management_server_key> -k <database_key> -r <region_id>
```

2. By the end of the installation procedure, the Management Server should have been started. Be sure that the Management Server installation was successful and complete.

3. Now add the new region to region 1 in CloudPlatform.
 - a. Log in to CloudPlatform in the first region as root administrator (that is, log in to <region.1.IP.address>:8080/client).
 - b. In the left navigation bar, click Regions.
 - c. Click Add Region. In the dialog, fill in the following fields:
 - ID. A unique identifying number. Use the same number you set in the database during Management Server installation in the new region; for example, 2.
 - Name. Give the new region a descriptive name.
 - Endpoint. The URL where you can log in to the Management Server in the new region. This has the format <region.2.IP.address>:8080/client.
4. Now perform the same procedure in reverse. Log in to region 2, and add region 1.
5. Copy the account, user, and domain tables from the region 1 database to the region 2 database.

In the following commands, it is assumed that you have set the root password on the database, which is a CloudPlatform recommended best practice. Substitute your own MySQL root password.

- a. First, run this command to copy the contents of the database:

```
# mysqldump -u root -p<mysql_password> -h <region1_db_host> cloud account user domain
> region1.sql
```

- b. Then run this command to put the data onto the region 2 database:

```
# mysql -u root -p<mysql_password> -h <region2_db_host> cloud < region1.sql
```

6. Remove project accounts. Run these commands on the region 2 database:

```
mysql> delete from account where type = 5;
```

7. Set the default zone as null:

```
mysql> update account set default_zone_id = null;
```

8. Restart the Management Servers in region 2.

8.2.3. Adding Third and Subsequent Regions

To add the third region, and subsequent additional regions, the steps are similar to those for adding the second region. However, you must repeat certain steps additional times for each additional region:

1. Install CloudPlatform in each additional region. Set the region ID for each region during the database setup step.

```
cloudstack-setup-databases cloud:<dbpassword>@localhost --deploy-as=root:<password> -e
<encryption_type> -m <management_server_key> -k <database_key> -r <region_id>
```

2. Once the Management Server is running, add your new region to all existing regions by repeatedly using the Add Region button in the UI. For example, if you were adding region 3:
 - a. Log in to CloudPlatform in the first region as root administrator (that is, log in to <region.1.IP.address>:8080/client), and add a region with ID 3, the name of region 3, and the endpoint <region.3.IP.address>:8080/client.
 - b. Log in to CloudPlatform in the second region as root administrator (that is, log in to <region.2.IP.address>:8080/client), and add a region with ID 3, the name of region 3, and the endpoint <region.3.IP.address>:8080/client.
3. Repeat the procedure in reverse to add all existing regions to the new region. For example, for the third region, add the other two existing regions:
 - a. Log in to CloudPlatform in the third region as root administrator (that is, log in to <region.3.IP.address>:8080/client).
 - b. Add a region with ID 1, the name of region 1, and the endpoint <region.1.IP.address>:8080/client.
 - c. Add a region with ID 2, the name of region 2, and the endpoint <region.2.IP.address>:8080/client.
4. Copy the account, user, and domain tables from any existing region's database to the new region's database.

In the following commands, it is assumed that you have set the root password on the database, which is a CloudPlatform recommended best practice. Substitute your own MySQL root password.

- a. First, run this command to copy the contents of the database:

```
# mysqldump -u root -p<mysql_password> -h <region1_db_host> cloud account user domain  
> region1.sql
```

- b. Then run this command to put the data onto the new region's database. For example, for region 3:

```
# mysql -u root -p<mysql_password> -h <region3_db_host> cloud < region1.sql
```

5. Remove project accounts. Run these commands on the region 3 database:

```
mysql> delete from account where type = 5;
```

6. Set the default zone as null:

```
mysql> update account set default_zone_id = null;
```

7. Restart the Management Servers in the new region.

8.2.4. Deleting a Region

Log in to each of the other regions, navigate to the one you want to delete, and click Remove Region. For example, to remove the third region in a 3-region cloud:

1. Log in to <region.1.IP.address>:8080/client.

2. In the left navigation bar, click Regions.
3. Click the name of the region you want to delete.
4. Click the Remove Region button.
5. Repeat these steps for <region.2.IP.address>:8080/client.

8.3. Adding a Zone

Adding a zone consists of three phases:

- Create a mount point for secondary storage on the Management Server.
- Seed the system VM template on the secondary storage.
- Add the zone.

8.3.1. Create a Secondary Storage Mount Point for the New Zone

To be sure the most up-to-date system VMs are deployed in new zones, you need to seed the latest system VM template to the zone's secondary storage. The first step is to create a mount point for the secondary storage. Then seed the system VM template.

1. On the management server, create a mount point for secondary storage. For example:

```
# mkdir -p /mnt/secondary
```

2. Mount the secondary storage on your Management Server. Replace the example NFS server name and NFS share paths below with your own.

```
# mount -t nfs nfsservername:/nfs/share/secondary /mnt/secondary
```

8.3.2. Prepare the System VM Template

Secondary storage must be seeded with a template that is used for CloudPlatform system VMs.



Note

When copying and pasting a command, be sure the command has pasted as a single line before executing. Some document viewers may introduce unwanted line breaks in copied text.

1. On the Management Server, run one or more of the following cloud-install-sys-tmpl commands to retrieve and decompress the system VM template. Run the command for each hypervisor type that you expect end users to run in this Zone.

If your secondary storage mount point is not named /mnt/secondary, substitute your own mount point name.

If you set the CloudPlatform database encryption type to "web" when you set up the database, you must now add the parameter -s <management-server-secret-key>. See About Password and Key Encryption in the Installation Guide.

This process will require approximately 5 GB of free space on the local file system and up to 30 minutes each time it runs.

- For XenServer:

```
# /usr/share/cloudstack-common/scripts/storage/secondary/cloud-install-sys-templt -m /mnt/secondary -u http://download.cloud.com/templates/4.2/systemvmtemplate-2013-07-12-master-xen.vhd.bz2 -h xenserver -s <optional-management-server-secret-key> -F
```

- For vSphere:

```
# /usr/share/cloudstack-common/scripts/storage/secondary/cloud-install-sys-templt -m /mnt/secondary -u http://download.cloud.com/templates/4.2/systemvmtemplate-4.2-vh7.ova -h vmware -s <optional-management-server-secret-key> -F
```

- For KVM:

```
# /usr/share/cloudstack-common/scripts/storage/secondary/cloud-install-sys-templt -m /mnt/secondary -u http://download.cloud.com/templates/4.2/systemvmtemplate-2013-06-12-master-kvm.qcow2.bz2 -h kvm -s <optional-management-server-secret-key> -F
```

2. If you are using a separate NFS server, perform this step. If you are using the Management Server as the NFS server, you MUST NOT perform this step.

When the script has finished, unmount secondary storage and remove the created directory.

```
# umount /mnt/secondary
# rmdir /mnt/secondary
```

3. Repeat these steps for each secondary storage server.

8.3.3. Steps to Add a New Zone

When you add a new zone, you will be prompted to configure the zone's physical network and add the first pod, cluster, host, primary storage, and secondary storage.

1. Be sure you have first performed the steps to seed the system VM template.
2. Log in to the CloudPlatform UI as the root administrator. See [Section 6.2, "Log In to the UI"](#).
3. In the left navigation, choose Infrastructure.
4. On Zones, click View More.
5. Click Add Zone. The zone creation wizard will appear.
6. Choose one of the following network types:
 - **Basic.** For AWS-style networking. Provides a single network where each VM instance is assigned an IP directly from the network. Guest isolation can be provided through layer-3 means such as security groups (IP address source filtering).
 - **Advanced.** For more sophisticated network topologies. This network model provides the most flexibility in defining guest networks and providing custom network offerings such as firewall, VPN, or load balancer support.

For more information about the network types, see Network Setup.

- The rest of the steps differ depending on whether you chose Basic or Advanced. Continue with the steps that apply to you:
 - [Section 8.3.3.1, “Basic Zone Configuration”](#)
 - [Section 8.3.3.2, “Advanced Zone Configuration”](#)

8.3.3.1. Basic Zone Configuration

- After you select Basic in the Add Zone wizard and click Next, you will be asked to enter the following details. Then click Next.
 - Name.** A name for the zone.
 - DNS 1 and 2.** These are DNS servers for use by guest VMs in the zone. These DNS servers will be accessed via the public network you will add later. The public IP addresses for the zone must have a route to the DNS server named here.
 - Internal DNS 1 and Internal DNS 2.** These are DNS servers for use by system VMs in the zone (these are VMs used by CloudPlatform itself, such as virtual routers, console proxies, and Secondary Storage VMs.) These DNS servers will be accessed via the management traffic network interface of the System VMs. The private IP address you provide for the pods must have a route to the internal DNS server named here.
 - Hypervisor.** Choose the hypervisor for the first cluster in the zone. You can add clusters with different hypervisors later, after you finish adding the zone.
 - Network Offering.** Your choice here determines what network services will be available on the network for guest VMs.

Network Offering	Description
DefaultSharedNetworkOfferingWithSGService	If you want to enable security groups for guest traffic isolation, choose this. (See Using Security Groups to Control Traffic to VMs.)
DefaultSharedNetworkOffering	If you do not need security groups, choose this.
DefaultSharedNetscalerEIPandELBNetworkOffering	If you have installed a Citrix NetScaler appliance as part of your zone network, and you will be using its Elastic IP and Elastic Load Balancing features, choose this. With the EIP and ELB features, a basic zone with security groups enabled can offer 1:1 static NAT and load balancing.

- Network Domain.** (Optional) If you want to assign a special domain name to the guest VM network, specify the DNS suffix.
 - Public.** A public zone is available to all users. A zone that is not public will be assigned to a particular domain. Only users in that domain will be allowed to create guest VMs in this zone.
- Choose which traffic types will be carried by the physical network.

The traffic types are management, public, guest, and storage traffic. For more information about the types, roll over the icons to display their tool tips, or see Basic Zone Network Traffic Types. This screen starts out with some traffic types already assigned. To add more, drag and drop traffic types onto the network. You can also change the network name if desired.

3. Assign a network traffic label to each traffic type on the physical network. These labels must match the labels you have already defined on the hypervisor host. To assign each label, click the Edit button under the traffic type icon. A popup dialog appears where you can type the label, then click OK.

These traffic labels will be defined only for the hypervisor selected for the first cluster. For all other hypervisors, the labels can be configured after the zone is created.

4. Click Next.
5. (NetScaler only) If you chose the network offering for NetScaler, you have an additional screen to fill out. Provide the requested details to set up the NetScaler, then click Next.
 - **IP address.** The NSIP (NetScaler IP) address of the NetScaler device.
 - **Username/Password.** The authentication credentials to access the device. CloudPlatform uses these credentials to access the device.
 - **Type.** NetScaler device type that is being added. It could be NetScaler VPX, NetScaler MPX, or NetScaler SDX. For a comparison of the types, see About Using a NetScaler Load Balancer.
 - **Public interface.** Interface of NetScaler that is configured to be part of the public network.
 - **Private interface.** Interface of NetScaler that is configured to be part of the private network.
 - **Number of retries.** Number of times to attempt a command on the device before considering the operation failed. Default is 2.
 - **Capacity.** Number of guest networks/accounts that will share this NetScaler device.
 - **Dedicated.** When marked as dedicated, this device will be dedicated to a single account. When Dedicated is checked, the value in the Capacity field has no significance – implicitly, its value is 1.
6. (NetScaler only) Configure the IP range for public traffic. The IPs in this range will be used for the static NAT capability which you enabled by selecting the network offering for NetScaler with EIP and ELB. Enter the following details, then click Add. If desired, you can repeat this step to add more IP ranges. When done, click Next.
 - **Gateway.** The gateway in use for these IP addresses.
 - **Netmask.** The netmask associated with this IP range.
 - **VLAN.** The VLAN that will be used for public traffic.
 - **Start IP/End IP.** A range of IP addresses that are assumed to be accessible from the Internet and will be allocated for access to guest VMs.
7. In a new zone, CloudPlatform adds the first pod for you. You can always add more pods later. For an overview of what a pod is, see [Section 3.3, “About Pods”](#).

To configure the first pod, enter the following, then click Next:

- **Pod Name.** A name for the pod.
 - **Reserved system gateway.** The gateway for the hosts in that pod.
 - **Reserved system netmask.** The network prefix that defines the pod's subnet. Use CIDR notation.
 - **Start/End Reserved System IP.** The IP range in the management network that CloudPlatform uses to manage various system VMs, such as Secondary Storage VMs, Console Proxy VMs, and DHCP. For more information, see System Reserved IP Addresses.
8. Configure the network for guest traffic. Provide the following, then click Next:
- **Guest gateway.** The gateway that the guests should use.
 - **Guest netmask.** The netmask in use on the subnet the guests will use.
 - **Guest start IP/End IP.** Enter the first and last IP addresses that define a range that CloudPlatform can assign to guests.
 - We strongly recommend the use of multiple NICs. If multiple NICs are used, they may be in a different subnet.
 - If one NIC is used, these IPs should be in the same CIDR as the pod CIDR.
9. In a new pod, CloudPlatform adds the first cluster for you. You can always add more clusters later. For an overview of what a cluster is, see About Clusters.

To configure the first cluster, enter the following, then click Next:

- **Hypervisor.** The type of hypervisor software that all hosts in this cluster will run. If the hypervisor is VMware, additional fields appear so you can give information about a vSphere cluster. For vSphere servers, we recommend creating the cluster of hosts in vCenter and then adding the entire cluster to CloudPlatform. See [Section 8.5.3, "Add Cluster: vSphere"](#).
 - **Cluster name.** Enter a name for the cluster. This can be text of your choosing and is not used by CloudPlatform.
10. In a new cluster, CloudPlatform adds the first host for you. You can always add more hosts later. For an overview of what a host is, see About Hosts.



Note

When you add a hypervisor host to CloudPlatform, the host must not have any VMs already running.

Before you can configure the host, you need to install the hypervisor software on the host. You will need to know which version of the hypervisor software version is supported by CloudPlatform and what additional configuration is required to ensure the host will work with CloudPlatform. To find these installation details, see:

- Citrix XenServer Installation and Configuration
- VMware vSphere Installation and Configuration

- KVM vSphere Installation and Configuration
- Oracle VM (OVM) Installation and Configuration

To configure the first host, enter the following, then click Next:

- **Host Name.** The DNS name or IP address of the host.
- **Username.** The username is root.
- **Password.** This is the password for the user named above (from your XenServer or KVM install).
- **Host Tags.** (Optional) Any labels that you use to categorize hosts for ease of maintenance. For example, you can set this to the cloud's HA tag (set in the ha.tag global configuration parameter) if you want this host to be used only for VMs with the "high availability" feature enabled. For more information, see HA-Enabled Virtual Machines as well as HA for Hosts.

11. In a new cluster, CloudPlatform adds the first primary storage server for you. You can always add more servers later. For an overview of what primary storage is, see About Primary Storage.

To configure the first primary storage server, enter the following, then click Next:

- **Name.** The name of the storage device.
- **Protocol.** For XenServer, choose either NFS, iSCSI, or PreSetup. For KVM, choose NFS or SharedMountPoint. For vSphere choose either VMFS (iSCSI or FiberChannel) or NFS. The remaining fields in the screen vary depending on what you choose here.

8.3.3.2. Advanced Zone Configuration

1. After you select Advanced in the Add Zone wizard and click Next, you will be asked to enter the following details. Then click Next.

- **Name.** A name for the zone.
- **DNS 1 and 2.** These are DNS servers for use by guest VMs in the zone. These DNS servers will be accessed via the public network you will add later. The public IP addresses for the zone must have a route to the DNS server named here.
- **Internal DNS 1 and Internal DNS 2.** These are DNS servers for use by system VMs in the zone (these are VMs used by CloudPlatform itself, such as virtual routers, console proxies, and Secondary Storage VMs.) These DNS servers will be accessed via the management traffic network interface of the System VMs. The private IP address you provide for the pods must have a route to the internal DNS server named here.
- **Network Domain.** (Optional) If you want to assign a special domain name to the guest VM network, specify the DNS suffix.
- **Guest CIDR.** This is the CIDR that describes the IP addresses in use in the guest virtual networks in this zone. For example, 10.1.1.0/24. As a matter of good practice you should set different CIDRs for different zones. This will make it easier to set up VPNs between networks in different zones.
- **Hypervisor.** Choose the hypervisor for the first cluster in the zone. You can add clusters with different hypervisors later, after you finish adding the zone.

- **Public.** A public zone is available to all users. A zone that is not public will be assigned to a particular domain. Only users in that domain will be allowed to create guest VMs in this zone.

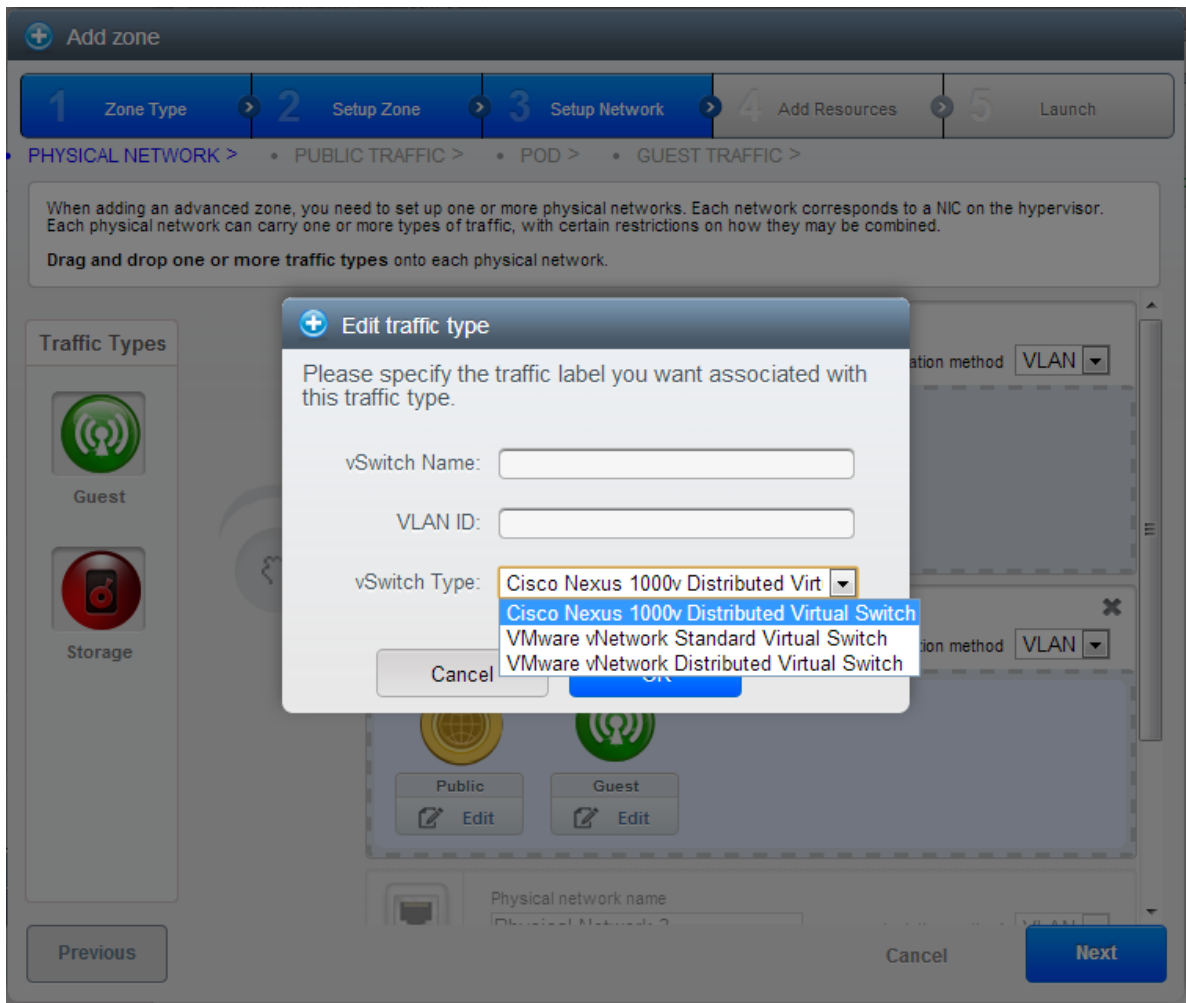
2. Choose which traffic types will be carried by the physical network.

The traffic types are management, public, guest, and storage traffic. For more information about the types, roll over the icons to display their tool tips, or see [Section 3.8.3, “Advanced Zone Network Traffic Types”](#). This screen starts out with one network already configured. If you have multiple physical networks, you need to add more. Drag and drop traffic types onto a greyed-out network and it will become active. You can move the traffic icons from one network to another; for example, if the default traffic types shown for Network 1 do not match your actual setup, you can move them down. You can also change the network names if desired.

3. Assign a network traffic label to each traffic type on each physical network. These labels must match the labels you have already defined on the hypervisor host. To assign each label, click the Edit button under the traffic type icon within each physical network. A popup dialog appears where you can type the label, then click OK.

These traffic labels will be defined only for the hypervisor selected for the first cluster. For all other hypervisors, the labels can be configured after the zone is created.

(VMware only) If you have enabled Nexus dvSwitch in the environment, you must specify the corresponding Ethernet port profile names as network traffic label for each traffic type on the physical network. For more information on Nexus dvSwitch, see [Configuring a vSphere Cluster with Nexus 1000v Virtual Switch](#). If you have enabled VMware dvSwitch in the environment, you must specify the corresponding Switch name as network traffic label for each traffic type on the physical network. For more information, see [Configuring a VMware Datacenter with VMware Distributed Virtual Switch in the Installation Guide](#).



4. Click Next.
5. Configure the IP range for public Internet traffic. Enter the following details, then click Add. If desired, you can repeat this step to add more public Internet IP ranges. When done, click Next.
 - **Gateway.** The gateway in use for these IP addresses.
 - **Netmask.** The netmask associated with this IP range.
 - **VLAN.** The VLAN that will be used for public traffic.
 - **Start IP/End IP.** A range of IP addresses that are assumed to be accessible from the Internet and will be allocated for access to guest networks.
6. In a new zone, CloudPlatform adds the first pod for you. You can always add more pods later. For an overview of what a pod is, see [Section 3.3, "About Pods"](#).

To configure the first pod, enter the following, then click Next:

- **Pod Name.** A name for the pod.
- **Reserved system gateway.** The gateway for the hosts in that pod.
- **Reserved system netmask.** The network prefix that defines the pod's subnet. Use CIDR notation.

- **Start/End Reserved System IP.** The IP range in the management network that CloudPlatform uses to manage various system VMs, such as Secondary Storage VMs, Console Proxy VMs, and DHCP. For more information, see [Section 3.8.6, “System Reserved IP Addresses”](#).
7. Specify a range of VLAN IDs to carry guest traffic for each physical network (see [VLAN Allocation Example](#)), then click Next.
 8. In a new pod, CloudPlatform adds the first cluster for you. You can always add more clusters later. For an overview of what a cluster is, see [Section 3.4, “About Clusters”](#).

To configure the first cluster, enter the following, then click Next:

- **Hypervisor.** The type of hypervisor software that all hosts in this cluster will run. If the hypervisor is VMware, additional fields appear so you can give information about a vSphere cluster. For vSphere servers, we recommend creating the cluster of hosts in vCenter and then adding the entire cluster to CloudPlatform. See [Section 8.5.3, “Add Cluster: vSphere”](#).
 - **Cluster name.** Enter a name for the cluster. This can be text of your choosing and is not used by CloudPlatform.
9. In a new cluster, CloudPlatform adds the first host for you. You can always add more hosts later. For an overview of what a host is, see [Section 3.5, “About Hosts”](#).



Note

When you deploy CloudPlatform, the hypervisor host must not have any VMs already running.

Before you can configure the host, you need to install the hypervisor software on the host. You will need to know which version of the hypervisor software version is supported by CloudPlatform and what additional configuration is required to ensure the host will work with CloudPlatform. To find these installation details, see:

- [Citrix XenServer Installation for CloudPlatform](#)
- [VMware vSphere Installation and Configuration](#)
- [KVM Installation and Configuration](#)
- [Oracle VM \(OVM\) Installation and Configuration](#)

To configure the first host, enter the following, then click Next:

- **Host Name.** The DNS name or IP address of the host.
- **Username.** Usually root.
- **Password.** This is the password for the user named above (from your XenServer or KVM install).
- **Host Tags.** (Optional) Any labels that you use to categorize hosts for ease of maintenance. For example, you can set to the cloud's HA tag (set in the `ha.tag` global configuration parameter) if you want this host to be used only for VMs with the "high availability" feature enabled. For

more information, see HA-Enabled Virtual Machines as well as HA for Hosts, both in the Administration Guide.

10. In a new cluster, CloudPlatform adds the first primary storage server for you. You can always add more servers later. For an overview of what primary storage is, see [Section 3.6, “About Primary Storage”](#).

To configure the first primary storage server, enter the following, then click Next:

- **Name.** The name of the storage device.
- **Protocol.** For XenServer, choose either NFS, iSCSI, or PreSetup. For KVM, choose NFS or SharedMountPoint. For vSphere choose either VMFS (iSCSI or FiberChannel) or NFS. The remaining fields in the screen vary depending on what you choose here.

NFS	<ul style="list-style-type: none"> • Server. The IP address or DNS name of the storage device. • Path. The exported path from the server. • Tags (optional). The comma-separated list of tags for this storage device. It should be an equivalent set or superset of the tags on your disk offerings. <p>The tag sets on primary storage across clusters in a Zone must be identical. For example, if cluster A provides primary storage that has tags T1 and T2, all other clusters in the Zone must also provide primary storage that has tags T1 and T2.</p>
iSCSI	<ul style="list-style-type: none"> • Server. The IP address or DNS name of the storage device. • Target IQN. The IQN of the target. For example, iqn.1986-03.com.sun:02:01ec9bb549-1271378984. • Lun. The LUN number. For example, 3. • Tags (optional). The comma-separated list of tags for this storage device. It should be an equivalent set or superset of the tags on your disk offerings. <p>The tag sets on primary storage across clusters in a Zone must be identical. For example, if cluster A provides primary storage that has tags T1 and T2, all other clusters in the Zone must also provide primary storage that has tags T1 and T2.</p>
preSetup	<ul style="list-style-type: none"> • Server. The IP address or DNS name of the storage device. • SR Name-Label. Enter the name-label of the SR that has been set up outside CloudPlatform. • Tags (optional). The comma-separated list of tags for this storage device. It should be an equivalent set or superset of the tags on your disk offerings. <p>The tag sets on primary storage across clusters in a Zone must be identical. For example, if cluster A provides primary storage that has tags T1 and T2, all other clusters in the Zone must also provide primary storage that has tags T1 and T2.</p>

SharedMountPoint	<ul style="list-style-type: none"> • Path. The path on each host that is where this primary storage is mounted. For example, "/mnt/primary". • Tags (optional). The comma-separated list of tags for this storage device. It should be an equivalent set or superset of the tags on your disk offerings. <p>The tag sets on primary storage across clusters in a Zone must be identical. For example, if cluster A provides primary storage that has tags T1 and T2, all other clusters in the Zone must also provide primary storage that has tags T1 and T2.</p>
VMFS	<ul style="list-style-type: none"> • Server. The IP address or DNS name of the vCenter server. • Path. A combination of the datacenter name and the datastore name. The format is "/" datacenter name "/" datastore name. For example, "/cloud.dc.VM/cluster1datastore". • Tags (optional). The comma-separated list of tags for this storage device. It should be an equivalent set or superset of the tags on your disk offerings. <p>The tag sets on primary storage across clusters in a Zone must be identical. For example, if cluster A provides primary storage that has tags T1 and T2, all other clusters in the Zone must also provide primary storage that has tags T1 and T2.</p>

11. In a new zone, CloudPlatform adds the first secondary storage server for you. For an overview of what secondary storage is, see [Section 3.7, "About Secondary Storage"](#).

Before you can fill out this screen, you need to prepare the secondary storage by setting up NFS shares and installing the latest CloudPlatform System VM template. See [Section 8.8, "Adding Secondary Storage"](#).

To configure the first secondary storage server, enter the following, then click Next:

- **NFS Server.** The IP address of the server.
- **Path.** The exported path from the server.

12. Click Launch.

8.4. Adding a Pod

When you create a new zone, CloudPlatform adds the first pod for you. You can add more pods at any time using the procedure in this section.

1. Log in to the CloudPlatform UI. See [Section 6.2, "Log In to the UI"](#).
2. In the left navigation, choose Infrastructure. In Zones, click View More, then click the zone to which you want to add a pod.
3. Click the Compute and Storage tab. In the Pods node of the diagram, click View All.
4. Click Add Pod.

5. Enter the following details in the dialog.
 - **Name.** The name of the pod.
 - **Gateway.** The gateway for the hosts in that pod.
 - **Netmask.** The network prefix that defines the pod's subnet. Use CIDR notation.
 - **Start/End Reserved System IP.** The IP range in the management network that CloudPlatform uses to manage various system VMs, such as Secondary Storage VMs, Console Proxy VMs, and DHCP. For more information, see System Reserved IP Addresses.
6. Click OK.

8.5. Adding a Cluster

You need to tell CloudPlatform about the hosts that it will manage. Hosts exist inside clusters, so before you begin adding hosts to the cloud, you must add at least one cluster.

8.5.1. Add Cluster: KVM or XenServer

These steps assume you have already installed the hypervisor on the hosts and logged in to the CloudPlatform UI.

1. In the left navigation, choose Infrastructure. In Zones, click View More, then click the zone in which you want to add the cluster.
2. Click the Compute tab.
3. In the Clusters node of the diagram, click View All.
4. Click Add Cluster.
5. Choose the hypervisor type for this cluster.
6. Choose the pod in which you want to create the cluster.
7. Enter a name for the cluster. This can be text of your choosing and is not used by CloudPlatform.
8. Click OK.

8.5.2. Add Cluster: OVM

To add a Cluster of hosts that run Oracle VM (OVM):

1. Add a companion non-OVM cluster to the Pod. This cluster provides an environment where the CloudPlatform System VMs can run. You should have already installed a non-OVM hypervisor on at least one Host to prepare for this step. Depending on which hypervisor you used:
 - For VMWare, follow the steps in Add Cluster: vSphere. When finished, return here and continue with the next step.
 - For KVM or XenServer, follow the steps in [Section 8.5.1, "Add Cluster: KVM or XenServer"](#). When finished, return here and continue with the next step
2. In the left navigation, choose Infrastructure. In Zones, click View More, then click the zone in which you want to add the cluster.

3. Click the Compute tab. In the Pods node, click View All. Select the same pod you used in step 1.
4. Click View Clusters, then click Add Cluster.

The Add Cluster dialog is displayed.

5. In Hypervisor, choose OVM.
6. In Cluster, enter a name for the cluster.
7. Click Add.

8.5.3. Add Cluster: vSphere

Host management for vSphere is done through a combination of vCenter and the CloudPlatform UI. CloudPlatform requires that all hosts be in a CloudPlatform cluster, but the cluster may consist of a single host. As an administrator you must decide if you would like to use clusters of one host or of multiple hosts. Clusters of multiple hosts allow for features like live migration. Clusters also require shared storage.

For vSphere servers, we recommend creating the cluster of hosts in vCenter and then adding the entire cluster to CloudPlatform.

8.5.3.1. VMware Cluster Size Limit

The maximum number of hosts in a vSphere cluster is determined by the VMware hypervisor software. For VMware versions 4.2, 4.1, 5.0, and 5.1, the limit is 32 hosts. CloudPlatform adheres to this maximum.



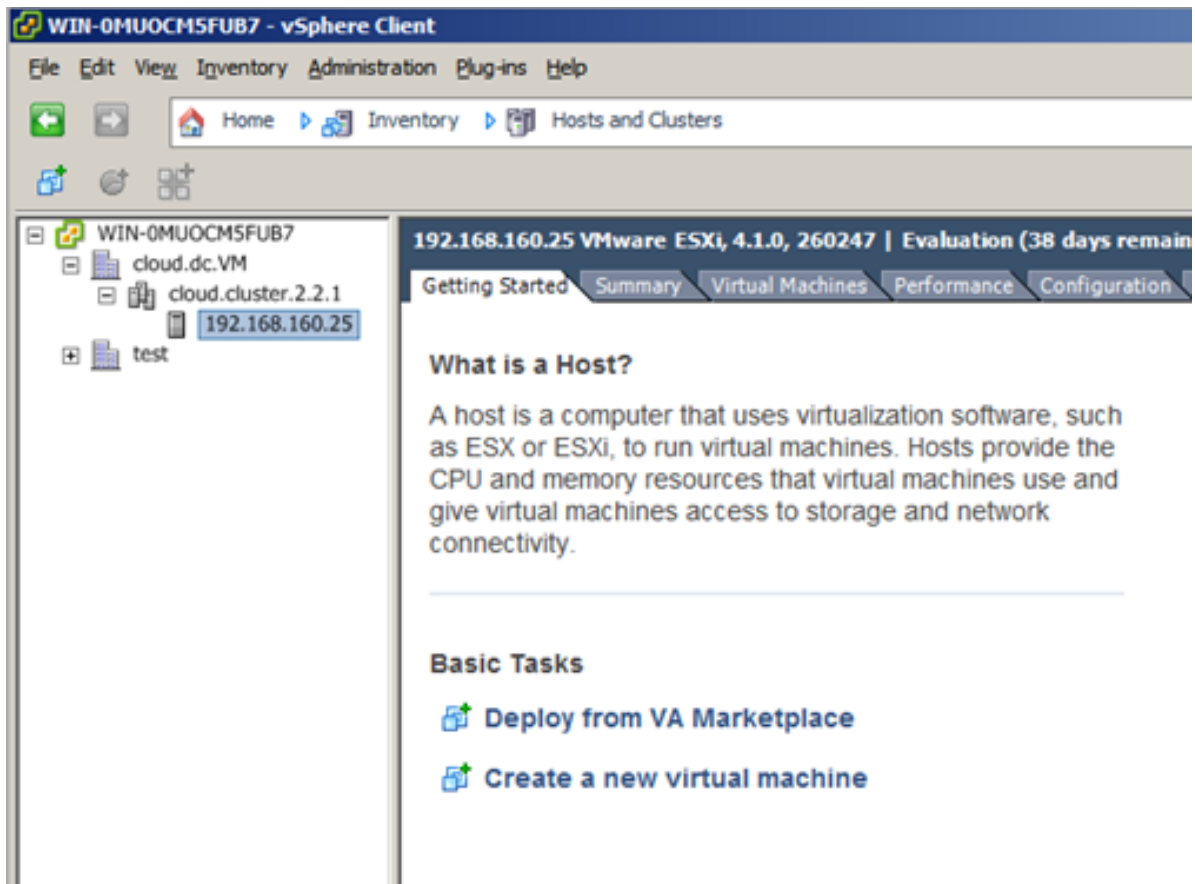
Note

Best Practice: It is advisable for VMware clusters in CloudPlatform to be smaller than the VMware hypervisor's maximum size. A cluster size of up to 8 hosts has been found optimal for most real-world situations.

8.5.3.2. Adding a vSphere Cluster

To add a vSphere cluster to CloudPlatform:

1. Create the cluster of hosts in vCenter. Follow the vCenter instructions to do this. You will create a cluster that looks something like this in vCenter.



2. Log in to the UI.
3. In the left navigation, choose Infrastructure. In Zones, click View More, then click the zone in which you want to add the cluster.
4. Click the Compute tab, and click View All on Pods. Choose the pod to which you want to add the cluster.
5. Click View Clusters.
6. Click Add Cluster.
7. In Hypervisor, choose VMware.
8. Provide the following information in the dialog. The fields below make reference to values from vCenter.
 - Cluster Name. Enter the name of the cluster you created in vCenter. For example, "cloud.cluster.2.2.1"
 - vCenter Host. Enter the hostname or IP address of the vCenter server.
 - vCenter Username. Enter the username that CloudPlatform should use to connect to vCenter. This user must have all administrative privileges.
 - vCenter Password. Enter the password for the user named above
 - vCenter Datacenter. Enter the vCenter datacenter that the cluster is in. For example, "cloud.dc.VM".

If you have enabled Nexus dvSwitch in the environment, the following parameters for dvSwitch configuration are displayed:

- Nexus dvSwitch IP Address: The IP address of the Nexus VSM appliance.
- Nexus dvSwitch Username: The username required to access the Nexus VSM appliance.
- Nexus dvSwitch Password: The password associated with the username specified above.

The screenshot shows the 'Add Cluster' dialog box with the following configuration:

- Zone Name:** Zone-1
- Hypervisor:** VMware
- Pod Name:** POD-1
- Cluster Name:** (empty)
- Dedicate:**
- vCenter Host:** (empty)
- vCenter Username:** (empty)
- vCenter Password:** (empty)
- vCenter Datacenter:** (empty)
- Override Public-Traffic:**
- Public Traffic vSwitch Type:** VMware vNetwork Distributed Virtu:
- Public Traffic vSwitch Name:** (empty)
- Override Guest-Traffic:**
- Guest Traffic vSwitch Type:** VMware vNetwork Distributed Virtu:
- Guest Traffic vSwitch Name:** (empty)

Buttons: Cancel, OK

There might be a slight delay while the cluster is provisioned. It will automatically display in the UI

8.6. Adding a Host

1. Before adding a host to the CloudPlatform configuration, you must first install your chosen hypervisor on the host. CloudPlatform can manage hosts running VMs under a variety of hypervisors.

The CloudPlatform Installation Guide provides instructions on how to install each supported hypervisor and configure it for use with CloudPlatform. See the appropriate section in the Installation Guide for information about which version of your chosen hypervisor is supported, as well as crucial additional steps to configure the hypervisor hosts for use with CloudPlatform.



Warning

Be sure you have performed the additional CloudPlatform-specific configuration steps described in the hypervisor installation section for your particular hypervisor.

2. Now add the hypervisor host to CloudPlatform. The technique to use varies depending on the hypervisor.
 - [Section 8.6.1, “Adding a Host \(XenServer, KVM, or OVM\)”](#)
 - [Section 8.6.2, “Adding a Host \(vSphere\)”](#)

8.6.1. Adding a Host (XenServer, KVM, or OVM)

XenServer, KVM, and Oracle VM (OVM) hosts can be added to a cluster at any time.

8.6.1.1. Requirements for XenServer, KVM, and OVM Hosts



Warning

Make sure the hypervisor host does not have any VMs already running before you add it to CloudPlatform.

Configuration requirements:

- Each cluster must contain only hosts with the identical hypervisor.
- For XenServer, do not put more than 8 hosts in a cluster.
- For KVM, do not put more than 16 hosts in a cluster.

For hardware requirements, see the installation section for your hypervisor in the CloudPlatform Installation Guide.

8.6.1.1.1. XenServer Host Additional Requirements

If network bonding is in use, the administrator must cable the new host identically to other hosts in the cluster.

For all additional hosts to be added to the cluster, run the following command. This will cause the host to join the master in a XenServer pool.

```
# xe pool-join master-address=[master IP] master-username=root master-password=[your password]
```



Note

When copying and pasting a command, be sure the command has pasted as a single line before executing. Some document viewers may introduce unwanted line breaks in copied text.

With all hosts added to the XenServer pool, run the `cloud-setup-bond` script. This script will complete the configuration and setup of the bonds on the new hosts in the cluster.

1. Copy the script from the Management Server in `/usr/share/cloudstack-common/scripts/vm/hypervisor/xenserver/cloud-setup-bonding.sh` to the master host and ensure it is executable.
2. Run the script:

```
# ./cloud-setup-bonding.sh
```

8.6.1.1.2. KVM Host Additional Requirements

- If shared mountpoint storage is in use, the administrator should ensure that the new host has all the same mountpoints (with storage mounted) as the other hosts in the cluster.
- Make sure the new host has the same network configuration (guest, private, and public network) as other hosts in the cluster.

8.6.1.1.3. OVM Host Additional Requirements

Before adding a used host in CloudPlatform, as part of the cleanup procedure on the host, be sure to remove `/etc/ovs-agent/db/`.

8.6.1.2. Adding a XenServer, KVM, or OVM Host

1. If you have not already done so, install the hypervisor software on the host. You will need to know which version of the hypervisor software version is supported by CloudPlatform and what additional configuration is required to ensure the host will work with CloudPlatform. To find these installation details, see the appropriate section for your hypervisor in the CloudPlatform Installation Guide.
2. Log in to the CloudPlatform UI as administrator.
3. In the left navigation, choose Infrastructure. In Zones, click View More, then click the zone in which you want to add the host.
4. Click the Compute tab. In the Clusters node, click View All.
5. Click the cluster where you want to add the host.
6. Click View Hosts.
7. Click Add Host.

8. Provide the following information.
 - Host Name. The DNS name or IP address of the host.
 - Username. Usually root.
 - Password. This is the password for the user named above (from your XenServer, KVM, or OVM install).
 - Host Tags (Optional). Any labels that you use to categorize hosts for ease of maintenance. For example, you can set to the cloud's HA tag (set in the ha.tag global configuration parameter) if you want this host to be used only for VMs with the "high availability" feature enabled. For more information, see HA-Enabled Virtual Machines as well as HA for Hosts.

There may be a slight delay while the host is provisioned. It should automatically display in the UI.

9. Repeat for additional hosts.

8.6.2. Adding a Host (vSphere)

For vSphere servers, we recommend creating the cluster of hosts in vCenter and then adding the entire cluster to CloudPlatform. See Add Cluster: vSphere.

8.7. Adding Primary Storage



Warning

When using preallocated storage for primary storage, be sure there is nothing on the storage (ex. you have an empty SAN volume or an empty NFS share). Adding the storage to CloudPlatform will destroy any existing data.

When you create a new zone, the first primary storage is added as part of that procedure. You can add primary storage servers at any time, such as when adding a new cluster or adding more servers to an existing cluster.

1. Log in to the CloudPlatform UI.
2. In the left navigation, choose Infrastructure. In Zones, click View All, then click the zone in which you want to add the primary storage.
3. Click the Compute and Storage tab.
4. In the Primary Storage node of the diagram, click View All.
5. Click Add Primary Storage.
6. Provide the following information in the dialog. The information required varies depending on your choice in Protocol.
 - Scope. Indicate whether the storage is available to all hosts in the zone or only to hosts in a single cluster.
 - Pod. (Visible only if you choose Cluster in the Scope field.) The pod for the storage device.

- Cluster. (Visible only if you choose Cluster in the Scope field.) The cluster for the storage device.
- Name. The name of the storage device
- Protocol. For XenServer, choose either NFS, iSCSI, or PreSetup. For KVM, choose NFS or SharedMountPoint. For vSphere choose either VMFS (iSCSI or FiberChannel) or NFS
- Server (for NFS, iSCSI, or PreSetup). The IP address or DNS name of the storage device
- Server (for VMFS). The IP address or DNS name of the vCenter server.
- Path (for NFS). In NFS this is the exported path from the server.
- Path (for VMFS). In vSphere this is a combination of the datacenter name and the datastore name. The format is "/" datacenter name "/" datastore name. For example, "/cloud.dc.VM/cluster1datastore".
- Path (for SharedMountPoint). With KVM this is the path on each host that is where this primary storage is mounted. For example, "/mnt/primary".
- SR Name-Label (for PreSetup). Enter the name-label of the SR that has been set up outside CloudPlatform.
- Target IQN (for iSCSI). In iSCSI this is the IQN of the target. For example, iqn.1986-03.com.sun:02:01ec9bb549-1271378984
- Lun # (for iSCSI). In iSCSI this is the LUN number. For example, 3.
- Tags (optional). The comma-separated list of tags for this storage device. It should be an equivalent set or superset of the tags on your disk offerings

The tag sets on primary storage across clusters in a Zone must be identical. For example, if cluster A provides primary storage that has tags T1 and T2, all other clusters in the Zone must also provide primary storage that has tags T1 and T2.

7. Click OK.

8.8. Adding Secondary Storage



Note

Be sure there is nothing stored on the server. Adding the server to CloudPlatform will destroy any existing data.

When you create a new zone, the first secondary storage is added as part of that procedure. You can add secondary storage servers at any time to add more servers to an existing zone.

1. To prepare for the zone-based Secondary Staging Store, you should have created and mounted an NFS share during Management Server installation.
2. Make sure you prepared the system VM template during Management Server installation.
3. Log in to the CloudPlatform UI as root administrator.

4. In the left navigation bar, click Infrastructure.
5. In Secondary Storage, click View All.
6. Click Add Secondary Storage.
7. Fill in the following fields:
 - **Name:** Give the storage a descriptive name.
 - **Provider:** Choose the type of storage provider (such as S3, Swift, or NFS). NFS can be used for zone-based storage, and the others for region-wide object storage. Depending on which provider you choose, additional fields will appear. Fill in all the required fields for your selected provider. For more information, consult the provider's documentation (such as the S3 or Swift website).



Warning

You can use only a single region-wide object storage account per region. For example, you can not mix both Swift and S3, or use S3 accounts from multiple different users.

- Create NFS Secondary Staging Store. This box must always be checked.



Warning

Even if the UI allows you to uncheck this box, do not do so. This check box and the three fields below it must be filled in. Even when object storage (such as S3) is used as the secondary storage provider, an NFS staging storage in each zone is still required.

- **Zone.** The zone where the NFS Secondary Staging Store is to be located.
- **NFS server.** The name of the zone's Secondary Staging Store.
- **Path.** The path to the zone's Secondary Staging Store.

8.8.1. Adding an NFS Secondary Staging Store for Each Zone

Every zone must have at least one NFS store provisioned; multiple NFS servers are allowed per zone. To provision an NFS Staging Store for a zone:


1. To prepare for the zone-based Secondary Staging Store, you should have created and mounted an NFS share during Management Server installation.
2. Make sure you prepared the system VM template during Management Server installation.
3. Log in to the CloudPlatform UI as root administrator.
4. In the left navigation bar, click Infrastructure.
5. In Secondary Storage, click View All.
6. In Select View, choose Secondary Staging Store.

7. Click the Add NFS Secondary Staging Store button.
8. Fill out the dialog box fields, then click OK:
 - Zone. The zone where the NFS Secondary Staging Store is to be located.
 - NFS server. The name of the zone's Secondary Staging Store.
 - Path. The path to the zone's Secondary Staging Store.

8.8.2. Configuring S3 Object Store for Secondary Storage

You can configure CloudPlatform to use Amazon S3 Object Store as a secondary storage. S3 Object Store can be used with Amazon Simple Storage Service or any other provider that supports the S3 interface.

1. Make sure you prepared the system VM template during Management Server installation.
2. Log in to the CloudPlatform UI as root administrator.
3. In the left navigation bar, click Infrastructure.
4. In Secondary Storage, click View All.
5. Click Add Secondary Storage.
6. Specify the following:

 Add Secondary Storage

Name:

Provider:

* Access Key:

* Secret Key:

* Bucket:

Endpoint:

Use HTTPS:

Connection Timeout:

Max Error Retry:

Socket Timeout:

Create NFS secondary staging store:

* Zone:

* NFS Server:

* Path:

- **Name:** Give the storage a descriptive name.
- **Provider:** Select S3 for region-wide object storage. S3 can be used with Amazon Simple Storage Service or any other provider that supports the S3 interface.



Warning

You can use only a single region-wide object storage account per region. For example, you can not mix both Swift and S3, or use S3 accounts from multiple different users.

- **Access Key:** The Access Key ID of the administrator. These credentials are used to securely sign the requests through a REST or Query API to the CloudPlatform services. You can get this from the admin user Details tab in the Accounts page. Because you include it in each request, the ID is a secret. Each Access Key ID has a Secret Access Key associated with it.
- **Secret Key:** The secret key ID of the administrator. You can get this from the admin user Details tab in the Accounts page.

This key is just a long string of characters (and not a file) that you use to calculate the digital signature that you include in the request. Your Secret Access Key is a secret, and only you and AWS should have it. Don't e-mail it to anyone, include it in any AWS requests, or post it on the AWS Discussion Forums. No authorized person from AWS will ever ask for your Secret Access Key.

- **Bucket :** The container of the objects stored in Amazon S3. Enter the name of the bucket where you store your files.

Your files are stored as objects in a location called a bucket. When you configure your Amazon S3 bucket as a website, the service delivers the files in your bucket to web browsers as if they were hosted on a web server.

- **End Point:** The IP address or DNS name of the S3 storage server.

For example: 10.10.29.1:8080, where 8080 is the listening port of the S3 storage server.

- **Use HTTPS:** Specify if you want a secure connection with the S3 storage.
- **Connection Timeout:** The default timeout for creating new connections.
- **Max Error Retry:** The number of retry after service exceptions due to internal errors.
- **Socket Timeout:** The default timeout for reading from a connected socket.
- **Create NFS Secondary Staging Store:** If the zone already contains a secondary staging store, do not select this option. Select if you are upgrading an existing NFS secondary storage into an object storage Upgrading from NFS to Object Storage in the Installation Guide. In this case, you can skip the rest of the fields described below (Zone, NFS Server, and Path).
- **Zone:** The zone where S3 the Object Store is to be located.
- **Path:** The path to the zone's Secondary Staging Store.

8.9. Initialize and Test

After everything is configured, CloudPlatform will perform its initialization. This can take 30 minutes or more, depending on the speed of your network. When the initialization has completed successfully, the administrator's Dashboard should be displayed in the CloudPlatform UI.

Chapter 8. Steps to Provisioning Your Cloud Infrastructure

1. Verify that the system is ready. In the left navigation bar, select Templates. Click on the CentOS 5.5 (64bit) no Gui (KVM) template. Check to be sure that the status is "Download Complete." Do not proceed to the next step until this status is displayed.
2. Go to the Instances tab, and filter by My Instances.
3. Click Add Instance and follow the steps in the wizard.
 - a. Choose the zone you just added.
 - b. In the template selection, choose the template to use in the VM. If this is a fresh installation, likely only the provided CentOS template is available.
 - c. Select a service offering. Be sure that the hardware you have allows starting the selected service offering.
 - d. In data disk offering, if desired, add another data disk. This is a second volume that will be available to but not mounted in the guest. For example, in Linux on XenServer you will see /dev/xvdb in the guest after rebooting the VM. A reboot is not required if you have a PV-enabled OS kernel in use.
 - e. In default network, choose the primary network for the guest. In a trial installation, you would have only one option here.
 - f. Optionally give your VM a name and a group. Use any descriptive text you would like.
 - g. Click Launch VM. Your VM will be created and started. It might take some time to download the template and complete the VM startup. You can watch the VM's progress in the Instances screen.

4. To use the VM, click the View Console button. 

For more information about using VMs, including instructions for how to allow incoming network traffic to the VM, start, stop, and delete VMs, and move a VM from one host to another, see Working With Virtual Machines in the Administrator's Guide.

Congratulations! You have successfully completed a CloudPlatform Installation.

If you decide to grow your deployment, you can add more hosts, primary storage, zones, pods, and clusters.

Service Offerings

In this chapter we discuss compute, disk, and system service offerings. Network offerings are discussed in the section on setting up networking for users.

9.1. Compute and Disk Service Offerings

A service offering is a set of virtual hardware features such as CPU core count and speed, memory, and disk size. The CloudPlatform administrator can set up various offerings, and then end users choose from the available offerings when they create a new VM. A service offering includes the following elements:

- CPU, memory, and network resource guarantees
- How resources are metered
- How the resource usage is charged
- How often the charges are generated

For example, one service offering might allow users to create a virtual machine instance that is equivalent to a 1 GHz Intel® Core™ 2 CPU, with 1 GB memory at \$0.20/hour, with network traffic metered at \$0.10/GB. Based on the user's selected offering, CloudPlatform emits usage records that can be integrated with billing systems. CloudPlatform separates service offerings into compute offerings and disk offerings. The computing service offering specifies:

- Guest CPU
- Guest RAM
- Guest Networking type (virtual or direct)
- Tags on the root disk

The disk offering specifies:

- Disk size (optional). An offering without a disk size will allow users to pick their own
- Tags on the data disk

9.1.1. Creating a New Compute Offering

To create a new compute offering:

1. Log in with admin privileges to the CloudPlatform UI.
2. In the left navigation bar, click Service Offerings.
3. In Select Offering, choose Compute Offering.
4. Click Add Compute Offering.
5. In the dialog, make the following choices:
 - **Name:** Any desired name for the service offering.
 - **Description:** A short description of the offering that can be displayed to users

- **Storage type:** The type of disk that should be allocated. Local allocates from storage attached directly to the host where the system VM is running. Shared allocates from storage accessible via NFS.
- **# of CPU cores:** The number of cores which should be allocated to a system VM with this offering
- **CPU (in MHz):** The CPU speed of the cores that the system VM is allocated. For example, “2000” would provide for a 2 GHz clock.
- **Memory (in MB):** The amount of memory in megabytes that the system VM should be allocated. For example, “2048” would provide for a 2 GB RAM allocation.
- **Network Rate:** Allowed data transfer rate in MB per second.
- **Offer HA:** If yes, the administrator can choose to have the system VM be monitored and as highly available as possible.
- **Storage Tags:** The tags that should be associated with the primary storage used by the system VM.
- **Host Tags:** (Optional) Any tags that you use to organize your hosts
- **CPU cap:** Whether to limit the level of CPU usage even if spare capacity is available.
- **isVolatile:** If checked, VMs created from this service offering will have their root disks reset upon reboot. This is useful for secure environments that need a fresh start on every boot and for desktops that should not retain state.
- **Public:** Indicate whether the service offering should be available all domains or only some domains. Choose Yes to make it available to all domains. Choose No to limit the scope to a subdomain; CloudPlatform will then prompt for the subdomain's name.

6. Click Add.

9.1.2. Creating a New Disk Offering

To create a new disk offering:

1. Log in with admin privileges to the CloudPlatform UI.
2. In the left navigation bar, click Service Offerings.
3. In Select Offering, choose Disk Offering.
4. Click Add Disk Offering.
5. In the dialog, make the following choices:
 - Name. Any desired name for the disk offering.
 - Description. A short description of the offering that can be displayed to users
 - Storage Type. Type of disk for the VM. Local is attached to the hypervisor host where the VM is running. Shared is storage accessible via the secondary storage provider.
 - Custom Disk Size. If checked, the user can set their own disk size. If not checked, the root administrator must define a value in Disk Size.

- **Disk Size.** Appears only if Custom Disk Size is not selected. Define the volume size in GB.
- **QoS Type.** Three options: Empty (no Quality of Service), hypervisor (rate limiting enforced on the hypervisor side), and storage (guaranteed minimum and maximum IOPS enforced on the storage side). If using QoS, make sure that the hypervisor or storage system supports this feature.
- **(Optional) Storage Tags.** The tags that should be associated with the primary storage for this disk. Tags are a comma separated list of attributes of the storage. For example "ssd,blue". Tags are also added on Primary Storage. CloudPlatform matches tags on a disk offering to tags on the storage. If a tag is present on a disk offering that tag (or tags) must also be present on Primary Storage for the volume to be provisioned. If no such primary storage exists, allocation from the disk offering will fail..
- **Public.** Indicate whether the service offering should be available all domains or only some domains. Choose Yes to make it available to all domains. Choose No to limit the scope to a subdomain; CloudPlatform will then prompt for the subdomain's name.

6. Click Add.

9.1.3. Modifying or Deleting a Service Offering

Service offerings cannot be changed once created. This applies to both compute offerings and disk offerings.

A service offering can be deleted. If it is no longer in use, it is deleted immediately and permanently. If the service offering is still in use, it will remain in the database until all the virtual machines referencing it have been deleted. After deletion by the administrator, a service offering will not be available to end users that are creating new instances.

9.2. System Service Offerings

System service offerings provide a choice of CPU speed, number of CPUs, tags, and RAM size, just as other service offerings do. But rather than being used for virtual machine instances and exposed to users, system service offerings are used to change the default properties of virtual routers, console proxies, and other system VMs. System service offerings are visible only to the CloudPlatform root administrator. CloudPlatform provides default system service offerings. The CloudPlatform root administrator can create additional custom system service offerings.

When CloudPlatform creates a virtual router for a guest network, it uses default settings which are defined in the system service offering associated with the network offering. You can upgrade the capabilities of the virtual router by applying a new network offering that contains a different system service offering. All virtual routers in that network will begin using the settings from the new service offering.

9.2.1. Creating a New System Service Offering

To create a system service offering:

1. Log in with admin privileges to the CloudPlatform UI.
2. In the left navigation bar, click Service Offerings.
3. In Select Offering, choose System Offering.
4. Click Add System Service Offering.


5. In the dialog, make the following choices:
 - Name. Any desired name for the system offering.
 - Description. A short description of the offering that can be displayed to users
 - System VM Type. Select the type of system virtual machine that this offering is intended to support.
 - Storage type. The type of disk that should be allocated. Local allocates from storage attached directly to the host where the system VM is running. Shared allocates from storage accessible via NFS.
 - # of CPU cores. The number of cores which should be allocated to a system VM with this offering
 - CPU (in MHz). The CPU speed of the cores that the system VM is allocated. For example, “2000” would provide for a 2 GHz clock.
 - Memory (in MB). The amount of memory in megabytes that the system VM should be allocated. For example, “2048” would provide for a 2 GB RAM allocation.
 - Network Rate. Allowed data transfer rate in MB per second.
 - Offer HA. If yes, the administrator can choose to have the system VM be monitored and as highly available as possible.
 - Storage Tags. The tags that should be associated with the primary storage used by the system VM.
 - Host Tags. (Optional) Any tags that you use to organize your hosts
 - CPU cap. Whether to limit the level of CPU usage even if spare capacity is available.
 - Public. Indicate whether the service offering should be available all domains or only some domains. Choose Yes to make it available to all domains. Choose No to limit the scope to a subdomain; CloudPlatform will then prompt for the subdomain’s name.
6. Click Add.


9.2.2. Changing the Secondary Storage VM Service Offering on a Guest Network

A user or administrator can change the SSVM service offering that is associated with an existing guest network.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. To change the SSVM service offering, you must first stop all the SSVMs on the network.

For more information, see [Section 11.7, “Stopping and Starting VMs”](#).

3. In the left navigation, click Instances.
4. Choose the VM that you want to work with.
5. Click the Stop button to stop the VM. 

6. Click the Change Service button. 
7. Select the offering you want.
The Change service dialog box is displayed.
8. Click OK.
9. If you stopped any VMs, restart them.

Setting Up Networking for Users

10.1. Overview of Setting Up Networking for Users

People using cloud infrastructure have a variety of needs and preferences when it comes to the networking services provided by the cloud. As a CloudPlatform administrator, you can do the following things to set up networking for your users:

- Set up physical networks in zones
- Set up several different providers for the same service on a single physical network (for example, both Cisco and Juniper firewalls)
- Bundle different types of network services into network offerings, so users can choose the desired network services for any given virtual machine
- Add new network offerings as time goes on so end users can upgrade to a better class of service on their network
- Provide more ways for a network to be accessed by a user, such as through a project of which the user is a member

10.2. About Virtual Networks

A virtual network is a logical construct that enables multi-tenancy on a single physical network. In CloudPlatform a virtual network can be shared or isolated.

10.2.1. Isolated Networks

An isolated network can be accessed only by virtual machines of a single account. Isolated networks have the following properties.

- Resources such as VLAN are allocated and garbage collected dynamically
- There is one network offering for the entire network
- The network offering can be upgraded or downgraded but it is for the entire network

For more information, see [Section 16.5.1, “Configuring Isolated Guest Network”](#).

10.2.2. Shared Networks

A shared network can be accessed by virtual machines that belong to many different accounts. Network Isolation on shared networks is accomplished by using techniques such as security groups, which is supported only in Basic zones.

- Shared Networks are created by the administrator
- Shared Networks can be designated to a certain domain
- Shared Network resources such as VLAN and physical network that it maps to are designated by the administrator
- Shared Networks can be isolated by security groups
- Public Network is a shared network that is not shown to the end users

- Source NAT per zone is not supported when the service provider is virtual router. However, Source NAT per account is supported with virtual router in a Shared Network.

For information, see [Section 16.5.3, “Configuring a Shared Guest Network”](#).

10.2.3. Runtime Allocation of Virtual Network Resources

When you define a new virtual network, all your settings for that network are stored in CloudPlatform. The actual network resources are activated only when the first virtual machine starts in the network. When all virtual machines have left the virtual network, the network resources are garbage collected so they can be allocated again. This helps to conserve network resources.

10.3. Network Service Providers



Note

For the most up-to-date list of supported network service providers, see the CloudPlatform UI or call `listNetworkServiceProviders`.

A service provider (also called a network element) is hardware or virtual appliance that makes a network service possible; for example, a firewall appliance can be installed in the cloud to provide firewall service. On a single network, multiple providers can provide the same network service. For example, a firewall service may be provided by Cisco or Juniper devices in the same physical network.

You can have multiple instances of the same service provider in a network (say, more than one Juniper SRX device).

If different providers are set up to provide the same service on the network, the administrator can create network offerings so users can specify which network service provider they prefer (along with the other choices offered in network offerings). Otherwise, CloudPlatform will choose which provider to use whenever the service is called for.

10.4. Network Service Providers Support Matrix

10.4.1. Individual

Y = Supported

N = Not Supported

	Virtual Router	VPC Virtual Router	BigIP F5	Juniper SRX	Citrix NetScaler
DHCP	Y	Y	N	N	N
DNS	Y	Y	N	N	N
User Data	Y	Y	N	N	N
Source NAT	Y	Y	N	Y	N
Static NAT	Y	Y	N	Y	N

Support Matrix for an Isolated Network (Combination)

	Virtual Router	VPC Virtual Router	BigIP F5	Juniper SRX	Citrix NetScaler
Port Forwarding	Y	Y	N	Y	N
Load Balancing	Y	Y	Y	N	Y
Remote VPN	Y	N	N	Y	N
Network ACL	N	Y	N	N	N
Usage Monitoring	Y	Y	Y	Y	Y
Security Group	N	N	N	N	N
Firewall	Y	N	N	Y	N

10.4.2. Support Matrix for an Isolated Network (Combination)

Y = Supported

N = Not Supported

NW Device	DHCP	DNS	User Data	Source NAT	Static NAT	Port Forward	Load Balanc	Remote VPN	Network ACL	Usage Monito	Security Group	Firewall
Virtual Router (VR)	VR	VR	VR	VR	VR	VR	VR	VR	N	Y	N	Y
VPC Virtual Router	VPC VR	VPC VR	VPC VR	VPC VR	VPC VR	VPC VR	VPC VR	N	VPC VR	Y	N	N
VR and F5 Side by side	VR	VR	VR	VR	VR	VR	F5	VR	N	Y	N	Static NAT / PF - Yes LB - No
VR and NetScaler Side by Side	VR	VR	VR	VR	VR	VR	NetScaler	VR	N	Y	N	Static NAT / PF - Yes LB - No
SRX and F5 Side by Side	VR	VR	VR	SRX	SRX	SRX	F5	SRX	SRX	Y	N	Static NAT / PF - Yes LB - No
SRX and NetScaler Side	VR	VR	VR	SRX	SRX	SRX	NetScaler	SRX	SRX	Y	N	Static NAT / PF - Yes

NW Device	DHCP	DNS	User Data	Source NAT	Static NAT	Port Forward	Load Balanc	Remote VPN	Network ACL	Usage Monito	Security Group	Firewal
by Side												LB - No
SRX and F5 Inline	VR	VR	VR	SRX	SRX	SRX	F5	SRX	SRX	Y	N	Static NAT / PF - Yes LB - Yes

10.4.3. Support Matrix for Shared Network (Combination)

Y = Supported

N = Not Supported

NW Device	DHCP	DNS	User Data	Source NAT	Static NAT	Port Forward	Load Balanc	Remote VPN	Network ACL	Usage Monito	Security Group	Firewal
Virtual Router	VR	VR	VR	N	N	N	N	N	N	Y	N	N
VR and F5 Side by side	VR	VR	VR	VR	VR	VR	F5	VR	N	Y	N	Static NAT / PF - Yes LB - No
VR and NetScaler Side by Side	VR	VR	VR	VR	VR	VR	NetScaler	VR	N	Y	N	Static NAT / PF - Yes LB - No
SRX and F5 Side by Side	VR	VR	VR	SRX	SRX	SRX	F5	SRX	SRX	Y	N	Static NAT / PF - Yes LB - No
SRX and NetScaler Side by Side	VR	VR	VR	SRX	SRX	SRX	NetScaler	SRX	SRX	Y	N	Static NAT / PF - Yes LB - No
SRX and F5 Inline	VR	VR	VR	SRX	SRX	SRX	F5	SRX	SRX	Y	N	Static NAT / PF - Yes LB - Yes

10.4.4. Support Matrix for Basic Zone

Y = Supported

N = Not Supported

NW Device	DHCP	DNS	User Data	Source NAT	Static NAT	Port Forward	Load Balanc	Remote VPN	Network ACL	Usage Monito	Security Group	Firewal
Virtual Router	VR	VR	VR	N	N	N	N	N	N	Y	Y	N
VR and NetScaler (EIP/ELB)	VR	VR	VR	N	NetScaler	N	NetScaler	N	N	Y	Y	N

10.5. Network Offerings



Note

For the most up-to-date list of supported network services, see the CloudPlatform UI or call `listNetworkServices`.

A network offering is a named set of network services, such as:

- DHCP
- DNS
- Source NAT
- Static NAT
- Port Forwarding
- Load Balancing
- Firewall
- VPN
- (Optional) Name one of several available providers to use for a given service, such as Juniper for the firewall
- (Optional) Network tag to specify which physical network to use

When creating a new VM, the user chooses one of the available network offerings, and that determines which network services the VM can use.

The CloudPlatform administrator can create any number of custom network offerings, in addition to the default network offerings provided by CloudPlatform. By creating multiple custom network offerings, you can set up your cloud to offer different classes of service on a single multi-tenant physical network. For example, while the underlying physical wiring may be the same for two tenants, tenant A may only need simple firewall protection for their website, while tenant B may be running

a web server farm and require a scalable firewall solution, load balancing solution, and alternate networks for accessing the database backend.



Note

If you create load balancing rules while using a network service offering that includes an external load balancer device such as NetScaler, and later change the network service offering to one that uses the CloudPlatform virtual router, you must create a firewall rule on the virtual router for each of your existing load balancing rules so that they continue to function.

When creating a new virtual network, the CloudPlatform administrator chooses which network offering to enable for that network. Each virtual network is associated with one network offering. A virtual network can be upgraded or downgraded by changing its associated network offering. If you do this, be sure to reprogram the physical network to match.

CloudPlatform also has internal network offerings for use by CloudPlatform system VMs. These network offerings are not visible to users but can be modified by administrators.

10.5.1. Creating a New Network Offering

To create a network offering:

1. Log in with admin privileges to the CloudPlatform UI.
2. In the left navigation bar, click Service Offerings.
3. In Select Offering, choose Network Offering.
4. Click Add Network Offering.
5. In the dialog, make the following choices:
 - **Name.** Any desired name for the network offering.
 - **Description.** A short description of the offering that can be displayed to users.
 - **Network Rate.** Allowed data transfer rate in MB per second.
 - **Guest Type.** Choose whether the guest network is isolated or shared.

For a description of this term, see [Section 10.2, “About Virtual Networks”](#).

- **Persistent.** Indicate whether the guest network is persistent or not. The network that you can provision without having to deploy a VM on it is termed persistent network. For more information, see [Section 16.28, “Persistent Networks”](#).
- **Specify VLAN.** (Isolated guest networks only) Indicate whether a VLAN could be specified when this offering is used. If you select this option and later use this network offering while creating a VPC tier or an isolated network, you will be able to specify a VLAN ID for the network you create.
- **VPC.** This option indicate whether the guest network is Virtual Private Cloud-enabled. A Virtual Private Cloud (VPC) is a private, isolated part of CloudPlatform. A VPC can have its own virtual network topology that resembles a traditional physical network. For more information on VPCs, see [Section 16.27.1, “About Virtual Private Clouds”](#).

- Supported Services.** Select one or more of the possible network services. For some services, you must also choose the service provider; for example, if you select Load Balancer, you can choose the CloudPlatform virtual router or any other load balancers that have been configured in the cloud. Depending on which services you choose, additional fields may appear in the rest of the dialog box.

Based on the guest network type selected, you can see the following supported services:

Supported Services	Description	Isolated	Shared
DHCP	For more information, see Section 16.23, "DNS and DHCP" .	Supported	Supported
DNS	For more information, see Section 16.23, "DNS and DHCP" .	Supported	Supported
Load Balancer	If you select Load Balancer, you can choose the CloudPlatform virtual router or any other load balancers that have been configured in the cloud.	Supported	Supported
Firewall	For more information, see the Administration Guide.	Supported	Supported
Source NAT	If you select Source NAT, you can choose the CloudPlatform virtual router or any other Source NAT providers that have been configured in the cloud.	Supported	Supported
Static NAT	If you select Static NAT, you can choose the CloudPlatform virtual router or any other Static NAT providers that have been configured in the cloud.	Supported	Supported
Port Forwarding	If you select Port Forwarding, you can choose the CloudPlatform virtual router or any other Port Forwarding providers that have	Supported	Supported

Supported Services	Description	Isolated	Shared
	been configured in the cloud.		
VPN	For more information, see Section 16.24, "Remote Access VPN" .	Supported	Supported
User Data	For more information, see Section 20.3, "User Data and Meta Data" .	Not Supported	Supported
Network ACL	For more information, see Section 16.27.4, "Configuring Network Access Control List" .	Supported	Not Supported
Security Groups	For more information, see Section 16.6.4, "Adding a Security Group" .	Not Supported	Supported

- System Offering.** If the service provider for any of the services selected in Supported Services is a virtual router, the System Offering field appears. Choose the system service offering that you want virtual routers to use in this network. For example, if you selected Load Balancer in Supported Services and selected a virtual router to provide load balancing, the System Offering field appears so you can choose between the CloudPlatform default system service offering and any custom system service offerings that have been defined by the CloudPlatform root administrator.

For more information, see [Section 9.2, "System Service Offerings"](#).

- LB Isolation:** Specify what type of load balancer isolation you want for the network: Shared or Dedicated.

Dedicated: If you select dedicated LB isolation, a dedicated load balancer device is assigned for the network from the pool of dedicated load balancer devices provisioned in the zone. If no sufficient dedicated load balancer devices are available in the zone, network creation fails. Dedicated device is a good choice for the high-traffic networks that make full use of the device's resources.

Shared: If you select shared LB isolation, a shared load balancer device is assigned for the network from the pool of shared load balancer devices provisioned in the zone. While provisioning CloudPlatform picks the shared load balancer device that is used by the least number of accounts. Once the device reaches its maximum capacity, the device will not be allocated to a new account.

- Mode:** You can select either Inline mode or Side by Side mode:

Inline mode: Supported only for Juniper SRX firewall and BigF5 load balancer devices. In inline mode, a firewall device is placed in front of a load balancing device. The firewall acts as the gateway for all the incoming traffic, then redirect the load balancing traffic to the load balancer behind it. The load balancer in this case will not have the direct access to the public network.

Side by Side: In side by side mode, a firewall device is deployed in parallel with the load balancer device. So the traffic to the load balancer public IP is not routed through the firewall, and therefore, is exposed to the public network.

- **Associate Public IP:** Select this option if you want to assign a public IP address to the VMs deployed in the guest network. This option is available only if
 - Guest network is shared.
 - StaticNAT is enabled.
 - Elastic IP is enabled.

For information on Elastic IP, see [Section 16.18, “About Elastic IP”](#).

- **Redundant router capability.** Available only when Virtual Router is selected as the Source NAT provider. Select this option if you want to use two virtual routers in the network for uninterrupted connection: one operating as the master virtual router and the other as the backup. The master virtual router receives requests from and sends responses to the user’s VM. The backup virtual router is activated only when the master is down. After the failover, the backup becomes the master virtual router. CloudPlatform deploys the routers on different hosts to ensure reliability if one host is down.
- **Conserve mode.** Indicate whether to use conserve mode. In this mode, network resources are allocated only when the first virtual machine starts in the network. When conservative mode is off, the public IP can only be used for a single service. For example, a public IP used for a port forwarding rule cannot be used for defining other services, such as StaticNAT or load balancing. When the conserve mode is on, you can define more than one service on the same public IP.



Note

If StaticNAT is enabled, irrespective of the status of the conserve mode, no port forwarding or load balancing rule can be created for the IP. However, you can add the firewall rules by using the `createFirewallRule` command.

- **Tags.** Network tag to specify which physical network to use.
- **Default egress policy:** Configure the default policy for firewall egress rule. Options are Allow and Deny. Default is Allow if no egress policy is specified, which indicates that all the egress traffic is accepted when a guest network is created from this offering.

To block the egress traffic for a guest network, select Deny. In this case, when you configure an egress rules for an isolated guest network, rules are added to allow the specified traffic.


6. Click Add.

10.5.2. Changing the Network Offering on a Guest Network

A user or administrator can change the network offering that is associated with an existing guest network.

1. Log in to the CloudPlatform UI as an administrator or end user.

2. If you are changing from a network offering that uses the CloudPlatform virtual router to one that uses external devices as network service providers, you must first stop all the VMs on the network. See [Section 11.7, “Stopping and Starting VMs”](#).
3. In the left navigation, choose Network.
4. Click the name of the network you want to modify.

5. In the Details tab, click Edit. 

6. In Network Offering, choose the new network offering, then click Apply.

A prompt is displayed asking whether you want to keep the existing CIDR. This is to let you know that if you change the network offering, the CIDR will be affected.

If you upgrade between virtual router as a provider and an external network device as provider, acknowledge the change of CIDR to continue, so choose Yes.

7. Wait for the update to complete. Don't try to restart VMs until the network change is complete.
8. If you stopped any VMs, restart them.

10.5.3. Creating and Changing a Virtual Router Network Offering

To create the network offering in association with a virtual router system service offering:

1. Log in to the CloudPlatform UI as a user or admin.
2. First, create a system service offering, for example: VRsystemofferingHA.

For more information on creating a system service offering, see [Section 9.2.1, “Creating a New System Service Offering”](#).

3. From the Select Offering drop-down, choose Network Offering.
4. Click Add Network Offering.
5. In the dialog, make the following choices:
 - **Name.** Any desired name for the network offering.
 - **Description.** A short description of the offering that can be displayed to users.
 - **Network Rate.** Allowed data transfer rate in MB per second.
 - **Traffic Type.** The type of network traffic that will be carried on the network.
 - **Guest Type.** Choose whether the guest network is isolated or shared. For a description of these terms, see [Section 10.2, “About Virtual Networks”](#).
 - **Specify VLAN.** (Isolated guest networks only) Indicate whether a VLAN should be specified when this offering is used.
 - **Supported Services.** Select one or more of the possible network services. For some services, you must also choose the service provider; for example, if you select Load Balancer, you can choose the CloudPlatform virtual router or any other load balancers that have been configured in the cloud. Depending on which services you choose, additional fields may appear in the rest of the dialog box. For more information, see [Section 10.5.1, “Creating a New Network Offering”](#)

- **System Offering.** Choose the system service offering that you want virtual routers to use in this network. In this case, the default “System Offering For Software Router” and the custom “VRsystemofferingHA” are available and displayed.

6. Click OK and the network offering is created.

To change the network offering of a guest network to the virtual router service offering:

1. Select Network from the left navigation pane.
2. Select the guest network that you want to offer this network service to.
3. Click the Edit button.
4. From the Network Offering drop-down, select the virtual router network offering you have just created.
5. Click OK.

Working With Virtual Machines

11.1. About Working with Virtual Machines

CloudPlatform provides administrators with complete control over the life cycle of all guest VMs executing in the cloud. CloudPlatform provides several guest management operations for end users and administrators. VMs may be stopped, started, rebooted, and destroyed.

Guest VMs have a name and group. VM names and groups are opaque to CloudPlatform and are available for end users to organize their VMs. Each VM can have three names for use in different contexts. Only two of these names can be controlled by the user:

- Instance name – a unique, immutable ID that is generated by CloudPlatform, and can not be modified by the user. This name conforms to the requirements in IETF RFC 1123.
- Display name – the name displayed in the CloudPlatform web UI. Can be set by the user. Defaults to instance name.
- Name – host name that the DHCP server assigns to the VM. Can be set by the user. Defaults to instance name.



Note

You can append the display name of a guest VM to its internal name. For more information, see [Section 11.6, “Appending a Display Name to the Guest VM’s Internal Name”](#).

Guest VMs can be configured to be Highly Available (HA). An HA-enabled VM is monitored by the system. If the system detects that the VM is down, it will attempt to restart the VM, possibly on a different host. For more information, see [Section 18.2, “HA-Enabled Virtual Machines”](#).

In a zone that uses basic networking with EIP enabled, each new VM is by default allocated one public IP address. When the VM is started, CloudPlatform automatically creates a static NAT between this public IP address and the private IP address of the VM.

If Elastic IP is in use (with the NetScaler load balancer), the IP address initially allocated to the new VM is not marked as elastic. The user must replace the automatically configured IP with a specifically acquired elastic IP, and set up the static NAT mapping between this new IP and the guest VM’s private IP. The VM’s original IP address is then released and returned to the pool of available public IPs. Optionally, you can also decide not to allocate a public IP to a VM in an EIP-enabled Basic zone. For more information on Elastic IP, see [Section 16.18, “About Elastic IP”](#).

CloudPlatform cannot distinguish a guest VM that was shut down by the user (such as with the “shutdown” command in Linux) from a VM that shut down unexpectedly. If an HA-enabled VM is shut down from inside the VM, CloudPlatform will restart it. To shut down an HA-enabled VM, you must go through the CloudPlatform UI or API.

11.2. Best Practices for Virtual Machines

For VMs to work as expected and provide excellent service, follow these guidelines.

11.2.1. Monitor VMs for Max Capacity

The CloudPlatform administrator should monitor the total number of VM instances in each cluster, and disable allocation to the cluster if the total is approaching the maximum that the hypervisor can handle. Be sure to leave a safety margin to allow for the possibility of one or more hosts failing, which would increase the VM load on the other hosts as the VMs are automatically redeployed. Consult the documentation for your chosen hypervisor to find the maximum permitted number of VMs per host, then use CloudPlatform global configuration settings to set this as the default limit. Monitor the VM activity in each cluster at all times. Keep the total number of VMs below a safe level that allows for the occasional host failure. For example, if there are N hosts in the cluster, and you want to allow for one host in the cluster to be down at any given time, the total number of VM instances you can permit in the cluster is at most $(N-1) * (\text{per-host-limit})$. Once a cluster reaches this number of VMs, use the CloudPlatform UI to disable allocation of more VMs to the cluster.

11.2.2. Install Required Tools and Drivers

Be sure the following are installed on each VM:

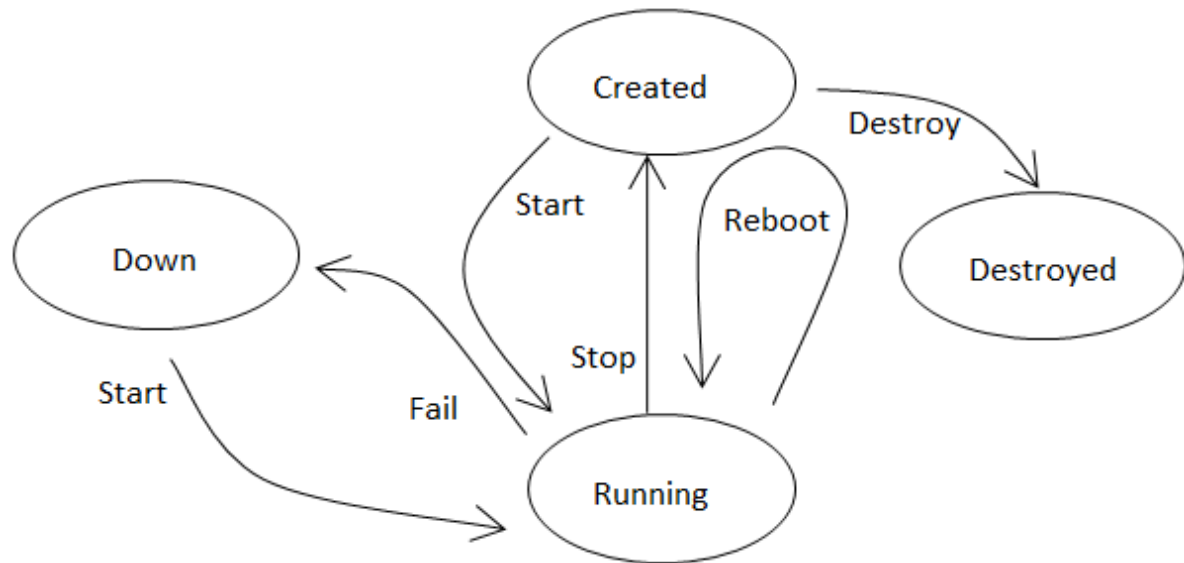
- For XenServer, install PV drivers and Xen tools on each VM. This will enable live migration and clean guest shutdown. Xen tools are required in order for dynamic CPU and RAM scaling to work.
- For vSphere, install VMware Tools on each VM. This will enable console view to work properly. VMware Tools are required in order for dynamic CPU and RAM scaling to work.

To be sure that Xen tools or VMware Tools is installed, use one of the following techniques:

- Create each VM from a template that already has the tools installed; or,
- When registering a new template, the administrator or user can indicate whether tools are installed on the template. This can be done through the UI or using the `updateTemplate` API; or,
- If a user deploys a virtual machine with a template that does not have Xen tools or VMware Tools, and later installs the tools on the VM, then the user can inform CloudPlatform using the `updateVirtualMachine` API. After installing the tools and updating the virtual machine, stop and start the VM.

11.3. VM Lifecycle

Virtual machines can be in the following states:



Once a virtual machine is destroyed, it cannot be recovered. All the resources used by the virtual machine will be reclaimed by the system. This includes the virtual machine's IP address.

A stop will attempt to gracefully shut down the operating system, which typically involves terminating all the running applications. If the operation system cannot be stopped, it will be forcefully terminated. This has the same effect as pulling the power cord to a physical machine.

A reboot is a stop followed by a start.

CloudPlatform preserves the state of the virtual machine hard disk until the machine is destroyed.

A running virtual machine may fail because of hardware or network issues. A failed virtual machine is in the down state.

The system places the virtual machine into the down state if it does not receive the heartbeat from the hypervisor for three minutes.

The user can manually restart the virtual machine from the down state.

The system will start the virtual machine from the down state automatically if the virtual machine is marked as HA-enabled.

11.4. Creating VMs

Virtual machines are usually created from a template. Users can also create blank virtual machines. A blank virtual machine is a virtual machine without an OS template. Users can attach an ISO file and install the OS from the CD/DVD-ROM.



Note

You can create a VM without starting it. You can determine whether the VM needs to be started as part of the VM deployment. A new request parameter, `startVM`, is introduced in the `deployVm` API to support this feature. For more information, see the [Developer's Guide](#)

11.4.1. Creating a VM from a template

1. Log in to the CloudPlatform UI as an administrator or user.

2. In the left navigation bar, click Instances.
3. Click Add Instance.
4. Select a zone.
5. Select a template, then follow the steps in the wizard. For more information about how the templates came to be in this list, see [Chapter 13, Working with Templates](#).
6. Be sure that the hardware you have allows starting the selected service offering.
7. Click Submit and your VM will be created and started.



Note

For security reasons, the internal name of the VM is visible only to the root admin.

11.4.2. Creating a VM from an ISO



Note

(XenServer) Windows VMs running on XenServer require PV drivers, which may be provided in the template or added after the VM is created. The PV drivers are necessary for essential management functions such as mounting additional volumes and ISO images, live migration, and graceful shutdown.

1. Log in to the CloudPlatform UI as an administrator or user.
2. In the left navigation bar, click Instances.
3. Click Add Instance.
4. Select a zone.
5. Select ISO Boot, and follow the steps in the wizard.
6. Click Submit and your VM will be created and started.
7. (Oracle VM only) After ISO installation, the installer reboots into the operating system. Due to a known issue in OVM, the reboot will place the VM in the Stopped state. In the CloudPlatform UI, detach the ISO from the VM (so that the VM will not boot from the ISO again), then click the Start button to restart the VM.

11.4.3. Configuring Usage of Linked Clones on VMware

(For ESX hypervisor in conjunction with vCenter)

VMs can be created as either linked clones or full clones on VMware.

For a full description of clone types, refer to VMware documentation. In summary: A full clone is a copy of an existing virtual machine which, once created, does not depend in any way on the original virtual machine. A linked clone is also a copy of an existing virtual machine, but it has ongoing

dependency on the original. A linked clone shares the virtual disk of the original VM, and retains access to all files that were present at the time the clone was created.

The use of these different clone types involves some side effects and tradeoffs, so it is to the administrator's advantage to be able to choose which of the two types will be used in a CloudPlatform deployment.


A new global configuration setting has been added, `vmware.create.full.clone`. When the administrator sets this to true, end users can create guest VMs only as full clones. When it is false, linked clones are used. The default value is true for fresh installations of CloudPlatform. For customers upgrading from CloudPlatform 2.x or 3.x, the default value of `vmware.create.full.clone` depends on whether the existing setup has any deployed data centers. If there are no deployed data centers in the previous-version CloudPlatform setup, the default value is true. If there are pre-existing data centers, the default is false.

It is not recommended to change the value of `vmware.create.full.clone` in a cloud with running VMs. However, if the value is changed, existing VMs are not affected. Only VMs created after the setting is put into effect are subject to the restriction.

11.5. Accessing VMs

Any user can access their own virtual machines. The administrator can access all VMs running in the cloud.

To access a VM through the CloudPlatform UI:

1. Log in to the CloudPlatform UI as a user or admin.
2. Click Instances, then click the name of a running VM.
3. Click the View Console 

To access a VM directly over the network:

1. The VM must have some port open to incoming traffic. For example, in a basic zone, a new VM might be assigned to a security group which allows incoming traffic. This depends on what security group you picked when creating the VM. In other cases, you can open a port by setting up a port forwarding policy. See IP Forwarding and Firewalling.
2. If a port is open but you can not access the VM using ssh, it's possible that ssh is not already enabled on the VM. This will depend on whether ssh is enabled in the template you picked when creating the VM. Access the VM through the CloudPlatform UI and enable ssh on the machine using the commands for the VM's operating system.
3. If the network has an external firewall device, you will need to create a firewall rule to allow access. See IP Forwarding and Firewalling.

11.6. Appending a Display Name to the Guest VM's Internal Name

Every guest VM has an internal name. The host uses the internal name to identify the guest VMs. CloudPlatform gives you an option to provide a guest VM with a display name. You can add this display name to the internal name so that it is displayed in contexts where the internal name is shown, such as in vCenter. This feature is intended to make the correlation between instance names and internal names easier in large data center deployments.

To append display names to VM internal names, set the global configuration parameter `vm.instancename.flag` to true. The default value of this parameter is false.

The default format of the internal name is `i-<user_id>-<vm_id>-<instance.name>`, where `instance.name` is a global parameter. When `vm.instancename.flag` is set to true, if a display name is provided during the creation of a guest VM, the display name is appended to the internal name of the guest VM on the host. This changes the internal name format to `i-<user_id>-<vm_id>-<displayName>`.

The following table explains how a VM name is displayed in different scenarios.

User-Provided Display Name	vm.instancename.	Hostname on the VM	Name on vCenter	Internal Name
Yes	True	Display name	i-<user_id>-<vm_id>-displayName	i-<user_id>-<vm_id>-displayName
No	True	UUID	i-<user_id>-<vm_id>-<instance.name>	i-<user_id>-<vm_id>-<instance.name>
Yes	False	Display name	i-<user_id>-<vm_id>-<instance.name>	i-<user_id>-<vm_id>-<instance.name>
No	False	UUID	i-<user_id>-<vm_id>-<instance.name>	i-<user_id>-<vm_id>-<instance.name>

11.7. Stopping and Starting VMs

Once a VM instance is created, you can stop, reset, or delete it as needed. In the CloudPlatform UI, click Instances, select the VM, and use the Stop, Start, Reset, Reboot, and Destroy buttons.

Resetting leads to restarting a VM. You can reset when a VM is either running or stopped.

11.8. Assigning VMs to Hosts

At any point in time, each virtual machine instance is running on a single host. How does CloudPlatform determine which host to place a VM on? There are several ways:

- Automatic default host allocation. CloudPlatform can automatically pick the most appropriate host to run each virtual machine.
- Instance type preferences. CloudPlatform administrators can specify that certain hosts should have a preference for particular types of guest instances. For example, an administrator could state that a host should have a preference to run Windows guests. The default host allocator will attempt to place guests of that OS type on such hosts first. If no such host is available, the allocator will place the instance wherever there is sufficient physical capacity.
- Vertical and horizontal allocation. Vertical allocation consumes all the resources of a given host before allocating any guests on a second host. This reduces power consumption in the cloud. Horizontal allocation places a guest on each host in a round-robin fashion. This may yield better performance to the guests in some cases.
- End user preferences. Users can not control exactly which host will run a given VM instance, but they can specify a zone for the VM. CloudPlatform is then restricted to allocating the VM only to one of the hosts in that zone.

- Host tags. The administrator can assign tags to hosts. These tags can be used to specify which host a VM should use. The CloudPlatform administrator decides whether to define host tags, then create a service offering using those tags and offer it to the user.
- Affinity groups. By defining affinity groups and assigning VMs to them, the user or administrator can influence (but not dictate) which VMs should run on separate hosts. This feature is to let users specify that certain VMs won't be on the same host.
- CloudPlatform also provides a pluggable interface for adding new allocators. These custom allocators can provide any policy the administrator desires.

11.8.1. Affinity Groups

By defining affinity groups and assigning VMs to them, the user or administrator can influence (but not dictate) which VMs should run on separate hosts. This feature is to let users specify that VMs with the same “host anti-affinity” type won't be on the same host. This serves to increase fault tolerance. If a host fails, another VM offering the same service (for example, hosting the user's website) is still up and running on another host.

The scope of an affinity group is per user account.

Creating a New Affinity Group

To add an affinity group:

1. Log in to the CloudPlatform UI as an administrator or user.
2. In the left navigation bar, click Affinity Groups.
3. Click Add affinity group. In the dialog box, fill in the following fields:
 - Name. Give the group a name.
 - Description. Any desired text to tell more about the purpose of the group.
 - Type. The only supported type shipped with CloudPlatform is Host Anti-Affinity. This indicates that the VMs in this group should avoid being placed on the same VM with each other. If you see other types in this list, it means that your installation of CloudPlatform has been extended with customized affinity group plugins.

Assign a New VM to an Affinity Group

To assign a new VM to an affinity group:

- Create the VM as usual, as described in [Section 11.4, “Creating VMs”](#). In the Add Instance wizard, there is a new Affinity tab where you can select the affinity group.

Change Affinity Group for an Existing VM

To assign an existing VM to an affinity group:

1. Log in to the CloudPlatform UI as an administrator or user.
2. In the left navigation bar, click Instances.
3. Click the name of the VM you want to work with.
4. Stop the VM by clicking the Stop button.

5.



Click the Change Affinity button.

View Members of an Affinity Group

To see which VMs are currently assigned to a particular affinity group:

1. In the left navigation bar, click Affinity Groups.
2. Click the name of the group you are interested in.
3. Click View Instances. The members of the group are listed.

From here, you can click the name of any VM in the list to access all its details and controls.

Delete an Affinity Group

To delete an affinity group:

1. In the left navigation bar, click Affinity Groups.
2. Click the name of the group you are interested in.
3. Click Delete.

Any VM that is a member of the affinity group will be disassociated from the group. The former group members will continue to run normally on the current hosts, but if the VM is restarted, it will no longer follow the host allocation rules from its former affinity group.

11.9. Virtual Machine Snapshots

(Supported on VMware and XenServer)

In addition to the existing CloudPlatform ability to snapshot individual VM volumes, you can now take a VM snapshot to preserve all the VM's data volumes as well as (optionally) its CPU/memory state. This is useful for quick restore of a VM. For example, you can snapshot a VM, then make changes such as software upgrades. If anything goes wrong, simply restore the VM to its previous state using the previously saved VM snapshot.

The snapshot is created using the hypervisor's native snapshot facility. The VM snapshot includes not only the data volumes, but optionally also whether the VM is running or turned off (CPU state) and the memory contents. The snapshot is stored in CloudPlatform's primary storage.

VM snapshots can have a parent/child relationship. Each successive snapshot of the same VM is the child of the snapshot that came before it. Each time you take an additional snapshot of the same VM, it saves only the differences between the current state of the VM and the state stored in the most recent previous snapshot. The previous snapshot becomes a parent, and the new snapshot is its child. It is possible to create a long chain of these parent/child snapshots, which amount to a "redo" record leading from the current state of the VM back to the original.

If you need more information about VM snapshots on VMware, check out the VMware documentation and the VMware Knowledge Base, especially [Understanding virtual machine snapshots](#)¹.

¹ <http://kb.vmware.com/selfservice/microsites/search.do?cmd=displayKC&externalId=1015180>

11.9.1. Limitations on VM Snapshots

- If a VM has some stored snapshots, you can't attach new volume to the VM or delete any existing volumes. If you change the volumes on the VM, it would become impossible to restore the VM snapshot which was created with the previous volume structure. If you want to attach a volume to such a VM, first delete its snapshots.
- VM snapshots which include both data volumes and memory can't be kept if you change the VM's service offering. Any existing VM snapshots of this type will be discarded.
- You can't make a VM snapshot at the same time as you are taking a volume snapshot.
- You can not specify the "quiesce" option on the CloudPlatform side when taking a VM snapshot. This option is provided by the underlying snapshot facility so that you can choose whether to quiesce the file system on a running virtual machine before taking the snapshot. The quiesce option is passed along from the user's choice on the hypervisor side, through the underlying API, and up to CloudPlatform.
- You should use only CloudPlatform to create VM snapshots on hosts managed by CloudPlatform. Any snapshots that you make directly on the hypervisor will not be tracked in CloudPlatform.


11.9.2. Configuring VM Snapshots

The cloud administrator can use global configuration variables to control the behavior of VM snapshots. To set these variables, go through the Global Settings area of the CloudPlatform UI.

Configuration Setting Name	Description
vmsnapshots.max	The maximum number of VM snapshots that can be saved for any given virtual machine in the cloud. The total possible number of VM snapshots in the cloud is (number of VMs) * vmsnapshots.max. If the number of snapshots for any VM ever hits the maximum, the older ones are removed by the snapshot expunge job.
vmsnapshot.create.wait	Number of seconds to wait for a snapshot job to succeed before declaring failure and issuing an error.

11.9.3. Using VM Snapshots

To create a VM snapshot using the CloudPlatform UI:

1. Log in to the CloudPlatform UI as a user or administrator.
2. Click Instances.
3. Click the name of the VM you want to snapshot.
4. Click the Take VM Snapshot button. 



Note

If a snapshot is already in progress, then clicking this button will have no effect.

5. Provide a name and description. These will be displayed in the VM Snapshots list.
6. (For running VMs only) If you want to include the VM's memory in the snapshot, click the Memory checkbox. This saves the CPU and memory state of the virtual machine. If you don't check this box, then only the current state of the VM disk is saved. Checking this box makes the snapshot take longer.
7. Click OK.

To delete a snapshot or restore a VM to the state saved in a particular snapshot:

1. Navigate to the VM as described in the earlier steps.
2. Click View VM Snapshots.
3. In the list of snapshots, click the name of the snapshot you want to work with.
4. Depending on what you want to do:

To delete the snapshot, click the Delete button.



To revert to the snapshot, click the Revert button.





Note

VM snapshots are deleted automatically when a VM is destroyed. You don't have to manually delete the snapshots in this case.

11.10. Changing the VM Name, OS, or Group

After a VM is created, you can modify the display name, operating system, and the group it belongs to.

To access a VM through the CloudPlatform UI:

1. Log in to the CloudPlatform UI as a user or admin.
2. In the left navigation, click Instances.
3. Select the VM that you want to modify.
4. Click the Stop button to stop the VM. 
5. Click Edit. 

6. Make the desired changes to the following:
 - **Display name:** Enter a new display name if you want to change the name of the VM.
 - **OS Type:** Select the desired operating system.
 - **Group:** Enter the group name for the VM.
7. Click Apply.

11.11. Changing the Service Offering for a VM

To upgrade or downgrade the level of compute resources available to a virtual machine, you can change the VM's compute offering.

1. Log in to the CloudPlatform UI as a user or admin.
2. In the left navigation, click Instances.
3. Choose the VM that you want to work with.
4. (Skip this step if you have enabled dynamic VM scaling; see [Section 11.11.1, "CPU and Memory Scaling for Running VMs"](#).)

Click the Stop button to stop the VM.



5.

Click the Change Service button.



The Change service dialog box is displayed.

6. Select the offering you want to apply to the selected VM.
7. Click OK.

11.11.1. CPU and Memory Scaling for Running VMs

(Supported on VMware and XenServer)

It is not always possible to accurately predict the CPU and RAM requirements when you first deploy a VM. You might need to increase these resources at any time during the life of a VM. You can dynamically modify CPU and RAM levels to scale up these resources for a running VM without incurring any downtime.

Dynamic CPU and RAM scaling can be used in the following cases:

- User VMs on hosts running VMware and XenServer.
- System VMs on VMware.
- VMware Tools or XenServer Tools must be installed on the virtual machine.
- The new requested CPU and RAM values must be within the constraints allowed by the hypervisor and the VM operating system.
- New VMs that are created after the installation of CloudPlatform 4.2 can use the dynamic scaling feature. If you are upgrading from a previous version of CloudPlatform, your existing VMs created

with previous versions will not have the dynamic scaling capability unless you update them using the following procedure.

11.11.2. Updating Existing VMs

If you are upgrading from a previous version of CloudPlatform, and you want your existing VMs created with previous versions to have the dynamic scaling capability, update the VMs using the following steps:

1. Make sure the zone-level setting `enable.dynamic.scale.vm` is set to `true`. In the left navigation bar of the CloudPlatform UI, click Infrastructure, then click Zones, click the zone you want, and click the Settings tab.
2. Install Xen tools (for XenServer hosts) or VMware Tools (for VMware hosts) on each VM if they are not already installed.
3. Stop the VM.
4. Click the Edit button.
5. Click the Dynamically Scalable checkbox.
6. Click Apply.
7. Restart the VM.

11.11.3. Configuring Dynamic CPU and RAM Scaling

To configure this feature, use the following new global configuration variables:

- `enable.dynamic.scale.vm`: Set to `True` to enable the feature. By default, the feature is turned off.
- `scale.retry`: How many times to attempt the scaling operation. Default = 2.

11.11.4. How to Dynamically Scale CPU and RAM

To modify the CPU and/or RAM capacity of a virtual machine, you need to change the compute offering of the VM to a new compute offering that has the desired CPU and RAM values. You can use the same steps described above in [Section 11.11, “Changing the Service Offering for a VM”](#), but skip the step where you stop the virtual machine. Of course, you might have to create a new compute offering first.

When you submit a dynamic scaling request, the resources will be scaled up on the current host if possible. If the host does not have enough resources, the VM will be live migrated to another host in the same cluster. If there is no host in the cluster that can fulfill the requested level of CPU and RAM, the scaling operation will fail. The VM will continue to run as it was before.

11.11.5. Limitations

- You can not do dynamic scaling for system VMs on XenServer.
- CloudPlatform will not check to be sure that the new CPU and RAM levels are compatible with the OS running on the VM.

² http://kb.vmware.com/selfservice/microsites/search.do?language=en_US&cmd=displayKC&externalId=1012764

- When scaling memory or CPU for a Linux VM on VMware, you might need to run scripts in addition to the other steps mentioned above. For more information, see [Hot adding memory in Linux \(1012764\)](#)² in the VMware Knowledge Base.
- (VMware) If resources are not available on the current host, scaling up will fail on VMware because of a known issue where CloudPlatform and vCenter calculate the available capacity differently. For more information, see <https://issues.apache.org/jira/browse/CLOUDSTACK-1809>.
- On VMs running Linux 64-bit and Windows 7 32-bit operating systems, if the VM is initially assigned a RAM of less than 3 GB, it can be dynamically scaled up to 3 GB, but not more. This is due to a known issue with these operating systems, which will freeze if an attempt is made to dynamically scale from less than 3 GB to more than 3 GB.

11.12. Resetting the Virtual Machine Root Volume on Reboot


For secure environments, and to ensure that VM state is not persisted across reboots, you can reset the root disk. For more information, see [Section 14.4.7, “Reset VM to New Root Disk on Reboot”](#).

11.13. Moving VMs Between Hosts (Manual Live Migration)

The CloudPlatform administrator can move a running VM from one host to another without interrupting service to users or going into maintenance mode. This is called manual live migration, and can be done under the following conditions:

- The root administrator is logged in. Domain admins and users can not perform manual live migration of VMs.
- The VM is running. Stopped VMs can not be live migrated.
- The destination host must have enough available capacity. If not, the VM will remain in the "migrating" state until memory becomes available.
- (KVM) The VM must not be using local disk storage. (On XenServer and VMware, VM live migration with local disk is enabled by CloudPlatform support for XenMotion and vMotion.)
- (KVM) The destination host must be in the same cluster as the original host. (On XenServer and VMware, VM live migration from one cluster to another is enabled by CloudPlatform support for XenMotion and vMotion.)
- (OVM) If the VM is running on the OVM hypervisor, it must not have an ISO attached. Live migration of a VM with attached ISO is not supported in OVM.

To manually live migrate a virtual machine:

1. Log in to the CloudPlatform UI as a user or admin.
2. In the left navigation, click Instances.
3. Choose the VM that you want to migrate.
4. Click the Migrate Instance button. 
5. From the list of suitable hosts, choose the one to which you want to move the VM.



Note


If the VM's storage has to be migrated along with the VM, this will be noted in the host list. CloudPlatform will take care of the storage migration for you.

6. Click OK.

11.14. Deleting VMs

Users can delete their own virtual machines. A running virtual machine will be abruptly stopped before it is deleted. Administrators can delete any virtual machines.


To delete a virtual machine:

1. Log in to the CloudPlatform UI as a user or admin.
2. In the left navigation, click Instances.
3. Choose the VM that you want to delete.
4. Click the Destroy Instance button. 

11.15. Recovering a Destroyed VM

Users can recover their virtual machines that are destroyed. Administrators can recover any destroyed virtual machines.

To recover a virtual machine:

1. Log in to the CloudPlatform UI as a user or admin.
2. In the left navigation, click Instances.
3. Select the VM that you want to recover.
4. Click the Restore Instance button 

11.16. Working with ISOs

CloudPlatform supports ISOs and their attachment to guest VMs. An ISO is a read-only file that has an ISO/CD-ROM style file system. Users can upload their own ISOs and mount them on their guest VMs. For information about how to create a new VM based on a previously uploaded ISO, see [Section 11.4.2, "Creating a VM from an ISO"](#).

ISOs are uploaded based on a URL. HTTP is the supported protocol. Once the ISO is available via HTTP specify an upload URL such as `http://my.web.server/filename.iso`.

ISOs may be public or private, like templates. ISOs are not hypervisor-specific. That is, a guest on vSphere can mount the exact same image that a guest on KVM can mount.

ISO images may be stored in the system and made available with a privacy level similar to templates. ISO images are classified as either bootable or not bootable. A bootable ISO image is one that

contains an OS image. CloudPlatform allows a user to boot a guest VM off of an ISO image. Users can also attach ISO images to guest VMs. For example, this enables installing PV drivers into Windows. ISO images are not hypervisor-specific.

11.16.1. Adding an ISO

To make additional operating system or other software available for use with guest VMs, you can add an ISO. The ISO is typically thought of as an operating system image, but you can also add ISOs for other types of software, such as desktop applications that you want to be installed as part of a template.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation bar, click Templates.
3. In Select View, choose ISOs.
4. Click Add ISO.
5. In the Add ISO screen, provide the following:
 - **Name:** Short name for the ISO image. For example, CentOS 6.2 64-bit.
 - **Description:** Display text for the ISO image. For example, CentOS 6.2 64-bit.
 - **URL:** The URL that hosts the ISO image. The Management Server must be able to access this location via HTTP. If needed you can place the ISO image directly on the Management Server
 - **Zone:** Choose the zone where you want the ISO to be available, or All Zones to make it available throughout CloudPlatform.
 - **Bootable:** Whether or not a guest could boot off this ISO image. For example, a CentOS ISO is bootable, a Microsoft Office ISO is not bootable.
 - **OS Type:** This helps CloudPlatform and the hypervisor perform certain operations and make assumptions that improve the performance of the guest. Select one of the following.
 - If the operating system of your desired ISO image is listed, choose it.
 - If the OS Type of the ISO is not listed or if the ISO is not bootable, choose Other.
 - (XenServer only) If you want to boot from this ISO in PV mode, choose Other PV (32-bit) or Other PV (64-bit)
 - (KVM only) If you choose an OS that is PV-enabled, the VMs created from this ISO will have a SCSI (virtio) root disk. If the OS is not PV-enabled, the VMs will have an IDE root disk. The PV-enabled types are:

Fedora 13	Fedora 12	Fedora 11
Fedora 10	Fedora 9	Other PV
Debian GNU/Linux	CentOS 5.3	CentOS 5.4
CentOS 5.5	Red Hat Enterprise Linux 5.3	Red Hat Enterprise Linux 5.4
Red Hat Enterprise Linux 5.5	Red Hat Enterprise Linux 6	



Note

It is not recommended to choose an older version of the OS than the version in the image. For example, choosing CentOS 5.4 to support a CentOS 6.2 image will usually not work. In these cases, choose Other.


- **Extractable:** Choose Yes if the ISO should be available for extraction.
- **Public:** Choose Yes if this ISO should be available to other users.
- **Featured:** Choose Yes if you would like this ISO to be more prominent for users to select. The ISO will appear in the Featured ISOs list. Only an administrator can make an ISO Featured.

6. Click OK.

The Management Server will download the ISO. Depending on the size of the ISO, this may take a long time. The ISO status column will display Ready once it has been successfully downloaded into secondary storage. Clicking Refresh updates the download percentage.

7. **Important:** Wait for the ISO to finish downloading. If you move on to the next task and try to use the ISO right away, it will appear to fail. The entire ISO must be available before CloudPlatform can work with it.

11.16.2. Attaching an ISO to a VM

1. In the left navigation, click Instances.
2. Choose the virtual machine you want to work with.
3. Click the Attach ISO button. 
4. In the Attach ISO dialog box, select the desired ISO.
5. Click OK.

11.16.3. Changing a VM's Base Image

Every VM is created from a base image, which is a template or ISO which has been created and stored in CloudPlatform. Both cloud administrators and end users can create and modify templates, ISOs, and VMs.

In CloudPlatform, you can change an existing VM's base image from one template to another, or from one ISO to another. (You can not change from an ISO to a template, or from a template to an ISO).

For example, suppose there is a template based on a particular operating system, and the OS vendor releases a software patch. The administrator or user naturally wants to apply the patch and then make sure existing VMs start using it. Whether a software update is involved or not, it's also possible to simply switch a VM from its current template to any other desired template.

To change a VM's base image, call the `restoreVirtualMachine` API command and pass in the virtual machine ID and a new template ID. The template ID parameter may refer to either a template or an ISO, depending on which type of base image the VM was already using (it must match the previous

type of image). When this call occurs, the VM's root disk is first destroyed, then a new root disk is created from the source designated in the template ID parameter. The new root disk is attached to the VM, and now the VM is based on the new template.

You can also omit the template ID parameter from the `restoreVirtualMachine` call. In this case, the VM's root disk is destroyed and recreated, but from the same template or ISO that was already in use by the VM.

Working With Hosts

12.1. Adding Hosts

Additional hosts can be added at any time to provide more capacity for guest VMs. For requirements and instructions, see [Section 8.6, "Adding a Host"](#).

12.2. Scheduled Maintenance and Maintenance Mode for Hosts

You can place a host into maintenance mode. When maintenance mode is activated, the host becomes unavailable to receive new guest VMs, and the guest VMs already running on the host are seamlessly migrated to another host not in maintenance mode. This migration uses live migration technology and does not interrupt the execution of the guest.

12.2.1. vCenter and Maintenance Mode

To enter maintenance mode on a vCenter host, both vCenter and CloudPlatform must be used in concert. CloudPlatform and vCenter have separate maintenance modes that work closely together.

1. Place the host into CloudPlatform's "scheduled maintenance" mode. This does not invoke the vCenter maintenance mode, but only causes VMs to be migrated off the host

When the CloudPlatform maintenance mode is requested, the host first moves into the Prepare for Maintenance state. In this state it cannot be the target of new guest VM starts. Then all VMs will be migrated off the server. Live migration will be used to move VMs off the host. This allows the guests to be migrated to other hosts with no disruption to the guests. After this migration is completed, the host will enter the Ready for Maintenance mode.

2. Wait for the "Ready for Maintenance" indicator to appear in the UI.
3. Now use vCenter to perform whatever actions are necessary to maintain the host. During this time, the host cannot be the target of new VM allocations.
4. When the maintenance tasks are complete, take the host out of maintenance mode as follows:

- a. First use vCenter to exit the vCenter maintenance mode.

This makes the host ready for CloudPlatform to reactivate it.

- b. Then use CloudPlatform's administrator UI to cancel the CloudPlatform maintenance mode.

When the host comes back online, the VMs that were migrated off of it are migrated back to it and new VMs can be added.

12.2.2. XenServer and Maintenance Mode

For XenServer, you can take a server offline temporarily by using the Maintenance Mode feature in XenCenter. When you place a server into Maintenance Mode, all running VMs are automatically migrated from it to another host in the same pool. If the server is the pool master, a new master will also be selected for the pool. While a server is Maintenance Mode, you cannot create or start any VMs on it.

To place a server in Maintenance Mode:

1. In the Resources pane, select the server, then do one of the following:
 - Right-click, then click Enter Maintenance Mode on the shortcut menu.
 - On the Server menu, click Enter Maintenance Mode.
2. Click Enter Maintenance Mode.

The server's status in the Resources pane shows when all running VMs have been successfully migrated off the server.



To take a server out of Maintenance Mode:

1. In the Resources pane, select the server, then do one of the following:
 - Right-click, then click Exit Maintenance Mode on the shortcut menu.
 - On the Server menu, click Exit Maintenance Mode.
2. Click Exit Maintenance Mode.

12.3. Disabling and Enabling Zones, Pods, and Clusters

You can enable or disable a zone, pod, or cluster without permanently removing it from the cloud. This is useful for maintenance or when there are problems that make a portion of the cloud infrastructure unreliable. No new allocations will be made to a disabled zone, pod, or cluster until its state is returned to Enabled. When a zone, pod, or cluster is first added to the cloud, it is Disabled by default.

To disable and enable a zone, pod, or cluster:

1. Log in to the CloudPlatform UI as administrator
2. In the left navigation bar, click Infrastructure.
3. In Zones, click View More.
4. If you are disabling or enabling a zone, find the name of the zone in the list, and click the Enable/Disable button. 
5. If you are disabling or enabling a pod or cluster, click the name of the zone that contains the pod or cluster.
6. Click the Compute tab.
7. In the Pods or Clusters node of the diagram, click View All.
8. Click the pod or cluster name in the list.
9. Click the Enable/Disable button. 

12.4. Removing Hosts

Hosts can be removed from the cloud as needed. The procedure to remove a host depends on the hypervisor type.

12.4.1. Removing XenServer and KVM Hosts

A node cannot be removed from a cluster until it has been placed in maintenance mode. This will ensure that all of the VMs on it have been migrated to other Hosts. To remove a Host from the cloud:

1. Place the node in maintenance mode.

See [Section 12.2, “Scheduled Maintenance and Maintenance Mode for Hosts”](#).

2. For KVM, stop the cloud-agent service.
3. Use the UI option to remove the node.

Then you may power down the Host, re-use its IP address, re-install it, etc

12.4.2. Removing vSphere Hosts

To remove this type of host, first place it in maintenance mode, as described in [Section 12.2, “Scheduled Maintenance and Maintenance Mode for Hosts”](#). Then use CloudPlatform to remove the host. CloudPlatform will not direct commands to a host that has been removed using CloudPlatform. However, the host may still exist in the vCenter cluster.

12.5. Re-Installing Hosts

You can re-install a host after placing it in maintenance mode and then removing it. If a host is down and cannot be placed in maintenance mode, it should still be removed before the re-install.

12.6. Maintaining Hypervisors on Hosts

When running hypervisor software on hosts, be sure all the hotfixes provided by the hypervisor vendor are applied. Track the release of hypervisor patches through your hypervisor vendor’s support channel, and apply patches as soon as possible after they are released. CloudPlatform will not track or notify you of required hypervisor patches. It is essential that your hosts are completely up to date with the provided hypervisor patches. The hypervisor vendor is likely to refuse to support any system that is not up to date with patches.



Note

The lack of up-to-date hotfixes can lead to data corruption and lost VMs.

(XenServer) For more information, see [Highly Recommended Hotfixes for XenServer in the CloudPlatform Knowledge Base](#)¹.

12.7. Using Cisco UCS as a Bare Metal Host

(Supported only for use in CloudPlatform zones with basic networking.)

You can provision Cisco UCS server blades into CloudPlatform for use as bare metal hosts. The goal is to enable easy expansion of the cloud by leveraging the programmability of the UCS converged infrastructure and CloudPlatform’s knowledge of the cloud architecture and ability to orchestrate.

¹ <http://support.citrix.com/article/CTX133467>

CloudPlatform can automatically understand the UCS environment so CloudPlatform administrators can deploy a bare metal OS on a Cisco UCS.

An overview of the steps involved in using UCS with CloudPlatform:

1. Set up your UCS blades, profile templates, and UCS Manager according to Cisco documentation.
2. Register the UCS Manager with CloudPlatform.
3. Associate a profile with a UCS blade by choosing one of the profile templates created in step 1.
4. Provision the blade as a bare metal host as described in Provisioning a Bare Metal Host with Kickstart in the CloudPlatform Installation Guide.

12.7.1. Limitation on Using UCS Manager Profile Templates

You can use profile templates only when first provisioning a blade into CloudPlatform. Updating the template later and modifying the blade's profile is not supported.

12.7.2. Registering a UCS Manager

Register the UCS Manager with CloudPlatform by following these steps:

1. Install the UCS hardware (blades) and UCS Manager according to the vendor's instructions. Make a note of the following information:
 - UCS manager IP address
 - UCS manager username
 - UCS manager password
2. Log in to the CloudPlatform UI as administrator.
3. In the left navigation bar, click Infrastructure, then click Zones.
4. Click the name of a zone where Network Type is Basic.
5. Click the Compute and Storage tab.
6. Scroll down in the diagram and click UCS.
7. Click the Add UCS Manager button.
8. In the dialog box, provide a display name, then the IP address, username, and password that you made a note of in step 1.
9. Click OK.

CloudPlatform will register the UCS Manager, then automatically discover the blades on this UCS Manager and add them to the resource pool.

12.7.3. Associating a Profile with a UCS Blade


Before associating a profile with a UCS blade, you must first do the steps in [Section 12.7.2, "Registering a UCS Manager"](#).

To associate a profile with a UCS blade, start the process by selecting a profile template from a dropdown list in the CloudPlatform UI. The list shows the profile templates that were previously

defined on the UCS Manager side. CloudPlatform then creates a profile based on that template and associates the profile with the blade. In the CloudPlatform UI, this is referred to as instantiating and associating a profile. The profile itself is stored on the UCS Manager.

1. Log in to the CloudPlatform UI as administrator.
2. In the left navigation bar, click Infrastructure, then click Zones.
3. Click the name of a zone where you have registered a UCS Manager.
4. Click the Compute and Storage tab.
5. Scroll down in the diagram and click UCS.
6. Click the name of the UCS Manager.
7. Click the Blades tab.

A list is displayed that shows the names of the blades that are installed under the selected manager.

8. In the Actions column, click the Instantiate and Associate icon. 

9. In the dialog, make the following selections:

- Select the name of the template for the profile you want to associate with this blade.

The dropdown list in the dialog box lists the profile templates that are currently defined in the UCS Manager where this blade resides. The list is refreshed any time you add or remove profile templates on the UCS Manager.


- (Optional) In the Profile field, you can provide a user-friendly display name for the profile. This can make it easier to work with the profile later. If you don't provide a value here, CloudPlatform will auto-generate an alphanumeric ID for the profile.
- You might need to wait a few minutes for this operation to finish. The operation might take a long time, depending on the complexity of the setup. The timeout is 60 minutes.

12.7.4. Disassociating a Profile from a UCS Blade

You can remove the association between a profile and a UCS blade. When you do, only the association and, optionally, the profile instance are removed. The profile template remains in place on the UCS Manager.

1. Log in to the CloudPlatform UI as administrator.
2. In the left navigation bar, click Infrastructure, then click Zones.
3. Click the name of a zone where you have registered a UCS Manager.
4. Click the Compute and Storage tab.
5. Scroll down in the diagram and click UCS.
6. Click the name of the UCS Manager.
7. Click the Blades tab.

A list is displayed that shows the names of the blades that are installed under the selected manager.

8. Select the name of a blade that has been associated with a profile.
9. In the Actions column, click the Disassociate Profile icon. 
10. If you want to disassociate the profile and also remove the profile instance from its storage place on UCS Manager, click the Delete Profile checkbox. If you want to disassociate the profile but still keep it in storage, such as to use it in another context, uncheck this box.

In either case, the profile template itself will not be deleted from UCS Manager.

11. Click OK.

You might need to wait a few minutes for this operation to finish. The operation might take a long time, depending on the complexity of the setup. The timeout is 60 minutes.

12.7.5. Synchronizing UCS Manager Changes with CloudPlatform

At any time, CloudPlatform users might directly make changes on the Cisco UCS Manager, and CloudPlatform would not be aware of these changes. For example, users can add or remove blades, and they can associate or dissociate profiles with blades. Periodically, or whenever you become aware that such changes have been made, you can force CloudPlatform to synchronize itself with UCS Manager in order to become aware of any changes that are made manually.

1. Log in to the CloudPlatform UI as administrator.
2. In the left navigation bar, click Infrastructure, then click Zones.
3. Click the name of a zone where you have registered a UCS Manager.
4. Click the Compute and Storage tab.
5. Scroll down in the diagram and click UCS.
6. Click the name of the UCS Manager.
7. Click the Blades tab.
8. Click the Refresh Blades button.
9. Click OK.

You might need to wait a few minutes for this operation to finish. The operation might take a long time, depending on the complexity of the setup. The timeout is 60 minutes.



Note

You might like to click the Refresh button anytime when you are about to make changes to the UCS blade configuration, such as associating or dissociating profiles. This way, you can make sure you are seeing the most up-to-date status of the UCS Manager in the CloudPlatform UI.

12.8. Changing Host Password

The password for a XenServer Node, KVM Node, or vSphere Node may be changed in the database. Note that all Nodes in a Cluster must have the same password.

To change a Node's password:

1. Identify all hosts in the cluster.
2. Change the password on all hosts in the cluster. Now the password for the host and the password known to CloudPlatform will not match. Operations on the cluster will fail until the two passwords match.
3. Get the list of host IDs for the host in the cluster where you are changing the password. You will need to access the database to determine these host IDs. For each hostname "h" (or vSphere cluster) that you are changing the password for, execute:

```
mysql> select id from cloud.host where name like '%h%';
```

4. This should return a single ID. Record the set of such IDs for these hosts.
5. Update the passwords for the host in the database. In this example, we change the passwords for hosts with IDs 5, 10, and 12 to "password".

```
mysql> update cloud.host set password='password' where id=5 or id=10 or id=12;
```

12.9. Over-Provisioning and Service Offering Limits

(Supported for XenServer, KVM, and VMware)

CPU and memory (RAM) over-provisioning factors can be set for each cluster to change the number of VMs that can run on each host in the cluster. This helps optimize the use of resources. By increasing the over-provisioning ratio, more resource capacity will be used. If the ratio is set to 1, no over-provisioning is done.

The administrator can also set global default over-provisioning ratios in the `cpu.overprovisioning.factor` and `mem.overprovisioning.factor` global configuration variables. The default value of these variables is 1: over-provisioning is turned off by default.

Over-provisioning ratios are dynamically substituted in CloudPlatform's capacity calculations. For example:

Capacity = 2 GB

Over-provisioning factor = 2

Capacity after over-provisioning = 4 GB

With this configuration, suppose you deploy 3 VMs of 1 GB each:

Used = 3 GB

Free = 1 GB

The administrator can specify a memory over-provisioning ratio, and can specify both CPU and memory over-provisioning ratios on a per-cluster basis.

In any given cloud, the optimum number of VMs for each host is affected by such things as the hypervisor, storage, and hardware configuration. These may be different for each cluster in the same cloud. A single global over-provisioning setting can not provide the best utilization for all the different clusters in the cloud. It has to be set for the lowest common denominator. The per-cluster setting provides a finer granularity for better utilization of resources, no matter where the CloudPlatform placement algorithm decides to place a VM.

The overprovisioning settings can be used along with dedicated resources (assigning a specific cluster to an account) to effectively offer different levels of service to different accounts. For example, an account paying for a more expensive level of service could be assigned to a dedicated cluster with an over-provisioning ratio of 1, and a lower-paying account to a cluster with a ratio of 2.

When a new host is added to a cluster, CloudPlatform will assume the host has the capability to perform the CPU and RAM over-provisioning which is configured for that cluster. It is up to the administrator to be sure the host is actually suitable for the level of over-provisioning which has been set.

12.9.1. Limitations on Over-Provisioning in XenServer and KVM

- In XenServer, due to a constraint of this hypervisor, you can not use an over-provisioning factor greater than 4.
- The KVM hypervisor can not manage memory allocation to VMs dynamically. CloudPlatform sets the minimum and maximum amount of memory that a VM can use. The hypervisor adjusts the memory within the set limits based on the memory contention.

12.9.2. Requirements for Over-Provisioning

Several prerequisites are required in order for over-provisioning to function properly. The feature is dependent on the OS type, hypervisor capabilities, and certain scripts. It is the administrator's responsibility to ensure that these requirements are met.

12.9.2.1. Balloon Driver

All VMs should have a balloon driver installed in them. The hypervisor communicates with the balloon driver to free up and make the memory available to a VM.

XenServer

The balloon driver can be found as a part of xen pv or PVHVM drivers. The xen pvhvm drivers are included in upstream linux kernels 2.6.36+.

VMware

The balloon driver can be found as a part of the VMware tools. All the VMs that are deployed in a over-provisioned cluster should have the VMware tools installed.

KVM

All VMs are required to support the virtio drivers. These drivers are installed in all Linux kernel versions 2.6.25 and greater. The administrator must set `CONFIG_VIRTIO_BALLOON=y` in the virtio configuration.

12.9.2.2. Hypervisor capabilities

The hypervisor must be capable of using the memory ballooning.

XenServer

The DMC (Dynamic Memory Control) capability of the hypervisor should be enabled. Only XenServer Advanced and above versions have this feature.

VMware, KVM

Memory ballooning is supported by default.

12.9.3. Setting Over-Provisioning Ratios

There are two ways the root admin can set CPU and RAM over-provisioning ratios. First, the global configuration settings `cpu.overprovisioning.factor` and `mem.overprovisioning.factor` will be applied when a new cluster is created. Later, the ratios can be modified for an existing cluster.

Only VMs deployed after the change are affected by the new setting. If you want VMs deployed before the change to adopt the new over-provisioning ratio, you must stop and restart the VMs. When this is done, CloudPlatform recalculates or scales the used and reserved capacities based on the new over-provisioning ratios, to ensure that CloudPlatform is correctly tracking the amount of free capacity.



Note

It is safer not to deploy additional new VMs while the capacity recalculation is underway, in case the new values for available capacity are not high enough to accommodate the new VMs. Just wait for the new used/available values to become available, to be sure there is room for all the new VMs you want.

To change the over-provisioning ratios for an existing cluster:

1. Log in as administrator to the CloudPlatform UI.
2. In the left navigation bar, click Infrastructure.
3. Under Clusters, click View All.
4. Select the cluster you want to work with, and click the Edit button.
5. Fill in your desired over-provisioning multipliers in the fields CPU overcommit ratio and RAM overcommit ratio. The value which is initially shown in these fields is the default value inherited from the global configuration settings.



Note

In XenServer, due to a constraint of this hypervisor, you can not use an over-provisioning factor greater than 4.

12.9.4. Changing Over-Provisioning Ratios with Running VMs

Ideally, you shouldn't change the over-provisioning factor in a cluster with VMs running, because the existing VMs were deployed with the previously specified factor. However, it is possible to change the over-provisioning factor, if you keep the following considerations in mind.

Chapter 12. Working With Hosts

When you change the over-provisioning factor for a cluster where VMs are running, both used and total capacity are multiplied by this factor to keep track of available capacity. For example:

```
Cluster - c,  
cpu over provisioning = 1,  
Total cpu = 2GHZ
```

Suppose you deploy 2 VMs which each have a 512Mhz service offering. Then:

```
totalCapacity = 2GHZ  
AvailableCapacity = 1GHZ  
UsedCapacity = 1GHZ
```

Now suppose you change the CPU over-provisioning ratio of cluster c to 2:

```
totalCapacity = 4GHZ  
AvailableCapacity = 2GHZ  
UsedCapacity = 2GHZ
```

Notice the difference. Both used and total capacity are multiplied by the over-provisioning factor. Used Capacity after changing the factor is:

```
(service offering of VM / overcommit it was originally deployed with) * new overcommit
```

Or, to plug in our specific example values:

```
(1GHZ/1)*2
```

CloudPlatform uses this calculation in order to guarantee minimum CPU in case of contention. When a VM is deployed with an overprovisioning factor of "x", CloudPlatform aims to guarantee (service offering of VM / x) during the VM's lifecycle, even though the overprovisioning factor might have changed. CloudPlatform scales the total used CPU value in order to keep track of the actual amount of CPU left on the host.

Now suppose you launch 2 VMs which each have a 1Ghz CPU service offering:

```
totalCapacity = 4GHZ  
AvailableCapacity = 0GHZ  
UsedCapacity = 4GHZ
```

The calculation for used capacity for all 4 VMs is:

```
((service offering of vm / overcommit it got deployed with) * new overcommit)
```

Or to plug in our specific example values:

```
(512Mhz/1)*2 + (512Mhz/1)*2 + (1Ghz/2)*2 + (1Ghz/2)*2 = 4Ghz
```

Now suppose you change the over-provisioning to 3:

```
totalCapacity = 6 GHZ  
AvailableCapacity = 0 GHZ  
UsedCapacity = 6 GHZ
```

The calculation for used capacity for 4 VMs is:

```
((service offering of vm / overcommit it got deployed with) * new overcommit)
```

Or to plug in our specific example values:

```
(512Mhz/1)*3 +(512Mhz/1)*3 +(1Ghz/2)*3 + (1Ghz/2)*3 = 6Ghz
```

So far, this example is assuming you haven't stopped and started the VMs all this while. Suppose now you stop and start 1 VM at 512Mhz and another VM at 1Ghz. The over-provisioning factor changes for these VMs to 3 each. Note the denominator in the calculation:

```
totalCapacity = 6 GHz
AvailableCapacity = 1.5 GHz
UsedCapacity = 4.5 GHz
```

The calculation for used capacity for 4 VMs is:

```
((service offering of vm / overcommit it got deployed with) * new overcommit)
```

Or to plug in our specific example values:

```
(512Mhz/3)*3 +(512Mhz/1)*3 +(1Ghz/3)*3 + (1Ghz/2)*3 = 4.5 GHz
```

This over-provisioning model guarantees QOS as the following during the lifecycle of any VM:

```
(service offering of vm / x )
```

12.9.5. Enforcement of Service Offering Limits

Service offering limits (e.g. 1 GHz, 1 core) are strictly enforced for core count. For example, a guest with a service offering of one core will have only one core available to it regardless of other activity on the Host.

Service offering limits for gigahertz are enforced only in the presence of contention for CPU resources. For example, suppose that a guest was created with a service offering of 1 GHz on a Host that has 2 GHz cores, and that guest is the only guest running on the Host. The guest will have the full 2 GHz available to it. When multiple guests are attempting to use the CPU a weighting factor is used to schedule CPU resources. The weight is based on the clock speed in the service offering. Guests receive a CPU allocation that is proportionate to the GHz in the service offering. For example, a guest created from a 2 GHz service offering will receive twice the CPU allocation as a guest created from a 1 GHz service offering.

12.10. VLAN Provisioning

CloudPlatform automatically creates and destroys interfaces bridged to VLANs on the hosts. In general the administrator does not need to manage this process.

CloudPlatform manages VLANs differently based on hypervisor type. For XenServer or KVM, the VLANs are created on only the hosts where they will be used and then they are destroyed when all guests that require them have been terminated or moved to another host.

For vSphere the VLANs are provisioned on all hosts in the cluster even if there is no guest running on a particular Host that requires the VLAN. This allows the administrator to perform live migration and

other functions in vCenter without having to create the VLAN on the destination Host. Additionally, the VLANs are not removed from the Hosts when they are no longer needed.

You can use the same VLANs on different physical networks provided that each physical network has its own underlying layer-2 infrastructure, such as switches. For example, you can specify VLAN range 500 to 1000 while deploying physical networks A and B in an Advanced zone setup. This capability allows you to set up an additional layer-2 physical infrastructure on a different physical NIC and use the same set of VLANs if you run out of VLANs. Another advantage is that you can use the same set of IPs for different customers, each one with their own routers and the guest networks on different physical NICs.

12.10.1. VLAN Allocation Example

VLANs are required for public and guest traffic. The following is an example of a VLAN allocation scheme:

VLAN IDs	Traffic type	Scope
less than 500	Management traffic. Reserved for administrative purposes.	CloudPlatform software can access this, hypervisors, system VMs.
500-599	VLAN carrying public traffic.	CloudPlatform accounts.
600-799	VLANs carrying guest traffic.	CloudPlatform accounts. Account-specific VLAN is chosen from this pool.
800-899	VLANs carrying guest traffic.	CloudPlatform accounts. Account-specific VLAN chosen by CloudPlatform admin to assign to that account.
900-999	VLAN carrying guest traffic	CloudPlatform accounts. Can be scoped by project, domain, or all accounts.
greater than 1000	Reserved for future use	

12.10.2. Adding Non Contiguous VLAN Ranges

CloudPlatform provides you with the flexibility to add non contiguous VLAN ranges to your network. The administrator can either update an existing VLAN range or add multiple non contiguous VLAN ranges while creating a zone. You can also use the `UpdatephysicalNetwork` API to extend the VLAN range.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. Ensure that the VLAN range does not already exist.
3. In the left navigation, choose Infrastructure.
4. On Zones, click View More, then click the zone with which you want to work.
5. Click Physical Network.
6. In the Guest node of the diagram, click Configure.

7. Click Edit 

The VLAN Ranges field now be editable.

8. Enter the start and end of the VLAN range. If you have multiple ranges, separate them by a comma.

For example: 200-210,300-350,500-600, 100-110

Specify all the VLANs you want to use, VLANs not specified will be removed if you are adding new ranges to the existing list.

9. Click Apply.

12.10.3. Assigning VLANs to Isolated Networks

CloudPlatform provides you the ability to control VLAN assignment to Isolated networks. You can assign a VLAN ID when a network is created, just the way it's done for Shared networks.

The former behaviour also is supported — VLAN is randomly allocated to a network from the VNET range of the physical network when the network turns to Implemented state. The VLAN is released back to the VNET pool when the network shuts down as a part of the Network Garbage Collection. The VLAN can be re-used either by the same network when it is implemented again, or by any other network. On each subsequent implementation of a network, a new VLAN can be assigned.

To enable you to assign VLANs to Isolated networks,

1. Create a network offering by specifying the following:

- **Guest Type:** Select Isolated.
- **Specify VLAN:** Select the option.

For more information, see the CloudPlatform Installation Guide.

2. Using this network offering, create a network.

You can create a VPC tier or an Isolated network.

3. Specify the VLAN when you create the network.

When VLAN is specified, a CIDR and gateway are assigned to this network and the state is changed to Setup. In this state, the network will not be garbage collected.



Note

You cannot change a VLAN once it's assigned to the network. The VLAN remains with the network for its entire life cycle.

Working with Templates

A template is a reusable configuration for virtual machines. When users launch VMs, they can choose from a list of templates in CloudPlatform.

Specifically, a template is a virtual disk image that includes one of a variety of operating systems, optional additional software such as office applications, and settings such as access control to determine who can use the template. Each template is associated with a particular type of hypervisor, which is specified when the template is added to CloudPlatform.

CloudPlatform ships with a default template. In order to present more choices to users, CloudPlatform administrators and users can create templates and add them to CloudPlatform.

13.1. Creating Templates: Overview

CloudPlatform ships with a default template for the CentOS operating system. There are a variety of ways to add more templates. Administrators and end users can add templates. The typical sequence of events is:

1. Launch a VM instance that has the operating system you want. Make any other desired configuration changes to the VM.
2. Stop the VM.
3. Convert the volume into a template.

There are other ways to add templates to CloudPlatform. For example, you can take a snapshot of the VM's volume and create a template from the snapshot, or import a VHD from another system into CloudPlatform.

The various techniques for creating templates are described in the next few sections.

13.2. Requirements for Templates

- For XenServer, install PV drivers / Xen tools on each template that you create. This will enable live migration and clean guest shutdown.
- For vSphere, install VMware Tools on each template that you create. This will enable console view to work properly.

13.3. Best Practices for Templates

If you plan to use large templates (100 GB or larger), be sure you have a 10-gigabit network to support the large templates. A slower network can lead to timeouts and other errors when large templates are used.

13.4. The Default Template

CloudPlatform includes a CentOS template. This template is downloaded by the Secondary Storage VM after the primary and secondary storage are configured. You can use this template in your production deployment or you can delete it and use custom templates.

The root password for the default template is "password".

A default template is provided for each of XenServer, KVM, and vSphere. The templates that are downloaded depend on the hypervisor type that is available in your cloud. Each template is approximately 2.5 GB physical size.

The default template includes the standard iptables rules, which will block most access to the template excluding ssh.

```
# iptables --list
Chain INPUT (policy ACCEPT)
target     prot opt source                destination
RH-Firewall-1-INPUT  all  --  anywhere               anywhere

Chain FORWARD (policy ACCEPT)
target     prot opt source                destination
RH-Firewall-1-INPUT  all  --  anywhere               anywhere

Chain OUTPUT (policy ACCEPT)
target     prot opt source                destination

Chain RH-Firewall-1-INPUT (2 references)
target     prot opt source                destination
ACCEPT     all  --  anywhere               anywhere
ACCEPT     icmp --  anywhere               anywhere    icmp any
ACCEPT     esp  --  anywhere               anywhere
ACCEPT     ah   --  anywhere               anywhere
ACCEPT     udp  --  anywhere               224.0.0.251    udp dpt:mdns
ACCEPT     udp  --  anywhere               anywhere       udp dpt:ipp
ACCEPT     tcp  --  anywhere               anywhere       tcp dpt:ipp
ACCEPT     all  --  anywhere               anywhere       state RELATED,ESTABLISHED
ACCEPT     tcp  --  anywhere               anywhere       state NEW tcp dpt:ssh
REJECT     all  --  anywhere               anywhere       reject-with icmp-host-
```

13.5. Private and Public Templates

When a user creates a template, it can be designated private or public.

Private templates are only available to the user who created them. By default, an uploaded template is private.

When a user marks a template as “public,” the template becomes available to all users in all accounts in the user’s domain, as well as users in any other domains that have access to the Zone where the template is stored. This depends on whether the Zone, in turn, was defined as private or public. A private Zone is assigned to a single domain, and a public Zone is accessible to any domain. If a public template is created in a private Zone, it is available only to users in the domain assigned to that Zone. If a public template is created in a public Zone, it is available to all users in all domains.

13.6. Creating a Template from an Existing Virtual Machine

Once you have at least one VM set up in the way you want, you can use it as the prototype for other VMs.

1. Create and start a virtual machine using any of the techniques given in [Section 11.4, “Creating VMs”](#).
2. Make any desired configuration changes on the running VM, then click Stop.
3. Wait for the VM to stop. When the status shows Stopped, go to the next step.
4. Click Create Template and provide the following:

- **Name and Display Text.** These will be shown in the UI, so choose something descriptive.
- **OS Type.** This helps CloudPlatform and the hypervisor perform certain operations and make assumptions that improve the performance of the guest. Select one of the following.
 - If the operating system of the stopped VM is listed, choose it.
 - If the OS type of the stopped VM is not listed, choose Other.
 - If you want to boot from this template in PV mode, choose Other PV (32-bit) or Other PV (64-bit). This choice is available only for XenServer:



Note

Generally you should not choose an older version of the OS than the version in the image. For example, choosing CentOS 5.4 to support a CentOS 6.2 image will in general not work. In those cases you should choose Other.

- **Public.** Choose Yes to make this template accessible to all users of this CloudPlatform installation. The template will appear in the Community Templates list. See [Section 13.5, “Private and Public Templates”](#).
- **Password Enabled.** Choose Yes if your template has the CloudPlatform password change script installed. See [Section 13.13, “Adding Password Management to Your Templates”](#).

5. Click Add.

The new template will be visible in the Templates section when the template creation process has been completed. The template is then available when creating a new VM.

13.7. Creating a Template from a Snapshot



Note

Not supported by Oracle VM.

If you do not want to stop the VM to use the Create Template menu item, as described in [Section 13.6, “Creating a Template from an Existing Virtual Machine”](#), you can create a template directly from any snapshot through the CloudPlatform UI.

13.8. Uploading Templates



Note

If you are uploading a template that was created using vSphere Client, be sure the OVA file does not contain an ISO. If it does, the deployment of VMs from the template will fail.

Templates are uploaded based on a URL. HTTP is the supported access protocol. Templates are frequently large files. You can optionally gzip them to decrease upload times.

To upload a template:

1. In the left navigation bar, click Templates.
2. Click Register Template.
3. Provide the following in the dialog box:
 - **Name and Description.** These will be shown in the UI, so choose something descriptive.
 - **URL.** The Management Server will download the file from the specified URL, such as `http://my.web.server/filename.vhd.gz`.
 - **Zone.** Choose the zone where you want the template to be available. If your CloudPlatform deployment includes multiple zones running the same hypervisor (the one selected in the Hypervisor field later in this dialog box), and you want the template to be available in all of them, choose All Zones.
 - **OS Type:** This helps CloudPlatform and the hypervisor perform certain operations and make assumptions that improve the performance of the guest. Select one of the following:
 - If the operating system of the stopped VM is listed, choose it.
 - If the OS type of the stopped VM is not listed, choose Other.



Note

Generally you should not choose an older version of the OS than the version in the image. For example, choosing CentOS 5.4 to support a CentOS 6.2 image will in general not work. In those cases you should choose Other.

- **Hypervisor:** The supported hypervisors are listed. Select the desired one.
- **Format.** The format of the template upload file, such as VHD or OVA.
- **Password Enabled.** Choose Yes if your template has the CloudPlatform password change script installed. See [Adding Password Management to Your Templates](#)
- **Extractable.** Choose Yes if the template is available for extraction. If this option is selected, end users can download a full image of a template.
- **Public.** Choose Yes to make this template accessible to all users of this CloudPlatform installation. The template will appear in the Community Templates list. See [Section 13.5, "Private and Public Templates"](#).
- **Featured.** Choose Yes if you would like this template to be more prominent for users to select. The template will appear in the Featured Templates list. Only an administrator can make a template Featured.

13.9. Exporting Templates

End users and Administrators may export templates from the CloudPlatform. Navigate to the template in the UI and choose the Download function from the Actions menu.

13.10. Creating a Windows Template

Windows templates must be prepared with Sysprep before they can be provisioned on multiple machines. Sysprep allows you to create a generic Windows template and avoid any possible SID conflicts.



Note

(XenServer) Windows VMs running on XenServer require PV drivers, which may be provided in the template or added after the VM is created. The PV drivers are necessary for essential management functions such as mounting additional volumes and ISO images, live migration, and graceful shutdown.

An overview of the procedure is as follows:

1. Upload your Windows ISO.
For more information, see [Section 11.16.1, “Adding an ISO”](#).
2. Create a VM Instance with this ISO.
For more information, see [Section 11.4, “Creating VMs”](#).
3. Follow the steps in Sysprep for Windows Server 2008 R2 (below) or Sysprep for Windows Server 2003 R2, depending on your version of Windows Server
4. The preparation steps are complete. Now you can actually create the template as described in [Creating the Windows Template](#).

13.10.1. System Preparation for Windows Server 2008 R2

For Windows 2008 R2, you run Windows System Image Manager to create a custom sysprep response XML file. Windows System Image Manager is installed as part of the Windows Automated Installation Kit (AIK). Windows AIK can be downloaded from [Microsoft Download Center](#)¹.

Use the following steps to run sysprep for Windows 2008 R2:



Note

The steps outlined here are derived from the excellent guide by Charity Shelbourne, originally published at [Windows Server 2008 Sysprep Mini-Setup](#).²

¹ <http://www.microsoft.com/en-us/download/details.aspx?id=9085>

² <http://blogs.technet.com/askcore/archive/2008/10/31/automating-the-oobe-process-during-windows-server-2008-sysprep-mini-setup.aspx>

1. Download and install the Windows AIK

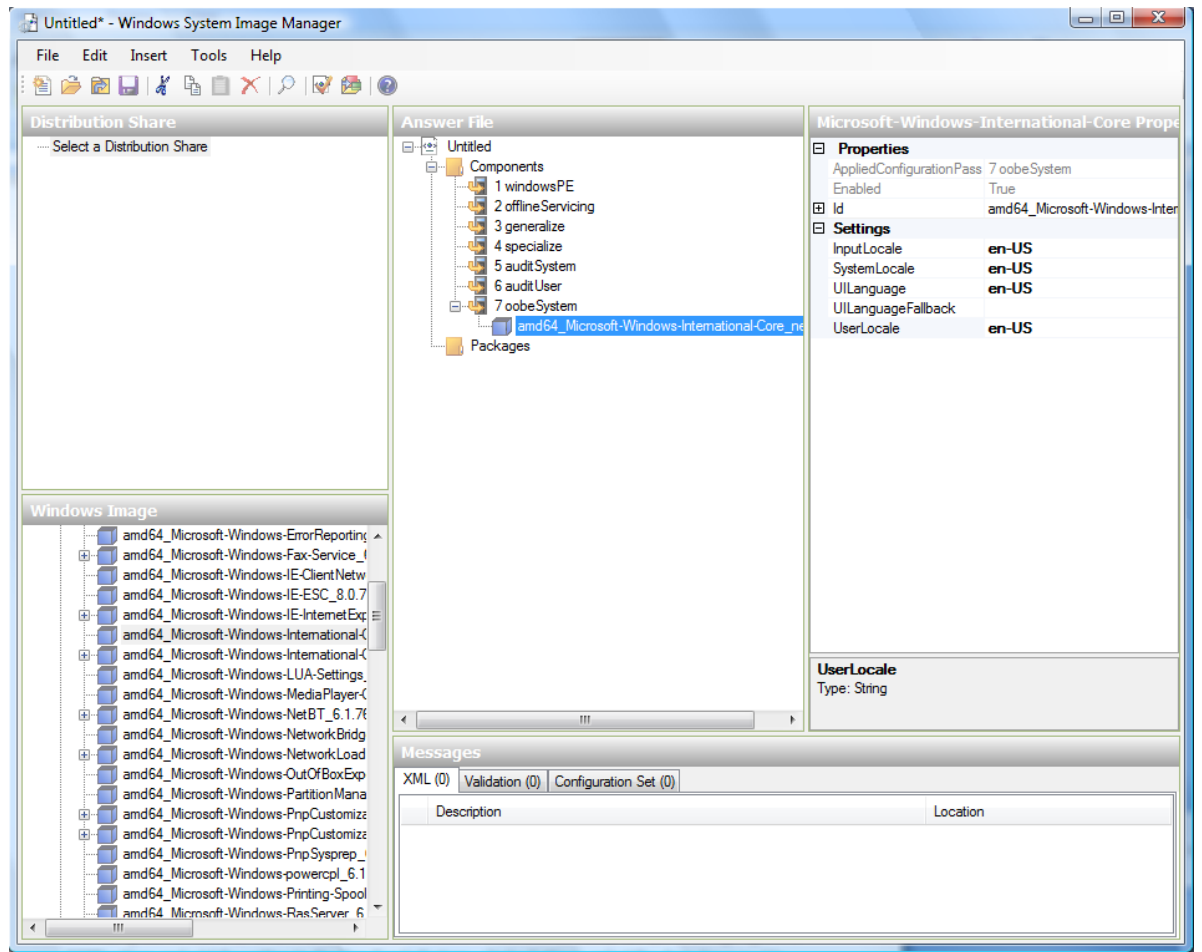


Note

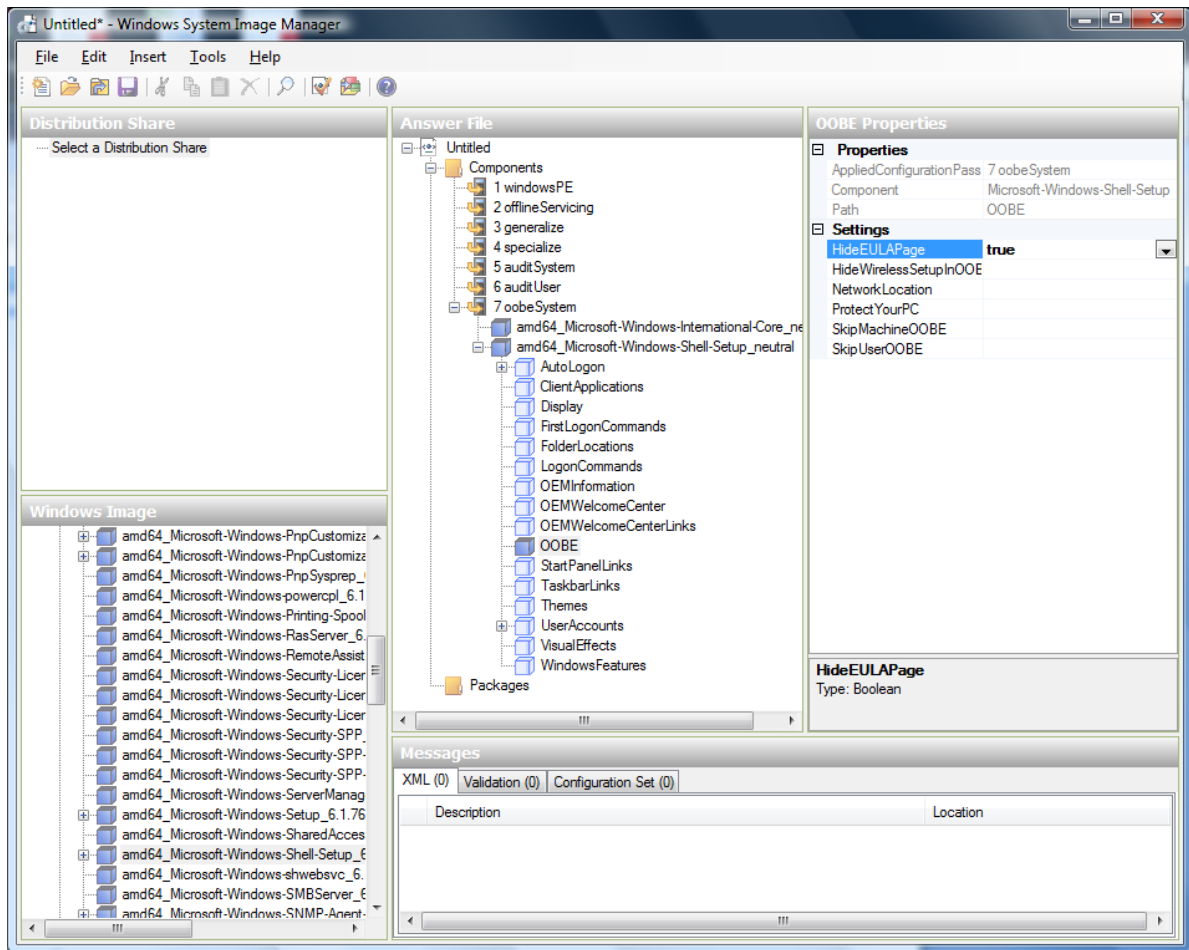
Windows AIK should not be installed on the Windows 2008 R2 VM you just created. Windows AIK should not be part of the template you create. It is only used to create the sysprep answer file.

2. Copy the install.wim file in the \sources directory of the Windows 2008 R2 installation DVD to the hard disk. This is a very large file and may take a long time to copy. Windows AIK requires the WIM file to be writable.
3. Start the Windows System Image Manager, which is part of the Windows AIK.
4. In the Windows Image pane, right click the Select a Windows image or catalog file option to load the install.wim file you just copied.
5. Select the Windows 2008 R2 Edition.

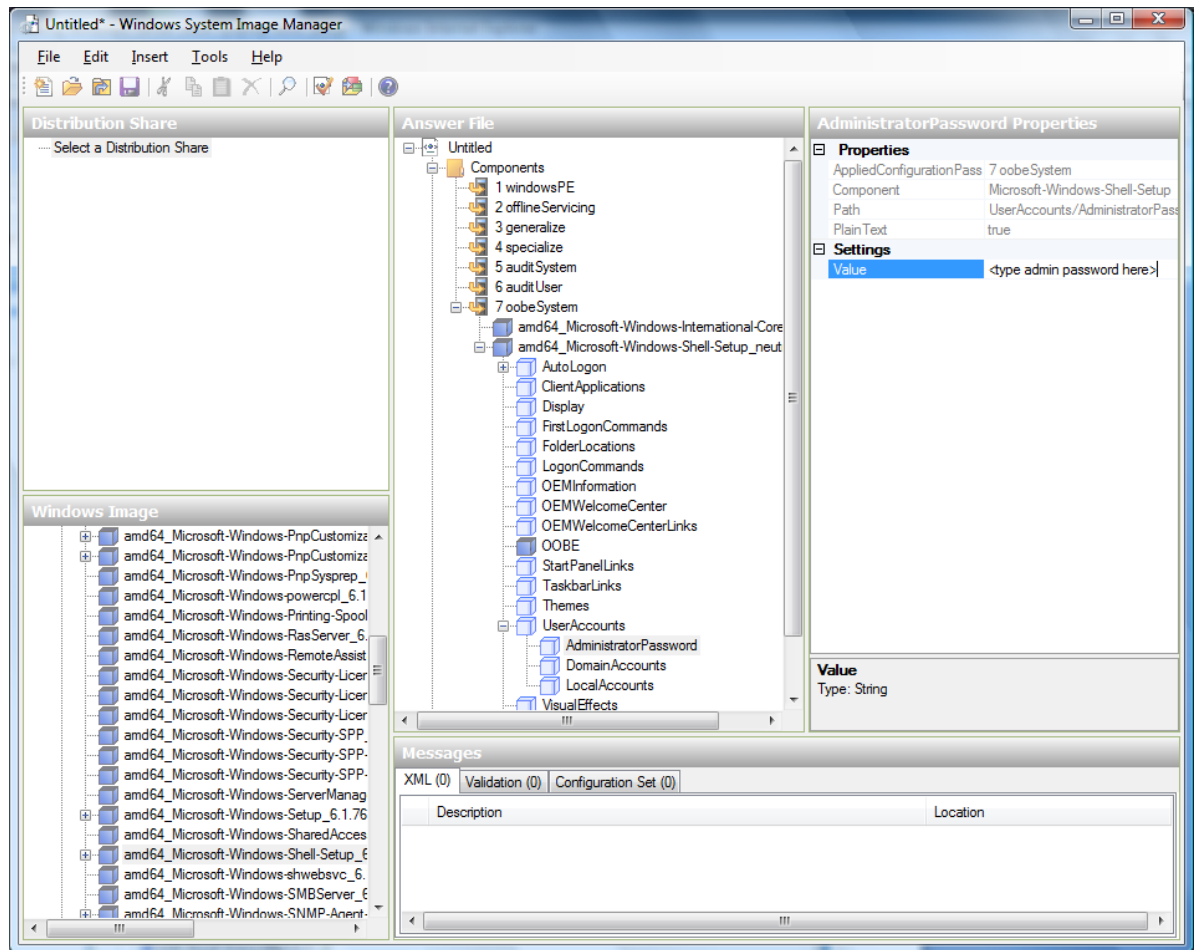
You may be prompted with a warning that the catalog file cannot be opened. Click Yes to create a new catalog file.
6. In the Answer File pane, right click to create a new answer file.
7. Generate the answer file from the Windows System Image Manager using the following steps:
 - a. The first page you need to automate is the Language and Country or Region Selection page. To automate this, expand Components in your Windows Image pane, right-click and add the Microsoft-Windows-International-Core setting to Pass 7 oobeSystem. In your Answer File pane, configure the InputLocale, SystemLocale, UILanguage, and UserLocale with the appropriate settings for your language and country or region. Should you have a question about any of these settings, you can right-click on the specific setting and select Help. This will open the appropriate CHM help file with more information, including examples on the setting you are attempting to configure.



- b. You need to automate the Software License Terms Selection page, otherwise known as the End-User License Agreement (EULA). To do this, expand the Microsoft-Windows-Shell-Setup component. High-light the OOBESetting, and add the setting to the Pass 7 oobeSystem. In Settings, set HideEULAPage true.



- c. Make sure the license key is properly set. If you use MAK key, you can just enter the MAK key on the Windows 2008 R2 VM. You need not input the MAK into the Windows System Image Manager. If you use KMS host for activation you need not enter the Product Key. Details of Windows Volume Activation can be found at <http://technet.microsoft.com/en-us/library/bb892849.aspx>
- d. You need to automate is the Change Administrator Password page. Expand the Microsoft-Windows-Shell-Setup component (if it is not still expanded), expand UserAccounts, right-click on AdministratorPassword, and add the setting to the Pass 7 oobeSystem configuration pass of your answer file. Under Settings, specify a password next to Value.



You may read the AIK documentation and set many more options that suit your deployment. The steps above are the minimum needed to make Windows unattended setup work.

8. Save the answer file as unattend.xml. You can ignore the warning messages that appear in the validation window.
9. Copy the unattend.xml file into the c:\windows\system32\sysprep directory of the Windows 2008 R2 Virtual Machine
10. Once you place the unattend.xml file in c:\windows\system32\sysprep directory, you run the sysprep tool as follows:

```
cd c:\Windows\System32\sysprep
sysprep.exe /oobe /generalize /shutdown
```

The Windows 2008 R2 VM will automatically shut down after sysprep is complete.

13.10.2. System Preparation for Windows Server 2003 R2

Earlier versions of Windows have a different sysprep tool. Follow these steps for Windows Server 2003 R2.

1. Extract the content of \support\tools\deploy.cab on the Windows installation CD into a directory called c:\sysprep on the Windows 2003 R2 VM.
2. Run c:\sysprep\setupmgr.exe to create the sysprep.inf file.

- a. Select Create New to create a new Answer File.
 - b. Enter “Sysprep setup” for the Type of Setup.
 - c. Select the appropriate OS version and edition.
 - d. On the License Agreement screen, select “Yes fully automate the installation”.
 - e. Provide your name and organization.
 - f. Leave display settings at default.
 - g. Set the appropriate time zone.
 - h. Provide your product key.
 - i. Select an appropriate license mode for your deployment
 - j. Select “Automatically generate computer name”.
 - k. Type a default administrator password. If you enable the password reset feature, the users will not actually use this password. This password will be reset by the instance manager after the guest boots up.
 - l. Leave Network Components at “Typical Settings”.
 - m. Select the “WORKGROUP” option.
 - n. Leave Telephony options at default.
 - o. Select appropriate Regional Settings.
 - p. Select appropriate language settings.
 - q. Do not install printers.
 - r. Do not specify “Run Once commands”.
 - s. You need not specify an identification string.
 - t. Save the Answer File as c:\sysprep\sysprep.inf.
3. Run the following command to sysprep the image:

```
c:\sysprep\sysprep.exe -reseal -mini -activated
```

After this step the machine will automatically shut down

13.11. Importing Amazon Machine Images

The following procedures describe how to import an Amazon Machine Image (AMI) into CloudPlatform when using the XenServer hypervisor.

Assume you have an AMI file and this file is called CentOS_6.2_x64. Assume further that you are working on a CentOS host. If the AMI is a Fedora image, you need to be working on a Fedora host initially.

You need to have a XenServer host with a file-based storage repository (either a local ext3 SR or an NFS SR) to convert to a VHD once the image file has been customized on the Centos/Fedora host.



Note

When copying and pasting a command, be sure the command has pasted as a single line before executing. Some document viewers may introduce unwanted line breaks in copied text.

To import an AMI:

1. Set up loopback on image file:

```
# mkdir -p /mnt/loop/centos62
# mount -o loop CentOS_6.2_x64 /mnt/loop/centos54
```

2. Install the kernel-xen package into the image. This downloads the PV kernel and ramdisk to the image.

```
# yum -c /mnt/loop/centos54/etc/yum.conf --installroot=/mnt/loop/centos62/ -y install
kernel-xen
```

3. Create a grub entry in /boot/grub/grub.conf.

```
# mkdir -p /mnt/loop/centos62/boot/grub
# touch /mnt/loop/centos62/boot/grub/grub.conf
# echo "" > /mnt/loop/centos62/boot/grub/grub.conf
```

4. Determine the name of the PV kernel that has been installed into the image.

```
# cd /mnt/loop/centos62
# ls lib/modules/
2.6.16.33-xenU 2.6.16-xenU 2.6.18-164.15.1.el5xen 2.6.18-164.6.1.el5.centos.plus
2.6.18-xenU-ec2-v1.0 2.6.21.7-2.fc8xen 2.6.31-302-ec2
# ls boot/initrd*
boot/initrd-2.6.18-164.6.1.el5.centos.plus.img boot/initrd-2.6.18-164.15.1.el5xen.img
# ls boot/vmlinuz*
boot/vmlinuz-2.6.18-164.15.1.el5xen boot/vmlinuz-2.6.18-164.6.1.el5.centos.plus boot/
vmlinuz-2.6.18-xenU-ec2-v1.0 boot/vmlinuz-2.6.21-2952.fc8xen
```

Xen kernels/ramdisk always end with "xen". For the kernel version you choose, there has to be an entry for that version under lib/modules, there has to be an initrd and vmlinuz corresponding to that. Above, the only kernel that satisfies this condition is 2.6.18-164.15.1.el5xen.

5. Based on your findings, create an entry in the grub.conf file. Below is an example entry.

```
default=0
timeout=5
hiddenmenu
title CentOS (2.6.18-164.15.1.el5xen)
    root (hd0,0)
    kernel /boot/vmlinuz-2.6.18-164.15.1.el5xen ro root=/dev/xvda
    initrd /boot/initrd-2.6.18-164.15.1.el5xen.img
```

6. Edit etc/fstab, changing "sda1" to "xvda" and changing "sdb" to "xvdb".

```
# cat etc/fstab
/dev/xvda / ext3 defaults 1 1
/dev/xvdb /mnt ext3 defaults 0 0
none /dev/pts devpts gid=5,mode=620 0 0
none /proc proc defaults 0 0
none /sys sysfs defaults 0 0
```

7. Enable login via the console. The default console device in a XenServer system is xvc0. Ensure that `etc/inittab` and `etc/securetty` have the following lines respectively:

```
# grep xvc0 etc/inittab
co:2345:respawn:/sbin/agetty xvc0 9600 vt100-nav
# grep xvc0 etc/securetty
xvc0
```

8. Ensure the ramdisk supports PV disk and PV network. Customize this for the kernel version you have determined above.

```
# chroot /mnt/loop/centos54
# cd /boot/
# mv initrd-2.6.18-164.15.1.el5xen.img initrd-2.6.18-164.15.1.el5xen.img.bak
# mkinitrd -f /boot/initrd-2.6.18-164.15.1.el5xen.img --with=xennet --preload=xenblk --omit-scsi-modules 2.6.18-164.15.1.el5xen
```

9. Change the password.

```
# passwd
Changing password for user root.
New UNIX password:
Retype new UNIX password:
passwd: all authentication tokens updated successfully.
```

10. Exit out of chroot.

```
# exit
```

11. Check `etc/ssh/sshd_config` for lines allowing ssh login using a password.

```
# egrep "PermitRootLogin|PasswordAuthentication" /mnt/loop/centos54/etc/ssh/sshd_config
PermitRootLogin yes
PasswordAuthentication yes
```

12. If you need the template to be enabled to reset passwords from the CloudPlatform UI or API, install the password change script into the image at this point. See [Section 13.13, “Adding Password Management to Your Templates”](#).

13. Unmount and delete loopback mount.

```
# umount /mnt/loop/centos54
# losetup -d /dev/loop0
```

14. Copy the image file to your XenServer host's file-based storage repository. In the example below, the XenServer is "xenhost". This XenServer has an NFS repository whose uid is a9c5b8c8-536b-a193-a6dc-51af3e5ff799.

```
# scp CentOS_6.2_x64 xenhost:/var/run/sr-mount/a9c5b8c8-536b-a193-a6dc-51af3e5ff799/
```

15. Log in to the Xenserver and create a VDI the same size as the image.

```
[root@xenhost ~]# cd /var/run/sr-mount/a9c5b8c8-536b-a193-a6dc-51af3e5ff799
[root@xenhost a9c5b8c8-536b-a193-a6dc-51af3e5ff799]# ls -lh CentOS_6.2_x64
-rw-r--r-- 1 root root 10G Mar 16 16:49 CentOS_6.2_x64
[root@xenhost a9c5b8c8-536b-a193-a6dc-51af3e5ff799]# xe vdi-create virtual-size=10GiB sr-
uuid=a9c5b8c8-536b-a193-a6dc-51af3e5ff799 type=user name-label="Centos 6.2 x86_64"
cad7317c-258b-4ef7-b207-cdf0283a7923
```

16. Import the image file into the VDI. This may take 10–20 minutes.

```
[root@xenhost a9c5b8c8-536b-a193-a6dc-51af3e5ff799]# xe vdi-import
filename=CentOS_6.2_x64 uuid=cad7317c-258b-4ef7-b207-cdf0283a7923
```

17. Locate a the VHD file. This is the file with the VDI's UUID as its name. Compress it and upload it to your web server.

```
[root@xenhost a9c5b8c8-536b-a193-a6dc-51af3e5ff799]# bzip2 -c cad7317c-258b-4ef7-b207-
cdf0283a7923.vhd > CentOS_6.2_x64.vhd.bz2
[root@xenhost a9c5b8c8-536b-a193-a6dc-51af3e5ff799]# scp CentOS_6.2_x64.vhd.bz2
webserver:/var/www/html/templates/
```

13.12. Converting a Hyper-V VM to a Template

To convert a Hyper-V VM to a XenServer-compatible CloudPlatform template, you will need a standalone XenServer host with an attached NFS VHD SR. Use whatever XenServer version you are using with CloudPlatform, but use XenCenter 5.6 FP1 or SP2 (it is backwards compatible to 5.6). Additionally, it may help to have an attached NFS ISO SR.

For Linux VMs, you may need to do some preparation in Hyper-V before trying to get the VM to work in XenServer. Clone the VM and work on the clone if you still want to use the VM in Hyper-V. Uninstall Hyper-V Integration Components and check for any references to device names in `/etc/fstab`:

1. From the `linux_ic/drivers/dist` directory, run `make uninstall` (where "linux_ic" is the path to the copied Hyper-V Integration Components files).
2. Restore the original `initrd` from backup in `/boot/` (the backup is named `*.backup0`).
3. Remove the "hdX=noprobe" entries from `/boot/grub/menu.lst`.
4. Check `/etc/fstab` for any partitions mounted by device name. Change those entries (if any) to mount by LABEL or UUID. You can get that information with the `blkid` command.

The next step is make sure the VM is not running in Hyper-V, then get the VHD into XenServer. There are two options for doing this.

Option one:

1. Import the VHD using XenCenter. In XenCenter, go to `Tools>Virtual Appliance Tools>Disk Image Import`.
2. Choose the VHD, then click Next.

3. Name the VM, choose the NFS VHD SR under Storage, enable "Run Operating System Fixups" and choose the NFS ISO SR.
4. Click Next, then Finish. A VM should be created.

Option two:

1. Run XenConvert, under From choose VHD, under To choose XenServer. Click Next.
2. Choose the VHD, then click Next.
3. Input the XenServer host info, then click Next.
4. Name the VM, then click Next, then Convert. A VM should be created.

Once you have a VM created from the Hyper-V VHD, prepare it using the following steps:

1. Boot the VM, uninstall Hyper-V Integration Services, and reboot.
2. Install XenServer Tools, then reboot.
3. Prepare the VM as desired. For example, run sysprep on Windows VMs. See [Section 13.10, "Creating a Windows Template"](#).

Either option above will create a VM in HVM mode. This is fine for Windows VMs, but Linux VMs may not perform optimally. Converting a Linux VM to PV mode will require additional steps and will vary by distribution.

1. Shut down the VM and copy the VHD from the NFS storage to a web server; for example, mount the NFS share on the web server and copy it, or from the XenServer host use sftp or scp to upload it to the web server.
2. In CloudPlatform, create a new template using the following values:
 - URL. Give the URL for the VHD
 - OS Type. Use the appropriate OS. For PV mode on CentOS, choose Other PV (32-bit) or Other PV (64-bit). This choice is available only for XenServer.
 - Hypervisor. XenServer
 - Format. VHD

The template will be created, and you can create instances from it.

13.13. Adding Password Management to Your Templates

CloudPlatform provides an optional password reset feature that allows users to set a temporary admin or root password as well as reset the existing admin or root password from the CloudPlatform UI.

To enable the Reset Password feature, you will need to download an additional script to patch your template. When you later upload the template into CloudPlatform, you can specify whether reset admin/root password feature should be enabled for this template.

The password management feature works always resets the account password on instance boot. The script does an HTTP call to the virtual router to retrieve the account password that should be set. As long as the virtual router is accessible the guest will have access to the account password that should be used. When the user requests a password reset the management server generates and sends a

new password to the virtual router for the account. Thus an instance reboot is necessary to effect any password changes.

If the script is unable to contact the virtual router during instance boot it will not set the password but boot will continue normally.

13.13.1. Linux OS Installation

Use the following steps to begin the Linux OS installation:

1. Download the script file `cloud-set-guest-password`:
 - Linux: <http://download.cloud.com/templates/4.2/bindir/cloud-set-guest-password.in>
 - Windows: <http://sourceforge.net/projects/cloudstack/files/Password%20Management%20Scripts/CloudInstanceManager.msi/download>
2. Copy this file to `/etc/init.d`.

On some Linux distributions, copy the file to `/etc/rc.d/init.d`.

3. Run the following command to make the script executable:

```
chmod +x /etc/init.d/cloud-set-guest-password
```

4. Depending on the Linux distribution, continue with the appropriate step.

13.13.2. Windows OS Installation

Download the installer, `CloudInstanceManager.msi`, from the [Download page](#)³ and run the installer in the newly created Windows VM.

13.14. Deleting Templates

Templates may be deleted. In general, when a template spans multiple Zones, only the copy that is selected for deletion will be deleted; the same template in other Zones will not be deleted. The provided CentOS template is an exception to this. If the provided CentOS template is deleted, it will be deleted from all Zones.

When templates are deleted, the VMs instantiated from them will continue to run. However, new VMs cannot be created based on the deleted template.

³ <http://cloudstack.org/download.html>

Working With Storage

14.1. Storage Overview

CloudPlatform defines two types of storage: primary and secondary. Primary storage can be accessed by either iSCSI or NFS. Additionally, direct attached storage may be used for primary storage. Secondary storage is always accessed using NFS or a combination of NFS and object storage.

There is no ephemeral storage in CloudPlatform. All volumes on all nodes are persistent.

14.2. Primary Storage

This section gives concepts and technical details about CloudPlatform primary storage. In addition to the material in this section, please see:

- For a basic overview, see [Section 3.6, “About Primary Storage”](#).
- For information about how to install and configure primary storage through the CloudPlatform UI, see [Section 8.7, “Adding Primary Storage”](#).

14.2.1. Best Practices for Primary Storage

- The speed of primary storage will impact guest performance. If possible, choose smaller, higher RPM drives for primary storage.
- Ensure that nothing is stored on the server. Adding the server to CloudPlatform will destroy any existing data

14.2.2. Runtime Behavior of Primary Storage

Root volumes are created automatically when a virtual machine is created. Root volumes are deleted when the VM is destroyed. Data volumes can be created and dynamically attached to VMs (although, when the Oracle VM hypervisor is used, the VM must be stopped before an additional volume can be attached). Data volumes are not deleted when VMs are destroyed.

Administrators should monitor the capacity of primary storage devices and add additional primary storage as needed. See the Advanced Installation Guide.

Administrators add primary storage to the system by creating a CloudPlatform storage pool. Each storage pool is associated with a cluster.

14.2.3. Hypervisor Support for Primary Storage

The following table shows storage options and parameters for different hypervisors.

	VMware vSphere	Citrix XenServer	KVM	Oracle VM
Format for Disks, Templates, and Snapshots	VMDK	VHD	QCOW2	RAW
iSCSI support	VMFS	Clustered LVM	Yes, via Shared Mountpoint	Yes, via OCFS2M

	VMware vSphere	Citrix XenServer	KVM	Oracle VM
Fiber Channel support	VMFS	Yes, via Existing SR	Yes, via Shared Mountpoint	No
NFS support	Y	Y	Y	Y
Local storage support	Y	Y	Y	Y
Storage over-provisioning	NFS and iSCSI	NFS	NFS	No

XenServer uses a clustered LVM system to store VM images on iSCSI and Fiber Channel volumes and does not support over-provisioning in the hypervisor. The storage server itself, however, can support thin-provisioning. As a result the CloudPlatform can still support storage over-provisioning by running on thin-provisioned storage volumes.

KVM supports "Shared Mountpoint" storage. A shared mountpoint is a file system path local to each server in a given cluster. The path must be the same across all Hosts in the cluster, for example /mnt/primary1. This shared mountpoint is assumed to be a clustered filesystem such as OCFS2. In this case the CloudPlatform does not attempt to mount or unmount the storage as is done with NFS. The CloudPlatform requires that the administrator insure that the storage is available

Oracle VM supports both iSCSI and NFS storage. When iSCSI is used with OVM, the CloudPlatform administrator is responsible for setting up iSCSI on the host, including re-mounting the storage after the host recovers from a failure such as a network outage. With other hypervisors, CloudPlatform takes care of mounting the iSCSI target on the host whenever it discovers a connection with an iSCSI server and unmounting the target when it discovers the connection is down.

With NFS storage, CloudPlatform manages the overprovisioning. In this case the global configuration parameter `storage.overprovisioning.factor` controls the degree of overprovisioning. This is independent of hypervisor type.

Local storage is an option for primary storage for vSphere, XenServer, Oracle VM, and KVM. When the local disk option is enabled, a local disk storage pool is automatically created on each host. To use local storage for the System Virtual Machines (such as the Virtual Router), set `system.vm.use.local.storage` to true in global configuration.

CloudPlatform supports multiple primary storage pools in a Cluster. For example, you could provision 2 NFS servers in primary storage. Or you could provision 1 iSCSI LUN initially and then add a second iSCSI LUN when the first approaches capacity.

14.2.4. Storage Tags

Storage may be "tagged". A tag is a text string attribute associated with primary storage, a Disk Offering, or a Service Offering. Tags allow administrators to provide additional information about the storage. For example, that is a "SSD" or it is "slow". Tags are not interpreted by CloudPlatform. They are matched against tags placed on service and disk offerings. CloudPlatform requires all tags on service and disk offerings to exist on the primary storage before it allocates root or data disks on the primary storage. Service and disk offering tags are used to identify the requirements of the storage that those offerings have. For example, the high end service offering may require "fast" for its root disk volume.

The interaction between tags, allocation, and volume copying across clusters and pods can be complex. To simplify the situation, use the same set of tags on the primary storage for all clusters in a pod. Even if different devices are used to present those tags, the set of exposed tags can be the same.

14.2.5. Maintenance Mode for Primary Storage

Primary storage may be placed into maintenance mode. This is useful, for example, to replace faulty RAM in a storage device. Maintenance mode for a storage device will first stop any new guests from being provisioned on the storage device. Then it will stop all guests that have any volume on that storage device. When all such guests are stopped the storage device is in maintenance mode and may be shut down. When the storage device is online again you may cancel maintenance mode for the device. The CloudPlatform will bring the device back online and attempt to start all guests that were running at the time of the entry into maintenance mode.

14.3. Secondary Storage

This section gives concepts and technical details about CloudPlatform secondary storage. In addition to the material in this section, please see:

- For a basic overview, see [Section 3.7, “About Secondary Storage”](#).
- For information about how to install and configure secondary storage through the CloudPlatform UI, see [Section 8.8, “Adding Secondary Storage”](#).

14.3.1. Best Practices for Secondary Storage

- Each Zone can have one or more secondary storage servers. Multiple secondary storage servers provide increased scalability to the system.
- Secondary storage has a high read:write ratio and is expected to consist of larger drives with lower IOPS than primary storage.
- Ensure that nothing is stored on the server. Adding the server to CloudPlatform will destroy any existing data.

14.3.2. Changing the Secondary Storage IP Address

You can change the secondary storage IP address after it has been provisioned. After changing the IP address on the host, log in to your management server and execute the following commands. Replace HOSTID below with your own value, and change the URL to use the appropriate IP address and path for your server:

```
# mysql -p
mysql> use cloud;
mysql> select id from host where type = 'image_store';
mysql> update host_details set value = 'nfs://192.168.160.20/export/mike-ssl'
where host_id = HOSTID and name = 'orig.url';
mysql> update host set name = 'nfs://192.168.160.20/export/mike-ssl' where type
= 'image_store' and id = #;
mysql> update host set url = 'nfs://192.168.160.20/export/mike-ssl' where type
= 'image_store' and id = #;
mysql> update host set guid = 'nfs://192.168.160.20/export/mike-ssl' where type
= 'image_store' and id = #;
```



Note

When copying and pasting a command, be sure the command has pasted as a single line before executing. Some document viewers may introduce unwanted line breaks in copied text.

Then log in to the CloudPlatform UI and stop and start (not reboot) the Secondary Storage VM for that Zone.

14.3.3. Changing Secondary Storage Servers

You can change the secondary storage NFS mount. Perform the following steps to do so:

1. Stop all running Management Servers.
2. Wait 30 minutes. This allows any writes to secondary storage to complete.
3. Copy all files from the old secondary storage mount to the new.
4. Change the IP address for secondary storage if required. See [Section 14.3.2, “Changing the Secondary Storage IP Address”](#).
5. Start the Management Server.

14.4. Working With Volumes

A volume provides storage to a guest VM. The volume can provide for a root disk or an additional data disk. CloudPlatform supports additional volumes for guest VMs.

Volumes are created for a specific hypervisor type. A volume that has been attached to guest using one hypervisor type (e.g. XenServer) may not be attached to a guest that is using another hypervisor type (e.g. vSphere, Oracle VM, KVM). This is because the different hypervisors use different disk image formats.

CloudPlatform defines a volume as a unit of storage available to a guest VM. Volumes are either root disks or data disks. The root disk has “/” in the file system and is usually the boot device. Data disks provide for additional storage (e.g. As “/opt” or “D:”). Every guest VM has a root disk, and VMs can also optionally have a data disk. End users can mount multiple data disks to guest VMs. Users choose data disks from the disk offerings created by administrators. The user can create a template from a volume as well; this is the standard procedure for private template creation. Volumes are hypervisor-specific: a volume from one hypervisor type may not be used on a guest of another hypervisor type.



Note

CloudPlatform supports attaching up to 13 data disks to a VM on XenServer hypervisor versions 6.0 and above. For the VMs on other hypervisor types, the data disk limit is 6.

14.4.1. Creating a New Volume

You can add more data disk volumes to a guest VM at any time, up to the limits of your storage capacity. Both CloudPlatform administrators and users can add volumes to VM instances. When you create a new volume, it is stored as an entity in CloudPlatform, but the actual storage resources are not allocated on the physical storage device until you attach the volume. This optimization allows the CloudPlatform to provision the volume nearest to the guest that will use it when the first attachment is made.

14.4.1.1. Using Local Storage for Data Volumes

You can create data volumes on local storage (supported with XenServer, KVM, and VMware). The data volume is placed on the same host as the VM instance that is attached to the data volume. These

local data volumes can be attached to virtual machines, detached, re-attached, and deleted just as with the other types of data volume.

Local storage is ideal for scenarios where persistence of data volumes and HA is not required. Some of the benefits include reduced disk I/O latency and cost reduction from using inexpensive local disks.

In order for local volumes to be used, the feature must be enabled for the zone.

You can create a data disk offering for local storage. When a user creates a new VM, they can select this disk offering in order to cause the data disk volume to be placed in local storage.

You can not migrate a VM that has a volume in local storage to a different host, nor migrate the volume itself away to a different host. If you want to put a host into maintenance mode, you must first stop any VMs with local data volumes on that host.

14.4.1.2. To Create a New Volume

1. Log in to the CloudPlatform UI as a user or admin.
2. In the left navigation bar, click Storage.
3. In Select View, choose Volumes.
4. To create a new volume, click Add Volume, provide the following details, and click OK.
 - Name. Give the volume a unique name so you can find it later.
 - Availability Zone. Where do you want the storage to reside? This should be close to the VM that will use the volume.
 - Disk Offering. Choose the characteristics of the storage.

The new volume appears in the list of volumes with the state "Allocated." The volume data is stored in CloudPlatform, but the volume is not yet ready for use

5. To start using the volume, continue to Attaching a Volume

14.4.2. Uploading an Existing Volume to a Virtual Machine

Existing data can be made accessible to a virtual machine. This is called uploading a volume to the VM. For example, this is useful to upload data from a local file system and attach it to a VM. Root administrators, domain administrators, and end users can all upload existing volumes to VMs.

The upload is performed using HTTP. The uploaded volume is placed in the zone's secondary storage

You cannot upload a volume if the preconfigured volume limit has already been reached. The default limit for the cloud is set in the global configuration parameter `max.account.volumes`, but administrators can also set per-domain limits that are different from the global default. See [Setting Usage Limits](#)

To upload a volume:

1. (Optional) Create an MD5 hash (checksum) of the disk image file that you are going to upload. After uploading the data disk, CloudPlatform will use this value to verify that no data corruption has occurred.
2. Log in to the CloudPlatform UI as an administrator or user
3. In the left navigation bar, click Storage.

- Click Upload Volume.
- Provide the following:
 - Name and Description. Any desired name and a brief description that can be shown in the UI.
 - Availability Zone. Choose the zone where you want to store the volume. VMs running on hosts in this zone can attach the volume.
 - Format. Choose one of the following to indicate the disk image format of the volume.


Hypervisor	Disk Image Format
XenServer	VHD
VMware	OVA
KVM	QCOW2
OVM	RAW

- URL. The secure HTTP or HTTPS URL that CloudPlatform can use to access your disk. The type of file at the URL must match the value chosen in Format. For example, if Format is VHD, the URL might look like the following:

`http://yourFileServerIP/userdata/myDataDisk.vhd`
 - MD5 checksum. (Optional) Use the hash that you created in step 1.
- Wait until the status of the volume shows that the upload is complete. Click Instances - Volumes, find the name you specified in step 5, and make sure the status is Uploaded.

14.4.3. Attaching a Volume

You can attach a volume to a guest VM to provide extra disk storage. Attach a volume when you first create a new volume, when you are moving an existing volume from one VM to another, or after you have migrated a volume from one storage pool to another.

- Log in to the CloudPlatform UI as a user or admin.
- In the left navigation, click Storage.
- In Select View, choose Volumes.
- Click the volume name in the Volumes list, then click the Attach Disk button 
- In the Instance popup, choose the VM to which you want to attach the volume. You will only see instances to which you are allowed to attach volumes; for example, a user will see only instances created by that user, but the administrator will have more choices.

(OVM) If the VM is running in the OVM hypervisor, the VM must be stopped before a new volume can be attached to it.

- When the volume has been attached, you should be able to see it by clicking Instances, the instance name, and View Volumes.

14.4.4. Detaching and Moving Volumes




Note

This procedure is different from moving volumes from one storage pool to another as described in [Section 14.4.5, “VM Storage Migration”](#).

A volume can be detached from a guest VM and attached to another guest. Both CloudPlatform administrators and users can detach volumes from VMs and move them to other VMs.

If the two VMs are in different clusters, and the volume is large, it may take several minutes for the volume to be moved to the new VM.

If the destination VM is running in the OVM hypervisor, the VM must be stopped before a new volume can be attached to it.

1. Log in to the CloudPlatform UI as a user or admin.
2. In the left navigation bar, click Storage, and choose Volumes in Select View. Alternatively, if you know which VM the volume is attached to, you can click Instances, click the VM name, and click View Volumes.
3. Click the name of the volume you want to detach, then click the Detach Disk button. 
4. To move the volume to another VM, follow the steps in [Section 14.4.3, “Attaching a Volume”](#).

14.4.5. VM Storage Migration

Supported in XenServer, KVM, and VMware.



Note

This procedure is different from moving disk volumes from one VM to another as described in [Section 14.4.4, “Detaching and Moving Volumes”](#).

You can migrate a virtual machine’s root disk volume or any additional data disk volume from one storage pool to another in the same zone.

You can use the storage migration feature to achieve some commonly desired administration goals, such as balancing the load on storage pools and increasing the reliability of virtual machines by moving them away from any storage pool that is experiencing issues.

On XenServer and VMware, live migration of VM storage is enabled through CloudPlatform support for XenMotion and vMotion. Live storage migration allows VMs to be moved from one host to another, where the VMs are not located on storage shared between the two hosts. It provides the option to live migrate a VM’s disks along with the VM itself. It is possible to migrate a VM from one XenServer resource pool / VMware cluster to another, or to migrate a VM whose disks are on local storage, or even to migrate a VM’s disks from one storage repository to another, all while the VM is running.



Note

Because of a limitation in VMware, live migration of storage for a VM is allowed only if the source and target storage pool are accessible to the source host; that is, the host where the VM is running when the live migration operation is requested.


14.4.5.1. Migrating a Data Volume to a New Storage Pool

There are two situations when you might want to migrate a disk:


- Move the disk to new storage, but leave it attached to the same running VM.
- Detach the disk from its current VM, move it to new storage, and attach it to a new VM.

14.4.5.1.1. Migrating Storage For a Running VM

(Supported on XenServer and VMware)

1. Log in to the CloudPlatform UI as a user or admin.
2. In the left navigation bar, click Instances, click the VM name, and click View Volumes.
3. Click the volume you want to migrate.
4. Detach the disk from the VM. See [Section 14.4.4, “Detaching and Moving Volumes”](#) but skip the “reattach” step at the end. You will do that after migrating to new storage.
5. Click the Migrate Volume button  and choose the destination from the dropdown list.
6. Watch for the volume status to change to Migrating, then back to Ready.


14.4.5.1.2. Migrating Storage and Attaching to a Different VM

1. Log in to the CloudPlatform UI as a user or admin.
2. Detach the disk from the VM. See [Section 14.4.4, “Detaching and Moving Volumes”](#) but skip the “reattach” step at the end. You will do that after migrating to new storage.
3. Click the Migrate Volume button  and choose the destination from the dropdown list.
4. Watch for the volume status to change to Migrating, then back to Ready. You can find the volume by clicking Storage in the left navigation bar. Make sure that Volumes is displayed at the top of the window, in the Select View dropdown.
5. Attach the volume to any desired VM running in the same cluster as the new storage server. See [Section 14.4.3, “Attaching a Volume”](#)

14.4.5.2. Migrating a VM Root Volume to a New Storage Pool

(XenServer, VMware) You can live migrate a VM's root disk from one storage pool to another, without stopping the VM first.

(KVM) When migrating the root disk volume, the VM must first be stopped, and users can not access the VM. After migration is complete, the VM can be restarted.

1. Log in to the CloudPlatform UI as a user or admin.
2. In the left navigation bar, click Instances, and click the VM name.
3. (KVM only) Stop the VM.
4. Click the Migrate button  and choose the destination from the dropdown list.



Note

If the VM's storage has to be migrated along with the VM, this will be noted in the host list. CloudPlatform will take care of the storage migration for you.

5. Watch for the volume status to change to Migrating, then back to Running (or Stopped, in the case of KVM). This can take some time.
6. (KVM only) Restart the VM.

14.4.6. Resizing Volumes

CloudPlatform provides the ability to resize data disks; CloudPlatform controls volume size by using disk offerings. This provides CloudPlatform administrators with the flexibility to choose how much space they want to make available to the end users. Volumes within the disk offerings with the same storage tag can be resized. For example, if you only want to offer 10, 50, and 100 GB offerings, the allowed resize should stay within those limits. That implies if you define a 10 GB, a 50 GB and a 100 GB disk offerings, a user can upgrade from 10 GB to 50 GB, or 50 GB to 100 GB. If you create a custom-sized disk offering, then you have the option to resize the volume by specifying a new, larger size.

Additionally, using the `resizeVolume` API, a data volume can be moved from a static disk offering to a custom disk offering with the size specified. This functionality allows those who might be billing by certain volume sizes or disk offerings to stick to that model, while providing the flexibility to migrate to whatever custom size necessary.


This feature is supported on KVM, XenServer, and VMware hosts. However, shrinking volumes is not supported on VMware hosts.

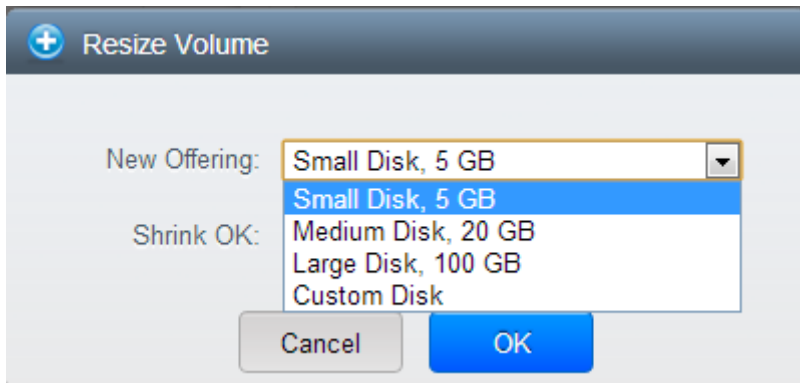
Before you try to resize a volume, consider the following:

- The VMs associated with the volume are stopped.
- The data disks associated with the volume are removed.
- When a volume is shrunk, the disk associated with it is simply truncated, and doing so would put its content at risk of data loss. Therefore, resize any partitions or file systems before you shrink a data disk so that all the data is moved off from that disk.

To resize a volume:

1. Log in to the CloudPlatform UI as a user or admin.
2. In the left navigation bar, click Storage.
3. In Select View, choose Volumes.

4. Select the volume name in the Volumes list, then click the Resize Volume button 
5. In the Resize Volume pop-up, choose desired characteristics for the storage.



- a. If you select Custom Disk, specify a custom size.
- b. Click Shrink OK to confirm that you are reducing the size of a volume.

This parameter protects against inadvertent shrinking of a disk, which might lead to the risk of data loss. You must sign off that you know what you are doing.

6. Click OK.

14.4.7. Reset VM to New Root Disk on Reboot

You can specify that you want to discard the root disk and create a new one whenever a given VM is rebooted. This is useful for secure environments that need a fresh start on every boot and for desktops that should not retain state. The IP address of the VM will not change due to this operation.

To enable root disk reset on VM reboot:

When creating a new service offering, set the parameter `Volatile VM` to `True`. VMs created from this service offering will have their disks reset upon reboot.

14.4.8. Volume Deletion and Garbage Collection

The deletion of a volume does not delete the snapshots that have been created from the volume

When a VM is destroyed, data disk volumes that are attached to the VM are not deleted.

Volumes are permanently destroyed using a garbage collection process. The global configuration variables `expunge.delay` and `expunge.interval` determine when the physical deletion of volumes will occur.

- `expunge.delay`: determines how old the volume must be before it is destroyed, in seconds
- `expunge.interval`: determines how often to run the garbage collection check

Administrators should adjust these values depending on site policies around data retention.

14.5. Working with Snapshots

(Supported for the following hypervisors: **XenServer**, **VMware vSphere**, and **KVM**)

CloudPlatform supports snapshots of disk volumes. Snapshots are a point-in-time capture of virtual machine disks. Memory and CPU states are not captured. If you are using the Oracle VM hypervisor, you can not take snapshots, since OVM does not support them.

Snapshots may be taken for volumes, including both root and data disks (except when the Oracle VM hypervisor is used, which does not support snapshots). The administrator places a limit on the number of stored snapshots per user. Users can create new volumes from the snapshot for recovery of particular files and they can create templates from snapshots to boot from a restored disk.

Users can create snapshots manually or by setting up automatic recurring snapshot policies. Users can also create disk volumes from snapshots, which may be attached to a VM like any other disk volume. Snapshots of both root disks and data disks are supported. However, CloudPlatform does not currently support booting a VM from a recovered root disk. A disk recovered from snapshot of a root disk is treated as a regular data disk; the data on recovered disk can be accessed by attaching the disk to a VM.

A completed snapshot is copied from primary storage to secondary storage, where it is stored until deleted or purged by newer snapshot.

14.5.1. Automatic Snapshot Creation and Retention

(Supported for the following hypervisors: **XenServer**, **VMware vSphere**, and **KVM**)

Users can set up a recurring snapshot policy to automatically create multiple snapshots of a disk at regular intervals. Snapshots can be created on an hourly, daily, weekly, or monthly interval. One snapshot policy can be set up per disk volume. For example, a user can set up a daily snapshot at 02:30.

With each snapshot schedule, users can also specify the number of scheduled snapshots to be retained. Older snapshots that exceed the retention limit are automatically deleted. This user-defined limit must be equal to or lower than the global limit set by the CloudPlatform administrator. See [Section 15.2.1, “Globally Configured Limits”](#). The limit applies only to those snapshots that are taken as part of an automatic recurring snapshot policy. Additional manual snapshots can be created and retained.

14.5.2. Incremental Snapshots and Backup

Snapshots are created on primary storage where a disk resides. After a snapshot is created, it is immediately backed up to secondary storage and removed from primary storage for optimal utilization of space on primary storage.

CloudPlatform does incremental backups for some hypervisors. When incremental backups are supported, every N backup is a full backup.

	VMware vSphere	Citrix XenServer	KVM
Support incremental backup	N	Y	N

14.5.3. Volume Status

When a snapshot operation is triggered by means of a recurring snapshot policy, a snapshot is skipped if a volume has remained inactive since its last snapshot was taken. A volume is considered to be inactive if it is either detached or attached to a VM that is not running. CloudPlatform ensures that at least one snapshot is taken since the volume last became inactive.

When a snapshot is taken manually, a snapshot is always created regardless of whether a volume has been active or not.

14.5.4. Snapshot Restore

There are two paths to restoring snapshots. Users can create a volume from the snapshot. The volume can then be mounted to a VM and files recovered as needed. Alternatively, a template may be created from the snapshot of a root disk. The user can then boot a VM from this template to effect recovery of the root disk.

14.5.5. Snapshot Job Throttling

When a snapshot of a virtual machine is requested, the snapshot job runs on the same host where the VM is running or, in the case of a stopped VM, the host where it ran last. If many snapshots are requested for VMs on a single host, this can lead to problems with too many snapshot jobs overwhelming the resources of the host.

To address this situation, the cloud's root administrator can throttle how many snapshot jobs are executed simultaneously on the hosts in the cloud by using the new global configuration setting `concurrent.snapshots.threshold.perhost`. By using this setting, the administrator can better ensure that snapshot jobs do not time out and hypervisor hosts do not experience performance issues due to hosts being overloaded with too many snapshot requests.

Set `concurrent.snapshots.threshold.perhost` to a value that represents a best guess about how many snapshot jobs the hypervisor hosts can execute at one time, given the current resources of the hosts and the number of VMs running on the hosts. If a given host has more snapshot requests, the additional requests are placed in a waiting queue. No new snapshot jobs will start until the number of currently executing snapshot jobs falls below the configured limit.

The admin can also set `job.expire.minutes` to place a maximum on how long a snapshot request will wait in the queue. If this limit is reached, the snapshot request fails and returns an error message.

14.5.6. VMware Volume Snapshot Performance

When you take a snapshot of a data or root volume on VMware, CloudPlatform uses an efficient storage technique to improve performance.

A snapshot is not immediately exported from vCenter to a mounted NFS share and packaged into an OVA file format. This operation would consume time and resources. Instead, the original file formats (e.g., VMDK) provided by vCenter are retained. An OVA file will only be created as needed, on demand. To generate the OVA, CloudPlatform uses information in a properties file (*.ova.meta) which it stored along with the original snapshot data.



Note

For upgrading customers: This process applies only to newly created snapshots after upgrade to CloudPlatform 4.2. Snapshots that have already been taken and stored in OVA format will continue to exist in that format, and will continue to work as expected.

Working with Usage

The Usage Server is an optional, separately-installed part of CloudPlatform that provides aggregated usage records which you can use to create billing integration for CloudPlatform. The Usage Server works by taking data from the events log and creating summary usage records that you can access using the `listUsageRecords` API call.

The usage records show the amount of resources, such as VM run time or template storage space, consumed by guest instances.

The Usage Server runs at least once per day. It can be configured to run multiple times per day.

15.1. Configuring the Usage Server

To configure the usage server:

1. Be sure the Usage Server has been installed. This requires extra steps beyond just installing the CloudPlatform software. See [Installing the Usage Server \(Optional\)](#) in the [Advanced Installation Guide](#).
2. Log in to the CloudPlatform UI as administrator.
3. Click [Global Settings](#).
4. In [Search](#), type `usage`. Find the configuration parameter that controls the behavior you want to set. See the table below for a description of the available parameters.
5. In [Actions](#), click the [Edit](#) icon.
6. Type the desired value and click the [Save](#) icon.
7. Restart the Management Server (as usual with any global configuration change) and also the Usage Server:

```
# service cloud-management restart
# service cloud-usage restart
```

The following table shows the global configuration settings that control the behavior of the Usage Server.

Parameter Name	Description
<code>enable.usage.server</code>	Whether the Usage Server is active.
<code>usage.aggregation.timezone</code>	Time zone of usage records. Set this if the usage records and daily job execution are in different time zones. For example, with the following settings, the usage job will run at PST 00:15 and generate usage records for the 24 hours from 00:00:00 GMT to 23:59:59 GMT: <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <pre>usage.stats.job.exec.time = 00:15 usage.execution.timezone = PST usage.aggregation.timezone = GMT</pre> </div> <p>Default: GMT</p>
<code>usage.execution.timezone</code>	The time zone of <code>usage.stats.job.exec.time</code> .

Parameter Name	Description
	Default: The time zone of the management server.
usage.sanity.check.interval	The number of days between sanity checks. Set this in order to periodically search for records with erroneous data before issuing customer invoices. For example, this checks for VM usage records created after the VM was destroyed, and similar checks for templates, volumes, and so on. It also checks for usage times longer than the aggregation range. If any issue is found, the alert ALERT_TYPE_USAGE_SANITY_RESULT = 21 is sent.
usage.stats.job.aggregation.range	<p>The time period in minutes between Usage Server processing jobs. For example, if you set it to 1440, the Usage Server will run once per day. If you set it to 600, it will run every ten hours. In general, when a Usage Server job runs, it processes all events generated since usage was last run.</p> <p>There is special handling for the case of 1440 (once per day). In this case the Usage Server does not necessarily process all records since Usage was last run. CloudPlatform assumes that you require processing once per day for the previous, complete day's records. For example, if the current day is October 7, then it is assumed you would like to process records for October 6, from midnight to midnight. CloudPlatform assumes this "midnight to midnight" is relative to the usage.execution.timezone.</p> <p>Default: 1440</p>
usage.stats.job.exec.time	<p>The time when the Usage Server processing will start. It is specified in 24-hour format (HH:MM) in the time zone of the server, which should be GMT. For example, to start the Usage job at 10:30 GMT, enter "10:30".</p> <p>If usage.stats.job.aggregation.range is also set, and its value is not 1440, then its value will be added to usage.stats.job.exec.time to get the time to run the Usage Server job again. This is repeated until 24 hours have elapsed, and the next day's processing begins again at usage.stats.job.exec.time.</p> <p>Default: 00:15.</p>

For example, suppose that your server is in GMT, your user population is predominantly in the East Coast of the United States, and you would like to process usage records every night at 2 AM local (EST) time. Choose these settings:

- `enable.usage.server = true`
- `usage.execution.timezone = America/New_York`
- `usage.stats.job.exec.time = 07:00`. This will run the Usage job at 2:00 AM EST. Note that this will shift by an hour as the East Coast of the U.S. enters and exits Daylight Savings Time.
- `usage.stats.job.aggregation.range = 1440`

With this configuration, the Usage job will run every night at 2 AM EST and will process records for the previous day's midnight-midnight as defined by the EST (America/New_York) time zone.



Note

Because the special value 1440 has been used for `usage.stats.job.aggregation.range`, the Usage Server will ignore the data between midnight and 2 AM. That data will be included in the next day's run.

15.2. Setting Usage Limits

CloudPlatform provides several administrator control points for capping resource usage by users. Some of these limits are global configuration parameters. Others are applied at the ROOT domain and may be overridden on a per-account basis.

Aggregate limits may be set on a per-domain basis. For example, you may limit a domain and all subdomains to the creation of 100 VMs.

There are two types of limits you can set. First, you can set limits based on the resource count, that is, restricting a user or domain on the basis of the number of VMs, volumes, or snapshots used.

In addition, CloudPlatform supports the customization model—need-basis usage, such as large VM or small VM. The resource types are broadly classified as CPU, RAM, Primary Storage, and Secondary Storage. The root administrator can impose resource usage limits by the following resource types for Domains, Projects, and Accounts:

- CPUs
- Memory (RAM)
- Primary Storage (Volumes)
- Secondary Storage (Snapshots, Templates, ISOs)

To control the behaviour of the needs-based usage feature, use the following configuration parameters:

Parameter Name	Description
<code>max.account.cpus</code>	Maximum number of CPU cores that can be used for an account. Default is 40.
<code>max.account.ram (MB)</code>	Maximum RAM that can be used for an account. Default is 40960.

Parameter Name	Description
max.account.primary.storage (GB)	Maximum primary storage space that can be used for an account. Default is 20*10.
max.account.secondary.storage (GB)	Maximum secondary storage space that can be used for an account. Default is 20*20.
max.project.cpus	Maximum number of CPU cores that can be used for an account. Default is 40.
max.project.ram (MB)	Maximum RAM that can be used for an account. Default is 40960.
max.project.primary.storage (GB)	Maximum primary storage space that can be used for an account. Default is 20*10.
max.project.secondary.storage (GB)	Maximum secondary storage space that can be used for an account. Default is 20*20.
max.project.network.rate (Mbps)	Maximum network rate that can be used for an account. Default is 200.

15.2.1. Globally Configured Limits

In a zone, the guest virtual network has a 24 bit CIDR by default. This limits the guest virtual network to 254 running instances. It can be adjusted as needed, but this must be done before any instances are created in the zone. For example, 10.1.1.0/22 would provide for ~1000 addresses.

The following table lists limits set in the Global Configuration:

Parameter Name	Definition
max.account.public.ips	Number of public IP addresses that can be owned by an account
max.account.snapshots	Number of snapshots that can exist for an account
max.account.templates	Number of templates that can exist for an account
max.account.user.vms	Number of virtual machine instances that can exist for an account
max.account.volumes	Number of disk volumes that can exist for an account
max.template.iso.size	Maximum size for a downloaded template or ISO in GB


Parameter Name	Definition
max.volume.size.gb	Maximum size for a volume in GB
network.throttling.rate	The default data transfer rate in megabits per second allowed in network.
snapshot.max.hourly	Maximum recurring hourly snapshots to be retained for a volume. If the limit is reached, early snapshots from the start of the hour are deleted so that newer ones can be saved. This limit does not apply to manual snapshots. If set to 0, recurring hourly snapshots can not be scheduled
snapshot.max.daily	Maximum recurring daily snapshots to be retained for a volume. If the limit is reached, snapshots from the start of the day are deleted so that newer ones can be saved. This limit does not apply to manual snapshots. If set to 0, recurring daily snapshots can not be scheduled
snapshot.max.weekly	Maximum recurring weekly snapshots to be retained for a volume. If the limit is reached, snapshots from the beginning of the week are deleted so that newer ones can be saved. This limit does not apply to manual snapshots. If set to 0, recurring weekly snapshots can not be scheduled
snapshot.max.monthly	Maximum recurring monthly snapshots to be retained for a volume. If the limit is reached, snapshots from the beginning of the month are deleted so that newer ones can be saved. This limit does not apply to manual snapshots. If set to 0, recurring monthly snapshots can not be scheduled.

To modify global configuration parameters, use the global configuration screen in the CloudPlatform UI. See [Setting Global Configuration Parameters](#)

15.2.2. Default Account Resource Limits

You can limit resource use by accounts. The default limits are set by using global configuration parameters, and they affect all accounts within a cloud. The relevant parameters are those beginning with max.account, for example: max.account.snapshots.


To override a default limit for a particular account, set a per-account resource limit.

1. Log in to the CloudPlatform UI.
2. In the left navigation tree, click Accounts.
3. Select the account you want to modify. The current limits are displayed. A value of -1 shows that there is no limit in place.
4. Click the Edit button. 

15.2.3. Per-Domain Limits

CloudPlatform allows the configuration of limits on a domain basis. With a domain limit in place, all users still have their account limits. They are additionally limited, as a group, to not exceed the resource limits set on their domain. Domain limits aggregate the usage of all accounts in the domain as well as all accounts in all subdomains of that domain. Limits set at the root domain level apply to the sum of resource usage by the accounts in all domains and sub-domains below that root domain.

To set a domain limit:

1. Log in to the CloudPlatform UI.
2. In the left navigation tree, click Domains.
3. 3. Select the domain you want to modify. The current domain limits are displayed. A value of -1 shows that there is no limit in place.
4. Click the Edit button 

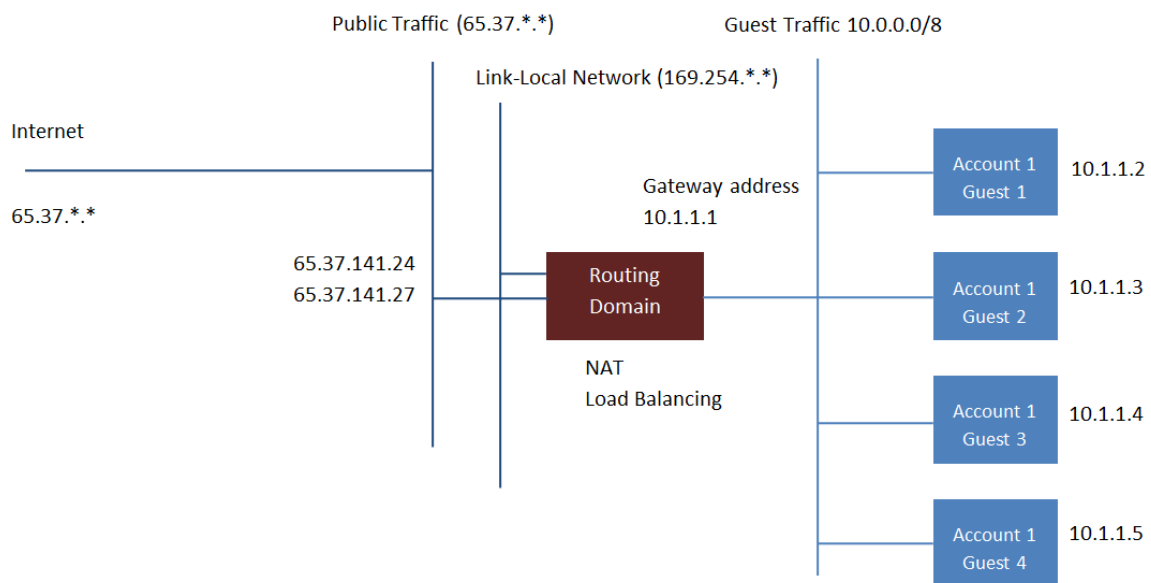
Managing Networks and Traffic

In a CloudPlatform, guest VMs can communicate with each other using shared infrastructure with the security and user perception that the guests have a private LAN. The CloudPlatform virtual router is the main component providing networking features for guest traffic.

16.1. Guest Traffic

A network can carry guest traffic only between VMs within one zone. Virtual machines in different zones cannot communicate with each other using their IP addresses; they must communicate with each other by routing through a public IP address.

See a typical guest traffic setup given below:



Guest Traffic Setup

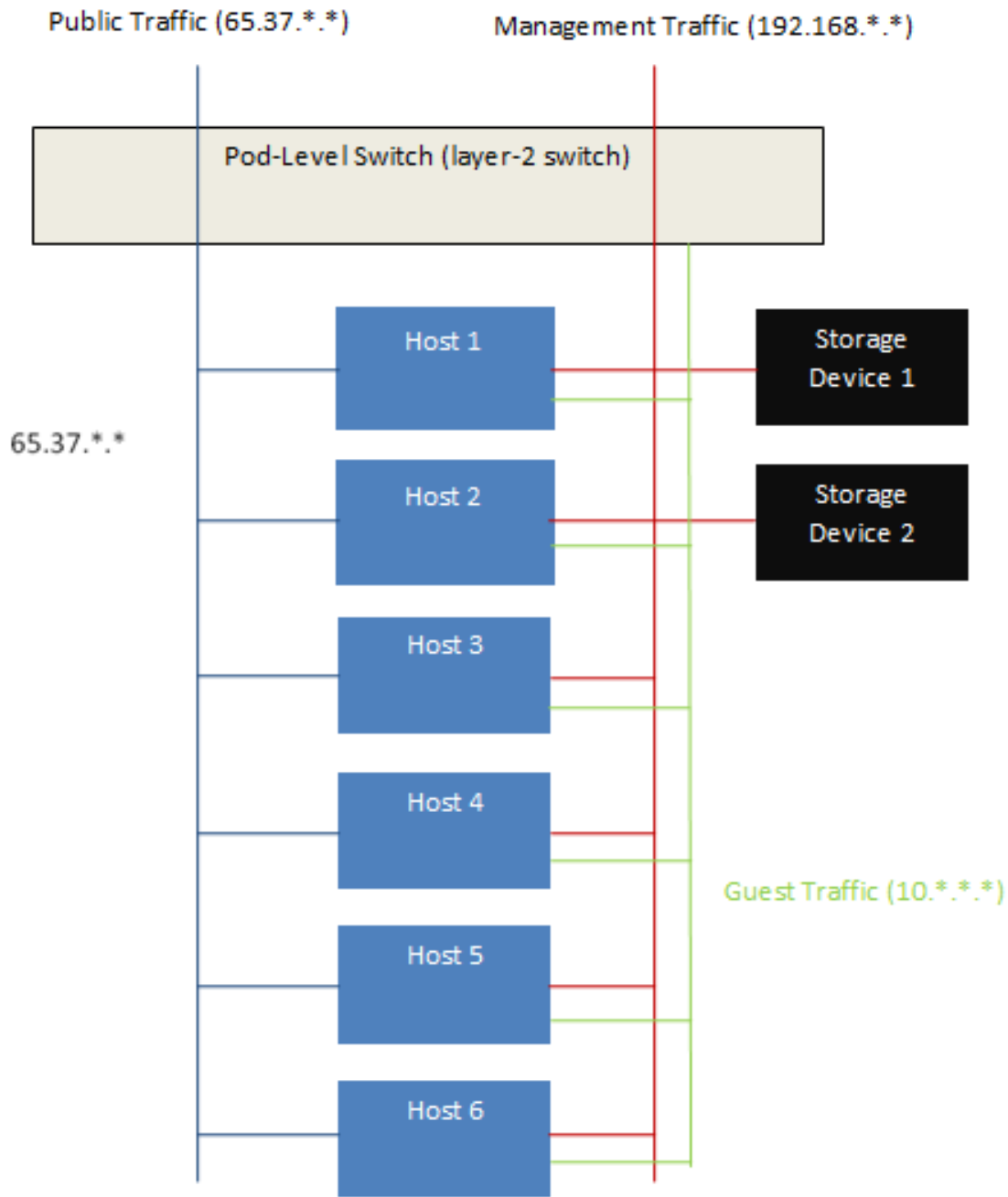
Typically, the Management Server automatically creates a virtual router for each network. A virtual router is a special virtual machine that runs on the hosts. Each virtual router in an isolated network has three network interfaces. If multiple public VLAN is used, the router will have multiple public interfaces. Its eth0 interface serves as the gateway for the guest traffic and has the IP address of 10.1.1.1. Its eth1 interface is used by the system to configure the virtual router. Its eth2 interface is assigned a public IP address for public traffic. If multiple public VLAN is used, the router will have multiple public interfaces.

The virtual router provides DHCP and will automatically assign an IP address for each guest VM within the IP range assigned for the network. The user can manually reconfigure guest VMs to assume different IP addresses.

Source NAT is automatically configured in the virtual router to forward outbound traffic for all guest VMs

16.2. Networking in a Pod

The figure below illustrates network setup within a single pod. The hosts are connected to a pod-level switch. At a minimum, the hosts should have one physical uplink to each switch. Bonded NICs are supported as well. The pod-level switch is a pair of redundant gigabit switches with 10 G uplinks.



Network Setup within a Single Pod – Logical View

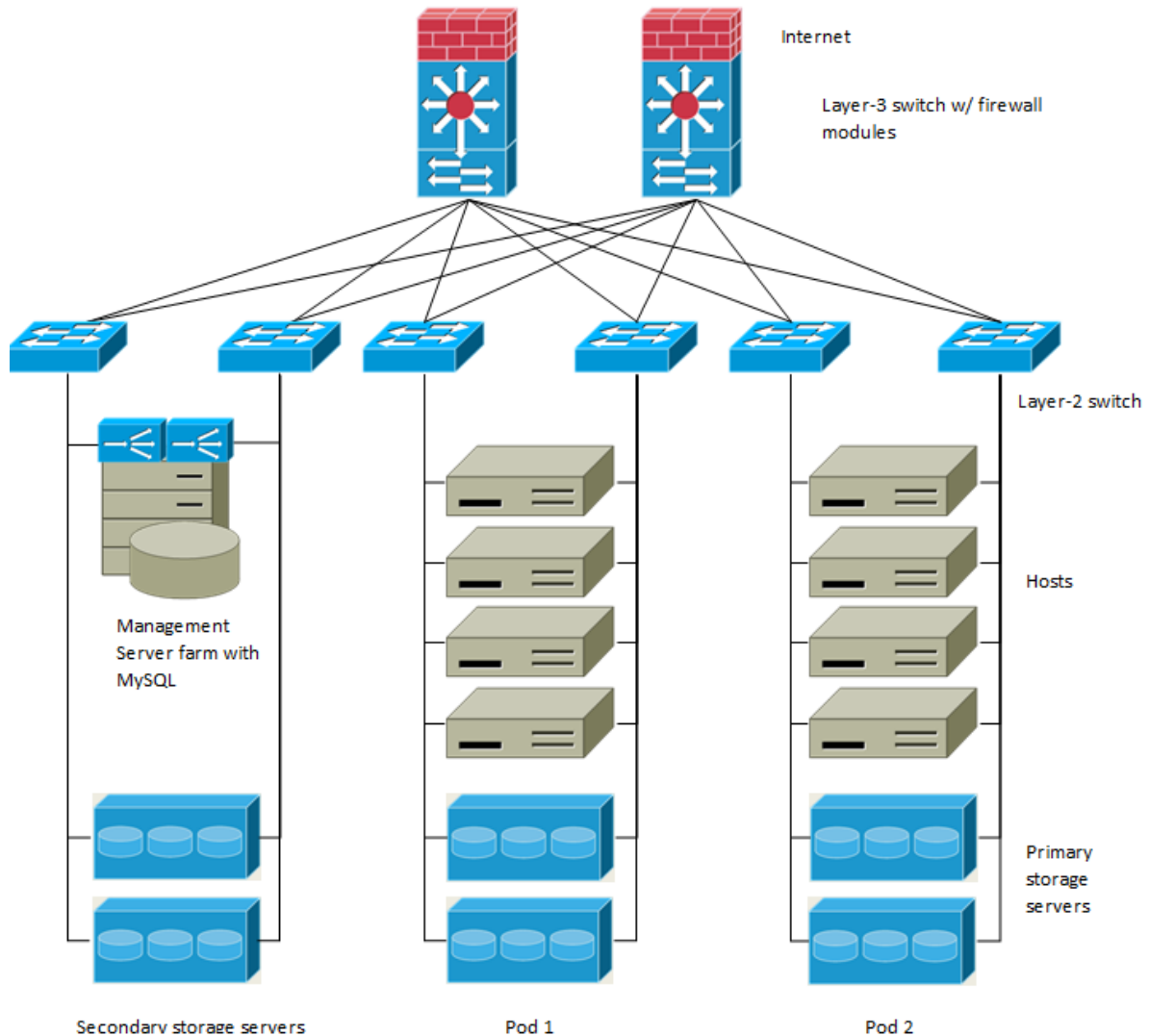
Servers are connected as follows:

- Storage devices are connected to only the network that carries management traffic.
- Hosts are connected to networks for both management traffic and public traffic.
- Hosts are also connected to one or more networks carrying guest traffic.

We recommend the use of multiple physical Ethernet cards to implement each network interface as well as redundant switch fabric in order to maximize throughput and improve reliability.

16.3. Networking in a Zone

The following figure illustrates the network setup within a single zone.



A firewall for management traffic operates in the NAT mode. The network typically is assigned IP addresses in the 192.168.0.0/16 Class B private address space. Each pod is assigned IP addresses in the 192.168.*.0/24 Class C private address space.

Each zone has its own set of public IP addresses. Public IP addresses from different zones do not overlap.

16.4. Basic Zone Physical Network Configuration

In a basic network, configuring the physical network is fairly straightforward. You only need to configure one guest network to carry traffic that is generated by guest VMs. When you first add a zone to CloudPlatform, you set up the guest network through the Add Zone screens.

16.5. Advanced Zone Physical Network Configuration

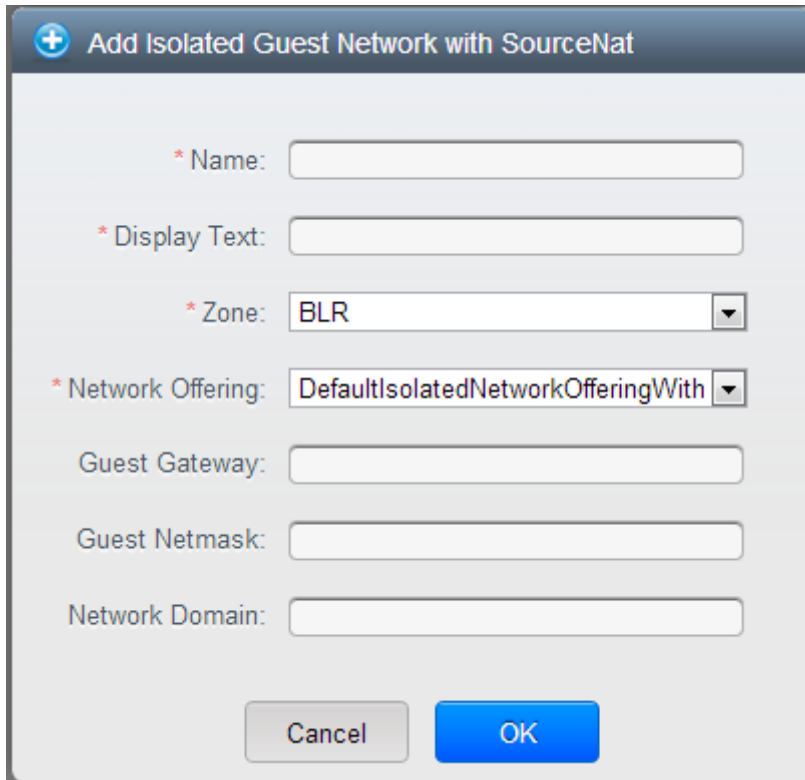
Within a zone that uses advanced networking, you need to tell the Management Server how the physical network is set up to carry different kinds of traffic in isolation.

16.5.1. Configuring Isolated Guest Network

These steps assume you have already logged in to the CloudPlatform UI. To configure the base guest network:

1. In the left navigation, choose Infrastructure. On Zones, click View More, then click the zone to which you want to add a network.
2. Click the Network tab.
3. Click Add Isolated Guest Network.

The Add Isolated Guest Network window is displayed:



The screenshot shows a dialog box titled "Add Isolated Guest Network with SourceNat". It contains the following fields and controls:

- * Name: [Text input field]
- * Display Text: [Text input field]
- * Zone: [Dropdown menu showing "BLR"]
- * Network Offering: [Dropdown menu showing "DefaultIsolatedNetworkOfferingWith"]
- Guest Gateway: [Text input field]
- Guest Netmask: [Text input field]
- Network Domain: [Text input field]
- Buttons: "Cancel" and "OK"

4. Provide the following information:
 - **Name.** The name of the network. This will be user-visible.
 - **Display Text:** The description of the network. This will be displayed to the user.
 - **Zone:** The zone in which you are configuring the guest network.
 - **Network offering:** If the administrator has configured multiple network offerings, select the one you want to use for this network.
 - **Guest Gateway:** The gateway that the guests should use.
 - **Guest Netmask:** The netmask in use on the subnet the guests will use.
 - **Network Domain:** A custom DNS suffix at the level of a network. If you want to assign a special domain name to the guest VM network, specify a DNS suffix.
5. Click OK.

16.5.2. Configure Public Traffic in an Advanced Zone

In a zone that uses advanced networking, you need to configure at least one range of IP addresses for Internet traffic.

16.5.3. Configuring a Shared Guest Network

1. Log in to the CloudPlatform UI as administrator.
2. In the left navigation, choose Infrastructure.
3. On Zones, click View More.
4. Click the zone to which you want to add a guest network.
5. Click the Physical Network tab.
6. Click the physical network you want to work with.
7. On the Guest node of the diagram, click Configure.
8. Click the Network tab.
9. Click Add guest network.

The Add guest network window is displayed.

10. Specify the following:

- **Name:** The name of the network. This will be visible to the user.
- **Description:** The short description of the network that can be displayed to users.
- **VLAN ID:** The unique ID of the VLAN.
- **Isolated VLAN ID:** The unique ID of the Secondary Isolated VLAN.
Applies only to a Private VLAN setup.
- **Scope:** The available scopes are Domain, Account, Project, and All.
 - **Domain:** Selecting Domain limits the scope of this guest network to the domain you specify. The network will not be available for other domains. If you select Subdomain Access, the guest network is available to all the sub domains within the selected domain.
 - **Account:** The account for which the guest network is being created for. You must specify the domain the account belongs to.
 - **Project:** The project for which the guest network is being created for. You must specify the domain the project belongs to.
 - **All:** The guest network is available for all the domains, account, projects within the selected zone.
- **Network Offering:** If the administrator has configured multiple network offerings, select the one you want to use for this network.
- **Gateway:** The gateway that the guests should use.
- **Netmask:** The netmask in use on the subnet the guests will use.
- **IP Range:** A range of IP addresses that are accessible from the Internet and are assigned to the guest VMs.

- **Network Domain:** A custom DNS suffix at the level of a network. If you want to assign a special domain name to the guest VM network, specify a DNS suffix.

11. Click OK to confirm.

16.6. Using Security Groups to Control Traffic to VMs

16.6.1. About Security Groups

Security groups provide a way to isolate traffic to VMs. A security group is a group of VMs that filter their incoming and outgoing traffic according to a set of rules, called ingress and egress rules. These rules filter network traffic according to the IP address that is attempting to communicate with the VM. Security groups are particularly useful in zones that use basic networking, because there is a single guest network for all guest VMs. In advanced zones, security groups are supported only on the KVM hypervisor.



Note

In a zone that uses advanced networking, you can instead define multiple guest networks to isolate traffic to VMs.

Each CloudPlatform account comes with a default security group that denies all inbound traffic and allows all outbound traffic. The default security group can be modified so that all new VMs inherit some other desired set of rules.

Any CloudPlatform user can set up any number of additional security groups. When a new VM is launched, it is assigned to the default security group unless another user-defined security group is specified. A VM can be a member of any number of security groups. Once a VM is assigned to a security group, it remains in that group for its entire lifetime; you can not move a running VM from one security group to another.

You can modify a security group by deleting or adding any number of ingress and egress rules. When you do, the new rules apply to all VMs in the group, whether running or stopped.

If no ingress rules are specified, then no traffic will be allowed in, except for responses to any traffic that has been allowed out through an egress rule.

16.6.2. Security Groups in Advanced Zones (KVM Only)

CloudPlatform provides the ability to use security groups to provide isolation between guests on a single shared, zone-wide network in an advanced zone where KVM is the hypervisor. Using security groups in advanced zones rather than multiple VLANs allows a greater range of options for setting up guest isolation in a cloud.

Limitation

Multiple VLAN ranges in a security group-enabled shared network are not supported.

Security groups must be enabled in the zone in order for this feature to be used.

16.6.3. Enabling Security Groups

In order for security groups to function in a zone, the security groups feature must first be enabled for the zone. The administrator can do this when creating a new zone, by selecting a network offering that includes security groups. The procedure is described in Zone Configuration in the Installation Guide. The administrator can not enable security groups for an existing zone, only when creating a new zone.

16.6.4. Adding a Security Group

A user or administrator can define a new security group.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network
3. In Select view, choose Security Groups.
4. Click Add Security Group.
5. Provide a name and description.
6. Click OK.

The new security group appears in the Security Groups Details tab.

7. To make the security group useful, continue to Adding Ingress and Egress Rules to a Security Group.

16.6.5. Adding Ingress and Egress Rules to a Security Group

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network
3. In Select view, choose Security Groups, then click the security group you want .
4. To add an ingress rule, click the Ingress Rules tab and fill out the following fields to specify what network traffic is allowed into VM instances in this security group. If no ingress rules are specified, then no traffic will be allowed in, except for responses to any traffic that has been allowed out through an egress rule.
 - **Add by CIDR/Account.** Indicate whether the source of the traffic will be defined by IP address (CIDR) or an existing security group in a CloudPlatform account (Account). Choose Account if you want to allow incoming traffic from all VMs in another security group
 - **Protocol.** The networking protocol that sources will use to send traffic to the security group. TCP and UDP are typically used for data exchange and end-user communications. ICMP is typically used to send error messages or network monitoring data.
 - **Start Port, End Port.** (TCP, UDP only) A range of listening ports that are the destination for the incoming traffic. If you are opening a single port, use the same number in both fields.
 - **ICMP Type, ICMP Code.** (ICMP only) The type of message and error code that will be accepted.
 - **CIDR.** (Add by CIDR only) To accept only traffic from IP addresses within a particular address block, enter a CIDR or a comma-separated list of CIDRs. The CIDR is the base IP address of the incoming traffic. For example, 192.168.0.0/22. To allow all CIDRs, set to 0.0.0.0/0.

- **Account, Security Group.** (Add by Account only) To accept only traffic from another security group, enter the CloudPlatform account and name of a security group that has already been defined in that account. To allow traffic between VMs within the security group you are editing now, enter its name (that is, the same name you chose in step 3).

The following example allows inbound HTTP access from anywhere:

Protocol	Start Port	End Port	CIDR	Add
TCP	80	80	0.0.0.0/0	Add

5. To add an egress rule, click the Egress Rules tab and fill out the following fields to specify what type of traffic is allowed to be sent out of VM instances in this security group. If no egress rules are specified, then all traffic will be allowed out. Once egress rules are specified, the following types of traffic are allowed out: traffic specified in egress rules; queries to DNS and DHCP servers; and responses to any traffic that has been allowed in through an ingress rule
 - **Add by CIDR/Account.** Indicate whether the destination of the traffic will be defined by IP address (CIDR) or an existing security group in a CloudPlatform account (Account). Choose Account if you want to allow outgoing traffic to all VMs in another security group.
 - **Protocol.** The networking protocol that VMs will use to send outgoing traffic. TCP and UDP are typically used for data exchange and end-user communications. ICMP is typically used to send error messages or network monitoring data.
 - **Start Port, End Port.** (TCP, UDP only) A range of listening ports that are the destination for the outgoing traffic. If you are opening a single port, use the same number in both fields.
 - **ICMP Type, ICMP Code.** (ICMP only) The type of message and error code that will be sent
 - **CIDR.** (Add by CIDR only) To send traffic only to IP addresses within a particular address block, enter a CIDR or a comma-separated list of CIDRs. The CIDR is the base IP address of the destination. For example, 192.168.0.0/22. To allow all CIDRs, set to 0.0.0.0/0.
 - **Account, Security Group.** (Add by Account only) To allow traffic to be sent to another security group, enter the CloudPlatform account and name of a security group that has already been defined in that account. To allow traffic between VMs within the security group you are editing now, enter its name (that is, the same name you chose in step 3).
6. Click Add.

16.7. External Firewalls and Load Balancers

CloudPlatform is capable of replacing its Virtual Router with an external Juniper SRX or Cisco ASA 1000v Cloud Firewall device and an optional external Citrix NetScaler or BigIP F5 load balancer for gateway and load balancing services. In this case, the VMs use the SRX or ASA as their gateway.

An external Juniper SRX or Cisco ASA can be used for:

- Source NAT
- Static NAT
- Firewall
- Port forwarding

A NetScaler or F5 can be used for:

- Load balancing

For details about installing and setting up these external network service providers, see the CloudPlatform Installation Guide.

16.7.1. About Using a NetScaler Load Balancer

Citrix NetScaler is supported as an external network element for load balancing in zones that use isolated networking in advanced zones. Set up an external load balancer when you want to provide load balancing through means other than CloudPlatform's provided virtual router.



Note

In a Basic zone, load balancing service is only supported if Elastic IP or Elastic LB services are enabled.

When NetScaler load balancer is used to provide EIP or ELB services in a Basic zone, ensure that all guest VM traffic must enter and exit through the NetScaler device. When inbound traffic goes through the NetScaler device, traffic is routed by using the NAT protocol depending on the EIP/ELB configured on the public IP to the private IP. The traffic that is originated from the guest VMs usually goes through the layer 3 router. To ensure that outbound traffic goes through NetScaler device providing EIP/ELB, layer 3 router must have a policy-based routing. A policy-based route must be set up so that all traffic originated from the guest VM's are directed to NetScaler device. This is required to ensure that the outbound traffic from the guest VM's is routed to a public IP by using NAT. For more information on Elastic IP, see [Section 16.18, "About Elastic IP"](#).

The NetScaler can be set up in direct (outside the firewall) mode. It must be added before any load balancing rules are deployed on guest VMs in the zone.

The functional behavior of the NetScaler with CloudPlatform is the same as described in the CloudPlatform documentation for using an F5 external load balancer. The only exception is that the F5 supports routing domains, and NetScaler does not. NetScaler can not yet be used as a firewall.

To install and enable an external load balancer for CloudPlatform management, see External Guest Load Balancer Integration in the Installation Guide.

The Citrix NetScaler comes in three varieties. The following table summarizes how these variants are treated in CloudPlatform.

NetScaler ADC Type	Description of Capabilities	CloudPlatform Supported Features
MPX	Physical appliance. Capable of deep packet inspection. Can	In advanced zones, load balancer functionality fully

NetScaler ADC Type	Description of Capabilities	CloudPlatform Supported Features
	act as application firewall and load balancer	supported without limitation. In basic zones, static NAT, elastic IP (EIP), and elastic load balancing (ELB) are also provided.
VPX	Virtual appliance. Can run as VM on XenServer, ESXi, and Hyper-V hypervisors. Same functionality as MPX	Supported on ESXi and XenServer. Same functional support as for MPX. CloudPlatform will treat VPX and MPX as the same device type.
SDX	Physical appliance. Can create multiple fully isolated VPX instances on a single appliance to support multi-tenant usage	CloudPlatform will dynamically provision, configure, and manage the lifecycle of VPX instances on the SDX. Provisioned instances are added into CloudPlatform automatically – no manual configuration by the administrator is required. Once a VPX instance is added into CloudPlatform, it is treated the same as a VPX on an ESXi host.

16.7.2. Configuring SNMPCommunity String on a RHEL Server

The SNMP Community string is similar to a user id or password that provides access to a network device, such as router. This string is sent along with all SNMP requests. If the community string is correct, the device responds with the requested information. If the community string is incorrect, the device discards the request and does not respond.

The NetScaler device uses SNMP to communicate with the VMs. You must install SNMP and configure SNMP Community string for a secure communication between the NetScaler device and the RHEL machine.

1. Ensure that you installed SNMP on RedHat. If not, run the following command:

```
yum install net-snmp-utils
```

2. Edit the /etc/snmp/snmpd.conf file to allow the SNMP polling from the NetScaler device.
 - a. Map the community name into a security name (local and mynetwork, depending on where the request is coming from):



Note

Use a strong password instead of public when you edit the following table.

```
#      sec.name  source      community
com2sec  local      localhost   public
com2sec  mynetwork  0.0.0.0     public
```



Note

Setting to 0.0.0.0 allows all IPs to poll the NetScaler server.

- b. Map the security names into group names:

```
#      group.name  sec.model  sec.name
group  MyRWGroup     v1         local
group  MyRWGroup     v2c        local
group  MyROGroup     v1         mynetwork
group  MyROGroup     v2c        mynetwork
```

- c. Create a view to allow the groups to have the permission to:

```
incl/excl subtree mask view all included .1
```

- d. Grant access with different write permissions to the two groups to the view you created.

```
# context      sec.model  sec.level  prefix  read  write  notif
access        MyROGroup  " "        any noauth  exact  all    none  none
access        MyRWGroup  " "        any noauth  exact  all    all   all
```

3. Unblock SNMP in iptables.

```
iptables -A INPUT -p udp --dport 161 -j ACCEPT
```

4. Start the SNMP service:

```
service snmpd start
```

5. Ensure that the SNMP service is started automatically during the system startup:

```
chkconfig snmpd on
```

16.7.3. Initial Setup of External Firewalls and Load Balancers

When the first VM is created for a new account, CloudPlatform programs the external firewall and load balancer to work with the VM. The following objects are created on the firewall:

- A new logical interface to connect to the account's private VLAN. The interface IP is always the first IP of the account's private subnet (e.g. 10.1.1.1).
- A source NAT rule that forwards all outgoing traffic from the account's private VLAN to the public Internet, using the account's public IP address as the source address
- A firewall filter counter that measures the number of bytes of outgoing traffic for the account

The following objects are created on the load balancer:

- A new VLAN that matches the account's provisioned Zone VLAN
- A self IP for the VLAN. This is always the second IP of the account's private subnet (e.g. 10.1.1.2).

16.7.4. Ongoing Configuration of External Firewalls and Load Balancers

Additional user actions (e.g. setting a port forward) will cause further programming of the firewall and load balancer. A user may request additional public IP addresses and forward traffic received at these IPs to specific VMs. This is accomplished by enabling static NAT for a public IP address, assigning the IP to a VM, and specifying a set of protocols and port ranges to open. When a static NAT rule is created, CloudPlatform programs the zone's external firewall with the following objects:

- A static NAT rule that maps the public IP address to the private IP address of a VM.
- A security policy that allows traffic within the set of protocols and port ranges that are specified.
- A firewall filter counter that measures the number of bytes of incoming traffic to the public IP.

The number of incoming and outgoing bytes through source NAT, static NAT, and load balancing rules is measured and saved on each external element. This data is collected on a regular basis and stored in the CloudPlatform database.

16.8. Load Balancer Rules

A CloudPlatform user or administrator may create rules that balance traffic received at a public IP address to one or more VMs. A load balancer rule is useful for distributing requests evenly among a pool of services. A service in this context means an application running on a virtual machine. The pool of services consists of multiple VMs running the same application. A user or cloud administrator creates a load balancer rule, specifies an algorithm, and assigns the rule to a set of VMs. Once the rule is in effect, each incoming request might be forwarded to any one of these redundant application instances, depending on the load balancing algorithm that has been specified in the rule.



Note

If you create load balancing rules while using a network service offering that includes an external load balancer device such as NetScaler, and later change the network service offering to one that uses the CloudPlatform virtual router, you must create a firewall rule on the virtual router for each of your existing load balancing rules so that they continue to function.

16.8.1. Adding a Load Balancer Rule

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. Click the name of the network where you want to load balance the traffic.
4. Click View IP Addresses.
5. Click the IP address for which you want to create the rule, then click the Configuration tab.

6. In the Load Balancing node of the diagram, click View All.

In a Basic zone, you can also create a load balancing rule without acquiring or selecting an IP address. CloudPlatform internally assigns an IP when you create the load balancing rule, which is listed in the IP Addresses page when the rule is created. To do that, select the name of the network, then click the Add Load Balancer tab. Continue with [7](#).

7. Fill in the following:

- **Name:** A name for the load balancer rule.
- **Public Port:** The port receiving incoming traffic to be balanced.
- **Private Port:** The port that the VMs will use to receive the traffic.
- **Algorithm:** Choose the load balancing algorithm you want CloudPlatform to use. CloudPlatform supports a variety of well-known algorithms. If you are not familiar with these choices, you will find plenty of information about them on the Internet.
- **Stickiness:** (Optional) Click Configure and choose the algorithm for the stickiness policy. See [Section 16.8.3, “Sticky Session Policies for Load Balancer Rules”](#).
- **AutoScale:** Click Configure and complete the AutoScale configuration as explained in [Section 16.8.2, “Configuring AutoScale”](#).
- **Health Check:** (Optional; NetScaler load balancers only) Click Configure and fill in the characteristics of the health check policy. See [Section 16.8.4, “Health Checks for Load Balancer Rules”](#).
 - **Ping path (Optional):** Sequence of destinations to which to send health check queries. Default: / (all).
 - **Response time (Optional):** How long to wait for a response from the health check (2 - 60 seconds). Default: 5 seconds.
 - **Interval time (Optional):** Amount of time between health checks (1 second - 5 minutes). Default value is set in the global configuration parameter `lbrule_health_check_time_interval`.
 - **Healthy threshold (Optional):** Number of consecutive health check successes that are required before declaring an instance healthy. Default: 2.
 - **Unhealthy threshold (Optional):** Number of consecutive health check failures that are required before declaring an instance unhealthy. Default: 10.

8. Click Add VMs, then select two or more VMs that will divide the load of incoming traffic, and click Apply.

The new load balancer rule appears in the list.

9. You can repeat these steps to add more load balancer rules for this IP address.

16.8.2. Configuring AutoScale

AutoScaling allows you to scale your back-end services or application VMs up or down seamlessly and automatically according to the conditions you define. With AutoScaling enabled, you can ensure that the number of VMs you are using seamlessly scale up when demand increases, and automatically decreases when demand subsides. Thus it helps you save compute costs by terminating underused

VMs automatically and launching new VMs when you need them, without the need for manual intervention.

NetScaler AutoScaling is designed to seamlessly launch or terminate VMs based on user-defined conditions. Conditions for triggering a scaleup or scaledown action can vary from a simple use case like monitoring the CPU usage of a server to a complex use case of monitoring a combination of server's responsiveness and its CPU usage. For example, you can configure AutoScaling to launch an additional VM whenever CPU usage exceeds 80 percent for 15 minutes, or to remove a VM whenever CPU usage is less than 20 percent for 30 minutes.

CloudPlatform uses the NetScaler load balancer to monitor all aspects of a system's health and work in unison with CloudPlatform to initiate scale-up or scale-down actions. The supported NetScaler version is 10.0.

Prerequisites

Before you configure an AutoScale rule, consider the following:

- Ensure that the necessary template is prepared before configuring AutoScale. When a VM is deployed by using a template and when it comes up, the application should be up and running.



Note

If the application is not running, the NetScaler device considers the VM as ineffective and continues provisioning the VMs unconditionally until the resource limit is exhausted.

- Deploy the templates you prepared. Ensure that the applications come up on the first boot and is ready to take the traffic. Observe the time requires to deploy the template. Consider this time when you specify the quiet time while configuring AutoScale.
- The AutoScale feature supports the SNMP counters that can be used to define conditions for taking scale up or scale down actions. To monitor the SNMP-based counter, ensure that the SNMP agent is installed in the template used for creating the AutoScale VMs, and the SNMP operations work with the configured SNMP community and port by using standard SNMP managers. For example, see [Section 16.7.2, “Configuring SNMPCommunity String on a RHEL Server”](#) to configure SNMP on a RHEL machine.
- Ensure that the `endpoint.url` parameter present in the Global Settings is set to the Management Server API URL. For example, `http://10.102.102.22:8080/client/api`. In a multi-node Management Server deployment, use the virtual IP address configured in the load balancer for the management server's cluster. Additionally, ensure that the NetScaler device has access to this IP address to provide AutoScale support.

If you update the `endpoint.url`, disable the AutoScale functionality of the load balancer rules in the system, then enable them back to reflect the changes. For more information see [Updating an AutoScale Configuration](#)

- If the API Key and Secret Key are regenerated for an AutoScale user, ensure that the AutoScale functionality of the load balancers that the user participates in are disabled and then enabled to reflect the configuration changes in the NetScaler.
- In an advanced Zone, ensure that at least one VM should be present before configuring a load balancer rule with AutoScale. Having one VM in the network ensures that the network is in implemented state for configuring AutoScale.

Configuration

Specify the following:

AutoScale Configuration Wizard

Template: RHEL62

Compute offering: Small Instance

* Min Instances: 1 * Max Instances: 4

Scale Up Policy

* Duration(in sec): 60

Counter	Operator	Threshold	Add
Linux User CPU - percentage	greater-than		Add
Response Time - microseconds	greater-than	1000	X

Scale Down Policy

* Duration(in sec): 60

Counter	Operator	Threshold	Add
			Add

Cancel Apply

- **Template:** A template consists of a base OS image and application. A template is used to provision the new instance of an application on a scaleup action. When a VM is deployed from a template, the VM can start taking the traffic from the load balancer without any admin intervention. For example, if the VM is deployed for a Web service, it should have the Web server running, the database connected, and so on.
- **Compute offering:** A predefined set of virtual hardware attributes, including CPU speed, number of CPUs, and RAM size, that the user can select when creating a new virtual machine instance. Choose one of the compute offerings to be used while provisioning a VM instance as part of scaleup action.
- **Min Instance:** The minimum number of active VM instances that is assigned to a load balancing rule. The active VM instances are the application instances that are up and serving the traffic, and are being load balanced. This parameter ensures that a load balancing rule has at least the configured number of active VM instances are available to serve the traffic.



Note

If an application, such as SAP, running on a VM instance is down for some reason, the VM is then not counted as part of Min Instance parameter, and the AutoScale feature initiates a scaleup action if the number of active VM instances is below the configured value. Similarly, when an application instance comes up from its earlier down state, this application instance is counted as part of the active instance count and the AutoScale process initiates a scaledown action when the active instance count breaches the Max instance value.

- **Max Instance:** Maximum number of active VM instances that **should be assigned to** a load balancing rule. This parameter defines the upper limit of active VM instances that can be assigned to a load balancing rule.

Specifying a large value for the maximum instance parameter might result in provisioning large number of VM instances, which in turn leads to a single load balancing rule exhausting the VM instances limit specified at the account or domain level.



Note

If an application, such as SAP, running on a VM instance is down for some reason, the VM is not counted as part of Max Instance parameter. So there may be scenarios where the number of VMs provisioned for a scaleup action might be more than the configured Max Instance value. Once the application instances in the VMs are up from an earlier down state, the AutoScale feature starts aligning to the configured Max Instance value.

Specify the following scale-up and scale-down policies:

- **Duration:** The duration, in seconds, in which the conditions that you specify for a scaleup action to **be true to trigger a scaleup action**. The conditions defined should hold true for the entire duration you specify for an AutoScale action to be invoked.
- **Counter:** The performance counters expose the state of the monitored instances. By default, CloudPlatform offers four performance counters: Three SNMP counters and one NetScaler counter. The SNMP counters are Linux User CPU, Linux System CPU, and Linux CPU Idle. The NetScaler counter is ResponseTime. The root administrator can add additional counters into CloudPlatform by using the CloudStack API.
- **Operator:** The following five relational operators are supported in AutoScale feature: Greater than, Less than, Less than or equal to, Greater than or equal to, and Equal to.
- **Threshold:** Threshold value to be used for the counter. Once the counter defined above breaches the threshold value, the AutoScale feature initiates a scaleup or scaledown action.
- **Add:** Click Add to add the condition.

Additionally, if you want to configure the advanced settings, click Show advanced settings, and specify the following:


- **Polling interval:** Frequency in which the conditions, combination of counter, operator and threshold, are to be evaluated before taking a scale up or down action. The default polling interval is 30 seconds.
- **Quiet Time:** This is the cool down period after an AutoScale action is initiated. The time includes the time taken to complete provisioning a VM instance from its template and the time taken by an application to be ready to serve traffic. This quiet time allows the fleet to come up to a stable state before any action can take place. The default is 300 seconds.
- **Destroy VM Grace Period:** The duration in seconds, after a scaledown action is initiated, to wait before the VM is destroyed as part of scaledown action. This is to ensure graceful close of any pending sessions or transactions being served by the VM marked for destroy. The default is 120 seconds.
- **Security Groups:** (Enabled only for Basic zones.) Security groups provide a way to isolate traffic to the VM instances. A security group is a group of VMs that filter their incoming and outgoing traffic according to a set of rules, called ingress and egress rules. These rules filter network traffic according to the IP address that is attempting to communicate with the VM.
- **Disk Offerings:** A predefined set of disk size for primary data storage.
- **SNMP Community:** The SNMP community string to be used by the NetScaler device to query the configured counter value from the provisioned VM instances. Default is public.
- **SNMP Port:** The port number on which the SNMP agent that run on the provisioned VMs is listening. Default port is 161.
- **User:** This is the user that the NetScaler device use to invoke scaleup and scaledown API calls to the cloud. If no option is specified, the user who configures AutoScaling is applied. Specify another user name to override.
- **Apply:** Click Apply to create the AutoScale configuration.

Disabling and Enabling an AutoScale Configuration

If you want to perform any maintenance operation on the AutoScale VM instances, disable the AutoScale configuration. When the AutoScale configuration is disabled, no scaleup or scaledown action is performed. You can use this downtime for the maintenance activities. To disable the

AutoScale configuration, click the Disable AutoScale  button.

The button toggles between enable and disable, depending on whether AutoScale is currently enabled or not. After the maintenance operations are done, you can enable the AutoScale configuration back.

To enable, open the AutoScale configuration page again, then click the Enable AutoScale  button.

Updating an AutoScale Configuration

You can update the various parameters and add or delete the conditions in a scaleup or scaledown rule. Before you update an AutoScale configuration, ensure that you disable the AutoScale load balancer rule by clicking the Disable AutoScale button.

After you modify the required AutoScale parameters, click Apply. To apply the new AutoScale policies, open the AutoScale configuration page again, then click the Enable AutoScale button.

Runtime Considerations

- An administrator should not assign a VM to a load balancing rule which is configured for AutoScale.
- Before a VM provisioning is completed if NetScaler is shutdown or restarted, the provisioned VM cannot be a part of the load balancing rule though the intent was to assign it to a load balancing rule. To workaround, rename the AutoScale provisioned VMs based on the rule name or ID so at any point of time the VMs can be reconciled to its load balancing rule.
- Making API calls outside the context of AutoScale, such as destroyVM, on an autoscaled VM leaves the load balancing configuration in an inconsistent state. Though VM is destroyed from the load balancer rule, NetScaler continues to show the VM as a service assigned to a rule.

16.8.3. Sticky Session Policies for Load Balancer Rules

Sticky sessions are used in Web-based applications to ensure continued availability of information across the multiple requests in a user's session. For example, if a shopper is filling a cart, you need to remember what has been purchased so far. The concept of "stickiness" is also referred to as persistence or maintaining state.

Any load balancer rule defined in CloudPlatform can have a stickiness policy. The policy consists of a name, stickiness method, and parameters. The parameters are name-value pairs or flags, which are defined by the load balancer vendor. The stickiness method could be load balancer-generated cookie, application-generated cookie, or source-based. In the source-based method, the source IP address is used to identify the user and locate the user's stored data. In the other methods, cookies are used. The cookie generated by the load balancer or application is included in request and response URLs to create persistence. The cookie name can be specified by the administrator or automatically generated. A variety of options are provided to control the exact behavior of cookies, such as how they are generated and whether they are cached.

For the most up to date list of available stickiness methods, see the CloudPlatform UI or call `listNetworks` and check the `SupportedStickinessMethods` capability.

For details on how to set a stickiness policy using the UI, see [Section 16.8.1, "Adding a Load Balancer Rule"](#).

16.8.4. Health Checks for Load Balancer Rules

(NetScaler load balancer only; requires NetScaler version 10.0)

Health checks are used in load-balanced applications to ensure that requests are forwarded only to running, available services. When creating a load balancer rule, you can specify a health check policy. This is in addition to specifying the stickiness policy, algorithm, and other load balancer rule options. You can configure one health check policy per load balancer rule.

Any load balancer rule defined on a NetScaler load balancer in CloudPlatform can have a health check policy. The policy consists of a ping path, thresholds to define "healthy" and "unhealthy" states, health check frequency, and timeout wait interval.

When a health check policy is in effect, the load balancer will stop forwarding requests to any resources that are found to be unhealthy. If the resource later becomes available again, the periodic health check will discover it, and the resource will once again be added to the pool of resources that can receive requests from the load balancer. At any given time, the most recent result of the health check is displayed in the UI. For any VM that is attached to a load balancer rule with a health check configured, the state will be shown as UP or DOWN in the UI depending on the result of the most recent health check.

You can delete or modify existing health check policies.

To configure how often the health check is performed by default, use the global configuration setting `healthcheck.update.interval` (default value is 600 seconds). You can override this value for an individual health check policy.

For details on how to set a health check policy using the UI, see [Section 16.8.1, “Adding a Load Balancer Rule”](#).

16.9. Global Server Load Balancing

CloudPlatform supports Global Server Load Balancing (GSLB) functionalities to provide business continuity by load balancing traffic to an instance on active zones only in case of zone failures. CloudPlatform achieves this by extending its functionality of integrating with NetScaler Application Delivery Controller (ADC), which also provides various GSLB capabilities, such as disaster recovery and load balancing. The DNS redirection technique is used to achieve GSLB in CloudPlatform.

In order to support this functionality, region level services and service provider are introduced. A new service 'GSLB' is introduced as a region level service. The GSLB service provider is introduced that will provide the GSLB service. Currently, NetScaler is the supported GSLB provider in CloudPlatform. GSLB functionality works in an Active-Active data center environment.

16.9.1. About Global Server Load Balancing

Global Server Load Balancing (GSLB) is an extension of load balancing functionality, which is highly efficient in avoiding downtime. Based on the nature of deployment, GSLB represents a set of technologies that is used for various purposes, such as load sharing, disaster recovery, performance, and legal obligations. With GSLB, workloads can be distributed across multiple data centers situated at geographically separated locations. GSLB can also provide an alternate location for accessing a resource in the event of a failure, or to provide a means of shifting traffic easily to simplify maintenance, or both.

16.9.1.1. Components of GSLB

A typical GSLB environment is comprised of the following components:

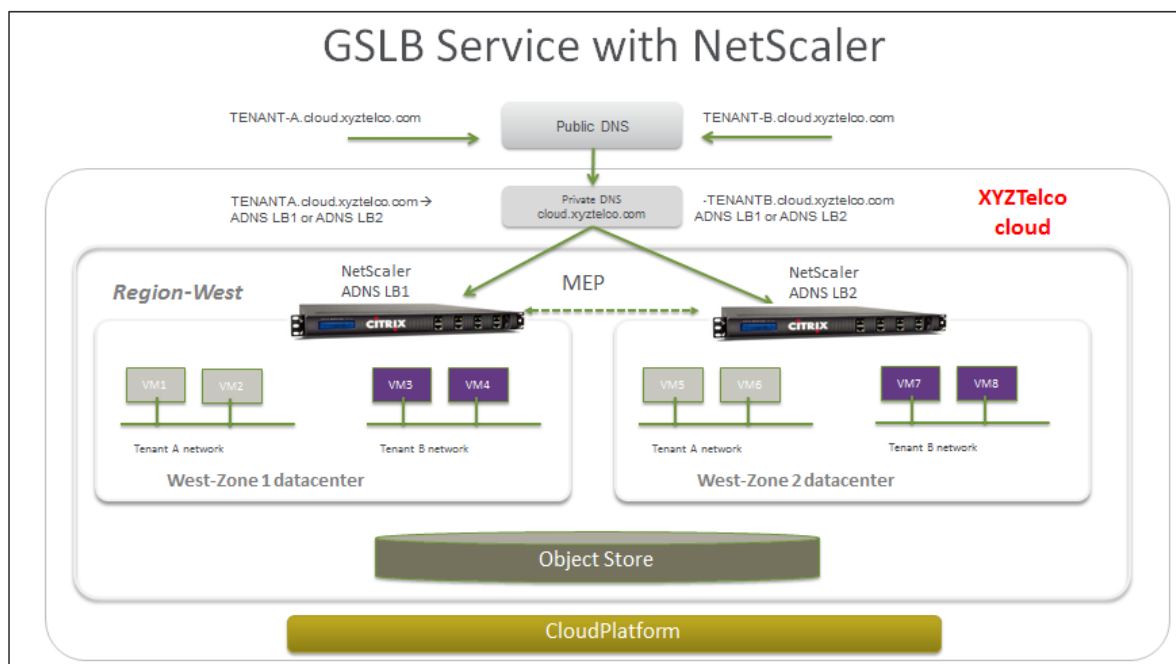
- **GSLB Site:** In CloudPlatform terminology, GSLB sites are represented by zones that are mapped to data centers, each of which has various network appliances. Each GSLB site is managed by a NetScaler appliance that is local to that site. Each of these appliances treats its own site as the local site and all other sites, managed by other appliances, as remote sites. It is the central entity in a GSLB deployment, and is represented by a name and an IP address.
- **GSLB Services:** A GSLB service is typically represented by a load balancing virtual server in a zone. In a GSLB environment, you can have a local as well as remote GSLB services. A local GSLB service represents a local load balancing or content switching virtual server. A remote GSLB service is the one configured at one of the other sites in the GSLB setup. At each site in the GSLB setup, you can create one local GSLB service and any number of remote GSLB services.
- **GSLB Virtual Servers:** A GSLB virtual server refers to a logical grouping of one or more GSLB services. CloudPlatform GSLB functionality ensures that traffic is load balanced across VMs in multiple zones. It evaluates the configured GSLB methods or algorithms to select a GSLB service to which to send the client requests. One or more virtual servers from different zones are bound to the GSLB virtual server. GSLB virtual server does not have a public IP associated with it, instead it will have a FQDN DNS name.

- **Load Balancing or Content Switching Virtual Servers:** According to Citrix NetScaler terminology, a load balancing or content switching virtual server represents one or many servers on the local network. Clients send their requests to the load balancing or content switching virtual server's virtual IP (VIP) address, and the virtual server balances the load across the local servers. After a GSLB virtual server selects a GSLB service representing either a local or a remote load balancing or content switching virtual server, the client sends the request to that virtual server's VIP address.
- **DNS VIPs:** DNS virtual IP represents a load balancing DNS virtual server on the GSLB service provider. The DNS requests for domains for which the GSLB service provider is authoritative can be sent to a DNS VIP.
- **Authoritative DNS:** ADNS (Authoritative Domain Name Server) is a service that provides actual answer to DNS queries, such as web site IP address. In a GSLB environment, an ADNS service responds only to DNS requests for domains for which the GSLB service provider is authoritative. When an ADNS service is configured, the service provider owns that IP address and advertises it. When you create an ADNS service, the NetScaler responds to DNS queries on the configured ADNS service IP and port.

16.9.1.2. How GSLB Works in CloudPlatform

Global server load balancing is used to manage the traffic flow to a web site hosted on two separate zones that ideally are in different geographic locations. The following is an illustration of how GSLB functionality is provided in CloudPlatform: An organization, xyztelco, has set up a public cloud that spans two zones, Zone-1 and Zone-2, across geographically separated data centers that are managed by CloudPlatform. Tenant-A of the cloud launches a highly available solution by using xyztelco cloud. For that purpose, they launch two instances each in both the zones: VM1 and VM2 in Zone-1 and VM5 and VM6 in Zone-2. Tenant-A acquires a public IP, IP-1 in Zone-1, and configures a load balancer rule to load balance the traffic between VM1 and VM2 instances. CloudPlatform orchestrates setting up a virtual server on the LB service provider in Zone-1. Virtual server 1 that is set up on the LB service provider in Zone-1 represents a publicly accessible virtual server that client reaches at IP-1. The client traffic to virtual server 1 at IP-1 will be load balanced across VM1 and VM2 instances.

Tenant-A acquires another public IP, IP-2 in Zone-2 and sets up a load balancer rule to load balance the traffic between VM5 and VM6 instances. Similarly in Zone-2, CloudPlatform orchestrates setting up a virtual server on the LB service provider. Virtual server 2 that is setup on the LB service provider in Zone-2 represents a publicly accessible virtual server that client reaches at IP-2. The client traffic that reaches virtual server 2 at IP-2 is load balanced across VM5 and VM6 instances. At this point Tenant-A has the service enabled in both the zones, but has no means to set up a disaster recovery plan if one of the zone fails. Additionally, there is no way for Tenant-A to load balance the traffic intelligently to one of the zones based on load, proximity and so on. The cloud administrator of xyztelco provisions a GSLB service provider to both the zones. A GSLB provider is typically an ADC that has the ability to act as an ADNS (Authoritative Domain Name Server) and has the mechanism to monitor health of virtual servers both at local and remote sites. The cloud admin enables GSLB as a service to the tenants that use zones 1 and 2.



Tenant-A wishes to leverage the GSLB service provided by the xyztelco cloud. Tenant-A configures a GSLB rule to load balance traffic across virtual server 1 at Zone-1 and virtual server 2 at Zone-2. The domain name is provided as A.xyztelco.com. CloudPlatform orchestrates setting up GSLB virtual server 1 on the GSLB service provider at Zone-1. CloudPlatform binds virtual server 1 of Zone-1 and virtual server 2 of Zone-2 to GLSB virtual server 1. GSLB virtual server 1 is configured to start monitoring the health of virtual server 1 and 2 in Zone-1. CloudPlatform will also orchestrate setting up GSLB virtual server 2 on GSLB service provider at Zone-2. CloudPlatform will bind virtual server 1 of Zone-1 and virtual server 2 of Zone-2 to GLSB virtual server 2. GSLB virtual server 2 is configured to start monitoring the health of virtual server 1 and 2. CloudPlatform will bind the domain A.xyztelco.com to both the GSLB virtual server 1 and 2. At this point, Tenant-A service will be globally reachable at A.xyztelco.com. The private DNS server for the domain xyztelco.com is configured by the admin out-of-band to resolve the domain A.xyztelco.com to the GSLB providers at both the zones, which are configured as ADNS for the domain A.xyztelco.com. A client when sends a DNS request to resolve A.xyztelco.com, will eventually get DNS delegation to the address of GSLB providers at zone 1 and 2. A client DNS request will be received by the GSLB provider. The GSLB provider, depending on the domain for which it needs to resolve, will pick up the GSLB virtual server associated with the domain. Depending on the health of the virtual servers being load balanced, DNS request for the domain will be resolved to the public IP associated with the selected virtual server.

16.9.2. Configuring GSLB

A GSLB deployment is the logical collection of GSLB virtual server, GSLB service, LB virtual server, service, domain, and ADNS service. To create a GSLB site, you must configure load balancing in the zone. You must create GSLB servers and GSLB services for each site. You must bind GSLB services to GSLB servers. You must then create an ADNS service that provides the IP address of the best performing site to the client's request. A GSLB server is an entity that performs load balancing for the domains bound to it by returning the IP address of the best GSLB service. A GSLB service is a representation of the load balancing/content switching server. An LB server load balances incoming traffic by identifying the best server, then directs traffic to the corresponding service. It can also load-balance external DNS name servers. Services are entities that represent the servers. The domain is the domain name for which the system is the authoritative DNS server. By creating an ADNS service, the system can be configured as an authoritative DNS server.

To configure GSLB in your cloud environment, as a cloud administrator you must first configure a standard load balancing setup for each zone. This enables to balance load across different servers in each zone in the region. Then, configure both the NetScaler appliances that you plan to add to each zone as authoritative DNS (ADNS) servers.

Next, as a domain administrator or user, create a GSLB site for each zone, configure GSLB virtual servers for each site, create GLSB services, and bind the GSLB services to the GSLB virtual servers. Finally, bind the domain to the GSLB virtual servers. The GSLB configurations on the two appliances at the two different sites are identical, although each sites load-balancing configuration is specific to that site.

As per the example given above, the administrator of xyztelco is the one who sets up GSLB. Perform steps *1* through *b* as a cloud administrator. As a domain administrator or user when you create a GSLB rule and assign load balancer rules on the CloudPlatform side, CloudPlatform orchestrates what is given in *c* through *g*.

1. In the cloud.dns.name global parameter, specify the DNS name of your tenant's cloud that make use of the GSLB service.
2. On the NetScaler side, configure GSLB as given in [Configuring Global Server Load Balancing \(GSLB\)](#)¹:
 - a. Configure a standard load balancing setup.
 - b. Configure Authoritative DNS, as explained in [Configuring an Authoritative DNS Service](#)².
 - c. Configure a GSLB site with site name formed from the domain name details.

Configure a GSLB site with the site name formed from the domain name.

As per the example given above, the site names are A.xyztelco.com and B.xyztelco.com.

For more information, see [Configuring a Basic GSLB Site](#)³.

- d. Configure a GSLB virtual server.

For more information, see [Configuring a GSLB Virtual Server](#)⁴.

- e. Configure a GSLB service for each virtual server.

For more information, see [Configuring a GSLB Service](#)⁵.

- f. Bind the GSLB services to the GSLB virtual server.

For more information, see [Binding GSLB Services to a GSLB Virtual Server](#)⁶.

- g. Bind domain name to GSLB virtual server. Domain name is obtained from the domain details.

For more information, see [Binding a Domain to a GSLB Virtual Server](#)⁷.

¹ <http://support.citrix.com/proddocs/topic/netScaler-traffic-management-10-map/ns-gslb-config-con.html>

² <http://support.citrix.com/proddocs/topic/netScaler-traffic-management-10-map/ns-gslb-config-adns-svc-tsk.html>

³ <http://support.citrix.com/proddocs/topic/netScaler-traffic-management-10-map/ns-gslb-config-basic-site-tsk.html>

⁴ <http://support.citrix.com/proddocs/topic/netScaler-traffic-management-10-map/ns-gslb-config-vsvr-tsk.html>

⁵ <http://support.citrix.com/proddocs/topic/netScaler-traffic-management-10-map/ns-gslb-config-svc-tsk.html>

⁶ <http://support.citrix.com/proddocs/topic/netScaler-traffic-management-10-map/ns-gslb-bind-svc-vsvr-tsk.html>

⁷ <http://support.citrix.com/proddocs/topic/netScaler-traffic-management-10-map/ns-gslb-bind-dom-vsvr-tsk.html>

3. In each zone that are participating in GSLB, add GSLB-enabled NetScaler device.

For more information, see [Section 16.9.2.2, “Enabling GSLB in NetScaler”](#).

On CloudPlatform side, perform the following as a domain administrator or user:

1. Add a GSLB rule on both the sites.

See [Section 16.9.2.3, “Adding a GSLB Rule”](#).

2. Assign load balancer rules.

See [Section 16.9.2.4, “Assigning Load Balancing Rules to GSLB”](#).

16.9.2.1. Prerequisites and Guidelines

- The GSLB functionality is supported both Basic and Advanced zones.
- GSLB is added as a new network service.
- GSLB service provider can be added to a physical network in a zone.
- When users have VMs deployed in multiple availability zones which are GSLB enabled, they can use the GSLB functionality to load balance traffic across the VMs in multiple zones.
- The users can use GSLB to load balance across the VMs across zones in a region only if the admin has enabled GSLB in that region.
- The users can load balance traffic across the availability zones in the same region or different regions.
- The admin can configure DNS name for the entire cloud.
- The users can specify an unique name across the cloud for a globally load balanced service. The provided name is used as the domain name under the DNS name associated with the cloud.

The user-provided name along with the admin-provided DNS name is used to produce a globally resolvable FQDN for the globally load balanced service of the user. For example, if the admin has configured xyztelco.com as the DNS name for the cloud, and user specifies 'foo' for the GSLB virtual service, then the FQDN name of the GSLB virtual service is foo.xyztelco.com.

- While setting up GSLB, users can select a load balancing method, such as round robin, for using across the zones that are part of GSLB.
- The user shall be able to set weight to zone-level virtual server. Weight shall be considered by the load balancing method for distributing the traffic.
- The GSLB functionality shall support session persistence, where series of client requests for particular domain name is sent to a virtual server on the same zone.

Statistics is collected from each GSLB virtual server.

16.9.2.2. Enabling GSLB in NetScaler

In each zone, add GSLB-enabled NetScaler device for load balancing.

1. Log in as administrator to the CloudPlatform UI.
2. In the left navigation bar, click Infrastructure.

3. In Zones, click View More.
4. Choose the zone you want to work with.
5. Click the Physical Network tab, then click the name of the physical network.
6. In the Network Service Providers node of the diagram, click Configure.

You might have to scroll down to see this.

7. Click NetScaler.
8. Click Add NetScaler device and provide the following:

For NetScaler:

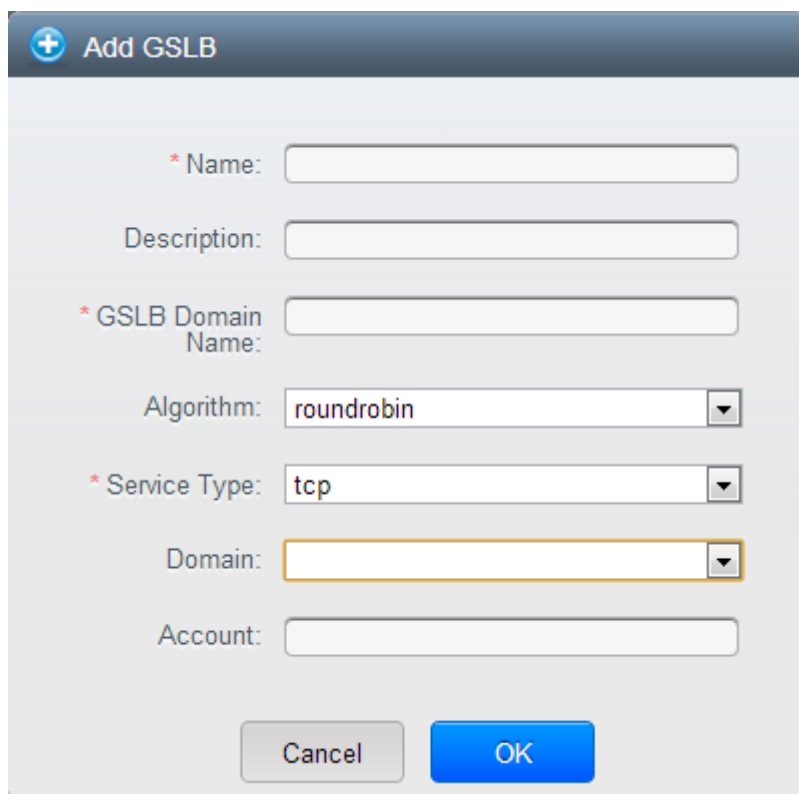
- **IP Address:** The IP address of the NetScaler appliance.
- **Username/Password:** The authentication credentials to access the device. CloudPlatform uses these credentials to access the device.
- **Type:** The type of device that is being added. It could be F5 Big IP Load Balancer, NetScaler VPX, NetScaler MPX, or NetScaler SDX. For a comparison of the NetScaler types, see the CloudPlatform Administration Guide.
- **Public interface:** Interface of device that is configured to be part of the public network.
- **Private interface:** Interface of device that is configured to be part of the private network.
- **GSLB service:** Select this option.
- **GSLB service Public IP:** The public IP address of the NAT translator for a GSLB service that is on a private network.
- **GSLB service Private IP:** The private IP of the GSLB service.
- **Number of Retries.** Number of times to attempt a command on the device before considering the operation failed. Default is 2.
- **Capacity:** The number of networks the device can handle.
- **Dedicated:** When marked as dedicated, this device will be dedicated to a single account. When Dedicated is checked, the value in the Capacity field has no significance implicitly, its value is 1.

9. Click OK.

16.9.2.3. Adding a GSLB Rule

1. Log in to the CloudPlatform UI as a domain administrator or user.
2. In the left navigation pane, click Region.
3. Select the region for which you want to create a GSLB rule.
4. In the Details tab, click View GSLB.
5. Click Add GSLB.

The Add GSLB page is displayed as follows:



The screenshot shows a dialog box titled "Add GSLB" with the following fields and options:

- * Name: [Text input field]
- Description: [Text input field]
- * GSLB Domain Name: [Text input field]
- Algorithm: [Dropdown menu with "roundrobin" selected]
- * Service Type: [Dropdown menu with "tcp" selected]
- Domain: [Dropdown menu]
- Account: [Text input field]

Buttons: Cancel, OK

- Specify the following:
 - **Name:** Name for the GSLB rule.
 - **Description:** (Optional) A short description of the GSLB rule that can be displayed to users.
 - **GSLB Domain Name:** A preferred domain name for the service.
 - **Algorithm:** (Optional) The algorithm to use to load balance the traffic across the zones. The options are Round Robin, Least Connection, and Proximity.
 - **Service Type:** The transport protocol to use for GSLB. The options are TCP and UDP.
 - **Domain:** (Optional) The domain for which you want to create the GSLB rule.
 - **Account:** (Optional) The account on which you want to apply the GSLB rule.
- Click OK to confirm.

16.9.2.4. Assigning Load Balancing Rules to GSLB

- Log in to the CloudPlatform UI as a domain administrator or user.
- In the left navigation pane, click Region.
- Select the region for which you want to create a GSLB rule.
- In the Details tab, click View GSLB.
- Select the desired GSLB.
- Click view assigned load balancing.

7. Click assign more load balancing.
8. Select the load balancing rule you have created for the zone.
9. Click OK to confirm.

16.10. Using Multiple Guest Networks

In zones that use advanced networking, additional networks for guest traffic may be added at any time after the initial installation. You can also customize the domain name associated with the network by specifying a DNS suffix for each network.

A VM's networks are defined at VM creation time. A VM cannot add or remove networks after it has been created, although the user can go into the guest and remove the IP address from the NIC on a particular network.

Each VM has just one default network. The virtual router's DHCP reply will set the guest's default gateway as that for the default network. Multiple non-default networks may be added to a guest in addition to the single, required default network. The administrator can control which networks are available as the default network.

Additional networks can either be available to all accounts or be assigned to a specific account. Networks that are available to all accounts are zone-wide. Any user with access to the zone can create a VM with access to that network. These zone-wide networks provide little or no isolation between guests. Networks that are assigned to a specific account provide strong isolation.

16.10.1. Adding an Additional Guest Network

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. Click Add guest network. Provide the following information:
 - **Name:** The name of the network. This will be user-visible.
 - **Display Text:** The description of the network. This will be user-visible.
 - **Zone.** The name of the zone this network applies to. Each zone is a broadcast domain, and therefore each zone has a different IP range for the guest network. The administrator must configure the IP range for each zone.
 - **Network offering:** If the administrator has configured multiple network offerings, select the one you want to use for this network.
 - **Guest Gateway:** The gateway that the guests should use.
 - **Guest Netmask:** The netmask in use on the subnet the guests will use.
4. Click Create.

16.10.2. Reconfiguring Networks in VMs

CloudPlatform provides you the ability to move VMs between networks and reconfigure a VM's network. You can remove a VM from a network and add to a new network. You can also change the default network of a virtual machine. With this functionality, hybrid or traditional server loads can be accommodated with ease.

This feature is supported on XenServer, VMware, and KVM hypervisors.

16.10.2.1. Prerequisites

For adding or removing networks to work, ensure that vm-tools are running on the guest VMs on VMware host.

16.10.2.2. Adding a Network

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, click Instances.
3. Choose the VM that you want to work with.
4. Click the NICs tab.
5. Click Add network to VM.


The Add network to VM dialog is displayed.

6. In the drop-down list, select the network that you would like to add this VM to.

A new NIC is added for this network. You can view the following details in the NICs page:


- ID
- Network Name
- Type
- IP Address
- Gateway
- Netmask
- Is default

16.10.2.3. Removing a Network

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, click Instances.
3. Choose the VM that you want to work with.
4. Click the NICs tab.
5. Locate the NIC you want to remove.
6. Click Remove NIC button. 
7. Click Yes to confirm.

16.10.2.4. Selecting the Default Network

1. Log in to the CloudPlatform UI as an administrator or end user.

2. In the left navigation, click Instances.
3. Choose the VM that you want to work with.
4. Click the NICs tab.
5. Locate the NIC you want to work with.
6. Click the Set default NIC button. 
7. Click Yes to confirm.

16.11. Guest IP Ranges

The IP ranges for guest network traffic are set on a per-account basis by the user. This allows the users to configure their network in a fashion that will enable VPN linking between their guest network and their clients.

In shared networks in Basic zone and Security Group-enabled Advanced networks, you will have the flexibility to add multiple guest IP ranges from different subnets. You can add or remove one IP range at a time. For more information, see [Section 16.17, “Multiple Subnets in Shared Network”](#).


16.12. Acquiring a New IP Address

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. Click the name of the network where you want to work with.
4. Click View IP Addresses.
5. Click Acquire New IP, and click Yes in the confirmation dialog.

You are prompted for confirmation because, typically, IP addresses are a limited resource. Within a few moments, the new IP address should appear with the state Allocated. You can now use the IP address in port forwarding or static NAT rules.

16.13. Releasing an IP Address

When the last rule for an IP address is removed, you can release that IP address. The IP address still belongs to the VPC; however, it can be picked up for any guest network again.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. Click the name of the network where you want to work with.
4. Click View IP Addresses.
5. Click the IP address you want to release.
6. Click the Release IP button. 

16.14. Reserving Public IP Addresses and VLANs for Accounts

CloudPlatform provides you the ability to reserve a set of public IP addresses and VLANs exclusively for an account. During zone creation, you can continue defining a set of VLANs and multiple public IP ranges. This feature extends the functionality to enable you to dedicate a fixed set of VLANs and guest IP addresses for a tenant.

Note that if an account has consumed all the VLANs and IPs dedicated to it, the account can acquire two more resources from the system. CloudPlatform provides the root admin with two configuration parameter to modify this default behavior—`use.system.public.ips` and `use.system.guest.vlans`. These global parameters enable the root admin to disallow an account from acquiring public IPs and guest VLANs from the system, if the account has dedicated resources and these dedicated resources have all been consumed. Both these configurations are configurable at the account level.

This feature provides you the following capabilities:


- Reserve a VLAN range and public IP address range from an Advanced zone and assign it to an account
- Disassociate a VLAN and public IP address range from an account
- View the number of public IP addresses allocated to an account
- Check whether the required range is available and is conforms to account limits.

The maximum IPs per account limit cannot be superseded.

16.14.1. Dedicating IP Address Ranges to an Account

1. Log in to the CloudPlatform UI as administrator.
2. In the left navigation bar, click Infrastructure.
3. In Zones, click View All.
4. Choose the zone you want to work with.
5. Click the Physical Network tab.
6. In the Public node of the diagram, click Configure.
7. Click the IP Ranges tab.

You can either assign an existing IP range to an account, or create a new IP range and assign to an account.

8. To assign an existing IP range to an account, perform the following:
 - a. Locate the IP range you want to work with.
 - b. Click Add Account  button.

The Add Account dialog is displayed.

- c. Specify the following:

- **Account:** The account to which you want to assign the IP address range.

- **Domain:** The domain associated with the account.

To create a new IP range and assign an account, perform the following:

a. Specify the following:

- **Gateway**
- **Netmask**
- **VLAN**
- **Start IP**
- **End IP**
- **Account:** Perform the following:

i. Click Account.

The Add Account page is displayed.

ii. Specify the following:

- **Account:** The account to which you want to assign an IP address range.
- **Domain:** The domain associated with the account.

iii. Click OK.

b. Click Add.

16.14.2. Dedicating VLAN Ranges to an Account

1. After the CloudPlatform Management Server is installed, log in to the CloudPlatform UI as administrator.
2. In the left navigation bar, click Infrastructure.
3. In Zones, click View All.
4. Choose the zone you want to work with.
5. Click the Physical Network tab.
6. In the Guest node of the diagram, click Configure.
7. Select the Dedicated VLAN Ranges tab.
8. Click Dedicate VLAN Range.

The Dedicate VLAN Range dialog is displayed.

9. Specify the following:

- **VLAN Range:** The VLAN range that you want to assign to an account.
- **Account:** The account to which you want to assign the selected VLAN range.

- **Domain:** The domain associated with the account.

16.15. IP Reservation in Isolated Guest Networks

In isolated guest networks, a part of the guest IP address space can be reserved for non-CloudPlatform VMs or physical servers. To do so, you configure a range of Reserved IP addresses by specifying the CIDR when a guest network is in Implemented state. If your customers wish to have non-CloudPlatform controlled VMs or physical servers on the same network, they can share a part of the IP address space that is primarily provided to the guest network.

In an Advanced zone, an IP address range or a CIDR is assigned to a network when the network is defined. The CloudPlatform virtual router acts as the DHCP server and uses CIDR for assigning IP addresses to the guest VMs. If you decide to reserve CIDR for non-CloudPlatform purposes, you can specify a part of the IP address range or the CIDR that should only be allocated by the DHCP service of the virtual router to the guest VMs created in CloudPlatform. The remaining IPs in that network are called Reserved IP Range. When IP reservation is configured, the administrator can add additional VMs or physical servers that are not part of CloudPlatform to the same network and assign them the Reserved IP addresses. CloudPlatform guest VMs cannot acquire IPs from the Reserved IP Range.

16.15.1. IP Reservation Considerations

Consider the following before you reserve an IP range for non-CloudPlatform machines:

- IP Reservation is supported only in Isolated networks.
- IP Reservation can be applied only when the network is in Implemented state.
- No IP Reservation is done by default.
- Guest VM CIDR you specify must be a subset of the network CIDR.
- Specify a valid Guest VM CIDR. IP Reservation is applied only if no active IPs exist outside the Guest VM CIDR.

You cannot apply IP Reservation if any VM is allotted with an IP address that is outside the Guest VM CIDR.

- To reset an existing IP Reservation, apply IP reservation by specifying the value of network CIDR in the CIDR field.

For example, the following table describes three scenarios of guest network creation:

Case	CIDR	Network CIDR	Reserved IP Range for Non-CloudPlatform VMs	Description
1	10.1.1.0/24	None	None	No IP Reservation.
2	10.1.1.0/26	10.1.1.0/24	10.1.1.64 to 10.1.1.254	IP Reservation configured by the UpdateNetwork API with <code>guestvmcidr=10.1.1.0/26</code> or enter 10.1.1.0/26 in the

Case	CIDR	Network CIDR	Reserved IP Range for Non-CloudPlatform VMs	Description
				CIDR field in the UI.
3	10.1.1.0/24	None	None	Removing IP Reservation by the UpdateNetwork API with <code>guestvmcidr=10.1.1.0/24</code> or enter 10.1.1.0/24 in the CIDR field in the UI.

16.15.2. Limitations


- The IP Reservation is not supported if active IPs that are found outside the Guest VM CIDR.
- Upgrading network offering which causes a change in CIDR (such as upgrading an offering with no external devices to one with external devices) IP Reservation becomes void if any. Reconfigure IP Reservation in the new re-implemented network.

16.15.3. Best Practices

Apply IP Reservation to the guest network as soon as the network state changes to Implemented. If you apply reservation soon after the first guest VM is deployed, lesser conflicts occurs while applying reservation.

16.15.4. Reserving an IP Range

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. Click the name of the network you want to modify.

4. In the Details tab, click Edit. 

The CIDR field changes to editable one.

5. In CIDR, specify the Guest VM CIDR.
6. Click Apply.

Wait for the update to complete. The Network CIDR and the Reserved IP Range are displayed on the Details page.

16.16. Configuring Multiple IP Addresses on a Single NIC

CloudPlatform provides you the ability to associate multiple private IP addresses per guest VM NIC. In addition to the primary IP, you can assign additional IPs to the guest VM NIC. This feature is

supported on all the network configurations—Basic, Advanced, and VPC. Security Groups, Static NAT and Port forwarding services are supported on these additional IPs.

As always, you can specify an IP from the guest subnet; if not specified, an IP is automatically picked up from the guest VM subnet. You can view the IPs associated with for each guest VM NICs on the UI. You can apply NAT on these additional guest IPs by using network configuration option in the CloudPlatform UI. You must specify the NIC to which the IP should be associated.

This feature is supported on XenServer, KVM, and VMware hypervisors. Note that Basic zone security groups are not supported on VMware.

16.16.1. Use Cases

Some of the use cases are described below:

- Network devices, such as firewalls and load balancers, generally work best when they have access to multiple IP addresses on the network interface.
- Moving private IP addresses between interfaces or instances. Applications that are bound to specific IP addresses can be moved between instances.
- Hosting multiple SSL Websites on a single instance. You can install multiple SSL certificates on a single instance, each associated with a distinct IP address.

16.16.2. Guidelines

To prevent IP conflict, configure different subnets when multiple networks are connected to the same VM.

16.16.3. Assigning Additional IPs to a VM

1. Log in to the CloudPlatform UI.
2. In the left navigation bar, click Instances.
3. Click the name of the instance you want to work with.
4. In the Details tab, click NICs.
5. Click View Secondary IPs.
6. Click Acquire New Secondary IP, and click Yes in the confirmation dialog.

You need to configure the IP on the guest VM NIC manually. CloudPlatform will not automatically configure the acquired IP address on the VM. Ensure that the IP address configuration persist on VM reboot.

Within a few moments, the new IP address should appear with the state Allocated. You can now use the IP address in Port Forwarding or StaticNAT rules.

16.16.4. Port Forwarding and StaticNAT Services Changes

Because multiple IPs can be associated per NIC, you are allowed to select a desired IP for the Port Forwarding and StaticNAT services. The default is the primary IP. To enable this functionality, an extra optional parameter 'vmguestip' is added to the Port forwarding and StaticNAT APIs (enableStaticNat, createIpForwardingRule) to indicate on what IP address NAT need to be configured. If vmguestip is

passed, NAT is configured on the specified private IP of the VM. If not passed, NAT is configured on the primary IP of the VM.

16.17. Multiple Subnets in Shared Network

CloudPlatform provides you with the flexibility to add guest IP ranges from different subnets in Basic zones and security groups-enabled Advanced zones. For security groups-enabled Advanced zones, it implies multiple subnets can be added to the same VLAN. With the addition of this feature, you will be able to add IP address ranges from the same subnet or from a different one when IP addresses are exhausted. This would in turn allow you to employ a higher number of subnets and thus reduce the address management overhead. You can delete the IP ranges you have added.

16.17.1. Prerequisites and Guidelines

- This feature can only be implemented:
 - on IPv4 addresses
 - if virtual router is the DHCP provider
 - on KVM, xenServer, and VMware hypervisors
- Manually configure the gateway of the new subnet before adding the IP range.
- CloudPlatform supports only one gateway for a subnet; overlapping subnets are not currently supported

16.17.2. Adding Multiple Subnets to a Shared Network

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Infrastructure.
3. On Zones, click View More, then click the zone to which you want to work with..
4. Click Physical Network.
5. In the Guest node of the diagram, click Configure.
6. Click Networks.
7. Select the networks you want to work with.
8. Click View IP Ranges.
9. Click Add IP Range.

The Add IP Range dialog is displayed, as follows:

The screenshot shows a dialog box titled "Add IP Range" with the following fields and values:

- Gateway: 10.1.0.1
- Netmask: 255.255.255.0
- IPv4 Start IP: 10.1.0.2
- IPv4 End IP: 10.1.0.4
- IPv6 Start IP: (empty)
- IPv6 End IP: (empty)

Buttons: Cancel, OK

10. Specify the following:

All the fields are mandatory.

- **Gateway:** The gateway for the tier you create. Ensure that the gateway is within the Super CIDR range that you specified while creating the VPC, and is not overlapped with the CIDR of any existing tier within the VPC.
- **Netmask:** The netmask for the tier you create.

For example, if the VPC CIDR is 10.0.0.0/16 and the network tier CIDR is 10.0.1.0/24, the gateway of the tier is 10.0.1.1, and the netmask of the tier is 255.255.255.0.

- **Start IP/ End IP:** A range of IP addresses that are accessible from the Internet and will be allocated to guest VMs. Enter the first and last IP addresses that define a range that CloudPlatform can assign to guest VMs .

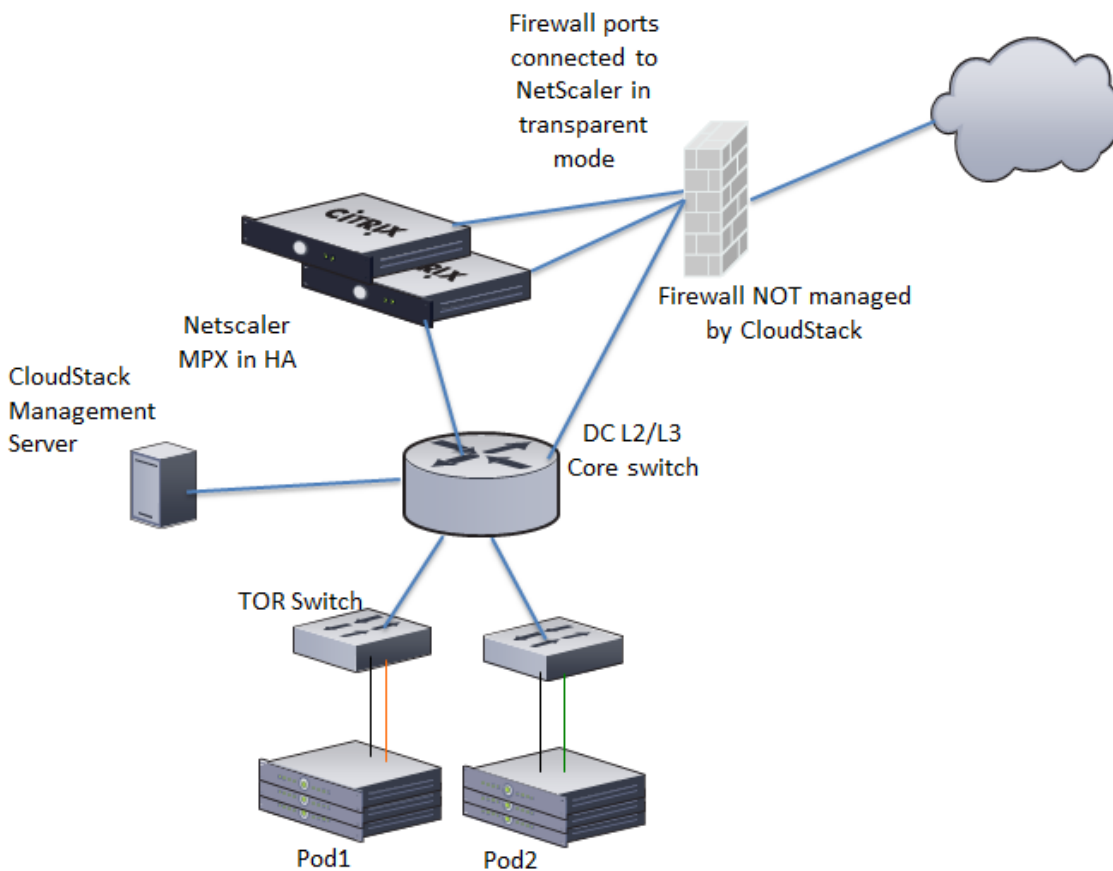
11. Click OK.

16.18. About Elastic IP

Elastic IP (EIP) addresses are the IP addresses that are associated with an account, and act as static IP addresses. The account owner has the complete control over the Elastic IP addresses that belong to the account. As an account owner, you can allocate an Elastic IP to a VM of your choice from the EIP pool of your account. Later if required you can reassign the IP address to a different VM. This feature is extremely helpful during VM failure. Instead of replacing the VM which is down, the IP address can be reassigned to a new VM in your account.

Similar to the public IP address, Elastic IP addresses are mapped to their associated private IP addresses by using StaticNAT. The EIP service is equipped with StaticNAT (1:1) service in an EIP-enabled basic zone. The default network offering, DefaultSharedNetscalerEIPandELBNetworkOffering, provides your network with EIP and ELB network

services if a NetScaler device is deployed in your zone. Consider the following illustration for more details.



In the illustration, a NetScaler appliance is the default entry or exit point for the CloudPlatform instances, and firewall is the default entry or exit point for the rest of the data center. Netscaler provides LB services and staticNAT service to the guest networks. The guest traffic in the pods and the Management Server are on different subnets / VLANs. The policy-based routing in the data center core switch sends the public traffic through the NetScaler, whereas the rest of the data center goes through the firewall.

The EIP work flow is as follows:

- When a user VM is deployed, a public IP is automatically acquired from the pool of public IPs configured in the zone. This IP is owned by the VM's account.
- Each VM will have its own private IP. When the user VM starts, Static NAT is provisioned on the NetScaler device by using the Inbound Network Address Translation (INAT) and Reverse NAT (RNAT) rules between the public IP and the private IP.

**Note**

Inbound NAT (INAT) is a type of NAT supported by NetScaler, in which the destination IP address is replaced in the packets from the public network, such as the Internet, with the private IP address of a VM in the private network. Reverse NAT (RNAT) is a type of NAT supported by NetScaler, in which the source IP address is replaced in the packets generated by a VM in the private network with the public IP address.

- This default public IP will be released in two cases:
 - When the VM is stopped. When the VM starts, it again receives a new public IP, not necessarily the same one allocated initially, from the pool of Public IPs.
 - The user acquires a public IP (Elastic IP). This public IP is associated with the account, but will not be mapped to any private IP. However, the user can enable Static NAT to associate this IP to the private IP of a VM in the account. The Static NAT rule for the public IP can be disabled at any time. When Static NAT is disabled, a new public IP is allocated from the pool, which is not necessarily be the same one allocated initially.

For the deployments where public IPs are limited resources, you have the flexibility to choose not to allocate a public IP by default. You can use the Associate Public IP option to turn on or off the automatic public IP assignment in the EIP-enabled Basic zones. If you turn off the automatic public IP assignment while creating a network offering, only a private IP is assigned to a VM when the VM is deployed with that network offering. Later, the user can acquire an IP for the VM and enable static NAT.

For more information on the Associate Public IP option, see [Section 10.5.1, “Creating a New Network Offering”](#).

**Note**

The Associate Public IP feature is designed only for use with user VMs. The System VMs continue to get both public IP and private by default, irrespective of the network offering configuration.

New deployments which use the default shared network offering with EIP and ELB services to create a shared network in the Basic zone will continue allocating public IPs to each user VM.

16.19. Portable IPs

16.19.1. About Portable IP

Portable IPs in CloudPlatform are region-level pool of IPs, which are elastic in nature, that can be transferred across geographically separated zones. As an administrator, you can provision a pool of portable public IPs at region level and are available for user consumption. The users can acquire portable IPs if admin has provisioned portable IPs at the region level they are part of. These IPs can be use for any service within an advanced zone. You can also use portable IPs for EIP services in basic zones.

The salient features of Portable IP are as follows:

- IP is statically allocated
- IP need not be associated with a network
- IP association is transferable across networks
- IP is transferable across both Basic and Advanced zones
- IP is transferable across VPC, non-VPC isolated and shared networks
- Portable IP transfer is available only for static NAT.

Guidelines

Before transferring to another network, ensure that no network rules (Firewall, Static NAT, Port Forwarding, and so on) exist on that portable IP.

16.19.2. Configuring Portable IPs

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, click Regions.
3. Choose the Regions that you want to work with.
4. Click View Portable IP.
5. Click Portable IP Range.

The Add Portable IP Range window is displayed.

6. Specify the following:
 - **Start IP/ End IP:** A range of IP addresses that are accessible from the Internet and will be allocated to guest VMs. Enter the first and last IP addresses that define a range that CloudPlatform can assign to guest VMs.
 - **Gateway:** The gateway in use for the Portable IP addresses you are configuring.
 - **Netmask:** The netmask associated with the Portable IP range.
 - **VLAN:** The VLAN that will be used for public traffic.
7. Click OK.

16.19.3. Acquiring a Portable IP

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. Click the name of the network where you want to work with.
4. Click View IP Addresses.
5. Click Acquire New IP.

The Acquire New IP window is displayed.

6. Specify whether you want cross-zone IP or not.
7. Click Yes in the confirmation dialog.

Within a few moments, the new IP address should appear with the state Allocated. You can now use the IP address in port forwarding or static NAT rules.

16.19.4. Transferring Portable IP

Portable IP is transferred from one network to another only if Static NAT is enabled. However, when a portable IP is associated with a network, you can use it for any service in the network.

To transfer a portable IP across the networks:

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. Click the name of the network where you want to work with.
4. Click View IP Addresses.
5. Click the Portable IP you want to work with.

If none, acquire one, as explained in [Section 16.19.3, “Acquiring a Portable IP”](#).

6. Click Enable Static NAT

The Select VM for Static NAT page is displayed.

7. Select the desired VM.
8. Specify which IP to be replaced with for the Static NAT service.

The VM can belong to any network owned by you.

9. Click Apply.

16.20. Static NAT

A static NAT rule maps a public IP address to the private IP address of a VM in order to allow Internet traffic into the VM. The public IP address always remains the same, which is why it is called “static” NAT. This section tells how to enable or disable static NAT for a particular IP address.


16.20.1. Enabling or Disabling Static NAT

If port forwarding rules are already in effect for an IP address, you cannot enable static NAT to that IP.

If a guest VM is part of more than one network, static NAT rules will function only if they are defined on the default network.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. Click the name of the network where you want to work with.
4. Click View IP Addresses.

5. Click the IP address you want to work with.

6. Click the Static NAT  button.

The button toggles between Enable and Disable, depending on whether static NAT is currently enabled for the IP address.

7. If you are enabling static NAT, a dialog appears where you can choose the destination VM and click Apply.

16.21. IP Forwarding and Firewalling

By default, all incoming traffic to the public IP address is rejected. All outgoing traffic from the guests is also blocked by default.

To allow outgoing traffic, follow the procedure in [Section 16.21.1, “Egress Firewall Rules in an Advanced Zone”](#).

To allow incoming traffic, users may set up firewall rules and/or port forwarding rules. For example, you can use a firewall rule to open a range of ports on the public IP address, such as 33 through 44. Then use port forwarding rules to direct traffic from individual ports within that range to specific ports on user VMs. For example, one port forwarding rule could route incoming traffic on the public IP's port 33 to port 100 on one user VM's private IP. For more information, see [Section 16.21.2, “Firewall Rules”](#) and [Section 16.21.3, “Port Forwarding”](#).

16.21.1. Egress Firewall Rules in an Advanced Zone

The egress traffic originates from a private network to a public network, such as the Internet. By default, the egress traffic is blocked in default network offerings, so no outgoing traffic is allowed from a guest network to the Internet. However, you can control the egress traffic in an Advanced zone by creating egress firewall rules. When an egress firewall rule is applied, the traffic specific to the rule is allowed and the remaining traffic is blocked. When all the firewall rules are removed the default policy, Block, is applied.

16.21.1.1. Prerequisites and Guidelines

Consider the following scenarios to apply egress firewall rules:

- Egress firewall rules are supported on Juniper SRX and virtual router.
- The egress firewall rules are not supported on shared networks.
- Allow the egress traffic from specified source CIDR. The Source CIDR is part of guest network CIDR.
- Allow the egress traffic with protocol TCP,UDP,ICMP, or ALL.
- Allow the egress traffic with protocol and destination port range. The port range is specified for TCP, UDP or for ICMP type and code.
- The default policy is Allow for the new network offerings, whereas on upgrade existing network offerings with firewall service providers will have the default egress policy Deny.

16.21.1.2. Configuring an Egress Firewall Rule

1. Log in to the CloudPlatform UI as an administrator or end user.

- In the left navigation, choose Network.
- In Select view, choose Guest networks, then click the Guest network you want.
- To add an egress rule, click the Egress rules tab and fill out the following fields to specify what type of traffic is allowed to be sent out of VM instances in this guest network:

CIDR	Protocol	Start Port	End Port	Add
<input type="text"/>	TCP	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>
10.1.1.0/24	TCP	22	22	<input type="button" value="X"/>

- **CIDR:** (Add by CIDR only) To send traffic only to the IP addresses within a particular address block, enter a CIDR or a comma-separated list of CIDRs. The CIDR is the base IP address of the destination. For example, 192.168.0.0/22. To allow all CIDRs, set to 0.0.0.0/0.
 - **Protocol:** The networking protocol that VMs uses to send outgoing traffic. The TCP and UDP protocols are typically used for data exchange and end-user communications. The ICMP protocol is typically used to send error messages or network monitoring data.
 - **Start Port, End Port:** (TCP, UDP only) A range of listening ports that are the destination for the outgoing traffic. If you are opening a single port, use the same number in both fields.
 - **ICMP Type, ICMP Code:** (ICMP only) The type of message and error code that are sent.
- Click Add.

16.21.1.3. Configuring the Default Egress Policy

The default egress policy for Isolated guest network is configured by using Network offering. Use the create network offering option to determine whether the default policy should be block or allow all the traffic to the public network from a guest network. Use this network offering to create the network. If no policy is specified, by default all the traffic is allowed from the guest network that you create by using this network offering.

You have two options: Allow and Deny.

Allow

If you select Allow for a network offering, by default egress traffic is allowed. However, when an egress rule is configured for a guest network, rules are applied to block the specified traffic and rest are allowed. If no egress rules are configured for the network, egress traffic is accepted.

Deny

If you select Deny for a network offering, by default egress traffic for the guest network is blocked. However, when an egress rules is configured for a guest network, rules are applied to allow the specified traffic. While implementing a guest network, CloudPlatform adds the firewall egress rule specific to the default egress policy for the guest network.

This feature is supported only on virtual router and Juniper SRX.

- Create a network offering with your desirable default egress policy:

- a. Log in with admin privileges to the CloudPlatform UI.
 - b. In the left navigation bar, click Service Offerings.
 - c. In Select Offering, choose Network Offering.
 - d. Click Add Network Offering.
 - e. In the dialog, make necessary choices, including firewall provider.
 - f. In the Default egress policy field, specify the behaviour.
 - g. Click OK.
2. Create an isolated network by using this network offering.

Based on your selection, the network will have the egress public traffic blocked or allowed.

16.21.2. Firewall Rules

By default, all incoming traffic to the public IP address is rejected by the firewall. To allow external traffic, you can open firewall ports by specifying firewall rules. You can optionally specify one or more CIDRs to filter the source IPs. This is useful when you want to allow only incoming requests from certain IP addresses.

You cannot use firewall rules to open ports for an elastic IP address. When elastic IP is used, outside access is instead controlled through the use of security groups. See [Section 16.6.4, “Adding a Security Group”](#).

In an advanced zone, you can also create egress firewall rules by using the virtual router. For more information, see [Section 16.21.1, “Egress Firewall Rules in an Advanced Zone”](#).

Firewall rules can be created using the Firewall tab in the Management Server UI. This tab is not displayed by default when CloudPlatform is installed. To display the Firewall tab, the CloudPlatform administrator must set the global configuration parameter `firewall.rule.ui.enabled` to "true."

To create a firewall rule:

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. Click the name of the network where you want to work with.
4. Click View IP Addresses.
5. Click the IP address you want to work with.
6. Click the Configuration tab and fill in the following values.
 - **Source CIDR.** (Optional) To accept only traffic from IP addresses within a particular address block, enter a CIDR or a comma-separated list of CIDRs. Example: 192.168.0.0/22. Leave empty to allow all CIDRs.
 - **Protocol.** The communication protocol in use on the opened port(s).
 - **Start Port and End Port.** The port(s) you want to open on the firewall. If you are opening a single port, use the same number in both fields

- **ICMP Type and ICMP Code.** Used only if Protocol is set to ICMP. Provide the type and code required by the ICMP protocol to fill out the ICMP header. Refer to ICMP documentation for more details if you are not sure what to enter

7. Click Add.

16.21.3. Port Forwarding

A port forward service is a set of port forwarding rules that define a policy. A port forward service is then applied to one or more guest VMs. The guest VM then has its inbound network access managed according to the policy defined by the port forwarding service. You can optionally specify one or more CIDRs to filter the source IPs. This is useful when you want to allow only incoming requests from certain IP addresses to be forwarded.

A guest VM can be in any number of port forward services. Port forward services can be defined but have no members. If a guest VM is part of more than one network, port forwarding rules will function only if they are defined on the default network

You cannot use port forwarding to open ports for an elastic IP address. When elastic IP is used, outside access is instead controlled through the use of security groups. See Security Groups.

To set up port forwarding:

1. Log in to the CloudPlatform UI as an administrator or end user.
2. If you have not already done so, add a public IP address range to a zone in CloudPlatform. See [Adding a Zone and Pod in the Installation Guide](#).
3. Add one or more VM instances to CloudPlatform.
4. In the left navigation bar, click Network.
5. Click the name of the guest network where the VMs are running.
6. Choose an existing IP address or acquire a new IP address. See [Section 16.12, "Acquiring a New IP Address"](#). Click the name of the IP address in the list.
7. Click the Configuration tab.
8. In the Port Forwarding node of the diagram, click View All.
9. Fill in the following:
 - **Public Port.** The port to which public traffic will be addressed on the IP address you acquired in the previous step.
 - **Private Port.** The port on which the instance is listening for forwarded public traffic.
 - **Protocol.** The communication protocol in use between the two ports
10. Click Add.

16.22. IP Load Balancing

The user may choose to associate the same public IP for multiple guests. CloudPlatform implements a TCP-level load balancer with the following policies.

- Round-robin

- Least connection
- Source IP

This is similar to port forwarding but the destination may be multiple IP addresses.

16.23. DNS and DHCP

The Virtual Router provides DNS and DHCP services to the guests. It proxies DNS requests to the DNS server configured on the Availability Zone.

16.24. Remote Access VPN

CloudPlatform account owners can create virtual private networks (VPN) to access their virtual machines. If the guest network is instantiated from a network offering that offers the Remote Access VPN service, the virtual router (based on the System VM) is used to provide the service. CloudPlatform provides a L2TP-over-IPsec-based remote access VPN service to guest virtual networks. Since each network gets its own virtual router, VPNs are not shared across the networks. VPN clients native to Windows, Mac OS X and iOS can be used to connect to the guest networks. The account owner can create and manage users for their VPN. CloudPlatform does not use its account database for this purpose but uses a separate table. The VPN user database is shared across all the VPNs created by the account owner. All VPN users get access to all VPNs created by the account owner.



Note

Make sure that not all traffic goes through the VPN. That is, the route installed by the VPN should be only for the guest network and not for all traffic.

- **Road Warrior / Remote Access.** Users want to be able to connect securely from a home or office to a private network in the cloud. Typically, the IP address of the connecting client is dynamic and cannot be preconfigured on the VPN server.
- **Site to Site.** In this scenario, two private subnets are connected over the public Internet with a secure VPN tunnel. The cloud user's subnet (for example, an office network) is connected through a gateway to the network in the cloud. The address of the user's gateway must be preconfigured on the VPN server in the cloud. Note that although L2TP-over-IPsec can be used to set up Site-to-Site VPNs, this is not the primary intent of this feature. For more information, see [Section 16.24.4, "Setting Up a Site-to-Site VPN Connection"](#)


16.24.1. Configuring Remote Access VPN

To set up VPN for the cloud:

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, click Global Settings.
3. Set the following global configuration parameters.
 - `remote.access.vpn.client.ip.range` – The range of IP addresses to be allocated to remote access VPN clients. The first IP in the range is used by the VPN server.

- `remote.access.vpn.psk.length` – Length of the IPsec key.
- `remote.access.vpn.user.limit` – Maximum number of VPN users per account.

To enable VPN for a particular network:

1. Log in as a user or administrator to the CloudPlatform UI.
2. In the left navigation, click Network.
3. Click the name of the network you want to work with.
4. Click View IP Addresses.
5. Click one of the displayed IP address names.
6. Click the Enable VPN button. 

The IPsec key is displayed in a popup window.

16.24.2. Using Remote Access VPN with Windows

The procedure to use VPN varies by Windows version. Generally, the user must edit the VPN properties and make sure that the default route is not the VPN. The following steps are for Windows L2TP clients on Windows Vista. The commands should be similar for other Windows versions.

1. Log in to the CloudPlatform UI and click on the source NAT IP for the account. The VPN tab should display the IPsec preshared key. Make a note of this and the source NAT IP. The UI also lists one or more users and their passwords. Choose one of these users, or, if none exists, add a user and password.
2. On the Windows box, go to Control Panel, then select Network and Sharing center. Click Setup a connection or network.
3. In the next dialog, select No, create a new connection.
4. In the next dialog, select Use my Internet Connection (VPN).
5. In the next dialog, enter the source NAT IP from step 1 and give the connection a name. Check Don't connect now.
6. In the next dialog, enter the user name and password selected in step 1.
7. Click Create.
8. Go back to the Control Panel and click Network Connections to see the new connection. The connection is not active yet.
9. Right-click the new connection and select Properties. In the Properties dialog, select the Networking tab.
10. In Type of VPN, choose L2TP IPsec VPN, then click IPsec settings. Select Use preshared key. Enter the preshared key from step 1.
11. The connection is ready for activation. Go back to Control Panel -> Network Connections and double-click the created connection.

12. Enter the user name and password from step 1.

16.24.3. Using Remote Access VPN with Mac OS X

First, be sure you've configured the VPN settings in your CloudPlatform install. This section is only concerned with connecting via Mac OS X to your VPN.

Note, these instructions were written on Mac OS X 10.7.5. They may differ slightly in older or newer releases of Mac OS X.

1. On your Mac, open System Preferences and click Network.
2. Make sure Send all traffic over VPN connection is not checked.
3. If your preferences are locked, you'll need to click the lock in the bottom left-hand corner to make any changes and provide your administrator credentials.
4. You will need to create a new network entry. Click the plus icon on the bottom left-hand side and you'll see a dialog that says "Select the interface and enter a name for the new service." Select VPN from the Interface drop-down menu, and "L2TP over IPSec" for the VPN Type. Enter whatever you like within the "Service Name" field.
5. You'll now have a new network interface with the name of whatever you put in the "Service Name" field. For the purposes of this example, we'll assume you've named it "CloudStack." Click on that interface and provide the IP address of the interface for your VPN under the Server Address field, and the user name for your VPN under Account Name.
6. Click Authentication Settings, and add the user's password under User Authentication and enter the pre-shared IPSec key in the Shared Secret field under Machine Authentication. Click OK.
7. You may also want to click the "Show VPN status in menu bar" but that's entirely optional.
8. Now click "Connect" and you will be connected to the CloudStack VPN.

16.24.4. Setting Up a Site-to-Site VPN Connection

A Site-to-Site VPN connection helps you establish a secure connection from an enterprise datacenter to the cloud infrastructure. This allows users to access the guest VMs by establishing a VPN connection to the virtual router of the account from a device in the datacenter of the enterprise. Having this facility eliminates the need to establish VPN connections to individual VMs.

The difference from Remote VPN is that Site-to-site VPNs connects entire networks to each other, for example, connecting a branch office network to a company headquarters network. In a site-to-site VPN, hosts do not have VPN client software; they send and receive normal TCP/IP traffic through a VPN gateway.

The supported endpoints on the remote datacenters are:

- Cisco ISR with IOS 12.4 or later
- Juniper J-Series routers with JunOS 9.5 or later

**Note**

In addition to the specific Cisco and Juniper devices listed above, the expectation is that any Cisco or Juniper device running on the supported operating systems are able to establish VPN connections.

To set up a Site-to-Site VPN connection, perform the following:

1. Create a Virtual Private Cloud (VPC).
See [Section 16.27, “Configuring a Virtual Private Cloud”](#).
2. Create a VPN Customer Gateway.
3. Create a VPN gateway for the VPC that you created.
4. Create VPN connection from the VPC VPN gateway to the customer VPN gateway.

16.24.4.1. Creating and Updating a VPN Customer Gateway

**Note**

A VPN customer gateway can be connected to only one VPN gateway at a time.

To add a VPN Customer Gateway:

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPN Customer Gateway.
4. Click Add site-to-site VPN.

+ add VPN Customer Gateway

* Name:

* Gateway:

* CIDR list:

* IPsec Preshared-Key:

IKE Encryption:

IKE Hash:

IKE DH:

ESP Encryption:

ESP Hash:

Perfect Forward Secrecy:

IKE lifetime (second):

ESP Lifetime (second):

Dead Peer Detection:

Cancel OK

Provide the following information:

- **Name:** A unique name for the VPN customer gateway you create.
- **Gateway:** The IP address for the remote gateway.
- **CIDR list:** The guest CIDR list of the remote subnets. Enter a CIDR or a comma-separated list of CIDRs. Ensure that a guest CIDR list is not overlapped with the VPC's CIDR, or another guest CIDR. The CIDR must be RFC1918-compliant.
- **IPsec Preshared Key:** Preshared keying is a method where the endpoints of the VPN share a secret key. This key value is used to authenticate the customer gateway and the VPC VPN gateway to each other.

**Note**

The IKE peers (VPN end points) authenticate each other by computing and sending a keyed hash of data that includes the Preshared key. If the receiving peer is able to create the same hash independently by using its Preshared key, it knows that both peers must share the same secret, thus authenticating the customer gateway.

- **IKE Encryption:** The Internet Key Exchange (IKE) policy for phase-1. The supported encryption algorithms are AES128, AES192, AES256, and 3DES. Authentication is accomplished through the Preshared Keys.

**Note**

The phase-1 is the first phase in the IKE process. In this initial negotiation phase, the two VPN endpoints agree on the methods to be used to provide security for the underlying IP traffic. The phase-1 authenticates the two VPN gateways to each other, by confirming that the remote gateway has a matching Preshared Key.

- **IKE Hash:** The IKE hash for phase-1. The supported hash algorithms are SHA1 and MD5.
- **IKE DH:** A public-key cryptography protocol which allows two parties to establish a shared secret over an insecure communications channel. The 1536-bit Diffie-Hellman group is used within IKE to establish session keys. The supported options are None, Group-5 (1536-bit) and Group-2 (1024-bit).
- **ESP Encryption:** Encapsulating Security Payload (ESP) algorithm within phase-2. The supported encryption algorithms are AES128, AES192, AES256, and 3DES.

**Note**

The phase-2 is the second phase in the IKE process. The purpose of IKE phase-2 is to negotiate IPSec security associations (SA) to set up the IPSec tunnel. In phase-2, new keying material is extracted from the Diffie-Hellman key exchange in phase-1, to provide session keys to use in protecting the VPN data flow.

- **ESP Hash:** Encapsulating Security Payload (ESP) hash for phase-2. Supported hash algorithms are SHA1 and MD5.
- **Perfect Forward Secrecy:** Perfect Forward Secrecy (or PFS) is the property that ensures that a session key derived from a set of long-term public and private keys will not be compromised. This property enforces a new Diffie-Hellman key exchange. It provides the keying material that has greater key material life and thereby greater resistance to cryptographic attacks. The available options are None, Group-5 (1536-bit) and Group-2 (1024-bit). The security of the key exchanges increase as the DH groups grow larger, as does the time of the exchanges.



Note



When PFS is turned on, for every negotiation of a new phase-2 SA the two gateways must generate a new set of phase-1 keys. This adds an extra layer of protection that PFS adds, which ensures if the phase-2 SA's have expired, the keys used for new phase-2 SA's have not been generated from the current phase-1 keying material.

- **IKE Lifetime (seconds):** The phase-1 lifetime of the security association in seconds. Default is 86400 seconds (1 day). Whenever the time expires, a new phase-1 exchange is performed.
- **ESP Lifetime (seconds):** The phase-2 lifetime of the security association in seconds. Default is 3600 seconds (1 hour). Whenever the value is exceeded, a re-key is initiated to provide a new IPsec encryption and authentication session keys.
- **Dead Peer Detection:** A method to detect an unavailable Internet Key Exchange (IKE) peer. Select this option if you want the virtual router to query the liveliness of its IKE peer at regular intervals. It's recommended to have the same configuration of DPD on both side of VPN connection.

5. Click OK.

Updating and Removing a VPN Customer Gateway

You can update a customer gateway either with no VPN connection, or related VPN connection is in error state.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPN Customer Gateway.
4. Select the VPN customer gateway you want to work with.
5. To modify the required parameters, click the Edit VPN Customer Gateway button 
6. To remove the VPN customer gateway, click the Delete VPN Customer Gateway button 
7. Click OK.

16.24.4.2. Creating a VPN gateway for the VPC

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.
All the VPCs that you have created for the account is listed in the page.
4. Click the Configure button of the VPC to which you want to deploy the VMs.

The VPC page is displayed where all the tiers you created are listed in a diagram.

5. Click the Settings icon.

For each tier, the following options are displayed:

- Internal LB
- Public LB IP
- Static NAT
- Virtual Machines
- CIDR

The following router information is displayed:

- Private Gateways
- Public IP Addresses
- Site-to-Site VPNs
- Network ACL Lists

6. Select Site-to-Site VPN.

If you are creating the VPN gateway for the first time, selecting Site-to-Site VPN prompts you to create a VPN gateway.

7. In the confirmation dialog, click Yes to confirm.

Within a few moments, the VPN gateway is created. You will be prompted to view the details of the VPN gateway you have created. Click Yes to confirm.

The following details are displayed in the VPN Gateway page:

- IP Address
- Account
- Domain

16.24.4.3. Creating a VPN Connection



Note

CloudPlatform supports creating up to 8 VPN connections.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you create for the account are listed in the page.

4. Click the Configure button of the VPC to which you want to deploy the VMs.

The VPC page is displayed where all the tiers you created are listed in a diagram.

5. Click the Settings icon.

For each tier, the following options are displayed:

- Internal LB
- Public LB IP
- Static NAT
- Virtual Machines
- CIDR

The following router information is displayed:

- Private Gateways
- Public IP Addresses
- Site-to-Site VPNs
- Network ACL Lists

6. Select Site-to-Site VPN.

The Site-to-Site VPN page is displayed.

7. From the Select View drop-down, ensure that VPN Connection is selected.
8. Click Create VPN Connection.

The Create VPN Connection dialog is displayed:



9. Select the desired customer gateway, then click OK to confirm.

Within a few moments, the VPN Connection is displayed.

The following information on the VPN connection is displayed:

- IP Address

- Gateway
- State
- IPsec Preshared Key
- IKE Policy
- ESP Policy

16.24.4.4. Restarting and Removing a VPN Connection

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.

4. Click the Configure button of the VPC to which you want to deploy the VMs.

The VPC page is displayed where all the tiers you created are listed in a diagram.

5. Click the Settings icon.

For each tier, the following options are displayed:

- Internal LB
- Public LB IP
- Static NAT
- Virtual Machines
- CIDR

The following router information is displayed:

- Private Gateways
- Public IP Addresses
- Site-to-Site VPNs
- Network ACL Lists

6. Select Site-to-Site VPN.

The Site-to-Site VPN page is displayed.

7. From the Select View drop-down, ensure that VPN Connection is selected.

All the VPN connections you created are displayed.

8. Select the VPN connection you want to work with.

The Details tab is displayed.

9. To remove a VPN connection, click the Delete VPN connection button

To restart a VPN connection, click the Reset VPN connection button present in the Details tab.

16.25. Isolation in Advanced Zone Using Private VLAN

Isolation of guest traffic in shared networks can be achieved by using Private VLANs (PVLAN). PVLANS provide Layer 2 isolation between ports within the same VLAN. In a PVLAN-enabled shared network, a user VM cannot reach other user VM though they can reach the DHCP server and gateway, this would in turn allow users to control traffic within a network and help them deploy multiple applications without communication between application as well as prevent communication with other users' VMs.

- Isolate VMs in a shared networks by using Private VLANs.
- Supported on KVM, XenServer, and VMware hypervisors
- PVLAN-enabled shared network can be a part of multiple networks of a guest VM.

16.25.1. About Private VLAN

In an Ethernet switch, a VLAN is a broadcast domain where hosts can establish direct communication with each another at Layer 2. Private VLAN is designed as an extension of VLAN standard to add further segmentation of the logical broadcast domain. A regular VLAN is a single broadcast domain, whereas a private VLAN partitions a larger VLAN broadcast domain into smaller sub-domains. A sub-domain is represented by a pair of VLANs: a Primary VLAN and a Secondary VLAN. The original VLAN that is being divided into smaller groups is called Primary, which implies that all VLAN pairs in a private VLAN share the same Primary VLAN. All the secondary VLANs exist only inside the Primary. Each Secondary VLAN has a specific VLAN ID associated to it, which differentiates one sub-domain from another.

Three types of ports exist in a private VLAN domain, which essentially determine the behaviour of the participating hosts. Each ports will have its own unique set of rules, which regulate a connected host's ability to communicate with other connected host within the same private VLAN domain. Configure each host that is part of a PVLAN pair can be by using one of these three port designation:

- **Promiscuous:** A promiscuous port can communicate with all the interfaces, including the community and isolated host ports that belong to the secondary VLANs. In Promiscuous mode, hosts are connected to promiscuous ports and are able to communicate directly with resources on both primary and secondary VLAN. Routers, DHCP servers, and other trusted devices are typically attached to promiscuous ports.
- **Isolated VLANs:** The ports within an isolated VLAN cannot communicate with each other at the layer-2 level. The hosts that are connected to Isolated ports can directly communicate only with the Promiscuous resources. If your customer device needs to have access only to a gateway router, attach it to an isolated port.
- **Community VLANs:** The ports within a community VLAN can communicate with each other and with the promiscuous ports, but they cannot communicate with the ports in other communities at the layer-2 level. In a Community mode, direct communication is permitted only with the hosts in the same community and those that are connected to the Primary PVLAN in promiscuous mode. If your customer has two devices that need to be isolated from other customers' devices, but to be able to communicate among themselves, deploy them in community ports.

For further reading:

- [Understanding Private VLANs](#)⁸
- [Cisco Systems' Private VLANs: Scalable Security in a Multi-Client Environment](#)⁹
- [Private VLAN \(PVLAN\) on vNetwork Distributed Switch - Concept Overview \(1010691\)](#)¹⁰

16.25.2. Prerequisites

- Use a PVLAN supported switch.

See [Private VLAN Catalyst Switch Support Matrix](#)¹¹ for more information.

- All the layer 2 switches, which are PVLAN-aware, are connected to each other, and one of them is connected to a router. All the ports connected to the host would be configured in trunk mode. Open Management VLAN, Primary VLAN (public) and Secondary Isolated VLAN ports. Configure the switch port connected to the router in PVLAN promiscuous trunk mode, which would translate an isolated VLAN to primary VLAN for the PVLAN-unaware router.

Note that only Cisco Catalyst 4500 has the PVLAN promiscuous trunk mode to connect both normal VLAN and PVLAN to a PVLAN-unaware switch. For the other Catalyst PVLAN support switch, connect the switch to upper switch by using cables, one each for a PVLAN pair.

- Configure private VLAN on your physical switches out-of-band.
- Before you use PVLAN on XenServer and KVM, enable Open vSwitch (OVS).



Note

OVS on XenServer and KVM does not support PVLAN natively. Therefore, CloudPlatform managed to simulate PVLAN on OVS for XenServer and KVM by modifying the flow table.

16.25.3. Creating a PVLAN-Enabled Guest Network

1. Log in to the CloudPlatform UI as administrator.
2. In the left navigation, choose Infrastructure.
3. On Zones, click View More.
4. Click the zone to which you want to add a guest network.
5. Click the Physical Network tab.
6. Click the physical network you want to work with.
7. On the Guest node of the diagram, click Configure.
8. Click the Network tab.

⁸ http://www.cisco.com/en/US/docs/switches/lan/catalyst3750/software/release/12.2_25_see/configuration/guide/swpvlan.html#wp1038379

⁹ <http://tools.ietf.org/html/rfc5517>

¹⁰ <http://kb.vmware.com>

¹¹ http://www.cisco.com/en/US/products/hw/switches/ps708/products_tech_note09186a0080094830.shtml

9. Click Add guest network.

The Add guest network window is displayed.

10. Specify the following:

- **Name:** The name of the network. This will be visible to the user.
- **Description:** The short description of the network that can be displayed to users.
- **VLAN ID:** The unique ID of the VLAN.
- **Secondary Isolated VLAN ID:** The unique ID of the Secondary Isolated VLAN.

For the description on Secondary Isolated VLAN, see [Section 16.25.1, “About Private VLAN”](#).

- **Scope:** The available scopes are Domain, Account, Project, and All.
 - **Domain:** Selecting Domain limits the scope of this guest network to the domain you specify. The network will not be available for other domains. If you select Subdomain Access, the guest network is available to all the sub domains within the selected domain.
 - **Account:** The account for which the guest network is being created for. You must specify the domain the account belongs to.
 - **Project:** The project for which the guest network is being created for. You must specify the domain the project belongs to.
 - **All:** The guest network is available for all the domains, account, projects within the selected zone.
- **Network Offering:** If the administrator has configured multiple network offerings, select the one you want to use for this network.
- **Gateway:** The gateway that the guests should use.
- **Netmask:** The netmask in use on the subnet the guests will use.
- **IP Range:** A range of IP addresses that are accessible from the Internet and are assigned to the guest VMs.
- **Network Domain:** A custom DNS suffix at the level of a network. If you want to assign a special domain name to the guest VM network, specify a DNS suffix.

11. Click OK to confirm.

16.26. About Inter-VLAN Routing

Inter-VLAN Routing is the capability to route network traffic between VLANs. This feature enables you to build Virtual Private Clouds (VPC), an isolated segment of your cloud, that can hold multi-tier applications. These tiers are deployed on different VLANs that can communicate with each other. You provision VLANs to the tiers you create, and VMs can be deployed on different tiers. The VLANs are connected to a virtual router, which facilitates communication between the VMs. In effect, you can segment VMs by means of VLANs into different networks that can host multi-tier applications, such as Web, Application, or Database. Such segmentation by means of VLANs logically separate application VMs for higher security and lower broadcasts, while remaining physically connected to the same device.

This feature is supported on XenServer and VMware hypervisors.

The major advantages are:

- The administrator can deploy a set of VLANs and allow users to deploy VMs on these VLANs. A guest VLAN is randomly allotted to an account from a pre-specified set of guest VLANs. All the VMs of a certain tier of an account reside on the guest VLAN allotted to that account.



Note

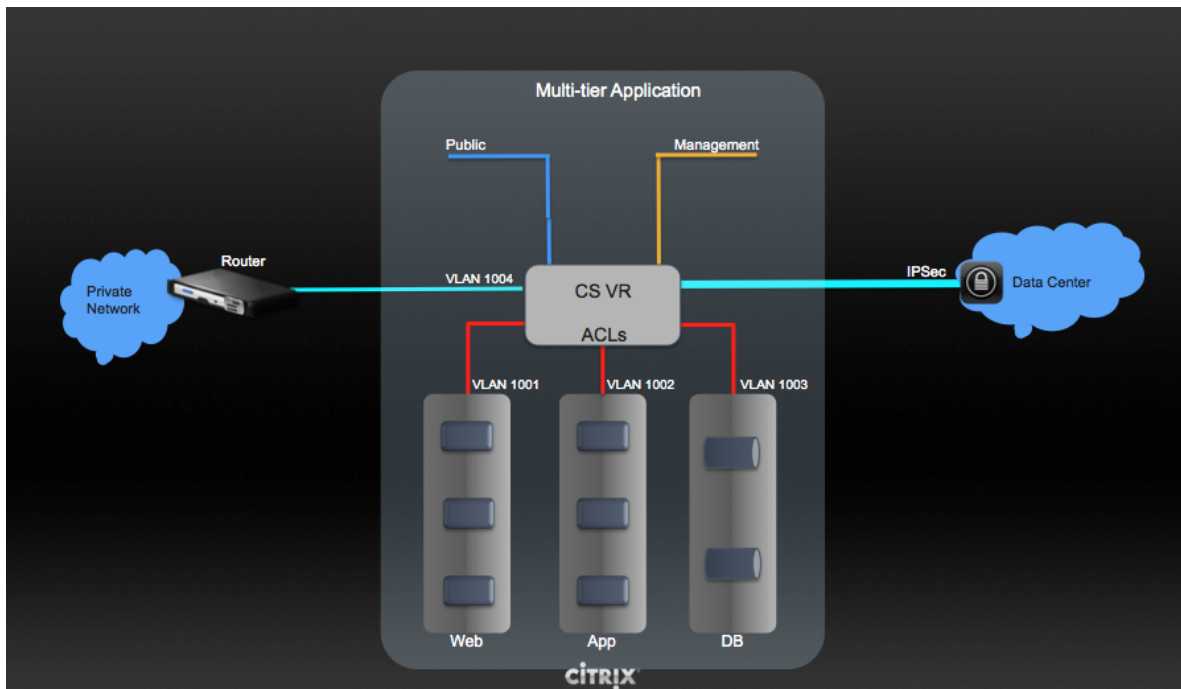
A VLAN allocated for an account cannot be shared between multiple accounts.

- The administrator can allow users create their own VPC and deploy the application. In this scenario, the VMs that belong to the account are deployed on the VLANs allotted to that account.
- Both administrators and users can create multiple VPCs. The guest network NIC is plugged to the VPC virtual router when the first VM is deployed in a tier.
- The administrator can create the following gateways to send to or receive traffic from the VMs:
 - **VPN Gateway:** For more information, see [Section 16.24.4.2, “Creating a VPN gateway for the VPC”](#).
 - **Public Gateway:** The public gateway for a VPC is added to the virtual router when the virtual router is created for VPC. The public gateway is not exposed to the end users. You are not allowed to list it, nor allowed to create any static routes.
 - **Private Gateway:** For more information, see [Section 16.27.5, “Adding a Private Gateway to a VPC”](#).
- Both administrators and users can create various possible destinations-gateway combinations. However, only one gateway of each type can be used in a deployment.

For example:

- **VLANs and Public Gateway:** For example, an application is deployed in the cloud, and the Web application VMs communicate with the Internet.
- **VLANs, VPN Gateway, and Public Gateway:** For example, an application is deployed in the cloud; the Web application VMs communicate with the Internet; and the database VMs communicate with the on-premise devices.
- The administrator can define Access Control List (ACL) on the virtual router to filter the traffic among the VLANs or between the Internet and a VLAN. You can define ACL based on CIDR, port range, protocol, type code (if ICMP protocol is selected) and Ingress/Egress type.

The following figure shows the possible deployment scenarios of a Inter-VLAN setup:



To set up a multi-tier Inter-VLAN deployment, see [Section 16.27, “Configuring a Virtual Private Cloud”](#).

16.27. Configuring a Virtual Private Cloud

16.27.1. About Virtual Private Clouds

CloudPlatform Virtual Private Cloud is a private, isolated part of CloudPlatform. A VPC can have its own virtual network topology that resembles a traditional physical network. You can launch VMs in the virtual network that can have private addresses in the range of your choice, for example: 10.0.0.0/16. You can define network tiers within your VPC network range, which in turn enables you to group similar kinds of instances based on IP address range.

For example, if a VPC has the private range 10.0.0.0/16, its guest networks can have the network ranges 10.0.1.0/24, 10.0.2.0/24, 10.0.3.0/24, and so on.

Major Components of a VPC:

A VPC is comprised of the following network components:

- **VPC:** A VPC acts as a container for multiple isolated networks that can communicate with each other via its virtual router.
- **Network Tiers:** Each tier acts as an isolated network with its own VLANs and CIDR list, where you can place groups of resources, such as VMs. The tiers are segmented by means of VLANs. The NIC of each tier acts as its gateway.
- **Virtual Router:** A virtual router is automatically created and started when you create a VPC. The virtual router connects the tiers and directs traffic among the public gateway, the VPN gateways, and the NAT instances. For each tier, a corresponding NIC and IP exist in the virtual router. The virtual router provides DNS and DHCP services through its IP.
- **Public Gateway:** The traffic to and from the Internet is routed to the VPC through the public gateway. In a VPC, the public gateway is not exposed to the end user; therefore, static routes are not supported for the public gateway.

- **Private Gateway:** All the traffic to and from a private network routed to the VPC through the private gateway. For more information, see [Section 16.27.5, “Adding a Private Gateway to a VPC”](#).
- **VPN Gateway:** The VPC side of a VPN connection.
- **Site-to-Site VPN Connection:** A hardware-based VPN connection between your VPC and your datacenter, home network, or co-location facility. For more information, see [Section 16.24.4, “Setting Up a Site-to-Site VPN Connection”](#).
- **Customer Gateway:** The customer side of a VPN Connection. For more information, see [Section 16.24.4.1, “Creating and Updating a VPN Customer Gateway”](#).
- **NAT Instance:** An instance that provides Port Address Translation for instances to access the Internet via the public gateway. For more information, see [Section 16.27.10, “Enabling or Disabling Static NAT on a VPC”](#).

Network Architecture in a VPC

In a VPC, the following four basic options of network architectures are present:

- VPC with a public gateway only
- VPC with public and private gateways
- VPC with public and private gateways and site-to-site VPN access
- VPC with a private gateway only and site-to-site VPN access

Connectivity Options for a VPC

You can connect your VPC to:

- The Internet through the public gateway.
- The corporate datacenter by using a site-to-site VPN connection through the VPN gateway.
- Both the Internet and your corporate datacenter by using both the public gateway and a VPN gateway.

VPC Network Considerations

Consider the following before you create a VPC:

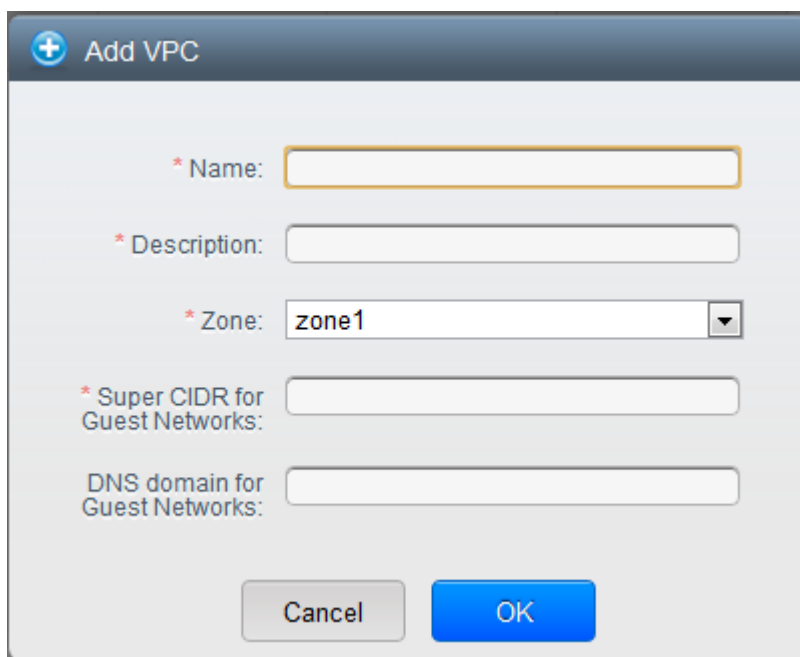
- A VPC, by default, is created in the enabled state.
- A VPC can be created in Advance zone only, and can't belong to more than one zone at a time.
- The default number of VPCs an account can create is 20. However, you can change it by using the `max.account.vpcs` global parameter, which controls the maximum number of VPCs an account is allowed to create.
- The default number of tiers an account can create within a VPC is 3. You can configure this number by using the `vpc.max.networks` parameter.
- Each tier should have an unique CIDR in the VPC. Ensure that the tier's CIDR should be within the VPC CIDR range.
- A tier belongs to only one VPC.

- All network tiers inside the VPC should belong to the same account.
- When a VPC is created, by default, a SourceNAT IP is allocated to it. The Source NAT IP is released only when the VPC is removed.
- A public IP can be used for only one purpose at a time. If the IP is a sourceNAT, it cannot be used for StaticNAT or port forwarding.
- The instances can only have a private IP address that you provision. To communicate with the Internet, enable NAT to an instance that you launch in your VPC.
- Only new networks can be added to a VPC. The maximum number of networks per VPC is limited by the value you specify in the `vpc.max.networks` parameter. The default value is three.
- The load balancing service can be supported by only one tier inside the VPC.
- If an IP address is assigned to a tier:
 - That IP can't be used by more than one tier at a time in the VPC. For example, if you have tiers A and B, and a public IP1, you can create a port forwarding rule by using the IP either for A or B, but not for both.
 - That IP can't be used for StaticNAT, load balancing, or port forwarding rules for another guest network inside the VPC.
- Remote access VPN is not supported in VPC networks.

16.27.2. Adding a Virtual Private Cloud

When creating the VPC, you simply provide the zone and a set of IP addresses for the VPC network address space. You specify this set of addresses in the form of a Classless Inter-Domain Routing (CIDR) block.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.
4. Click Add VPC. The Add VPC page is displayed as follows:



Provide the following information:

- **Name:** A short name for the VPC that you are creating.
- **Description:** A brief description of the VPC.
- **Zone:** Choose the zone where you want the VPC to be available.
- **Super CIDR for Guest Networks:** Defines the CIDR range for all the tiers (guest networks) within a VPC. When you create a tier, ensure that its CIDR is within the Super CIDR value you enter. The CIDR must be RFC1918 compliant.
- **DNS domain for Guest Networks:** If you want to assign a special domain name, specify the DNS suffix. This parameter is applied to all the tiers within the VPC. That implies, all the tiers you create in the VPC belong to the same DNS domain. If the parameter is not specified, a DNS domain name is generated automatically.

16.27.3. Adding Tiers

Tiers are distinct locations within a VPC that act as isolated networks, which do not have access to other tiers by default. Tiers are set up on different VLANs that can communicate with each other by using a virtual router. Tiers provide inexpensive, low latency network connectivity to other tiers within the VPC.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPC that you have created for the account is listed in the page.



Note

The end users can see their own VPCs, while root and domain admin can see any VPC they are authorized to see.

4. Click the Configure button of the VPC for which you want to set up tiers.
5. Click Create network.

The Add new tier dialog is displayed, as follows:

The screenshot shows a dialog box titled "Add new tier" with a plus icon in the top left corner. The dialog contains the following fields:

- * Name:
- * Network Offering: (dropdown menu)
- * Gateway:
- * Netmask:
- ACL: (dropdown menu)

At the bottom of the dialog are two buttons: "Cancel" and "OK".

If you have already created tiers, the VPC diagram is displayed. Click Create Tier to add a new tier.

6. Specify the following:

All the fields are mandatory.

- **Name:** A unique name for the tier you create.
- **Network Offering:** The following default network offerings are listed:
Internal LB, DefaultIsolatedNetworkOfferingForVpcNetworksNoLB,
DefaultIsolatedNetworkOfferingForVpcNetworks

In a VPC, only one tier can be created by using LB-enabled network offering.

- **Gateway:** The gateway for the tier you create. Ensure that the gateway is within the Super CIDR range that you specified while creating the VPC, and is not overlapped with the CIDR of any existing tier within the VPC.
- **VLAN:** The VLAN ID for the tier you create.

This option is only visible if the network offering you selected is VLAN-enabled.

For more information, see [Section 12.10.3, “Assigning VLANs to Isolated Networks”](#).

- **Netmask:** The netmask for the tier you create.

For example, if the VPC CIDR is 10.0.0.0/16 and the network tier CIDR is 10.0.1.0/24, the gateway of the tier is 10.0.1.1, and the netmask of the tier is 255.255.255.0.

7. Click OK.
8. Continue with configuring access control list for the tier.

16.27.4. Configuring Network Access Control List

Define Network Access Control List (ACL) on the VPC virtual router to control incoming (ingress) and outgoing (egress) traffic between the VPC tiers, and the tiers and Internet. By default, all incoming traffic to the guest networks is blocked and all outgoing traffic from guest networks is allowed, once you add an ACL rule for outgoing traffic, then only outgoing traffic specified in this ACL rule is allowed, the rest is blocked. To open the ports, you must create a new network ACL. The network ACLs can be created for the tiers only if the NetworkACL service is supported.

16.27.4.1. About Network ACL Lists

In CloudPlatform terminology, Network ACL is a group of Network ACL items. Network ACL items are nothing but numbered rules that are evaluated in order, starting with the lowest numbered rule. These rules determine whether traffic is allowed in or out of any tier associated with the network ACL. You need to add the Network ACL items to the Network ACL, then associate the Network ACL with a tier. Network ACL is associated with a VPC and can be assigned to multiple VPC tiers within a VPC. A Tier is associated with a Network ACL at all the times. Each tier can be associated with only one ACL.

The default Network ACL is used when no ACL is associated. Default behavior is all the incoming traffic is blocked and outgoing traffic is allowed from the tiers. Default network ACL cannot be removed or modified. Contents of the default Network ACL is:

Rule	Protocol	Traffic type	Action	CIDR
1	All	Ingress	Deny	0.0.0.0/0
2	All	Egress	Allow	0.0.0.0/0

16.27.4.2. Creating ACL Lists

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.

4. Click the Configure button of the VPC.

For each tier, the following options are displayed:

- Internal LB
- Public LB IP
- Static NAT

- Virtual Machines
- CIDR

The following router information is displayed:

- Private Gateways
- Public IP Addresses
- Site-to-Site VPNs
- Network ACL Lists

5. Select Network ACL Lists.

The following default rules are displayed in the Network ACLs page: `default_allow`, `default_deny`.

6. Click Add ACL Lists, and specify the following:

- **ACL List Name:** A name for the ACL list.
- **Description:** A short description of the ACL list that can be displayed to users.

16.27.4.3. Creating an ACL Rule

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.

4. Click the Configure button of the VPC.
5. Select Network ACL Lists.

In addition to the custom ACL lists you have created, the following default rules are displayed in the Network ACLs page: `default_allow`, `default_deny`.

6. Select the desired ACL list.
7. Select the ACL List Rules tab.

To add an ACL rule, fill in the following fields to specify what kind of network traffic is allowed in the VPC.

- **Rule Number:** The order in which the rules are evaluated.
- **CIDR:** The CIDR acts as the Source CIDR for the Ingress rules, and Destination CIDR for the Egress rules. To accept traffic only from or to the IP addresses within a particular address block, enter a CIDR or a comma-separated list of CIDRs. The CIDR is the base IP address of the incoming traffic. For example, `192.168.0.0/22`. To allow all CIDRs, set to `0.0.0.0/0`.
- **Action:** What action to be taken. Allow traffic or block.
- **Protocol:** The networking protocol that sources use to send traffic to the tier. The TCP and UDP protocols are typically used for data exchange and end-user communications. The ICMP

protocol is typically used to send error messages or network monitoring data. All supports all the traffic. Other option is Protocol Number.

- **Start Port, End Port** (TCP, UDP only): A range of listening ports that are the destination for the incoming traffic. If you are opening a single port, use the same number in both fields.
- **Protocol Number**: The protocol number associated with IPv4. For more information, see [Protocol Numbers](#)¹².
- **ICMP Type, ICMP Code** (ICMP only): The type of message and error code that will be sent.
- **Traffic Type**: The type of traffic: Incoming or outgoing.

8. Click Add. The ACL rule is added.

You can edit the tags assigned to the ACL rules and delete the ACL rules you have created. Click the appropriate button in the Details tab.


16.27.4.4. Creating a Tier with Custom ACL List

1. Create a VPC.
2. Create a custom ACL list.
3. Add ACL rules to the ACL list.
4. Create a tier in the VPC.

Select the desired ACL list while creating a tier.

5. Click OK.

16.27.4.5. Assigning a Custom ACL List to a Tier

1. Create a VPC.
2. Create a tier in the VPC.
3. Associate the tier with the default ACL rule.
4. Create a custom ACL list.
5. Add ACL rules to the ACL list.
6. Select the tier for which you want to assign the custom ACL.
7. Click the Replace ACL List icon. 

The Replace ACL List dialog is displayed.

8. Select the desired ACL list.
9. Click OK.

¹² <http://www.iana.org/assignments/protocol-numbers/protocol-numbers.xml>

16.27.5. Adding a Private Gateway to a VPC

A private gateway can be added by the root admin only. The VPC private network has 1:1 relationship with the NIC of the physical network. You can configure multiple private gateways to a single VPC. No gateways with duplicated VLAN and IP are allowed in the same data center.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.

4. Click the Configure button of the VPC to which you want to configure load balancing rules.

The VPC page is displayed where all the tiers you created are listed in a diagram.

5. Click the Settings icon.

The following options are displayed.

- Internal LB
- Public LB IP
- Static NAT
- Virtual Machines
- CIDR

The following router information is displayed:

- Private Gateways
- Public IP Addresses
- Site-to-Site VPNs
- Network ACL Lists

6. Select Private Gateways.

The Gateways page is displayed.

7. Click Add new gateway:

+ Add new gateway

Please specify the information to add a new gateway to this VPC.

Physical Network:

* VLAN:

* IP Address:

* Gateway:

* Netmask:

Source NAT:

ACL:

8. Specify the following:

- **Physical Network:** The physical network you have created in the zone.
- **IP Address:** The IP address associated with the VPC gateway.
- **Gateway:** The gateway through which the traffic is routed to and from the VPC.
- **Netmask:** The netmask associated with the VPC gateway.
- **VLAN:** The VLAN associated with the VPC gateway.
- **Source NAT:** Select this option to enable the source NAT service on the VPC private gateway.

See [Section 16.27.5.1, “Source NAT on Private Gateway”](#).

- **ACL:** Controls both ingress and egress traffic on a VPC private gateway. By default, all the traffic is blocked.

See [Section 16.27.5.2, “ACL on Private Gateway”](#).

The new gateway appears in the list. You can repeat these steps to add more gateway for this VPC.

16.27.5.1. Source NAT on Private Gateway

You might want to deploy multiple VPCs with the same super CIDR and guest tier CIDR. Therefore, multiple guest VMs from different VPCs can have the same IPs to reach an enterprise data center through the private gateway. In such cases, a NAT service needs to be configured on the private

gateway to avoid IP conflicts. If Source NAT is enabled, the guest VMs in VPC reaches the enterprise network via private gateway IP address by using the NAT service.

The Source NAT service on a private gateway can be enabled while adding the private gateway. On deletion of a private gateway, source NAT rules specific to the private gateway are deleted.

To enable source NAT on existing private gateways, delete them and create afresh with source NAT.

16.27.5.2. ACL on Private Gateway

The traffic on the VPC private gateway is controlled by creating both ingress and egress network ACL rules. The ACLs contains both allow and deny rules. As per the rule, all the ingress traffic to the private gateway interface and all the egress traffic out from the private gateway interface are blocked.

You can change this default behaviour while creating a private gateway. Alternatively, you can do the following:

1. In a VPC, identify the Private Gateway you want to work with.
2. In the Private Gateway page, do either of the following:
 - Use the Quickview. See [3](#).
 - Use the Details tab. See [4](#) through .
3. In the Quickview of the selected Private Gateway, click Replace ACL, select the ACL rule, then click OK
4. Click the IP address of the Private Gateway you want to work with.

5. In the Detail tab, click the Replace ACL button. 

The Replace ACL dialog is displayed.

6. select the ACL rule, then click OK.

Wait for few seconds. You can see that the new ACL rule is displayed in the Details page.

16.27.5.3. Creating a Static Route

CloudPlatform enables you to specify routing for the VPN connection you create. You can enter one or CIDR addresses to indicate which traffic is to be routed back to the gateway.

1. In a VPC, identify the Private Gateway you want to work with.
2. In the Private Gateway page, click the IP address of the Private Gateway you want to work with.
3. Select the Static Routes tab.
4. Specify the CIDR of destination network.
5. Click Add.

Wait for few seconds until the new route is created.

16.27.5.4. Blacklisting Routes

CloudPlatform enables you to block a list of routes so that they are not assigned to any of the VPC private gateways. Specify the list of routes that you want to blacklist in the `blacklisted.routes` global parameter. Note that the parameter update affects only new static route creations. If you block an existing static route, it remains intact and continue functioning. You cannot add a static route if the route is blacklisted for the zone.

16.27.6. Deploying VMs to the Tier

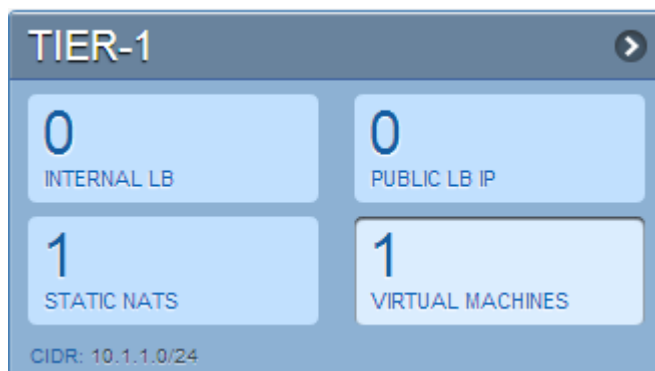
1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.

4. Click the Configure button of the VPC to which you want to deploy the VMs.

The VPC page is displayed where all the tiers you have created are listed.

5. Click Virtual Machines tab of the tier to which you want to add a VM.



The Add Instance page is displayed.

Follow the on-screen instruction to add an instance. For information on adding an instance, see the Installation Guide.

16.27.7. Deploying VMs to VPC Tier and Shared Networks

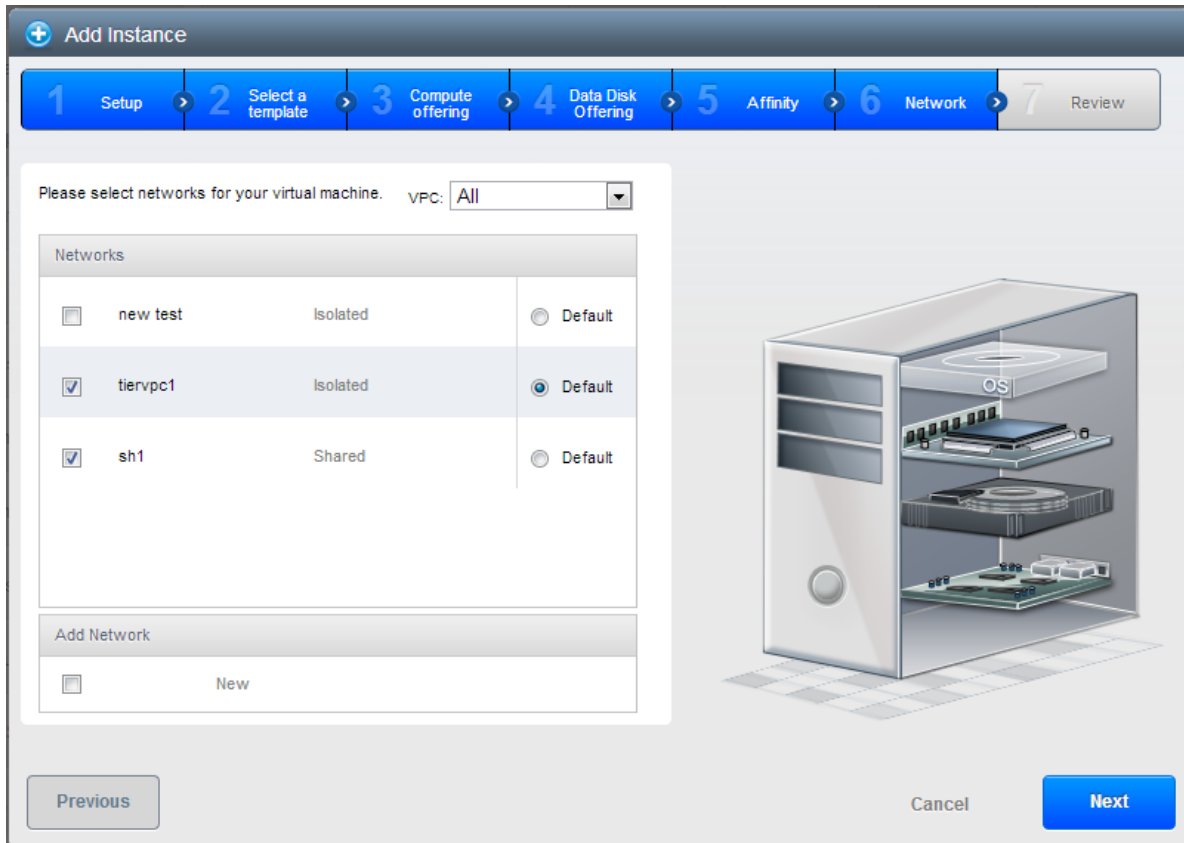
CloudPlatform allows you deploy VMs on a VPC tier and one or more shared networks. With this feature, VMs deployed in a multi-tier application can receive services offered by a service provider over the shared network. One example of such a service is monitoring service.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Instances.
3. Select the VM you want to work with.
4. Click Add Instance.
5. Select a zone.
6. Select a template or ISO, then follow the steps in the wizard.

For more information about how the templates came to be in this list, see [Chapter 13, Working with Templates](#).

7. Ensure that the hardware you have allows starting the selected service offering.
8. Under Networks, select networks for the VM you are launching.

You can deploy a VM to a VPC tier and multiple shared networks.



9. Click Next, review the configuration and click Launch.

Your VM will be deployed to the selected VPC tier and shared network.

16.27.8. Acquiring a New IP Address for a VPC

When you acquire an IP address, all IP addresses are allocated to VPC, not to the guest networks within the VPC. The IPs are associated to the guest network only when the first port-forwarding, load balancing, or Static NAT rule is created for the IP or the network. IP can't be associated to more than one network at a time.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.

4. Click the Configure button of the VPC to which you want to deploy the VMs.

The VPC page is displayed where all the tiers you created are listed in a diagram.

The following options are displayed.

- Internal LB
- Public LB IP
- Static NAT
- Virtual Machines
- CIDR

The following router information is displayed:

- Private Gateways
- Public IP Addresses
- Site-to-Site VPNs
- Network ACL Lists

5. Select IP Addresses.

The Public IP Addresses page is displayed.

6. Click Acquire New IP, and click Yes in the confirmation dialog.

You are prompted for confirmation because, typically, IP addresses are a limited resource. Within a few moments, the new IP address should appear with the state Allocated. You can now use the IP address in port forwarding, load balancing, and static NAT rules.

16.27.9. Releasing an IP Address Alloted to a VPC

The IP address is a limited resource. If you no longer need a particular IP, you can disassociate it from its VPC and return it to the pool of available addresses. An IP address can be released from its tier, only when all the networking (port forwarding, load balancing, or StaticNAT) rules are removed for this IP address. The released IP address will still belongs to the same VPC.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.

4. Click the Configure button of the VPC whose IP you want to release.

The VPC page is displayed where all the tiers you created are listed in a diagram.

The following options are displayed.

- Internal LB
- Public LB IP

- Static NAT
- Virtual Machines
- CIDR


The following router information is displayed:

- Private Gateways
- Public IP Addresses
- Site-to-Site VPNs
- Network ACL Lists

5. Select Public IP Addresses.

The IP Addresses page is displayed.

6. Click the IP you want to release.

7. In the Details tab, click the Release IP button 

16.27.10. Enabling or Disabling Static NAT on a VPC

A static NAT rule maps a public IP address to the private IP address of a VM in a VPC to allow Internet traffic to it. This section tells how to enable or disable static NAT for a particular IP address in a VPC.

If port forwarding rules are already in effect for an IP address, you cannot enable static NAT to that IP.

If a guest VM is part of more than one network, static NAT rules will function only if they are defined on the default network.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.

4. Click the Configure button of the VPC to which you want to deploy the VMs.

The VPC page is displayed where all the tiers you created are listed in a diagram.

For each tier, the following options are displayed.

- Internal LB
- Public LB IP
- Static NAT
- Virtual Machines
- CIDR


The following router information is displayed:

- Private Gateways
- Public IP Addresses
- Site-to-Site VPNs
- Network ACL Lists

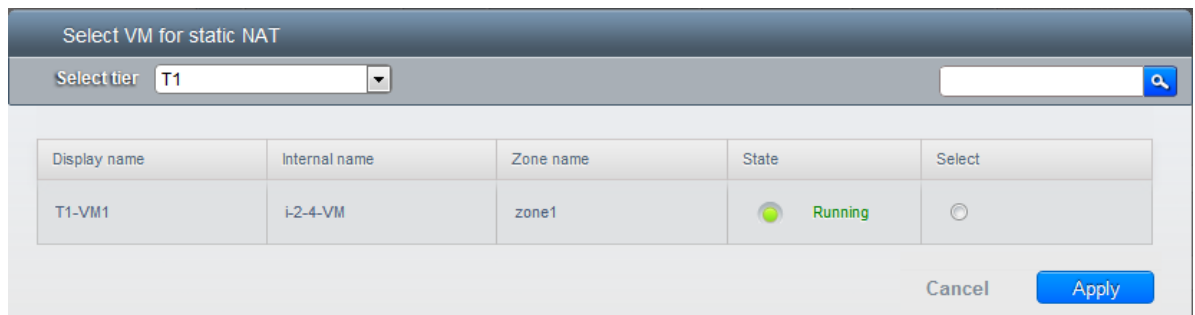
5. In the Router node, select Public IP Addresses.

The IP Addresses page is displayed.

6. Click the IP you want to work with.

7. In the Details tab, click the Static NAT button.  The button toggles between Enable and Disable, depending on whether static NAT is currently enabled for the IP address.

8. If you are enabling static NAT, a dialog appears as follows:



9. Select the tier and the destination VM, then click Apply.

16.27.11. Adding Load Balancing Rules on a VPC

In a VPC, you can configure two types of load balancing—public LB and internal LB. External LB is nothing but a LB rule created to redirect the traffic received at a public IP of the VPC virtual router. The traffic is load balanced within a tier based on your configuration. Citrix NetScaler and VPC virtual router are supported for public LB. When you use internal LB service, traffic received at a tier is load balanced across different VMs within that tier. For example, traffic reached at Web tier is redirected to another VM in that tier. External load balancing devices are not supported for internal LB. The service is provided by a internal LB VM configured on the target tier.

16.27.11.1. Load Balancing Public Traffic (Public LB)

A CloudPlatform user or administrator may create load balancing rules that balance traffic received at a public IP to one or more VMs that belong to a network tier that provides load balancing service in a VPC. A user creates a rule, specifies an algorithm, and assigns the rule to a set of VMs within a tier.

16.27.11.1.1. Enabling NetScaler as the LB Provider on a VPC Tier

1. Add and enable Netscaler VPX in dedicated mode.

Netscaler can be used in a VPC environment only if it is in dedicated mode.

2. Create a network offering, as given in [Section 16.27.11.1.2, “Creating a Network Offering for Public LB”](#).
3. Create a VPC with Netscaler as the Public LB provider.
For more information, see [Section 16.27.2, “Adding a Virtual Private Cloud”](#).
4. For the VPC, acquire an IP.
5. Create an public load balancing rule and apply, as given in [Section 16.27.11.1.3, “Creating a Public LB Rule”](#).

16.27.11.1.2. Creating a Network Offering for Public LB

To have public LB support on VPC, create a network offering as follows:

1. Log in to the CloudPlatform UI as a user or admin.
2. From the Select Offering drop-down, choose Network Offering.
3. Click Add Network Offering.
4. In the dialog, make the following choices:
 - **Name:** Any desired name for the network offering.
 - **Description:** A short description of the offering that can be displayed to users.
 - **Network Rate:** Allowed data transfer rate in MB per second.
 - **Traffic Type:** The type of network traffic that will be carried on the network.
 - **Guest Type:** Choose whether the guest network is isolated or shared.
 - **Persistent:** Indicate whether the guest network is persistent or not. The network that you can provision without having to deploy a VM on it is termed persistent network.
 - **VPC:** This option indicate whether the guest network is Virtual Private Cloud-enabled. A Virtual Private Cloud (VPC) is a private, isolated part of CloudPlatform. A VPC can have its own virtual network topology that resembles a traditional physical network. For more information on VPCs, see [Section 16.27.1, “About Virtual Private Clouds”](#).
 - **Specify VLAN:** (Isolated guest networks only) Indicate whether a VLAN should be specified when this offering is used.
 - **Supported Services:** Select Load Balancer. Use Netscaler or VpcVirtualRouter.
 - **Load Balancer Type:** Select Public LB from the drop-down.
 - **LB Isolation:** Select Dedicated if Netscaler is used as the public LB provider.
 - **System Offering:** Choose the system service offering that you want virtual routers to use in this network.
 - **Conserve mode:** Indicate whether to use conserve mode. In this mode, network resources are allocated only when the first virtual machine starts in the network.
5. Click OK and the network offering is created.

16.27.11.1.3. Creating a Public LB Rule

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.

4. Click the Configure button of the VPC, for which you want to configure load balancing rules.
The VPC page is displayed where all the tiers you created listed in a diagram.

For each tier, the following options are displayed:

- Internal LB
- Public LB IP
- Static NAT
- Virtual Machines
- CIDR

The following router information is displayed:

- Private Gateways
- Public IP Addresses
- Site-to-Site VPNs
- Network ACL Lists

5. In the Router node, select Public IP Addresses.

The IP Addresses page is displayed.

6. Click the IP address for which you want to create the rule, then click the Configuration tab.
7. In the Load Balancing node of the diagram, click View All.
8. Select the tier to which you want to apply the rule.
9. Specify the following:

- **Name:** A name for the load balancer rule.
- **Public Port:** The port that receives the incoming traffic to be balanced.
- **Private Port:** The port that the VMs will use to receive the traffic.
- **Algorithm.** Choose the load balancing algorithm you want CloudPlatform to use. CloudPlatform supports the following well-known algorithms:
 - Round-robin
 - Least connections

- Source
- **Stickiness.** (Optional) Click Configure and choose the algorithm for the stickiness policy. See Sticky Session Policies for Load Balancer Rules.
- **Add VMs:** Click Add VMs, then select two or more VMs that will divide the load of incoming traffic, and click Apply.

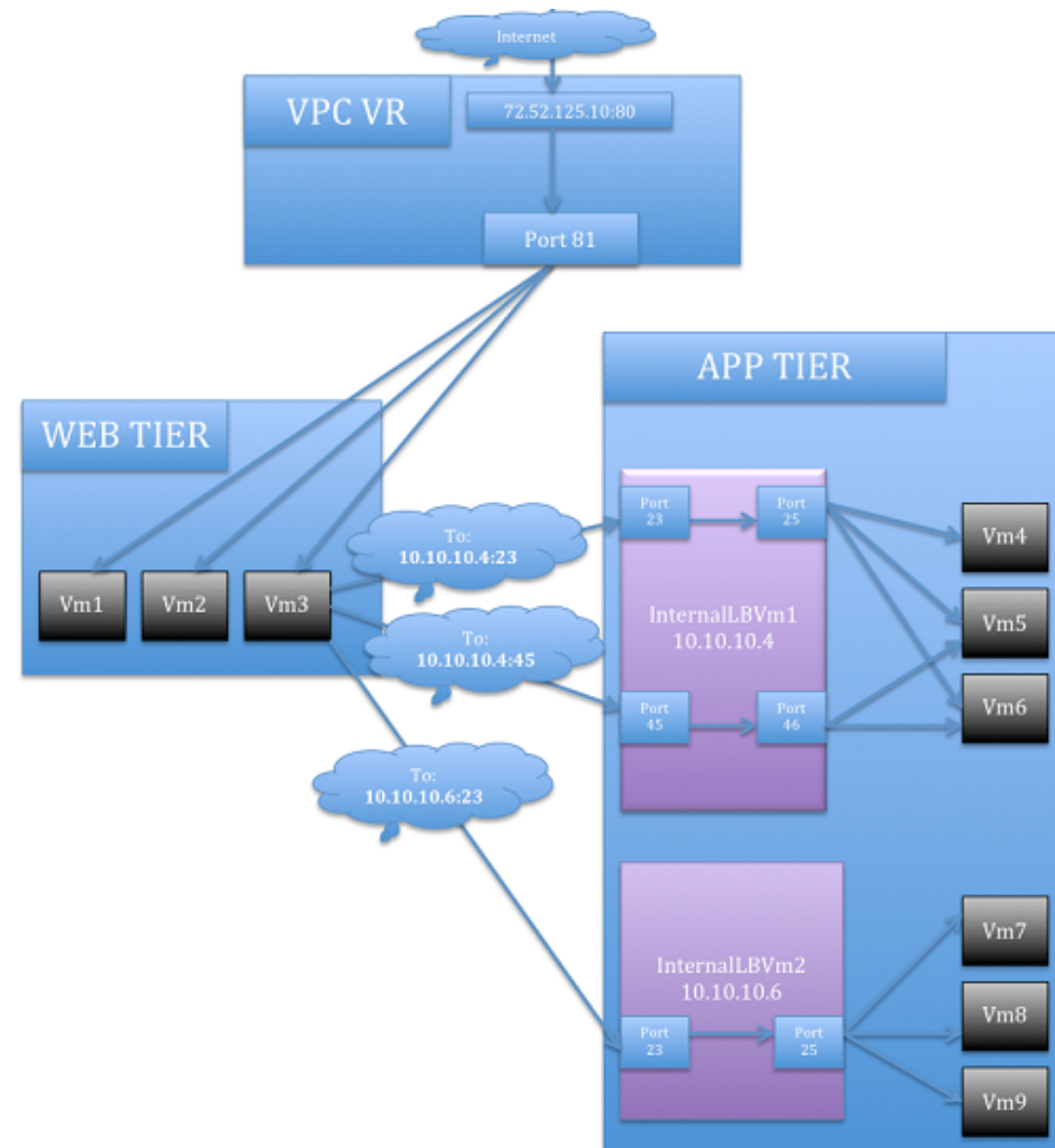
The new load balancing rule appears in the list. You can repeat these steps to add more load balancing rules for this IP address.

16.27.11.2. Load Balancing Tier-to-Tier traffic (Internal LB)

CloudPlatform supports sharing workload across different tiers within your VPC. Assume that multiple tiers are set up in your environment, such as Web tier and Application tier. Traffic to each tier is balanced on the VPC virtual router on the public side, as explained in [Section 16.27.11, “Adding Load Balancing Rules on a VPC”](#). If you want the traffic coming from the Web tier to the Application tier to be balanced, use the internal load balancing feature offered by CloudPlatform.

16.27.11.2.1. How Does Internal LB Work in VPC?

In this figure, a public LB rule is created for the public IP 72.52.125.10 with public port 80 and private port 81. The LB rule, created on the VPC virtual router, is applied on the traffic coming from the Internet to the VMs on the Web tier. On the Application tier two internal load balancing rules are created. An internal LB rule for the guest IP 10.10.10.4 with load balancer port 23 and instance port 25 is configured on the VM, InternalLBVM1. Another internal LB rule for the guest IP 10.10.10.4 with load balancer port 45 and instance port 46 is configured on the VM, InternalLBVM1. Another internal LB rule for the guest IP 10.10.10.6, with load balancer port 23 and instance port 25 is configured on the VM, InternalLBVM2.



16.27.11.2.2. Enabling Internal LB on a VPC Tier

1. Create a network offering, as given in [Section 16.27.11.2.4, "Creating an Internal LB Rule"](#).
2. Create an internal load balancing rule and apply, as given in [Section 16.27.11.2.4, "Creating an Internal LB Rule"](#).

16.27.11.2.3. Creating a Network Offering for Internal LB

To have internal LB support on VPC, either use the default offering, `DefaultIsolatedNetworkOfferingForVpcNetworksWithInternalLB`, or create a network offering as follows:

1. Log in to the CloudPlatform UI as a user or admin.
2. From the Select Offering drop-down, choose Network Offering.
3. Click Add Network Offering.
4. In the dialog, make the following choices:

- **Name:** Any desired name for the network offering.
 - **Description:** A short description of the offering that can be displayed to users.
 - **Network Rate:** Allowed data transfer rate in MB per second.
 - **Traffic Type:** The type of network traffic that will be carried on the network.
 - **Guest Type:** Choose whether the guest network is isolated or shared.
 - **Persistent:** Indicate whether the guest network is persistent or not. The network that you can provision without having to deploy a VM on it is termed persistent network.
 - **VPC:** This option indicate whether the guest network is Virtual Private Cloud-enabled. A Virtual Private Cloud (VPC) is a private, isolated part of CloudPlatform. A VPC can have its own virtual network topology that resembles a traditional physical network. For more information on VPCs, see [Section 16.27.1, “About Virtual Private Clouds”](#).
 - **Specify VLAN:** (Isolated guest networks only) Indicate whether a VLAN should be specified when this offering is used.
 - **Supported Services:** Select Load Balancer. Select `InternalLBVM` from the provider list.
 - **Load Balancer Type:** Select Internal LB from the drop-down.
 - **System Offering:** Choose the system service offering that you want virtual routers to use in this network.
 - **Conserve mode:** Indicate whether to use conserve mode. In this mode, network resources are allocated only when the first virtual machine starts in the network.
5. Click OK and the network offering is created.

16.27.11.2.4. Creating an Internal LB Rule

When you create the Internal LB rule and applies to a VM, an Internal LB VM, which is responsible for load balancing, is created. You can view the created Internal LB VM in the Instances page if you navigate to **Infrastructure > Zones > <zone_name> > <physical_network_name> > Network Service Providers > Internal LB VM**.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.
4. Locate the VPC for which you want to configure internal LB, then click Configure.

The VPC page is displayed where all the tiers you created listed in a diagram.
5. Locate the Tier for which you want to configure an internal LB rule, click Internal LB.

In the Internal LB page, click Add Internal LB.
6. In the dialog, specify the following:

- **Name:** A name for the load balancer rule.
- **Description:** A short description of the rule that can be displayed to users.
- **Source IP Address:** The source IP from which traffic originates. The IP is acquired from the CIDR of that particular tier on which you want to create the Internal LB rule.

For every Source IP, a new Internal LB VM is created for load balancing.

- **Source Port:** The port associated with the source IP. Traffic on this port is load balanced.
- **Instance Port:** The port of the internal LB VM.
- **Algorithm.** Choose the load balancing algorithm you want CloudPlatform to use. CloudPlatform supports the following well-known algorithms:
 - Round-robin
 - Least connections
 - Source

16.27.12. Adding a Port Forwarding Rule on a VPC

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPCs that you have created for the account is listed in the page.

4. Click the Configure button of the VPC to which you want to deploy the VMs.

The VPC page is displayed where all the tiers you created are listed in a diagram.

For each tier, the following options are displayed:

- Internal LB
- Public LB IP
- Static NAT
- Virtual Machines
- CIDR

The following router information is displayed:

- Private Gateways
- Public IP Addresses
- Site-to-Site VPNs
- Network ACL Lists

5. In the Router node, select Public IP Addresses.

The IP Addresses page is displayed.

6. Click the IP address for which you want to create the rule, then click the Configuration tab.
7. In the Port Forwarding node of the diagram, click View All.
8. Select the tier to which you want to apply the rule.
9. Specify the following:
 - **Public Port:** The port to which public traffic will be addressed on the IP address you acquired in the previous step.
 - **Private Port:** The port on which the instance is listening for forwarded public traffic.
 - **Protocol:** The communication protocol in use between the two ports.
 - TCP
 - UDP
 - **Add VM:** Click Add VM. Select the name of the instance to which this rule applies, and click Apply.

You can test the rule by opening an SSH session to the instance.

16.27.13. Removing Tiers

You can remove a tier from a VPC. A removed tier cannot be revoked. When a tier is removed, only the resources of the tier are expunged. All the network rules (port forwarding, load balancing and staticNAT) and the IP addresses associated to the tier are removed. The IP address still be belonging to the same VPC.

1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.

All the VPC that you have created for the account is listed in the page.

4. Click the Configure button of the VPC for which you want to set up tiers.

The Configure VPC page is displayed. Locate the tier you want to work with.

5. Select the tier you want to remove.

6. In the Network Details tab, click the Delete Network button. 

Click Yes to confirm. Wait for some time for the tier to be removed.

16.27.14. Editing, Restarting, and Removing a Virtual Private Cloud




Note

Ensure that all the tiers are removed before you remove a VPC.


1. Log in to the CloudPlatform UI as an administrator or end user.
2. In the left navigation, choose Network.
3. In the Select view, select VPC.


All the VPCs that you have created for the account is listed in the page.

4. Select the VPC you want to work with.

5. In the Details tab, click the Remove VPC button 

You can remove the VPC by also using the remove button in the Quick View.

You can edit the name and description of a VPC. To do that, select the VPC, then click the Edit button. 

To restart a VPC, select the VPC, then click the Restart button. 

16.28. Persistent Networks

The network that you can provision without having to deploy any VMs on it is called a persistent network. A persistent network can be part of a VPC or a non-VPC environment.

When you create other types of network, a network is only a database entry until the first VM is created on that network. When the first VM is created, a VLAN ID is assigned and the network is provisioned. Also, when the last VM is destroyed, the VLAN ID is released and the network is no longer available. With the addition of persistent network, you will have the ability to create a network in CloudPlatform in which physical devices can be deployed without having to run any VMs. Additionally, you can deploy physical devices on that network.

One of the advantages of having a persistent network is that you can create a VPC with a tier consisting of only physical devices. For example, you might create a VPC for a three-tier application, deploy VMs for Web and Application tier, and use physical machines for the Database tier. Another use case is that if you are providing services by using physical hardware, you can define the network as persistent and therefore even if all its VMs are destroyed the services will not be discontinued.

16.28.1. Persistent Network Considerations

- Persistent network is designed for Isolated networks.
- All default network offerings are non-persistent.
- A network offering cannot be editable because changing it affects the behavior of the existing networks that were created using this network offering.

- When you create a guest network, the network offering that you select defines the network persistence. This in turn depends on whether persistent network is enabled in the selected network offering.
- An existing network can be made persistent by changing its network offering to an offering that has the Persistent option enabled. While setting this property, even if the network has no running VMs, the network is provisioned.
- An existing network can be made non-persistent by changing its network offering to an offering that has the Persistent option disabled. If the network has no running VMs, during the next network garbage collection run the network is shut down.
- When the last VM on a network is destroyed, the network garbage collector checks if the network offering associated with the network is persistent, and shuts down the network only if it is non-persistent.

16.28.2. Creating a Persistent Guest Network

To create a persistent network, perform the following:

1. Create a network offering with the Persistent option enabled.
See [Section 10.5.1, “Creating a New Network Offering”](#).
2. Select Network from the left navigation pane.
3. Select the guest network that you want to offer this network service to.
4. Click the Edit button.
5. From the Network Offering drop-down, select the persistent network offering you have just created.
6. Click OK.

Working with System Virtual Machines

CloudPlatform uses several types of system virtual machines to perform tasks in the cloud. In general CloudPlatform manages these system VMs and creates, starts, and stops them as needed based on scale and immediate needs. However, the administrator should be aware of them and their roles to assist in debugging issues.

17.1. The System VM Template

The System VMs come from a single template. The System VM has the following characteristics:

- Debian 7.0
- Has a minimal set of packages installed, thereby reducing the attack surface
- 32-bit for enhanced performance on XenServer and VMWare
- pvops kernel with Xen PV drivers, KVM virtio drivers, and VMware tools for optimum performance on all hypervisors
- Xen tools inclusion allows performance monitoring
- Latest versions of HAProxy, iptables, IPsec, and Apache from debian repository ensures improved security and speed
- Latest version of JRE from Sun/Oracle ensures improved security and speed

17.2. Changing the Default System VM Template

CloudPlatform allows you to change the default 32-bit System VM template to 64-bit one. Using the 64-bit template, upgrade the virtual router to manage larger number of connection in your network.

1. Based on the hypervisor you use, download the 64-bit template from the following location:

Hypervisor	Download Location
XenServer	http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64-2013-07-15-master-xen.vhd.bz2
KVM	http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64-2013-07-15-master-kvm.qcow2.bz2

2. As an administrator, log in to the CloudPlatform UI
3. Register the 64 bit template.
For example: KVM64bitTemplate
4. While registering the template, select Routing.
5. Navigate to Infrastructure > Zone > Settings.
6. Set the name of the 64-bit template, KVM64bitTemplate, in the `router.template.kvm` global parameter.

If you are using a XenServer 64-bit template, set the name in the `router.template.xen` global parameter.

Any new virtual router created in this Zone automatically picks up this template.

7. Restart the Management Server.

17.3. Multiple System VM Support for VMware

Every CloudPlatform zone has single System VM for template processing tasks such as downloading templates, uploading templates, and uploading ISOs. In a zone where VMware is being used, additional System VMs can be launched to process VMware-specific tasks such as taking snapshots and creating private templates. The CloudPlatform management server launches additional System VMs for VMware-specific tasks as the load increases. The management server monitors and weights all commands sent to these System VMs and performs dynamic load balancing and scaling-up of more System VMs.

17.4. Console Proxy

The Console Proxy is a type of System Virtual Machine that has a role in presenting a console view via the web UI. It connects the user's browser to the VNC port made available via the hypervisor for the console of the guest. Both the administrator and end user web UIs offer a console connection.

Clicking on a console icon brings up a new window. The AJAX code downloaded into that window refers to the public IP address of a console proxy VM. There is exactly one public IP address allocated per console proxy VM. The AJAX application connects to this IP. The console proxy then proxies the connection to the VNC port for the requested VM on the Host hosting the guest. .



Note

The hypervisors will have many ports assigned to VNC usage so that multiple VNC sessions can occur simultaneously.

The VNC traffic never goes through the guest virtual IP, and there is no need to enable VNC within the guest.

The console proxy VM will periodically report its active session count to the Management Server. The default reporting interval is five seconds. This can be changed through standard Management Server configuration with the parameter `consoleproxy.loadscan.interval`.

Assignment of guest VM to console proxy is determined by first determining if the guest VM has a previous session associated with a console proxy. If it does, the Management Server will assign the guest VM to the target Console Proxy VM regardless of the load on the proxy VM. Failing that, the first available running Console Proxy VM that has the capacity to handle new sessions is used.

Console proxies can be restarted by administrators but this will interrupt existing console sessions for users.

The console viewing functionality uses a dynamic DNS service under the domain name `realhostip.com` to assist in providing SSL security to console sessions. The console proxy is assigned a public IP address. In order to avoid browser warnings for mismatched SSL certificates, the URL for the new

console window is set to the form of `https://aaa-bbb-ccc-ddd.realhostip.com`. Customers will see this URL during console session creation. CloudPlatform includes the `realhostip.com` SSL certificate in the console proxy VM. Of course, CloudPlatform cannot know about DNS records for our customers' public IPs prior to shipping the software. CloudPlatform therefore runs a dynamic DNS server that is authoritative for the `realhostip.com` domain. It maps the `aaa-bbb-ccc-ddd` part of the DNS name to the IP address `aaa.bbb.ccc.ddd` on lookups. This allows the browser to correctly connect to the console proxy's public IP, where it then expects and receives a SSL certificate for `realhostip.com`, and SSL is set up without browser warnings.

17.4.1. Changing the Console Proxy SSL Certificate and Domain

If the administrator prefers, it is possible for the URL of the customer's console session to show a domain other than `realhostip.com`. The administrator can customize the displayed domain by selecting a different domain and uploading a new SSL certificate and private key. The domain must run a DNS service that is capable of resolving queries for addresses of the form `aaa-bbb-ccc-ddd.your.domain` to an IPv4 IP address in the form `aaa.bbb.ccc.ddd`, for example, `202.8.44.1`. To change the console proxy domain, SSL certificate, and private key:

1. Set up dynamic name resolution or populate all possible DNS names in your public IP range into your existing DNS server with the format `aaa-bbb-ccc-ddd.company.com -> aaa.bbb.ccc.ddd`.
2. Generate the private key and certificate signing request (CSR). When you are using `openssl` to generate private/public key pairs and CSRs, for the private key that you are going to paste into the CloudPlatform UI, be sure to convert it into PKCS#8 format.

- a. Generate a new 2048-bit private key

```
openssl genrsa -des3 -out yourprivate.key 2048
```

- b. Generate a new certificate CSR

```
openssl req -new -key yourprivate.key -out yourcertificate.csr
```

- c. Head to the website of your favorite trusted Certificate Authority, purchase an SSL certificate, and submit the CSR. You should receive a valid certificate in return
- d. Convert your private key format into PKCS#8 encrypted format.

```
openssl pkcs8 -topk8 -in yourprivate.key -out yourprivate.pkcs8.encrypted.key
```

- e. Convert your PKCS#8 encrypted private key into the PKCS#8 format that is compliant with CloudPlatform

```
openssl pkcs8 -in yourprivate.pkcs8.encrypted.key -out yourprivate.pkcs8.key
```

3. In the Update SSL Certificate screen of the CloudPlatform UI, paste the following

- Certificate from step 1(c).
- Private key from step 1(e).
- The desired new domain name; for example, `company.com`

4. The desired new domain name; for example, `company.com`

This stops all currently running console proxy VMs, then restarts them with the new certificate and key. Users might notice a brief interruption in console availability

The Management Server will generate URLs of the form "aaa-bbb-ccc-ddd.company.com" after this change is made. New console requests will be served with the new DNS domain name, certificate, and key

17.5. Virtual Router

The virtual router is a type of System Virtual Machine. The virtual router is one of the most frequently used service providers in CloudPlatform. The end user has no direct access to the virtual router. Users can ping the virtual router and take actions that affect it (such as setting up port forwarding), but users do not have SSH access into the virtual router.

There is no mechanism for the administrator to log in to the virtual router. Virtual routers can be restarted by administrators, but this will interrupt public network access and other services for end users. A basic test in debugging networking issues is to attempt to ping the virtual router from a guest VM. Some of the characteristics of the virtual router are determined by its associated system service offering.

17.5.1. Configuring the Virtual Router

You can set the following:

- IP range
- Supported network services
- Default domain name for the network serviced by the virtual router
- Gateway IP address
- How often CloudPlatform fetches network usage statistics from CloudPlatform virtual routers. If you want to collect traffic metering data from the virtual router, set the global configuration parameter `router.stats.interval`. If you are not using the virtual router to gather network usage statistics, set it to 0.

17.5.2. Upgrading a Virtual Router with System Service Offerings

When CloudPlatform creates a virtual router, it uses default settings which are defined in a default system service offering. See [Section 9.2, "System Service Offerings"](#). All the virtual routers in a single guest network use the same system service offering. You can upgrade the capabilities of the virtual router by creating and applying a custom system service offering.

1. Define your custom system service offering. See [Section 9.2.1, "Creating a New System Service Offering"](#). In System VM Type, choose Domain Router.
2. Associate the system service offering with a network offering. See [Section 10.5.1, "Creating a New Network Offering"](#)
3. Apply the network offering to the network where you want the virtual routers to use the new system service offering. If this is a new network, follow the steps in Adding an Additional Guest Network on page 66. To change the service offering for existing virtual routers, follow the steps in [Section 10.5.2, "Changing the Network Offering on a Guest Network"](#).

17.5.3. Best Practices for Virtual Routers

- **WARNING:** Restarting a virtual router from a hypervisor console deletes all the iptables rules. To work around this issue, stop the virtual router and start it from the CloudPlatform UI.
- **WARNING:** Do not use the `destroyRouter` API when only one router is available in the network, because `restartNetwork` API with the `cleanup=false` parameter can't recreate it later. If you want to destroy and recreate the single router available in the network, use the `restartNetwork` API with the `cleanup=true` parameter.

17.6. Secondary Storage VM

In addition to the hosts, CloudPlatform's Secondary Storage VM mounts and writes to secondary storage.

Submissions to secondary storage go through the Secondary Storage VM. The Secondary Storage VM can retrieve templates and ISO images from URLs using a variety of protocols.

The secondary storage VM takes care of a variety of secondary storage activities: downloading a new template to a Zone, copying templates between Zones, and snapshot backups.

The administrator can log in to the secondary storage VM if needed.

17.7. Setting a Random System VM Password

You can log in to system virtual machines, just like any other VM, by using the procedure in [Section 11.5, "Accessing VMs"](#). When you log in to a system VM, you will need to provide a password. For added security, it is recommended that you create a randomized system VM password rather than accepting the default that is provided when you install CloudPlatform.

To generate a random system VM password:

1. Set the global configuration setting `system.vm.random.password` to `true`.
2. Restart the Management Server.
3. To obtain the new password, view the global configuration setting `system.vm.password`.

The new password will remain the same even if you restart the Management Server again.

If you ever need to change the password, manually edit the CloudPlatform database. In the configuration table, remove the entry `system.vm.password`. The next time you restart the Management Server, assuming the value of the global configuration setting `system.vm.random.password` is still `true`, a new random password will be generated and stored in the database.

System Reliability and High Availability

18.1. HA for Management Server

The CloudPlatform Management Server should be deployed in a multi-node configuration such that it is not susceptible to individual server failures. The Management Server itself (as distinct from the MySQL database) is stateless and may be placed behind a load balancer.

Normal operation of Hosts is not impacted by an outage of all Management Servers. All guest VMs will continue to work.

When the Management Server is down, no new VMs can be created, and the end user and admin UI, API, dynamic load distribution, and HA will cease to work.

18.2. HA-Enabled Virtual Machines

The user can specify a virtual machine as HA-enabled. By default, all virtual router VMs and Elastic Load Balancing VMs are automatically configured as HA-enabled. When an HA-enabled VM crashes, CloudPlatform detects the crash and restarts the VM automatically within the same Availability Zone. HA is never performed across different Availability Zones. CloudPlatform has a conservative policy towards restarting VMs and ensures that there will never be two instances of the same VM running at the same time. The Management Server attempts to start the VM on another Host in the same cluster.

HA features work with iSCSI or NFS primary storage. HA with local storage is not supported.

18.3. Dedicated HA Hosts

One or more hosts can be designated for use only by HA-enabled VMs that are restarting due to a host failure. Setting up a pool of such dedicated HA hosts as the recovery destination for all HA-enabled VMs is useful to:

- Make it easier to determine which VMs have been restarted as part of the CloudPlatform high-availability function. If a VM is running on a dedicated HA host, then it must be an HA-enabled VM whose original host failed. (With one exception: It is possible for an administrator to manually migrate any VM to a dedicated HA host.)
- Keep HA-enabled VMs from restarting on hosts which may be reserved for other purposes.

The dedicated HA option is set through a special host tag when the host is created. To allow the administrator to dedicate hosts to only HA-enabled VMs, set the global configuration variable `ha.tag` to the desired tag (for example, "ha_host"), and restart the Management Server. Enter the value in the Host Tags field when adding the host(s) that you want to dedicate to HA-enabled VMs.



Note

If you set `ha.tag`, be sure to actually use that tag on at least one host in your cloud. If the tag specified in `ha.tag` is not set for any host in the cloud, the HA-enabled VMs will fail to restart after a crash.

18.4. Primary Storage Outage and Data Loss

When a primary storage outage occurs, all hosts in that cluster are rebooted. This ensures that affected VMs running on the hypervisor are appropriately marked as stopped. Guests that are marked for HA will be restarted as soon as practical when the primary storage comes back on line. With NFS, the hypervisor may allow the virtual machines to continue running depending on the nature of the issue. For example, an NFS hang will cause the guest VMs to be suspended until storage connectivity is restored. Primary storage is not designed to be backed up. Individual volumes in primary storage can be backed up using snapshots.



Note

If there are multiple primary storage servers in a cluster and only one goes down, VMs using a healthy primary storage will also be affected, because all hosts are rebooted.

18.5. Secondary Storage Outage and Data Loss

For a Zone that has only one secondary storage server, a secondary storage outage will have feature level impact to the system but will not impact running guest VMs. It may become impossible to create a VM with the selected template for a user. A user may also not be able to save snapshots or examine/restore saved snapshots. These features will automatically be available when the secondary storage comes back online.

Secondary storage data loss will impact recently added user data including templates, snapshots, and ISO images. Secondary storage should be backed up periodically. Multiple secondary storage servers can be provisioned within each zone to increase the scalability of the system.

18.6. Limiting the Rate of API Requests

You can limit the rate at which API requests can be placed for each account. This is useful to avoid malicious attacks on the Management Server, prevent performance degradation, and provide fairness to all accounts.

If the number of API calls exceeds the threshold, an error message is returned for any additional API calls. The caller will have to retry these API calls at another time.

18.6.1. Configuring the API Request Rate

To control the API request rate, use the following global configuration settings:

- `api.throttling.enabled` - Enable/Disable API throttling. By default, this setting is false, so API throttling is not enabled.
- `api.throttling.interval` (in seconds) - Time interval during which the number of API requests is to be counted. When the interval has passed, the API count is reset to 0.
- `api.throttling.max` - Maximum number of APIs that can be placed within the `api.throttling.interval` period.
- `api.throttling.cachesize` - Cache size for storing API counters. Use a value higher than the total number of accounts managed by the cloud. One cache entry is needed for each account, to store the running API total for that account.

18.6.2. Limitations on API Throttling

The following limitations exist in the current implementation of this feature.



Note

Even with these limitations, CloudPlatform is still able to effectively use API throttling to avoid malicious attacks causing denial of service.

- In a deployment with multiple Management Servers, the cache is not synchronized across them. In this case, CloudPlatform might not be able to ensure that only the exact desired number of API requests are allowed. In the worst case, the number of API calls that might be allowed is (number of Management Servers) * (api.throttling.max).
- The API commands `resetApiLimit` and `getApiLimit` are limited to the Management Server where the API is invoked.

Managing the Cloud

19.1. Using Tags to Organize Resources in the Cloud

A tag is a key-value pair that stores metadata about a resource in the cloud. Tags are useful for categorizing resources. For example, you can tag a user VM with a value that indicates the user's city of residence. In this case, the key would be "city" and the value might be "Toronto" or "Tokyo." You can then request CloudPlatform to find all resources that have a given tag; for example, VMs for users in a given city.

You can tag a user virtual machine, volume, snapshot, guest network, template, ISO, firewall rule, port forwarding rule, public IP address, security group, load balancer rule, project, VPC, network ACL, or static route. You can not tag a remote access VPN.

You can work with tags through the UI or through the API commands `createTags`, `deleteTags`, and `listTags`. You can define multiple tags for each resource. There is no limit on the number of tags you can define. Each tag can be up to 255 characters long. Users can define tags on the resources they own, and administrators can define tags on any resources in the cloud.

An optional input parameter, "tags," exists on many of the list* API commands. The following example shows how to use this new parameter to find all the volumes having tag `region=canada` OR tag `city=Toronto`:

```
command=listVolumes
  &listAll=true
  &tags[0].key=region
  &tags[0].value=canada
  &tags[1].key=city
  &tags[1].value=Toronto
```

The following API commands have the "tags" input parameter:

- `listVirtualMachines`
- `listVolumes`
- `listSnapshots`
- `listNetworks`
- `listTemplates`
- `listIscsi`
- `listFirewallRules`
- `listPortForwardingRules`
- `listPublicIpAddresses`
- `listSecurityGroups`
- `listLoadBalancerRules`
- `listProjects`
- `listVPCs`

- listNetworkACLs
- listStaticRoutes

19.2. Setting Configuration Parameters

19.2.1. About Configuration Parameters

CloudPlatform provides a variety of settings you can use to set limits, configure features, and enable or disable features in the cloud. Once your Management Server is running, you might need to set some of these configuration parameters, depending on what optional features you are setting up. You can set default values at the global level, which will be in effect throughout the cloud unless you override them at a lower level. You can make local settings, which will override the global configuration parameter values, at the level of an account, zone, cluster, or primary storage.

The documentation for each CloudPlatform feature should direct you to the names of the applicable parameters. The following table shows a few of the more useful parameters.

Field	Value
management.network.cidr	A CIDR that describes the network that the management CIDRs reside on. This variable must be set for deployments that use vSphere. It is recommended to be set for other deployments as well. Example: 192.168.3.0/24.
xen.setup.multipath	<p>For XenServer nodes, this is a true/false variable that instructs CloudStack to enable iSCSI multipath on the XenServer Hosts when they are added. This defaults to false. Set it to true if you would like CloudStack to enable multipath.</p> <p>If this is true for a NFS-based deployment multipath will still be enabled on the XenServer host. However, this does not impact NFS operation and is harmless.</p>
secstorage.allowed.internal.sites	This is used to protect your internal network from rogue attempts to download arbitrary files using the template download feature. This is a comma-separated list of CIDRs. If a requested URL matches any of these CIDRs the Secondary Storage VM will use the private network interface to fetch the URL. Other URLs will go through the public interface. We suggest you set this to 1 or 2 hardened internal machines where you keep your templates. For example, set it to 192.168.1.66/32.
use.local.storage	Determines whether CloudStack will use storage that is local to the Host for data disks, templates, and snapshots. By default CloudStack will not use this storage. You should change this to true if you want to use local storage and you understand the reliability and feature drawbacks to choosing local storage.

Field	Value
host	This is the IP address of the Management Server. If you are using multiple Management Servers you should enter a load balanced IP address that is reachable via the private network.
default.page.size	Maximum number of items per page that can be returned by a CloudStack API command. The limit applies at the cloud level and can vary from cloud to cloud. You can override this with a lower value on a particular API call by using the page and page size API command parameters. For more information, see the Developer's Guide. Default: 500.
ha.tag	The label you want to use throughout the cloud to designate certain hosts as dedicated HA hosts. These hosts will be used only for HA-enabled VMs that are restarting due to the failure of another host. For example, you could set this to ha_host. Specify the ha.tag value as a host tag when you add a new host to the cloud.

19.2.2. Setting Global Configuration Parameters

Use the following steps to set global configuration parameters. These values will be the defaults in effect throughout your CloudPlatform deployment.

1. Log in to the UI as administrator.
2. In the left navigation bar, click Global Settings.
3. In Select View, choose one of the following:
 - Global Settings. This displays a list of the parameters with brief descriptions and current values.
 - Hypervisor Capabilities. This displays a list of hypervisor versions with the maximum number of guests supported for each.
4. Use the search box to narrow down the list to those you are interested in.
5. In the Actions column, click the Edit icon to modify a value. If you are viewing Hypervisor Capabilities, you must click the name of the hypervisor first to display the editing screen.

19.2.3. Setting Local Configuration Parameters

Use the following steps to set local configuration parameters for an account, zone, cluster, or primary storage. These values will override the global configuration settings.

1. Log in to the UI as administrator.
2. In the left navigation bar, click Infrastructure or Accounts, depending on where you want to set a value.
3. Find the name of the particular resource that you want to work with. For example, if you are in Infrastructure, click View All on the Zones, Clusters, or Primary Storage area.

4. Click the name of the resource where you want to set a limit.
5. Click the Settings tab.
6. Use the search box to narrow down the list to those you are interested in.
7. In the Actions column, click the Edit icon to modify a value.

19.2.4. Granular Global Configuration Parameters

The following global configuration parameters have been made more granular. The parameters are listed under three different scopes: account, cluster, and zone.

Field	Field	Value
account	remote.access.vpn.client.iprange	The range of IPs to be allocated to remotely access the VPN clients. The first IP in the range is used by the VPN server.
account	allow.public.user.templates	If false, users will not be able to create public templates.
account	use.system.public.ips	If true and if an account has one or more dedicated public IP ranges, IPs are acquired from the system pool after all the IPs dedicated to the account have been consumed.
account	use.system.guest.vlans	If true and if an account has one or more dedicated guest VLAN ranges, VLANs are allocated from the system pool after all the VLANs dedicated to the account have been consumed.
cluster	cluster.storage.allocated.capacity.notification.threshold	The percentage, as a value between 0 and 1, of allocated storage utilization above which alerts are sent that the storage is below the threshold.
cluster	cluster.storage.capacity.notification.threshold	The percentage, as a value between 0 and 1, of storage utilization above which alerts are sent that the available storage is below the threshold.
cluster	cluster.cpu.allocated.capacity.notification.threshold	The percentage, as a value between 0 and 1, of cpu utilization above which alerts are sent that the available CPU is below the threshold.
cluster	cluster.memory.allocated.capacity.notification.threshold	The percentage, as a value between 0 and 1, of memory utilization above which alerts

Field	Field	Value
		are sent that the available memory is below the threshold.
cluster	cluster.cpu.allocated.capacity.disablethreshold	The percentage, as a value between 0 and 1, of CPU utilization above which allocators will disable that cluster from further usage. Keep the corresponding notification threshold lower than this value to be notified beforehand.
cluster	cluster.memory.allocated.capacity.disablethreshold	The percentage, as a value between 0 and 1, of memory utilization above which allocators will disable that cluster from further usage. Keep the corresponding notification threshold lower than this value to be notified beforehand.
cluster	cpu.overprovisioning.factor	Used for CPU over-provisioning calculation; the available CPU will be the mathematical product of actualCpuCapacity and cpu.overprovisioning.factor.
cluster	mem.overprovisioning.factor	Used for memory over-provisioning calculation.
cluster	vmware.reserve.cpu	Specify whether or not to reserve CPU when not over-provisioning; In case of CPU over-provisioning, CPU is always reserved.
cluster	vmware.reserve.mem	Specify whether or not to reserve memory when not over-provisioning; In case of memory over-provisioning memory is always reserved.
zone	pool.storage.allocated.capacity.disablethreshold	The percentage, as a value between 0 and 1, of allocated storage utilization above which allocators will disable that pool because the available allocated storage is below the threshold.
zone	pool.storage.capacity.disablethreshold	The percentage, as a value between 0 and 1, of storage utilization above which allocators will disable the pool

Field	Field	Value
		because the available storage capacity is below the threshold.
zone	storage.overprovisioning.factor	Used for storage overprovisioning calculation; available storage will be the mathematical product of actualStorageSize and storage.overprovisioning.factor.
zone	network.throttling.rate	Default data transfer rate in megabits per second allowed in a network.
zone	guest.domain.suffix	Default domain name for VMs inside a virtual networks with a router.
zone	router.template.xen	Name of the default router template on Xenserver.
zone	router.template.kvm	Name of the default router template on KVM.
zone	router.template.vmware	Name of the default router template on VMware.
zone	enable.dynamic.scale.vm	Enable or diable dynamically scaling of a VM.
zone	use.external.dns	Bypass internal DNS, and use the external DNS1 and DNS2
zone	blacklisted.routes	Routes that are blacklisted cannot be used for creating static routes for a VPC Private Gateway.

19.3. Changing the Database Configuration

The CloudPlatform Management Server stores database configuration information, for example hostname, port, credentials, in the file `/etc/cloud/management/db.properties`. To effect a change, edit this file on each Management Server, then restart the Management Server.

19.4. Administrator Alerts

CloudPlatform provides alerts to help with the management of the cloud. Alerts are notices to an administrator that an error has occurred in the cloud. Alerts are displayed on the Dashboard in the CloudPlatform UI, and can also be sent to an email address, an external SNMP manager, or an external syslog manager.

Alerts are generated under the following circumstances:

- The Management Server cluster runs low on CPU, memory, or storage resources
- The Management Server loses heartbeat from a Host for more than 3 minutes
- The Host cluster runs low on CPU, memory, or storage resources

For a list of CloudPlatform alerts, see [Appendix B, Alerts](#). For the most up-to-date list, call the listAlerts API.



Note

In addition to alerts, CloudPlatform also generates events. Unlike alerts, which indicate issues of concern, events track all routine user and administrator actions in the cloud. For example, every time a guest VM starts, this creates an associated event. Events are stored in the Management Server's database. For more details, see [Section 22.1, "Events"](#).

19.4.1. Customizing Alerts with Global Configuration Settings

To exercise some control over how alerts behave, you can use the global configuration settings. You can configure recipient and sender email addresses, SMTP server and authentication, timeouts, frequency intervals, and more. To access these settings through the CloudPlatform UI, go to the Global Settings screen (click the Global Settings button in the left navbar) and type "alert" in the search box.

The following table shows some of the more useful alert configuration settings.

Configuration Variable	Description
alert.email.addresses	One or more email addresses to which alerts will be sent. There are several companion settings for the SMTP host, From: address, etc.
alert.purge.delay	A useful tuning parameter. Alerts older than the specified number days will be deleted, freeing up resources. If you want to keep alerts forever, you can set this to 0.
alert.wait	Another useful tuning parameter, this one controls the sensitivity of the alerting mechanism. CloudPlatform will wait the specified number of seconds before generating an alert on a disconnected agent. By setting this value high, you can potentially reduce the number of alerts, allowing for issues to self-correct. However, this should be used with caution, as it can also obscure issues and delay the fix.

19.4.2. Sending Alerts to External SNMP and Syslog Managers

In addition to showing administrator alerts on the Dashboard in the CloudPlatform UI and sending them in email, CloudPlatform can also send the same alerts to external SNMP or Syslog management software. This is useful if you prefer to use an SNMP or Syslog manager to monitor your cloud.

The alerts which can be sent are listed in [Appendix B, Alerts](#). You can also display the most up to date list by calling the API command listAlerts.

19.4.2.1. SNMP Alert Details

The supported protocol is SNMP version 2.

Each SNMP trap contains the following information: message, podId, dataCenterId, clusterId, and generationTime.

19.4.2.2. Syslog Alert Details

CloudPlatform generates a syslog message for every alert. Each syslog message includes the fields alertType, message, podId, dataCenterId, and clusterId, in the following format. If any field does not have a valid value, it will not be included.

```
Date severity_level Management_Server_IP_Address/Name alertType:: value dataCenterId:: value
podId:: value clusterId:: value message:: value
```

For example:

```
Mar 4 10:13:47 WARN localhost alertType:: managementNode message:: Management
server node 127.0.0.1 is up
```

19.4.2.3. Configuring SNMP and Syslog Managers

To configure one or more SNMP managers or Syslog managers to receive alerts from CloudPlatform:

1. For an SNMP manager, install the CloudPlatform MIB file on your SNMP manager system. This maps the SNMP OIDs to trap types that can be more easily read by users. The file must be publicly available. For more information on how to install this file, consult the documentation provided with the SNMP manager.
2. Edit the file /etc/cloudstack/management/log4j-cloud.xml.

```
# vi /etc/cloudstack/management/log4j-cloud.xml
```

3. Add an entry using the syntax shown below. Follow the appropriate example depending on whether you are adding an SNMP manager or a Syslog manager. To specify multiple external managers, separate the IP addresses and other configuration values with commas (,).



Note

The recommended maximum number of SNMP or Syslog managers is 20 for each.

The following example shows how to configure two SNMP managers at IP addresses 10.1.1.1 and 10.1.1.2. Substitute your own IP addresses, ports, and communities. Do not change the other values (name, threshold, class, and layout values).

```
<appender name="SNMP" class="org.apache.cloudstack.alert.snmp.SnmpTrapAppender">
  <param name="Threshold" value="WARN"/> <!-- Do not edit. The alert feature assumes
WARN. -->
  <param name="SnmpManagerIpAddresses" value="10.1.1.1,10.1.1.2"/>
  <param name="SnmpManagerPorts" value="162,162"/>
  <param name="SnmpManagerCommunities" value="public,public"/>
  <layout class="org.apache.cloudstack.alert.snmp.SnmpEnhancedPatternLayout"> <!-- Do not
edit -->
    <param name="PairDelimiter" value="//"/>
    <param name="KeyValueDelimiter" value="::"/>
  </layout>
```

```
</appender>
```

The following example shows how to configure two Syslog managers at IP addresses 10.1.1.1 and 10.1.1.2. Substitute your own IP addresses. You can set Facility to any syslog-defined value, such as LOCAL0 - LOCAL7. Do not change the other values.

```
<appender name="ALERTSYSLOG">
  <param name="Threshold" value="WARN"/>
  <param name="SyslogHosts" value="10.1.1.1,10.1.1.2"/>
  <param name="Facility" value="LOCAL6"/>
  <layout>
    <param name="ConversionPattern" value="" />
  </layout>
</appender>
```

4. If your cloud has multiple Management Server nodes, repeat these steps to edit log4j-cloud.xml on every instance.
5. If you have made these changes while the Management Server is running, wait a few minutes for the change to take effect.

Troubleshooting: If no alerts appear at the configured SNMP or Syslog manager after a reasonable amount of time, it is likely that there is an error in the syntax of the <appender> entry in log4j-cloud.xml. Check to be sure that the format and settings are correct.

19.4.2.4. Deleting an SNMP or Syslog Manager

To remove an external SNMP manager or Syslog manager so that it no longer receives alerts from CloudPlatform, remove the corresponding entry from the file /etc/cloudstack/management/log4j-cloud.xml.

19.5. Customizing the Network Domain Name

The root administrator can optionally assign a custom DNS suffix at the level of a network, account, domain, zone, or entire CloudPlatform installation, and a domain administrator can do so within their own domain. To specify a custom domain name and put it into effect, follow these steps.

1. Set the DNS suffix at the desired scope
 - At the network level, the DNS suffix can be assigned through the UI when creating a new network, as described in [Section 16.10.1, "Adding an Additional Guest Network"](#) or with the updateNetwork command in the CloudPlatform API.
 - At the account, domain, or zone level, the DNS suffix can be assigned with the appropriate CloudPlatform API commands: createAccount, editAccount, createDomain, editDomain, createZone, or editZone.
 - At the global level, use the configuration parameter guest.domain.suffix. You can also use the CloudPlatform API command updateConfiguration. After modifying this global configuration, restart the Management Server to put the new setting into effect.
2. To make the new DNS suffix take effect for an existing network, call the CloudPlatform API command updateNetwork. This step is not necessary when the DNS suffix was specified while creating a new network.

The source of the network domain that is used depends on the following rules.

- For all networks, if a network domain is specified as part of a network's own configuration, that value is used.
- For an account-specific network, the network domain specified for the account is used. If none is specified, the system looks for a value in the domain, zone, and global configuration, in that order.
- For a domain-specific network, the network domain specified for the domain is used. If none is specified, the system looks for a value in the zone and global configuration, in that order.
- For a zone-specific network, the network domain specified for the zone is used. If none is specified, the system looks for a value in the global configuration.

19.6. Stopping and Restarting the Management Server

The root administrator will need to stop and restart the Management Server from time to time.

For example, after changing a global configuration parameter, a restart is required. If you have multiple Management Server nodes, restart all of them to put the new parameter value into effect consistently throughout the cloud..

To stop the Management Server, issue the following command at the operating system prompt on the Management Server node:

```
# service cloudstack-management stop
```

To start the Management Server:

```
# service cloudstack-management start
```


CloudPlatform API

The CloudPlatform API is a low level API that has been used to implement the CloudPlatform web UIs. It is also a good basis for implementing other popular APIs such as EC2/S3 and emerging DMTF standards.

Many CloudPlatform API calls are asynchronous. These will return a Job ID immediately when called. This Job ID can be used to query the status of the job later. Also, status calls on impacted resources will provide some indication of their state.

The API has a REST-like query basis and returns results in XML or JSON.

See the Developer's Guide and the API Reference.

20.1. Provisioning and Authentication API

CloudPlatform expects that a customer will have their own user provisioning infrastructure. It provides APIs to integrate with these existing systems where the systems call out to CloudPlatform to add/remove users..

CloudPlatform supports pluggable authenticators. By default, CloudPlatform assumes it is provisioned with the user's password, and as a result authentication is done locally. However, external authentication is possible as well. For example, see Using an LDAP Server for User Authentication .

20.2. Allocators

CloudPlatform enables administrators to write custom allocators that will choose the Host to place a new guest and the storage host from which to allocate guest virtual disk images.

20.3. User Data and Meta Data

CloudPlatform provides API access to attach up to 32KB of user data to a deployed VM. Deployed VMs also have access to instance metadata via the virtual router.

User data can be accessed once the IP address of the virtual router is known. Once the IP address is known, use the following steps to access the user data:

1. Run the following command to find the virtual router.

```
# cat /var/lib/dhclient/dhclient-eth0.leases | grep dhcp-server-identifier | tail -1
```

2. Access user data by running the following command using the result of the above command

```
# curl http://10.1.1.1/latest/user-data
```

Meta Data can be accessed similarly, using a URL of the form `http://10.1.1.1/latest/meta-data/{metadata type}`. (For backwards compatibility, the previous URL `http://10.1.1.1/latest/{metadata type}` is also supported.) For metadata type, use one of the following:

- `service-offering`. A description of the VMs service offering
- `availability-zone`. The Zone name
- `local-ipv4`. The guest IP of the VM

- local-hostname. The hostname of the VM
- public-ipv4. The first public IP for the router. (E.g. the first IP of eth2)
- public-hostname. This is the same as public-ipv4
- instance-id. The instance name of the VM

Tuning

This section provides tips on how to improve the performance of your cloud.

21.1. Performance Monitoring

Host and guest performance monitoring is available to end users and administrators. This allows the user to monitor their utilization of resources and determine when it is appropriate to choose a more powerful service offering or larger disk.

21.2. Increase Management Server Maximum Memory

If the Management Server is subject to high demand, the default maximum JVM memory allocation can be insufficient. To increase the memory:

1. Edit the Tomcat configuration file:

```
/etc/cloud/management/tomcat6.conf
```

2. Change the command-line parameter `-XmxNNNm` to a higher value of `N`.

For example, if the current value is `-Xmx128m`, change it to `-Xmx1024m` or higher.

3. To put the new setting into effect, restart the Management Server.

```
# service cloud-management restart
```

For more information about memory issues, see "FAQ: Memory" at [Tomcat Wiki](#).¹

21.3. Set Database Buffer Pool Size

It is important to provide enough memory space for the MySQL database to cache data and indexes:

1. Edit the Tomcat configuration file:

```
/etc/my.cnf
```

2. Insert the following line in the `[mysqld]` section, below the `datadir` line. Use a value that is appropriate for your situation. We recommend setting the buffer pool at 40% of RAM if MySQL is on the same server as the management server or 70% of RAM if MySQL has a dedicated server. The following example assumes a dedicated server with 1024M of RAM.

```
innodb_buffer_pool_size=700M
```

3. Restart the MySQL service.

```
# service mysqld restart
```

¹ <http://wiki.apache.org/tomcat/FAQ/Memory>

For more information about the buffer pool, see "The InnoDB Buffer Pool" at [MySQL Reference Manual](#)².

21.4. Set and Monitor Total VM Limits per Host

The CloudPlatform administrator should monitor the total number of VM instances in each cluster, and disable allocation to the cluster if the total is approaching the maximum that the hypervisor can handle. Be sure to leave a safety margin to allow for the possibility of one or more hosts failing, which would increase the VM load on the other hosts as the VMs are automatically redeployed. Consult the documentation for your chosen hypervisor to find the maximum permitted number of VMs per host, then use CloudPlatform global configuration settings to set this as the default limit. Monitor the VM activity in each cluster at all times. Keep the total number of VMs below a safe level that allows for the occasional host failure. For example, if there are N hosts in the cluster, and you want to allow for one host in the cluster to be down at any given time, the total number of VM instances you can permit in the cluster is at most $(N-1) * (\text{per-host-limit})$. Once a cluster reaches this number of VMs, use the CloudPlatform UI to disable allocation of more VMs to the cluster.

21.5. Configure XenServer dom0 Memory

Configure the XenServer dom0 settings to allocate more memory to dom0. This can enable XenServer to handle larger numbers of virtual machines. We recommend 2940 MB of RAM for XenServer dom0. For instructions on how to do this, see [Citrix Knowledgebase Article](#)³. The article refers to XenServer 5.6, but the same information applies to XenServer 6

² <http://dev.mysql.com/doc/refman/5.5/en/innodb-buffer-pool.html>

³ <http://support.citrix.com/article/CTX126531>

Troubleshooting

22.1. Events

An event is essentially a significant or meaningful change in the state of both virtual and physical resources associated with a cloud environment. Events are used by monitoring systems, usage and billing systems, or any other event-driven workflow systems to discern a pattern and make the right business decision. In CloudPlatform an event could be a state change of virtual or physical resources, an action performed by an user (action events), or policy based events (alerts).

22.1.1. Event Logs

There are two types of events logged in the CloudPlatform Event Log. Standard events log the success or failure of an event and can be used to identify jobs or processes that have failed. There are also long running job events. Events for asynchronous jobs log when a job is scheduled, when it starts, and when it completes. Other long running synchronous jobs log when a job starts, and when it completes. Long running synchronous and asynchronous event logs can be used to gain more information on the status of a pending job or can be used to identify a job that is hanging or has not started. The following sections provide more information on these events..

22.1.2. Event Notification

Event notification framework provides a means for the Management Server components to publish and subscribe to CloudPlatform events. Event notification is achieved by implementing the concept of event bus abstraction in the Management Server. An event bus is introduced in the Management Server that allows the CloudPlatform components and extension plug-ins to subscribe to the events by using the Advanced Message Queuing Protocol (AMQP) client. In CloudPlatform, a default implementation of event bus is provided as a plug-in that uses the RabbitMQ AMQP client. The AMQP client pushes the published events to a compatible AMQP server. Therefore all the CloudPlatform events are published to an exchange in the AMQP server.

A new event for state change, resource state change, is introduced as part of Event notification framework. Every resource, such as user VM, volume, NIC, network, public IP, snapshot, and template, is associated with a state machine and generates events as part of the state change. That implies that a change in the state of a resource results in a state change event, and the event is published in the corresponding state machine on the event bus. All the CloudPlatform events (alerts, action events, usage events) and the additional category of resource state change events, are published on to the events bus.

Use Cases

The following are some of the use cases:

- Usage or Billing Engines: A third-party cloud usage solution can implement a plug-in that can connect to CloudPlatform to subscribe to CloudPlatform events and generate usage data. The usage data is consumed by their usage software.
- AMQP plug-in can place all the events on the a message queue, then a AMQP message broker can provide topic-based notification to the subscribers.
- Publish and Subscribe notification service can be implemented as a pluggable service in CloudPlatform that can provide rich set of APIs for event notification, such as topics-based subscription and notification. Additionally, the pluggable service can deal with multi-tenancy, authentication, and authorization issues.

Configuration

As a CloudPlatform administrator, perform the following one-time configuration to enable event notification framework. At run time no changes can control the behaviour.

1. Open '`componentContext.xml`'.
2. Define a bean named `eventNotificationBus` as follows:
 - name : Specify a name for the bean.
 - server : The name or the IP address of the RabbitMQ AMQP server.
 - port : The port on which RabbitMQ server is running.
 - username : The username associated with the account to access the RabbitMQ server.
 - password : The password associated with the username of the account to access the RabbitMQ server.
 - exchange : The exchange name on the RabbitMQ server where CloudPlatform events are published.

A sample bean is given below:

```
<bean id="eventNotificationBus"
class="org.apache.cloudstack.mom.rabbitmq.RabbitMQEventBus">
  <property name="name" value="eventNotificationBus"/>
  <property name="server" value="127.0.0.1"/>
  <property name="port" value="5672"/>
  <property name="username" value="guest"/>
  <property name="password" value="guest"/>
  <property name="exchange" value="cloudstack-events"/>
</bean>
```

The `eventNotificationBus` bean represents the `org.apache.cloudstack.mom.rabbitmq.RabbitMQEventBus` class.

3. Restart the Management Server.

22.1.3. Standard Events

The events log records three types of standard events.

- INFO. This event is generated when an operation has been successfully performed.
- WARN. This event is generated in the following circumstances.
 - When a network is disconnected while monitoring a template download.
 - When a template download is abandoned.
 - When an issue on the storage server causes the volumes to fail over to the mirror storage server.
- ERROR. This event is generated when an operation has not been successfully performed

22.1.4. Long Running Job Events

The events log records three types of standard events.

- INFO. This event is generated when an operation has been successfully performed.
- WARN. This event is generated in the following circumstances.
 - When a network is disconnected while monitoring a template download.
 - When a template download is abandoned.
 - When an issue on the storage server causes the volumes to fail over to the mirror storage server.
- ERROR. This event is generated when an operation has not been successfully performed

22.1.5. Event Log Queries

Database logs can be queried from the user interface. The list of events captured by the system includes:

- Virtual machine creation, deletion, and on-going management operations
- Virtual router creation, deletion, and on-going management operations
- Template creation and deletion
- Network/load balancer rules creation and deletion
- Storage volume creation and deletion
- User login and logout

22.1.6. Deleting and Archiving Events and Alerts

CloudPlatform provides you the ability to delete or archive the existing alerts and events that you no longer want to implement. You can regularly delete or archive any alerts or events that you cannot, or do not want to resolve from the database.

You can delete or archive individual alerts or events either directly by using the Quickview or by using the Details page. If you want to delete multiple alerts or events at the same time, you can use the respective context menu. You can delete alerts or events by category for a time period. For example, you can select categories such as **USER.LOGOUT**, **VM.DESTROY**, **VM.AG.UPDATE**, **CONFIGURATION.VALUE.EDI**, and so on. You can also view the number of events or alerts archived or deleted.

In order to support the delete or archive alerts, the following global parameters have been added:

- **alert.purge.delay**: The alerts older than specified number of days are purged. Set the value to 0 to never purge alerts automatically.
- **alert.purge.interval**: The interval in seconds to wait before running the alert purge thread. The default is 86400 seconds (one day).



Note

Archived alerts or events cannot be viewed in the UI or by using the API. They are maintained in the database for auditing or compliance purposes.

22.1.6.1. Permissions

Consider the following:

- The root admin can delete or archive one or multiple alerts or events.
- The domain admin or end user can delete or archive one or multiple events.

22.1.6.2. Procedure

1. Log in as administrator to the CloudPlatform UI.
2. In the left navigation, click Events.
3. Perform either of the following:
 - To archive events, click Archive Events, and specify event type and date.
 - To archive events, click Delete Events, and specify event type and date.
4. Click OK.

22.2. Working with Server Logs

The CloudPlatform Management Server logs all web site, middle tier, and database activities for diagnostics purposes in `/var/log/cloudstack/management/`. The CloudPlatform logs a variety of error messages. We recommend this command to find the problematic output in the Management Server log:



Note

When copying and pasting a command, be sure the command has pasted as a single line before executing. Some document viewers may introduce unwanted line breaks in copied text.

```
grep -i -E 'exception|unable|fail|invalid|leak|warn|error' /var/log/cloudstack/management/management-server.log
```

The CloudPlatform processes requests with a Job ID. If you find an error in the logs and you are interested in debugging the issue you can grep for this job ID in the management server log. For example, suppose that you find the following ERROR message:

```
2010-10-04 13:49:32,595 ERROR [cloud.vm.UserVmManagerImpl] (Job-Executor-11:job-1076) Unable to find any host for [User|i-8-42-VM-untagged]
```

Note that the job ID is 1076. You can track back the events relating to job 1076 with the following grep:

```
grep "job-1076)" management-server.log
```

The CloudPlatform Agent Server logs its activities in `/var/log/cloudstack/agent/`.

22.3. Getting the Exact CloudPlatform Version with cloudstack-sccs

CloudPlatform provides a command you can use to obtain the exact software version and patch that is currently installed and running, by identifying the most recently committed software code that is included in the install. This information can help with troubleshooting issues. Just log in as root on any compute node where CloudPlatform has been installed and run the following command:

```
# cloudstack-sccs
```

The output is a git commit hash. For example:

```
745811fc01bf93b6517e3ff1160bb8570034860b
```

22.4. Log Collection Utility cloud-bugtool

CloudPlatform provides a command-line utility called cloud-bugtool to make it easier to collect the logs and other diagnostic data required for troubleshooting. This is especially useful when interacting with Citrix Technical Support.

You can use cloud-bugtool to collect the following:

- Basic system and environment information and network configuration including IP addresses, routing, and name resolver settings
- Information about running processes
- Management Server logs
- System logs in `/var/log/`
- Dump of the cloud database



Warning

cloud-bugtool collects information which might be considered sensitive and confidential. Using the `--nodb` option to avoid the cloud database can reduce this concern, though it is not guaranteed to exclude all sensitive data.

22.4.1. Using cloud-bugtool

Log in as root on any compute node where CloudPlatform has been installed.

To gather all the possible troubleshooting data, run cloud-bugtool with no arguments:

```
# /usr/share/cloudstack-management/util/cloud-bugtool
```

The output is written to a `.zip` file. The location of this file is displayed on the console.

You can also use command-line options to specify which data will be collected:

- `-f, --full` : Collects all the data.

- `-m`, `--minimal` : Collects only system properties and the most recent log files.
- `-d`, `--nodb` : Does not collect the cloud database dump.

To display the current list of options on standard output, run `cloud-bugtool` with the command-line option `-h` or `--help`.

22.5. Data Loss on Exported Primary Storage

Symptom

Loss of existing data on primary storage which has been exposed as a Linux NFS server export on an iSCSI volume.

Cause

It is possible that a client from outside the intended pool has mounted the storage. When this occurs, the LVM is wiped and all data in the volume is lost

Solution

When setting up LUN exports, restrict the range of IP addresses that are allowed access by specifying a subnet mask. For example:

```
echo "/export 192.168.1.0/24(rw,async,no_root_squash)" > /etc/exports
```

Adjust the above command to suit your deployment needs.

More Information

See the export procedure in the "Secondary Storage" section of the CloudPlatform Installation Guide

22.6. Recovering a Lost Virtual Router

Symptom

A virtual router is running, but the host is disconnected. A virtual router no longer functions as expected.

Cause

The Virtual router is lost or down.

Solution

If you are sure that a virtual router is down forever, or no longer functions as expected, destroy it. You must create one afresh while keeping the backup router up and running (it is assumed this is in a redundant router setup):

- Force stop the router. Use the `stopRouter` API with `forced=true` parameter to do so.
- Before you continue with destroying this router, ensure that the backup router is running. Otherwise the network connection will be lost.

- Destroy the router by using the destroyRouter API.

Recreate the missing router by using the restartNetwork API with cleanup=false parameter. For more information about redundant router setup, see [Creating a New Network Offering](#).

For more information about the API syntax, see the [API Reference](#).

22.7. Maintenance mode not working on vCenter

Symptom

Host was placed in maintenance mode, but still appears live in vCenter.

Cause

The CloudPlatform administrator UI was used to place the host in scheduled maintenance mode. This mode is separate from vCenter's maintenance mode.

Solution

Use vCenter to place the host in maintenance mode.

More Information

See [Section 12.2, "Scheduled Maintenance and Maintenance Mode for Hosts"](#)

22.8. Unable to deploy VMs from uploaded vSphere template

Symptom

When attempting to create a VM, the VM will not deploy.

Cause

If the template was created by uploading an OVA file that was created using vSphere Client, it is possible the OVA contained an ISO image. If it does, the deployment of VMs from the template will fail.

Solution

Remove the ISO and re-upload the template.

22.9. Unable to power on virtual machine on VMware

Symptom

Virtual machine does not power on. You might see errors like:

- Unable to open Swap File
- Unable to access a file since it is locked

- – Unable to access Virtual machine configuration

Cause

A known issue on VMware machines. ESX hosts lock certain critical virtual machine files and file systems to prevent concurrent changes. Sometimes the files are not unlocked when the virtual machine is powered off. When a virtual machine attempts to power on, it can not access these critical files, and the virtual machine is unable to power on.

Solution

See the following:

[VMware Knowledge Base Article¹](#)

22.10. Load balancer rules fail after changing network offering

Symptom

After changing the network offering on a network, load balancer rules stop working.

Cause

Load balancing rules were created while using a network service offering that includes an external load balancer device such as NetScaler, and later the network service offering changed to one that uses the CloudPlatform virtual router.

Solution

Create a firewall rule on the virtual router for each of your existing load balancing rules so that they continue to function.

¹ http://kb.vmware.com/selfservice/microsites/search.do?language=en_US&cmd=displayKC&externalId=10051/

Appendix A. Event Types

Types	Events
VM	VM.CREATE VM.DESTROY VM.START VM.STOP VM.REBOOT VM.UPDATE VM.UPGRADE VM.DYNAMIC.SCALE VM.RESETPASSWORD VM.RESETSSHKEY VM.MIGRATE VM.MOVE VM.RESTORE
Domain Router	ROUTER.CREATE ROUTER.DESTROY ROUTER.START ROUTER.STOP ROUTER.REBOOT ROUTER.HA ROUTER.UPGRADE
Console proxy	PROXY.CREATE PROXY.DESTROY PROXY.START PROXY.STOP PROXY.REBOOT PROXY.HA
VNC Console Events	VNC.CONNECT VNC.DISCONNECT
Network Events	NET.IPASSIGN

Appendix A. Event Types

Types	Events
	NET.IPRELEASE PORTABLE.IPASSIGN PORTABLE.IPRELEASE NET.RULEADD NET.RULEDELETE NET.RULEMODIFY NETWORK.CREATE NETWORK.DELETE NETWORK.UPDATE FIREWALL.OPEN FIREWALL.CLOSE
NIC Events	NIC.CREATE NIC.DELETE NIC.UPDATE NIC.DETAIL.ADD NIC.DETAIL.UPDATE NIC.DETAIL.REMOVE
Load Balancers	LB.ASSIGN.TO.RULE LB.REMOVE.FROM.RULE LB.CREATE LB.DELETE LB.STICKINESSPOLICY.CREATE LB.STICKINESSPOLICY.DELETE LB.HEALTHCHECKPOLICY.CREATE LB.HEALTHCHECKPOLICY.DELETE LB.UPDATE
Global Load Balancer rules	GLOBAL.LB.ASSIGN GLOBAL.LB.REMOVE GLOBAL.LB.CREATE GLOBAL.LB.DELETE

Types	Events
	GLOBAL.LB.UPDATE
Account events	ACCOUNT.ENABLE ACCOUNT.DISABLE ACCOUNT.CREATE ACCOUNT.DELETE ACCOUNT.UPDATE ACCOUNT.MARK.DEFAULT.ZONE
UserVO Events	USER.LOGIN USER.LOGOUT USER.CREATE USER.DELETE USER.DISABLE USER.UPDATE USER.ENABLE USER.LOCK
Registering SSH keypair events	REGISTER.SSH.KEYPAIR
Register for user API and secret keys	REGISTER.USER.KEY
Template Events	TEMPLATE.CREATE TEMPLATE.DELETE TEMPLATE.UPDATE TEMPLATE.DOWNLOAD.START TEMPLATE.DOWNLOAD.SUCCESS TEMPLATE.DOWNLOAD.FAILED TEMPLATE.COPY TEMPLATE.EXTRACT TEMPLATE.UPLOAD TEMPLATE.CLEANUP
Volume Events	VOLUME.CREATE VOLUME.DELETE VOLUME.ATTACH VOLUME.DETACH

Appendix A. Event Types

Types	Events
	VOLUME.EXTRACT VOLUME.UPLOAD VOLUME.MIGRATE VOLUME.RESIZE VOLUME.DETAIL.UPDATE VOLUME.DETAIL.ADD VOLUME.DETAIL.REMOVE
Domains	DOMAIN.CREATE DOMAIN.DELETE DOMAIN.UPDATE
Snapshots	SNAPSHOT.CREATE SNAPSHOT.DELETE SNAPSHOTPOLICY.CREATE SNAPSHOTPOLICY.UPDATE SNAPSHOTPOLICY.DELETE
ISO	ISO.CREATE ISO.DELETE ISO.COPY ISO.ATTACH ISO.DETACH ISO.EXTRACT ISO.UPLOAD
SSVM	SSVM.CREATE SSVM.DESTROY SSVM.START SSVM.STOP SSVM.REBOOT SSVM.HA
Service Offerings	SERVICE.OFFERING.CREATE SERVICE.OFFERING.EDIT SERVICE.OFFERING.DELETE

Types	Events
Disk Offerings	DISK.OFFERING.CREATE DISK.OFFERING.EDIT DISK.OFFERING.DELETE
Network offerings	NETWORK.OFFERING.CREATE NETWORK.OFFERING.ASSIGN NETWORK.OFFERING.EDIT NETWORK.OFFERING.REMOVE NETWORK.OFFERING.DELETE
Pods	POD.CREATE POD.EDIT POD.DELETE
Zones	ZONE.CREATE ZONE.EDIT ZONE.DELETE
VLANs/IP ranges	VLAN.IP.RANGE.CREATE VLAN.IP.RANGE.DELETE VLAN.IP.RANGE.DEDICATE VLAN.IP.RANGE.RELEASE STORAGE.IP.RANGE.CREATE STORAGE.IP.RANGE.DELETE STORAGE.IP.RANGE.UPDATE
Configuration Table	CONFIGURATION.VALUE.EDIT
Security Groups	SG.AUTH.INGRESS SG.REVOKE.INGRESS SG.AUTH.EGRESS SG.REVOKE.EGRESS SG.CREATE SG.DELETE SG.ASSIGN SG.REMOVE
Host	HOST.RECONNECT
Maintenance	MAINT.CANCEL

Appendix A. Event Types

Types	Events
	MAINT.CANCEL.PS MAINT.PREPARE MAINT.PREPARE.PS
VPN	VPN.REMOTE.ACCESS.CREATE VPN.REMOTE.ACCESS.DESTROY VPN.USER.ADD VPN.USER.REMOVE VPN.S2S.VPN.GATEWAY.CREATE VPN.S2S.VPN.GATEWAY.DELETE VPN.S2S.CUSTOMER.GATEWAY.CREATE VPN.S2S.CUSTOMER.GATEWAY.DELETE VPN.S2S.CUSTOMER.GATEWAY.UPDATE VPN.S2S.CONNECTION.CREATE VPN.S2S.CONNECTION.DELETE VPN.S2S.CONNECTION.RESET
Network	NETWORK.RESTART
Custom certificates	UPLOAD.CUSTOM.CERTIFICATE
OneToOnenat	STATICNAT.ENABLE STATICNAT.DISABLE ZONE.VLAN.ASSIGN ZONE.VLAN.RELEASE
Projects	PROJECT.CREATE PROJECT.UPDATE PROJECT.DELETE PROJECT.ACTIVATE PROJECT.SUSPEND PROJECT.ACCOUNT.ADD PROJECT.INVITATION.UPDATE PROJECT.INVITATION.REMOVE PROJECT.ACCOUNT.REMOVE
Network as a Service	NETWORK.ELEMENT.CONFIGURE

Types	Events
Physical Network Events	PHYSICAL.NETWORK.CREATE PHYSICAL.NETWORK.DELETE PHYSICAL.NETWORK.UPDATE
Physical Network Service Provider Events	SERVICE.PROVIDER.CREATE SERVICE.PROVIDER.DELETE SERVICE.PROVIDER.UPDATE
Physical Network Traffic Type Events	TRAFFIC.TYPE.CREATE TRAFFIC.TYPE.DELETE TRAFFIC.TYPE.UPDATE
External network device events	PHYSICAL.LOADBALANCER.ADD PHYSICAL.LOADBALANCER.DELETE PHYSICAL.LOADBALANCER.CONFIGURE
External switch management device events For example: Cisco Nexus 1000v Virtual Supervisor Module.	SWITCH.MGMT.ADD SWITCH.MGMT.DELETE SWITCH.MGMT.CONFIGURE SWITCH.MGMT.ENABLE SWITCH.MGMT.DISABLE PHYSICAL.FIREWALL.ADD PHYSICAL.FIREWALL.DELETE PHYSICAL.FIREWALL.CONFIGURE
VPC	VPC.CREATE VPC.UPDATE VPC.DELETE VPC.RESTART
Network ACL	NETWORK.ACL.CREATE NETWORK.ACL.DELETE NETWORK.ACL.REPLACE NETWORK.ACL.ITEM.CREATE NETWORK.ACL.ITEM.UPDATE NETWORK.ACL.ITEM.DELETE
VPC offerings	VPC.OFFERING.CREATE

Appendix A. Event Types

Types	Events
	VPC.OFFERING.UPDATE VPC.OFFERING.DELETE
Private gateway	PRIVATE.GATEWAY.CREATE PRIVATE.GATEWAY.DELETE
Static routes	STATIC.ROUTE.CREATE STATIC.ROUTE.DELETE
Tag-related events	CREATE_TAGS DELETE_TAGS
Meta data-related events	CREATE_RESOURCE_DETAILS DELETE_RESOURCE_DETAILS
VM snapshot events	VMSNAPSHOT.CREATE VMSNAPSHOT.DELETE VMSNAPSHOT.REVERTTO
External network device events	PHYSICAL.NVPCONTROLLER.ADD PHYSICAL.NVPCONTROLLER.DELETE PHYSICAL.NVPCONTROLLER.CONFIGURE
AutoScale	COUNTER.CREATE COUNTER.DELETE CONDITION.CREATE CONDITION.DELETE AUTOSCALEPOLICY.CREATE AUTOSCALEPOLICY.UPDATE AUTOSCALEPOLICY.DELETE AUTOSCALEVMPROFILE.CREATE AUTOSCALEVMPROFILE.DELETE AUTOSCALEVMPROFILE.UPDATE AUTOSCALEVMGROUP.CREATE AUTOSCALEVMGROUP.DELETE AUTOSCALEVMGROUP.UPDATE AUTOSCALEVMGROUP.ENABLE AUTOSCALEVMGROUP.DISABLE

Types	Events
	PHYSICAL.DHCP.ADD PHYSICAL.DHCP.DELETE PHYSICAL.PXE.ADD PHYSICAL.PXE.DELETE AG.CREATE AG.DELETE AG.ASSIGN AG.REMOVE VM.AG.UPDATE INTERNALLBVM.START INTERNALLBVM.STOP HOST.RESERVATION.RELEASE
Dedicated guest vlan range	GUESTVLANRANGE.DEDICATE GUESTVLANRANGE.RELEASE PORTABLE.IP.RANGE.CREATE PORTABLE.IP.RANGE.DELETE PORTABLE.IP.TRANSFER
Dedicated Resources	DEDICATE.RESOURCE DEDICATE.RESOURCE.RELEASE VM.RESERVATION.CLEANUP
Bare Metal Hosts	UCS.REFRESHBLADES UCS.TEMPLATEASSOCIATION UCS.DISASSOCIATEPROFILE

Appendix B. Alerts

The following is the list of alert type numbers. The current alerts can be found by calling listAlerts.

```
MEMORY = 0 // Available Memory below configured threshold
```

```
CPU = 1 // Unallocated CPU below configured threshold
```

```
STORAGE = 2 // Available Storage below configured threshold
```

```
STORAGE_ALLOCATED = 3 // Remaining unallocated Storage is below configured threshold
```

```
PUBLIC_IP = 4 // Number of unallocated virtual network public IPs is below configured threshold
```

```
PRIVATE_IP = 5 // Number of unallocated private IPs is below configured threshold
```

```
SECONDARY_STORAGE = 6 // Available Secondary Storage in availability zone is below configured threshold
```

```
HOST = 7 // Host related alerts like host disconnected
```

```
USERVM = 8 // User VM stopped unexpectedly
```

```
DOMAIN_ROUTER = 9 // Domain Router VM stopped unexpectedly
```

```
CONSOLE_PROXY = 10 // Console Proxy VM stopped unexpectedly
```

```
ROUTING = 11 // Lost connection to default route (to the gateway)
```

```
STORAGE_MISC = 12 // Storage issue in system VMs
```

```
USAGE_SERVER = 13 // No usage server process running
```

```
MANAGMENT_NODE = 14 // Management network CIDR is not configured originally
```

```
DOMAIN_ROUTER_MIGRATE = 15 // Domain Router VM Migration was unsuccessful
```

```
CONSOLE_PROXY_MIGRATE = 16 // Console Proxy VM Migration was unsuccessful
```

```
USERVM_MIGRATE = 17 // User VM Migration was unsuccessful
```

```
VLAN = 18 // Number of unallocated VLANs is below configured threshold in availability zone
```

```
SSVM = 19 // SSVM stopped unexpectedly
```

Appendix B. Alerts

USAGE_SERVER_RESULT = 20 // Usage job failed

STORAGE_DELETE = 21 // Failed to delete storage pool

UPDATE_RESOURCE_COUNT = 22 // Failed to update the resource count

USAGE_SANITY_RESULT = 23 // Usage Sanity Check failed

DIRECT_ATTACHED_PUBLIC_IP = 24 // Number of unallocated shared network IPs is low in availability zone

LOCAL_STORAGE = 25 // Remaining unallocated Local Storage is below configured threshold

RESOURCE_LIMIT_EXCEEDED = 26 //Generated when the resource limit exceeds the limit. Currently used for recurring snapshots only