

# **CloudPlatform (powered by Apache CloudStack) Version 4.2.1 Installation Guide**

Revised November 18, 2013 02:00 am Pacific



Citrix CloudPlatform

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Author

Citrix CloudPlatform

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Installation Guide for CloudPlatform.

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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/](http://support.citrix.com/product/cs/)<sup>1</sup>.

## 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/cloudsupport](http://support.citrix.com/cloudsupport)<sup>2</sup> by using the account credentials you received when you purchased your support contract.

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

<sup>2</sup> <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.

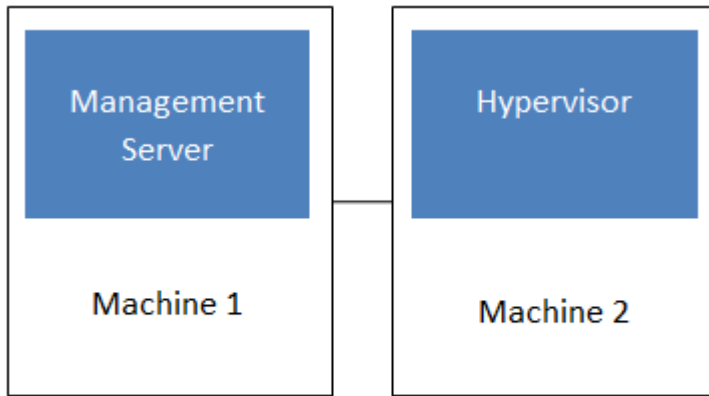
### **High Availability**

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 [Chapter 13, Choosing a Deployment Architecture](#).

## 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 [Section 5.3, “Minimum System Requirements”](#).

The Management Server:

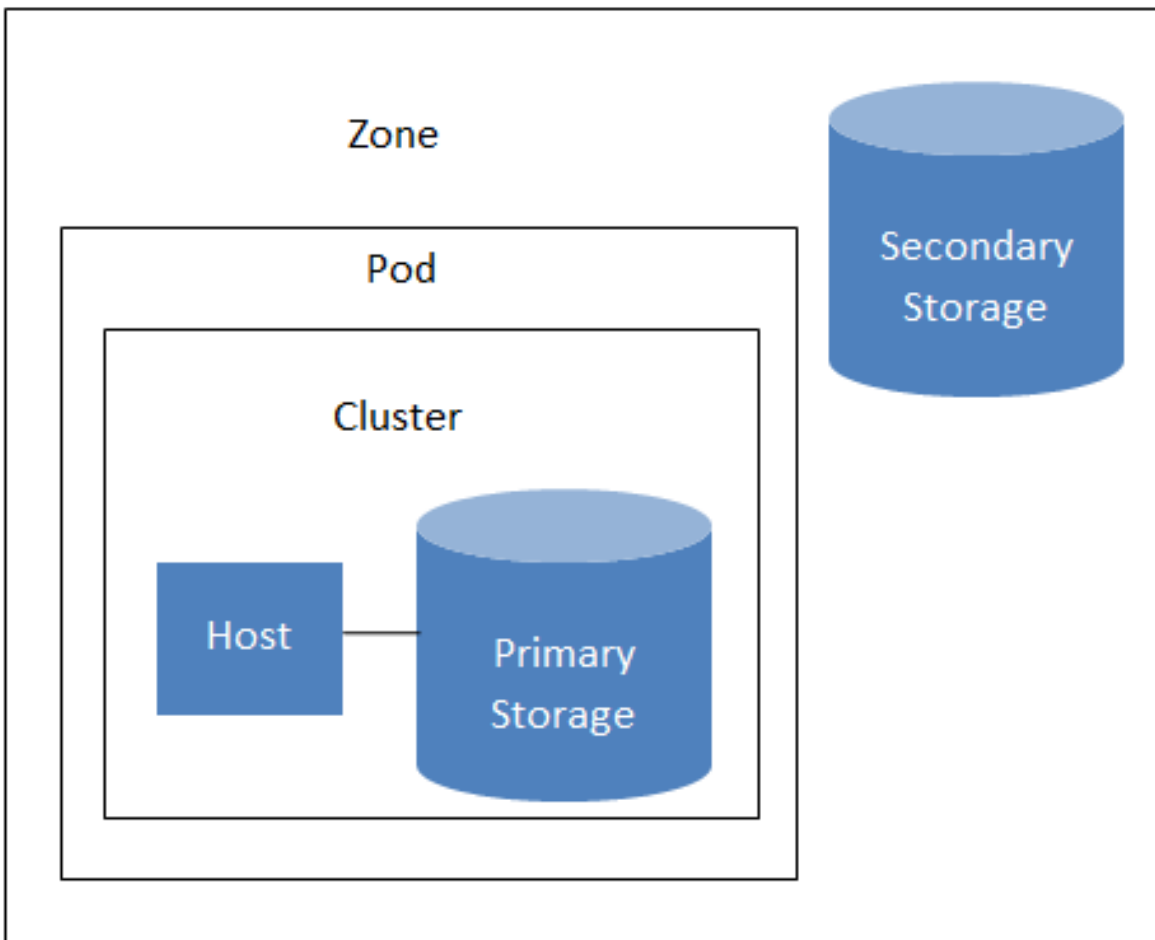
- Provides the web user interface for the administrator and a reference user interface for end users.
- Provides the APIs for CloudPlatform.
- Manages the assignment of guest VMs to particular hosts.
- Manages the assignment of public and private IP addresses to particular accounts.
- Manages the allocation 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.
- 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 [Chapter 14, Network Setup](#).





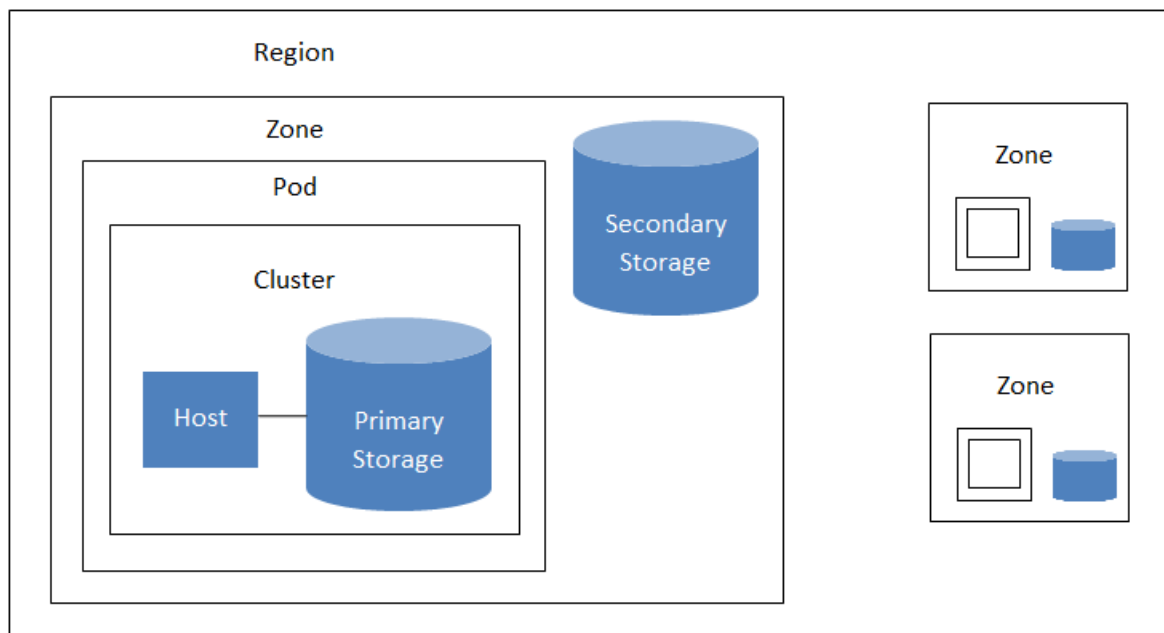
# Cloud Infrastructure Concepts

## 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.

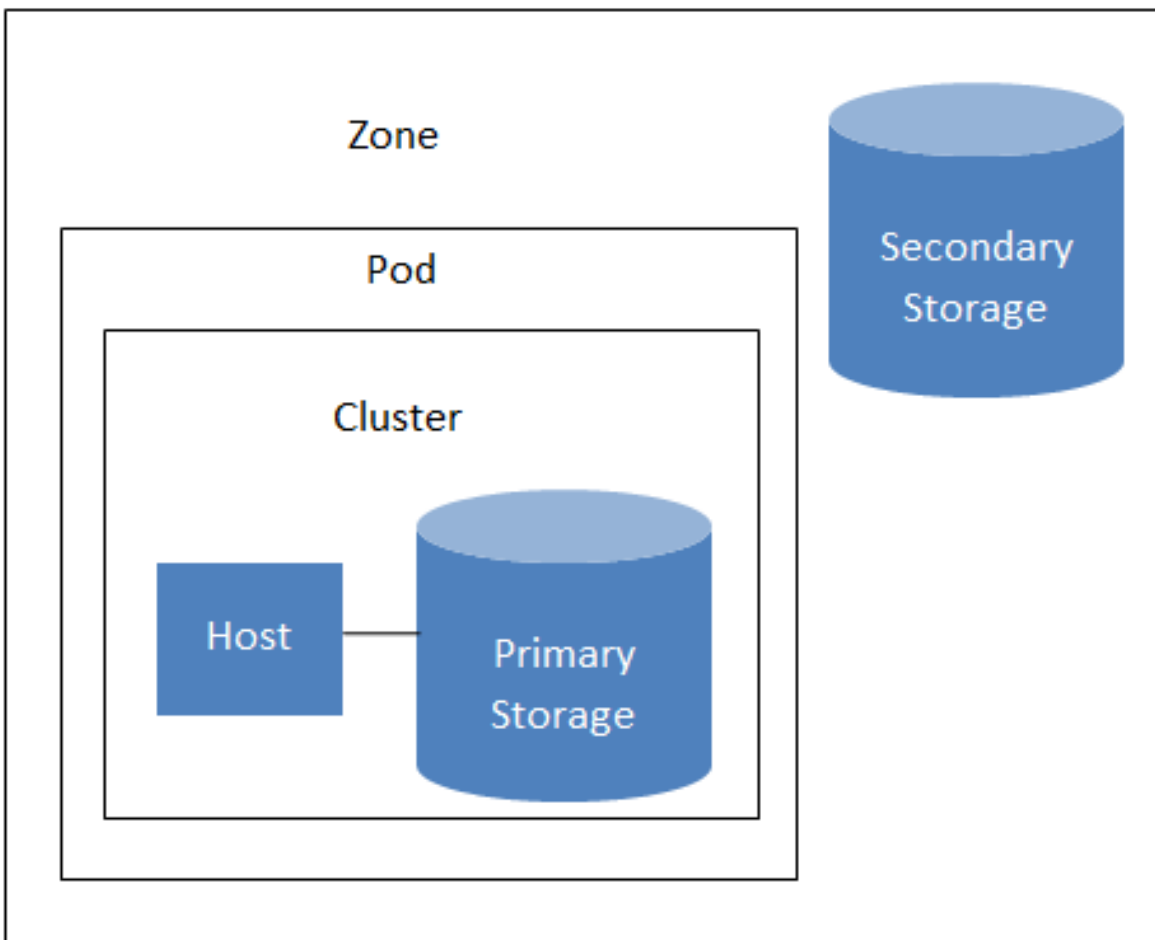
## Chapter 3. Cloud Infrastructure Concepts

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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.

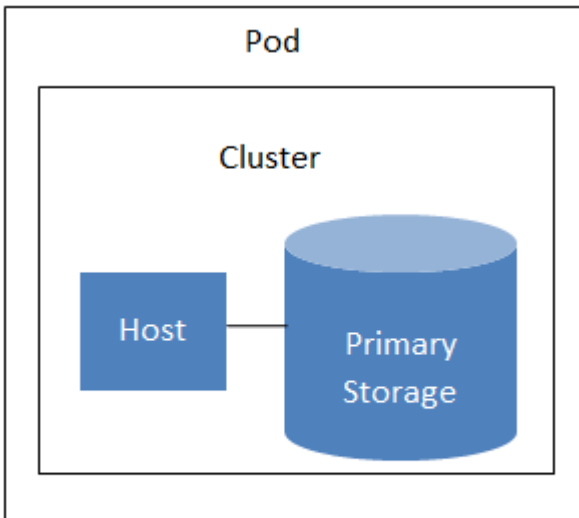


#### Note

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.



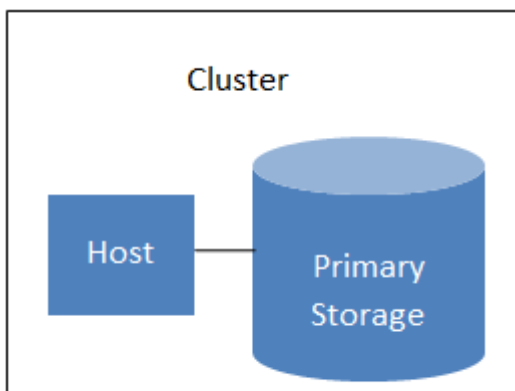
A simple pod

### 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.org](http://swift.openstack.org)<sup>1</sup>) 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

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<sup>1</sup> <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 [About Elastic IP 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.

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 IP Reservation in Isolated Guest Networks in the Administrator's Guide).



### 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.



# Upgrade Instructions

## 4.1. Upgrade from 4.2.0 to 4.2.1

Perform the following to upgrade from version 4.2.0 to version 4.2.1.

1. (KVM on RHEL 6.0/6.1 only) If your existing CloudPlatform deployment includes one or more clusters of KVM hosts running RHEL 6.0 or RHEL 6.1, you must first upgrade the operating system version on those hosts before upgrading CloudPlatform itself.

Run the following commands on every KVM host.

- a. Download the CloudPlatform 4.2.1 RHEL 6.3 binaries from <https://www.citrix.com/English/ss/downloads/>.

- b. Extract the binaries:

```
# cd /root
# tar xvf CloudPlatform-4.2.1.0-1-rhel6.3.tar.gz
```

- c. Create a CloudPlatform 4.2.1 qemu repo:

```
# cd CloudPlatform-4.2.1.0-1-rhel6.3/6.3
# createrepo
```

- d. Prepare the yum repo for upgrade. Edit the file `/etc/yum.repos.d/rhel63.repo`. For example:

```
[upgrade]
name=rhel63
baseurl=url-of-your-rhel6.3-repo
enabled=1
gpgcheck=0
[cloudstack]
name=cloudstack
baseurl=file:///root/CloudPlatform-4.2.1.0-1-rhel6.3/6.3
enabled=1
gpgcheck=0
```

- e. Upgrade the host operating system from RHEL 6.0 to 6.3:

```
yum upgrade
```

2. Stop all Usage Servers if running. Run this on all Usage Server hosts.

```
# service cloudstack-usage stop
```

3. Stop the Management Servers. Run this on all Management Server hosts.

```
# service cloudstack-management stop
```

4. On the MySQL master, take a backup of the MySQL databases. We recommend performing this step even in test upgrades. If there is an issue, this will assist with debugging.

## Chapter 4. Upgrade Instructions

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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.

```
# mysqldump -u root -p<mysql_password> cloud >> cloud-backup.dmp
# mysqldump -u root -p<mysql_password> cloud_usage > cloud-usage-backup.dmp
```

5. (RHEL/CentOS 5.x) If you are currently running CloudPlatform on RHEL/CentOS 5.x, use the following command to set up an Extra Packages for Enterprise Linux (EPEL) repo:

```
rpm -Uvh http://mirror.pnl.gov/epel/5/i386/epel-release-5-4.noarch.rpm
```

6. Download CloudPlatform 4.2.1 onto the management server host where it will run. Get the software from the following link:

<https://www.citrix.com/English/ss/downloads/>.

You need a [My Citrix Account](#)<sup>1</sup>.

7. Upgrade the CloudPlatform packages. You should have a file in the form of "CloudPlatform-4.2.1-N-OSVERSION.tar.gz". Untar the file, then run the install.sh script inside it. Replace the file and directory names below with those you are using:

```
# tar xzf CloudPlatform-4.2.1-N-OSVERSION.tar.gz
# cd CloudPlatform-4.2.1-N-OSVERSION
# ./install.sh
```

You should see a few messages as the installer prepares, followed by a list of choices.

8. Choose "U" to upgrade the package

```
>U
```

You should see some output as the upgrade proceeds, ending with a message like "Complete! Done."

9. If you have made changes to your existing copy of the configuration files components.xml, db.properties, or server.xml in your previous-version CloudPlatform installation, the changes will be preserved in the upgrade. However, you need to do the following steps to place these changes in a new version of the file which is compatible with version 4.2.1.



### Note

How will you know whether you need to do this? If the upgrade output in the previous step included a message like the following, then some custom content was found in your old file, and you need to merge the two files:

---

<sup>1</sup> <http://www.citrix.com/lang/English/publicindex.asp?destURL=%2FEnglish%2FmyCitrix%2Findex.asp%3F#>

```
warning: /etc/cloud.rpmsave/management/components.xml created as /etc/cloudstack/management/components.xml.rpmnew
```

- a. Make a backup copy of your previous version file. For example: (substitute the file name components.xml, db.properties, or server.xml in these commands as needed)

```
# mv /etc/cloudstack/management/components.xml /etc/cloudstack/management/components.xml-backup
```

- b. Copy the \*.rpmnew file to create a new file. For example:

```
# cp -ap /etc/cloudstack/management/components.xml.rpmnew /etc/cloudstack/management/components.xml
```

- c. Merge your changes from the backup file into the new file. For example:

```
# vi /etc/cloudstack/management/components.xml
```

10. Repeat steps 5 - 9 on each management server node.

11. Start the first Management Server. Do not start any other Management Server nodes yet.

```
# service cloudstack-management start
```

Wait until the databases are upgraded. Ensure that the database upgrade is complete. After confirmation, start the other Management Servers one at a time by running the same command on each node.



### Note

Failing to restart the Management Server indicates a problem in the upgrade. Restarting the Management Server without any issues indicates that the upgrade is successfully completed.

12. Start all Usage Servers (if they were running on your previous version). Perform this on each Usage Server host.

```
# service cloudstack-usage start
```

13. (VMware only) If you have existing clusters created in CloudPlatform 3.0.6, additional steps are required to update the existing vCenter password for each VMware cluster.

These steps will not affect running guests in the cloud. These steps are required only for clouds using VMware clusters:

- a. Stop the Management Server:

```
service cloudstack-management stop
```

- b. Perform the following on each VMware cluster:

- i. Encrypt the vCenter password:

```
java -classpath /usr/share/cloudstack-common/lib/jasypt-1.9.0.jar
org.jasypt.intf.cli.JasyptPBEStrEncryptionCLI encrypt.sh
input=<_your_vCenter_password_> password="`cat /etc/cloudstack/management/key`"
verbose=false
```

Save the output from this step for later use. You need to add this in the `cluster_details` and `vmware_data_center` tables in place of the existing password.

- ii. Find the ID of the cluster from the `cluster_details` table:

```
mysql -u <username> -p<password>
```

```
select * from cloud.cluster_details;
```

- iii. Update the existing password with the encrypted one:

```
update cloud.cluster_details set value = <_ciphertext_from_step_i_> where id =
<_id_from_step_ii_>;
```

- iv. Confirm that the table is updated:

```
select * from cloud.cluster_details;
```

- v. Find the ID of the VMware data center that you want to work with:

```
select * from cloud.vmware_data_center;
```

- vi. Change the existing password to the encrypted one:

```
update cloud.vmware_data_center set password = <_ciphertext_from_step_i_> where
id = <_id_from_step_v_>;
```

- vii. Confirm that the table is updated:

```
select * from cloud.vmware_data_center;
```

- c. Start the CloudPlatform Management server

```
service cloudstack-management start
```

14. (KVM only) Additional steps are required for each KVM host. These steps will not affect running guests in the cloud. These steps are required only for clouds using KVM as hosts and only on the KVM hosts.

**Note**

After the software upgrade on a KVM machine, the Ctrl+Alt+Del button on the console view of a VM doesn't work. Use Ctrl+Alt+Insert to log in to the console of the VM.

- a. Copy the CloudPlatform 4.2.1.tgz download to the host, untar it, and cd into the resulting directory.
- b. Stop the running agent.

```
# service cloud-agent stop
```

- c. Update the agent software.

```
# ./install.sh
```

- d. Choose "U" to update the packages.
- e. Upgrade all the existing bridge names to new bridge names by running this script:

```
# cloudstack-agent-upgrade
```

- f. Install a libvirt hook with the following commands:

```
# mkdir /etc/libvirt/hooks
# cp /usr/share/cloudstack-agent/lib/libvirtqemuhook /etc/libvirt/hooks/qemu
# chmod +x /etc/libvirt/hooks/qemu
```

- g. Restart libvirtd.

```
# service libvirtd restart
```

- h. Start the agent.

```
# service cloudstack-agent start
```

15. Log in to the CloudPlatform UI as administrator, and check the status of the hosts. All hosts should come to Up state (except those that you know to be offline). You may need to wait 20 or 30 minutes, depending on the number of hosts.

**Note**

Troubleshooting: If login fails, clear your browser cache and reload the page.

Do not proceed to the next step until the hosts show in Up state. If the hosts do not come to the Up state, contact support.

## Chapter 4. Upgrade Instructions

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16. (VMware only) Log in to the CloudPlatform UI. Destroy both the Secondary Storage VM (SSVM) and Console Proxy VM (CPVM).
17. (VMware) Run the following script to destroy and re-create all remaining System VMs.

- a. Run the script once on one management server. Substitute your own IP address of the MySQL instance, the MySQL user to connect as, and the password to use for that user. In addition to those parameters, provide the "-n" and "-v" arguments. For example:

```
# nohup cloudstack-sysvmadm -d 192.168.1.5 -u cloud -p password -n -v > sysvm.log 2>&1 &
```

This might take up to an hour or more to run, depending on the number of accounts in the system.

- b. After the script terminates, check the log to verify correct execution:

```
# tail -f sysvm.log
```

The content should be like the following:

```
nohup: ignoring input
Restarting 4 networks...
Done restarting networks.
Restarting 2 vpcs...
INFO: Restarting vpc with id 2
INFO: Restarting vpc with id 1
INFO: Successfully restarted vpc with id 1
INFO: Successfully restarted vpc with id 2
Done restarting vpcs.
```

18. (XenServer or KVM) Run the following script to stop, then start, all System VMs including Secondary Storage VMs, Console Proxy VMs, and virtual routers.
- a. Run the script once on one management server. Substitute your own IP address of the MySQL instance, the MySQL user to connect as, and the password to use for that user. In addition to those parameters, provide the "-a" argument. For example:

```
# nohup cloudstack-sysvmadm -d 192.168.1.5 -u cloud -p password -a > sysvm.log 2>&1 &
```

This might take up to an hour or more to run, depending on the number of accounts in the system.

- b. After the script terminates, check the log to verify correct execution:

```
# tail -f sysvm.log
```

The content should be like the following:

```
Stopping and starting 1 secondary storage vm(s)...
Done stopping and starting secondary storage vm(s)
Stopping and starting 1 console proxy vm(s)...
Done stopping and starting console proxy vm(s).
Stopping and starting 4 running routing vm(s)...
Done restarting router(s).
```



19. (XenServer only) If needed, upgrade all Citrix XenServer hypervisor hosts in your cloud to a version supported by CloudPlatform 4.2.1 and apply any required hotfixes. Instructions for upgrading XenServer software and applying hotfixes can be found in [Section 4.6, "Upgrading and Hotfixing XenServer Hypervisor Hosts"](#).
20. (VMware only) After upgrade, if you want to change a Standard vSwitch zone to a VMware dvSwitch Zone, perform the following:
  - a. Ensure that the Public and Guest traffics are not on the same network as the Management and Storage traffic.
  - b. Set `vmware.use.dvswitch` to `true`.
  - c. Access the physical network for the Public and guest traffic, then change the traffic labels as given below:

```
<dvSwitch name>,<VLANID>,<Switch Type>
```

For example: `dvSwitch18,,vmwaredvs`

VLANID is optional.

- d. Stop the Management server.
- e. Start the Management server.
- f. Add the new VMware dvSwitch-enabled cluster to this zone.



### Note

Troubleshooting tip: If passwords which you know to be valid appear not to work after upgrade, or other UI issues are seen, try clearing your browser cache and reloading the UI page.



### Note

(VMware only) After upgrade, whenever you add a new VMware cluster to a zone that was created with a previous version of CloudPlatform, the fields vCenter host, vCenter Username, vCenter Password, and vCenter Datacenter are required. The Add Cluster dialog in the CloudPlatform user interface incorrectly shows them as optional, and will allow you to proceed with adding the cluster even though these important fields are blank. If you do not provide the values, you will see an error message like "Your host and/or path is wrong. Make sure it's of the format `http://hostname/path`".

## 4.2. Upgrade from 3.0.x to 4.2.1

Perform the following to upgrade from version 3.0.0, 3.0.1, 3.0.2, 3.0.3, 3.0.4, 3.0.5, 3.0.6, or 3.0.7 to version 4.2.1.

1. If you are upgrading from 3.0.0 or 3.0.1, ensure that you query your IP address usage records and process them; for example, issue invoices for any usage that you have not yet billed users for.

Starting in 3.0.2, the usage record format for IP addresses is the same as the rest of the usage types. Instead of a single record with the assignment and release dates, separate records are generated per aggregation period with start and end dates. After upgrading, any existing IP address usage records in the old format will no longer be available.

2. While running the 3.0.x system, log in to the UI as root administrator.
3. Using the UI, add a new System VM template for each hypervisor type that is used in your cloud. In each zone, add a system VM template for each hypervisor used in that zone.



### Note

You might notice that the size of the system VM template has increased compared to previous CloudPlatform versions. This is because the new version of the underlying Debian template has an increased disk size.

- a. In the left navigation bar, click Templates.
- b. In Select view, click Templates.
- c. Click Register template.

The Register template dialog box is displayed.

- d. In the Register template dialog box, specify the following values depending on the hypervisor type (do not change these):

Hypervisor	Description
XenServer	<p>Name: systemvm-xenserver-4.2</p> <p>Description: systemvm-xenserver-4.2</p> <p>URL (if using 32-bit system VM template):  <a href="http://download.cloud.com/templates/4.2/systemvmtemplate-2013-07-12-master-xen.vhd.bz2">http://download.cloud.com/templates/4.2/systemvmtemplate-2013-07-12-master-xen.vhd.bz2</a></p> <p>URL (if using 64-bit system VM template):  <a href="http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64-2013-07-15-master-xen.vhd.bz2">http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64-2013-07-15-master-xen.vhd.bz2</a></p> <p>Zone: Choose the zone where this hypervisor is used. If your CloudPlatform deployment includes multiple zones running XenServer, choose All Zones to make the template available in all the XenServer zones.</p> <p>Hypervisor: XenServer</p> <p>Format: VHD</p> <p>OS Type: Debian GNU/Linux 7.0 (32-bit and 64-bit) (or the highest Debian release number available in the dropdown)</p> <p>Extractable: no</p>

Hypervisor	Description
	Password Enabled: no  Public: no  Featured: no
KVM	Name: systemvm-kvm-4.2  Description: systemvm-kvm-4.2  URL (if using 32-bit system VM template): <a href="http://download.cloud.com/templates/4.2/systemvmtemplate-2013-06-12-master-kvm.qcow2.bz2">http://download.cloud.com/templates/4.2/systemvmtemplate-2013-06-12-master-kvm.qcow2.bz2</a>  URL (if using 64-bit system VM template): <a href="http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64-2013-07-15-master-kvm.qcow2.bz2">http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64-2013-07-15-master-kvm.qcow2.bz2</a>  Zone: Choose the zone where this hypervisor is used. If your CloudPlatform deployment includes multiple zones running KVM, choose All Zones to make the template available in all the KVM zones.  Hypervisor: KVM  Format: QCOW2  OS Type: Debian GNU/Linux 7.0 (32-bit and 64-bit) (or the highest Debian release number available in the dropdown)  Extractable: no  Password Enabled: no  Public: no  Featured: no
VMware	Name: systemvm-vmware-4.2  Description: systemvm-vmware-4.2  URL (if using 32-bit system VM template on ESX 5.*): <a href="http://download.cloud.com/templates/4.2/systemvmtemplate-4.2-vh8.ova">http://download.cloud.com/templates/4.2/systemvmtemplate-4.2-vh8.ova</a>  URL (if using 32-bit system VM template on earlier VMware version): <a href="http://download.cloud.com/templates/4.2/systemvmtemplate-4.2-vh7.ova">http://download.cloud.com/templates/4.2/systemvmtemplate-4.2-vh7.ova</a>  URL (if using 64-bit system VM template): <a href="http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64.ova">http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64.ova</a>  Zone: Choose the zone where this hypervisor is used. If your CloudPlatform deployment includes multiple zones running

Hypervisor	Description
	<p>VMware, choose All Zones to make the template available in all the VMware zones.</p> <p>Hypervisor: VMware</p> <p>Format: OVA</p> <p>OS Type: Debian GNU/Linux 7.0 (32-bit) (or the highest Debian release number available in the dropdown)</p> <p>Extractable: no</p> <p>Password Enabled: no</p> <p>Public: no</p> <p>Featured: no</p>

- e. Watch the screen to be sure that the template downloads successfully and enters the READY state. Do not proceed until this is successful
- f. If you use more than one type of hypervisor in your cloud, repeat these steps to download the system VM template for each hypervisor type.

**Warning**

If you do not repeat the steps for each hypervisor type, the upgrade will fail.

- 4. (KVM on RHEL 6.0/6.1 only) If your existing CloudPlatform deployment includes one or more clusters of KVM hosts running RHEL 6.0 or RHEL 6.1, you must first upgrade the operating system version on those hosts before upgrading CloudPlatform itself.

Run the following commands on every KVM host.

- a. Download the CloudPlatform 4.2.1 RHEL 6.3 binaries from <https://www.citrix.com/English/ss/downloads/>.
- b. Extract the binaries:

```
# cd /root
# tar xvf CloudPlatform-4.2.1.0-1-rhel6.3.tar.gz
```

- c. Create a CloudPlatform 4.2.1 qemu repo:

```
# cd CloudPlatform-4.2.1.0-1-rhel6.3/6.3
# createrepo
```

- d. Prepare the yum repo for upgrade. Edit the file /etc/yum.repos.d/rhel63.repo. For example:

```
[upgrade]
name=rhel63
baseurl=url-of-your-rhel6.3-repo
```

```
enabled=1
gpgcheck=0
[cloudstack]
name=cloudstack
baseurl=file:///root/CloudPlatform-4.2.1.0-1-rhel6.3/6.3
enabled=1
gpgcheck=0
```

- e. Upgrade the host operating system from RHEL 6.0 to 6.3:

```
yum upgrade
```

5. Stop all Usage Servers if running. Run this on all Usage Server hosts.

```
# service cloud-usage stop
```

6. Stop the Management Servers. Run this on all Management Server hosts.

```
# service cloud-management stop
```

7. On the MySQL master, take a backup of the MySQL databases. We recommend performing this step even in test upgrades. If there is an issue, this will assist with debugging.

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.

```
# mysqldump -u root -p<mysql_password> cloud >> cloud-backup.dmp
# mysqldump -u root -p<mysql_password> cloud_usage > cloud-usage-backup.dmp
```

8. (RHEL/CentOS 5.x) If you are currently running CloudPlatform on RHEL/CentOS 5.x, use the following command to set up an Extra Packages for Enterprise Linux (EPEL) repo:

```
rpm -Uvh http://mirror.pnl.gov/epel/5/i386/epel-release-5-4.noarch.rpm
```

9. Download CloudPlatform 4.2.1 onto the management server host where it will run. Get the software from the following link:

<https://www.citrix.com/English/ss/downloads/>.

You need a [My Citrix Account](#)<sup>2</sup>.

10. Upgrade the CloudPlatform packages. You should have a file in the form of “CloudPlatform-4.2.1-N-OSVERSION.tar.gz”. Untar the file, then run the install.sh script inside it. Replace the file and directory names below with those you are using:

```
# tar xzf CloudPlatform-4.2.1-N-OSVERSION.tar.gz
# cd CloudPlatform-4.2.1-N-OSVERSION
# ./install.sh
```

You should see a few messages as the installer prepares, followed by a list of choices.

<sup>2</sup> <http://www.citrix.com/lang/English/publicindex.asp?destURL=%2FEnglish%2FmyCitrix%2Findex.asp%3F#>

11. Choose "U" to upgrade the package

```
>U
```

You should see some output as the upgrade proceeds, ending with a message like "Complete! Done."

12. If you have made changes to your existing copy of the configuration files `components.xml`, `db.properties`, or `server.xml` in your previous-version CloudPlatform installation, the changes will be preserved in the upgrade. However, you need to do the following steps to place these changes in a new version of the file which is compatible with version 4.2.1.



### Note

How will you know whether you need to do this? If the upgrade output in the previous step included a message like the following, then some custom content was found in your old file, and you need to merge the two files:

```
warning: /etc/cloud.rpmsave/management/components.xml created as /etc/cloudstack/management/components.xml.rpmnew
```

- a. Make a backup copy of your previous version file. For example: (substitute the file name `components.xml`, `db.properties`, or `server.xml` in these commands as needed)

```
# mv /etc/cloudstack/management/components.xml /etc/cloudstack/management/
components.xml-backup
```

- b. Copy the `*.rpmnew` file to create a new file. For example:

```
# cp -ap /etc/cloudstack/management/components.xml.rpmnew /etc/cloudstack/management/
components.xml
```

- c. Merge your changes from the backup file into the new file. For example:

```
# vi /etc/cloudstack/management/components.xml
```

13. Repeat steps 8 - 12 on each management server node.

14. Start the first Management Server. Do not start any other Management Server nodes yet.

```
# service cloudstack-management start
```

Wait until the databases are upgraded. Ensure that the database upgrade is complete. After confirmation, start the other Management Servers one at a time by running the same command on each node.

**Note**

Failing to restart the Management Server indicates a problem in the upgrade. Restarting the Management Server without any issues indicates that the upgrade is successfully completed.

15. Start all Usage Servers (if they were running on your previous version). Perform this on each Usage Server host.

```
# service cloudstack-usage start
```

**Note**

After upgrade from 3.0.4 to 4.2.1, if the usage server fails to restart then copy db.properties from /etc/cloudstack/management to /etc/cloudstack/usage. Then start the Usage Server.

16. (VMware only) If you are upgrading from 3.0.6 or beyond and you have existing clusters created in 3.0.6, additional steps are required to update the existing vCenter password for each VMware cluster.

These steps will not affect running guests in the cloud. These steps are required only for clouds using VMware clusters:

- a. Stop the Management Server:

```
service cloudstack-management stop
```

- b. Perform the following on each VMware cluster:

- i. Encrypt the vCenter password:

```
java -classpath /usr/share/cloudstack-common/lib/jasypt-1.9.0.jar
org.jasypt.intf.cli.JasyptPBEStrEncryptionCLI encrypt.sh
input=<_your_vCenter_password_> password="`cat /etc/cloudstack/management/key`"
verbose=false
```

Save the output from this step for later use. You need to add this in the cluster\_details and vmware\_data\_center tables in place of the existing password.

- ii. Find the ID of the cluster from the cluster\_details table:

```
mysql -u <username> -p<password>
```

```
select * from cloud.cluster_details;
```

- iii. Update the existing password with the encrypted one:

```
update cloud.cluster_details set value = <_ciphertext_from_step_i_> where id =
<_id_from_step_ii_>;
```

- iv. Confirm that the table is updated:

```
select * from cloud.cluster_details;
```

- v. Find the ID of the VMware data center that you want to work with:

```
select * from cloud.vmware_data_center;
```

- vi. Change the existing password to the encrypted one:

```
update cloud.vmware_data_center set password = <_ciphertext_from_step_i_> where
id = <_id_from_step_v_>;
```

- vii. Confirm that the table is updated:

```
select * from cloud.vmware_data_center;
```

- c. Start the CloudPlatform Management server

```
service cloudstack-management start
```

17. (KVM only) Additional steps are required for each KVM host. These steps will not affect running guests in the cloud. These steps are required only for clouds using KVM as hosts and only on the KVM hosts.



### Note

After the software upgrade on a KVM machine, the Ctrl+Alt+Del button on the console view of a VM doesn't work. Use Ctrl+Alt+Insert to log in to the console of the VM.

- a. Copy the CloudPlatform 4.2.1.tgz download to the host, untar it, and cd into the resulting directory.
- b. Stop the running agent.

```
# service cloud-agent stop
```

- c. Update the agent software.

```
# ./install.sh
```

- d. Choose "U" to update the packages.



- e. Edit `/etc/cloudstack/agent/agent.properties` to change the resource parameter from `com.cloud.agent.resource.computing.LibvirtComputingResource` to `com.cloud.hypervisor.kvm.resource.LibvirtComputingResource`.
- f. Upgrade all the existing bridge names to new bridge names by running this script:

```
# cloudstack-agent-upgrade
```

- g. Install a libvirt hook with the following commands:

```
# mkdir /etc/libvirt/hooks  
# cp /usr/share/cloudstack-agent/lib/libvirtqemuhook /etc/libvirt/hooks/qemu  
# chmod +x /etc/libvirt/hooks/qemu
```

- h. Restart libvirtd.

```
# service libvirtd restart
```

- i. Start the agent.

```
# service cloudstack-agent start
```

18. Log in to the CloudPlatform UI as administrator, and check the status of the hosts. All hosts should come to Up state (except those that you know to be offline). You may need to wait 20 or 30 minutes, depending on the number of hosts.



### Note

Troubleshooting: If login fails, clear your browser cache and reload the page.

Do not proceed to the next step until the hosts show in Up state. If the hosts do not come to the Up state, contact support.

19. If you are upgrading from 3.0.1 or 3.0.2, perform the following:
  - a. Ensure that the admin port is set to 8096 by using the "integration.api.port" global parameter.

This port is used by the `cloudstack-sysvmadm` script later in the upgrade procedure. For information about how to set this parameter, see "Setting Configuration Parameters" in the Installation Guide.

- b. Restart the Management Server.



### Note

If you don't want the admin port to remain open, you can set it to null after the upgrade is done and restart the Management Server.

## Chapter 4. Upgrade Instructions

---

20. (VMware only) Log in to the CloudPlatform UI. Destroy both the Secondary Storage VM (SSVM) and Console Proxy VM (CPVM).
21. (VMware) Run the following script to destroy and re-create all remaining System VMs.

- a. Run the script once on one management server. Substitute your own IP address of the MySQL instance, the MySQL user to connect as, and the password to use for that user. In addition to those parameters, provide the "-n" and "-v" arguments. For example:

```
# nohup cloudstack-sysvmadm -d 192.168.1.5 -u cloud -p password -n -v > sysvm.log 2>&1 &
```

This might take up to an hour or more to run, depending on the number of accounts in the system.

- b. After the script terminates, check the log to verify correct execution:

```
# tail -f sysvm.log
```

The content should be like the following:

```
nohup: ignoring input
Restarting 4 networks...
Done restarting networks.
Restarting 2 vpcs...
INFO: Restarting vpc with id 2
INFO: Restarting vpc with id 1
INFO: Successfully restarted vpc with id 1
INFO: Successfully restarted vpc with id 2
Done restarting vpcs.
```

22. (XenServer or KVM) Run the following script to stop, then start, all System VMs including Secondary Storage VMs, Console Proxy VMs, and virtual routers.
- a. Run the script once on one management server. Substitute your own IP address of the MySQL instance, the MySQL user to connect as, and the password to use for that user. In addition to those parameters, provide the "-a" argument. For example:

```
# nohup cloudstack-sysvmadm -d 192.168.1.5 -u cloud -p password -a > sysvm.log 2>&1 &
```

This might take up to an hour or more to run, depending on the number of accounts in the system.

- b. After the script terminates, check the log to verify correct execution:

```
# tail -f sysvm.log
```

The content should be like the following:

```
Stopping and starting 1 secondary storage vm(s)...
Done stopping and starting secondary storage vm(s)
Stopping and starting 1 console proxy vm(s)...
Done stopping and starting console proxy vm(s).
Stopping and starting 4 running routing vm(s)...
Done restarting router(s).
```

23. If you would like additional confirmation that the new system VM templates were correctly applied when these system VMs were rebooted, SSH into the System VM and check the version.

Use one of the following techniques, depending on the hypervisor.

### XenServer or KVM:

SSH in by using the link local IP address of the system VM. For example, in the command below, substitute your own path to the private key used to log in to the system VM and your own link local IP.

Run the following commands on the XenServer or KVM host on which the system VM is present:

```
# ssh -i /root/.ssh/id_rsa.cloud <link-local-ip> -p 3922
# cat /etc/cloudstack-release
```

The output should be like the following:

```
Cloudstack Release 4.2.1 Mon Nov 12 15:10:04 PST 2013
```

### ESXi

SSH in using the private IP address of the system VM. For example, in the command below, substitute your own path to the private key used to log in to the system VM and your own private IP.

Run the following commands on the Management Server:

```
# ssh -i /var/cloudstack/management/.ssh/id_rsa <private-ip> -p 3922
# cat /etc/cloudstack-release
```

The output should be like the following:

```
Cloudstack Release 4.2.1 Fri Nov 8 15:10:04 PST 2012
```

24. If you want to close the admin port again (recommended in production systems), set `integration.api.port` to null. Then restart the Management Server. For information about how to set `integration.api.port`, see [Section 5.5, "Setting Configuration Parameters"](#).
25. (XenServer only) If needed, upgrade all Citrix XenServer hypervisor hosts in your cloud to a version supported by CloudPlatform 4.2.1 and apply any required hotfixes. Instructions for upgrading XenServer software and applying hotfixes can be found in [Section 4.6, "Upgrading and Hotfixing XenServer Hypervisor Hosts"](#).
26. (VMware only) After upgrade, if you want to change a Standard vSwitch zone to a VMware dvSwitch Zone, perform the following:
- Ensure that the Public and Guest traffics are not on the same network as the Management and Storage traffic.
  - Set `vmware.use.dvswitch` to true.
  - Access the physical network for the Public and guest traffic, then change the traffic labels as given below:

```
<dvSwitch name>,<VLANID>,<Switch Type>
```

For example: dvSwitch18,,vmwaredvs

VLANID is optional.

- d. Stop the Management server.
- e. Start the Management server.
- f. Add the new VMware dvSwitch-enabled cluster to this zone.



### Note

Troubleshooting tip: If passwords which you know to be valid appear not to work after upgrade, or other UI issues are seen, try clearing your browser cache and reloading the UI page.



### Note

(VMware only) After upgrade, whenever you add a new VMware cluster to a zone that was created with a previous version of CloudPlatform, the fields vCenter host, vCenter Username, vCenter Password, and vCenter Datacenter are required. The Add Cluster dialog in the CloudPlatform user interface incorrectly shows them as optional, and will allow you to proceed with adding the cluster even though these important fields are blank. If you do not provide the values, you will see an error message like "Your host and/or path is wrong. Make sure it's of the format http://hostname/path".

## 4.3. Upgrade from 2.2.x to 4.2.1

1. Ensure that you query your IP address usage records and process them; for example, issue invoices for any usage that you have not yet billed users for.

Starting in 3.0.2, the usage record format for IP addresses is the same as the rest of the usage types. Instead of a single record with the assignment and release dates, separate records are generated per aggregation period with start and end dates. After upgrading to 4.2.1, any existing IP address usage records in the old format will no longer be available.

2. If you are using version 2.2.0 - 2.2.13, first upgrade to 2.2.14 by using the instructions in the [2.2.14 Release Notes](#)<sup>3</sup>.

---

<sup>3</sup> <http://download.cloud.com/releases/2.2.0/CloudStack2.2.14ReleaseNotes.pdf>

**Note**

(KVM only) If KVM hypervisor is used in your cloud, be sure you completed the step to insert a valid username and password into the `host_details` table on each KVM node as described in the 2.2.14 Release Notes. This step is critical, as the database will be encrypted after the upgrade to 4.2.1.

3. While running the 2.2.x system (which by this step should be at version 2.2.14 or greater), log in to the UI as root administrator.
4. Using the UI, add a new System VM template for each hypervisor type that is used in your cloud. In each zone, add a system VM template for each hypervisor used in that zone.

**Note**

You might notice that the size of the system VM template has increased compared to previous CloudPlatform versions. This is because the new version of the underlying Debian template has an increased disk size.

- a. In the left navigation bar, click Templates.
- b. In Select view, click Templates.
- c. Click Register template.  
The Register template dialog box is displayed.
- d. In the Register template dialog box, specify the following values depending on the hypervisor type (do not change these):

Hypervisor	Description
XenServer	<p>Name: systemvm-xenserver-4.2</p> <p>Description: systemvm-xenserver-4.2</p> <p>URL (if using 32-bit system VM template):  <a href="http://download.cloud.com/templates/4.2/systemvmtemplate-2013-07-12-master-xen.vhd.bz2">http://download.cloud.com/templates/4.2/systemvmtemplate-2013-07-12-master-xen.vhd.bz2</a></p> <p>URL (if using 64-bit system VM template):  <a href="http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64-2013-07-15-master-xen.vhd.bz2">http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64-2013-07-15-master-xen.vhd.bz2</a></p> <p>Zone: Choose the zone where this hypervisor is used. If your CloudPlatform deployment includes multiple zones running XenServer, choose All Zones to make the template available in all the XenServer zones.</p> <p>Hypervisor: XenServer</p>

Hypervisor	Description
	<p>Format: VHD</p> <p>OS Type: Debian GNU/Linux 7.0 (32-bit and 64-bit) (or the highest Debian release number available in the dropdown)</p> <p>Extractable: no</p> <p>Password Enabled: no</p> <p>Public: no</p> <p>Featured: no</p>
KVM	<p>Name: systemvm-kvm-4.2</p> <p>Description: systemvm-kvm-4.2</p> <p>URL (if using 32-bit system VM template): <a href="http://download.cloud.com/templates/4.2/systemvmtemplate-2013-06-12-master-kvm.qcow2.bz2">http://download.cloud.com/templates/4.2/systemvmtemplate-2013-06-12-master-kvm.qcow2.bz2</a></p> <p>URL (if using 64-bit system VM template): <a href="http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64-2013-07-15-master-kvm.qcow2.bz2">http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64-2013-07-15-master-kvm.qcow2.bz2</a></p> <p>Zone: Choose the zone where this hypervisor is used. If your CloudPlatform deployment includes multiple zones running KVM, choose All Zones to make the template available in all the KVM zones.</p> <p>Hypervisor: KVM</p> <p>Format: QCOW2</p> <p>OS Type: Debian GNU/Linux 7.0 (32-bit and 64-bit) (or the highest Debian release number available in the dropdown)</p> <p>Extractable: no</p> <p>Password Enabled: no</p> <p>Public: no</p> <p>Featured: no</p>
VMware	<p>Name: systemvm-vmware-4.2</p> <p>Description: systemvm-vmware-4.2</p> <p>URL (if using 32-bit system VM template on ESX 5.*): <a href="http://download.cloud.com/templates/4.2/systemvmtemplate-4.2-vh8.ova">http://download.cloud.com/templates/4.2/systemvmtemplate-4.2-vh8.ova</a></p> <p>URL (if using 32-bit system VM template on earlier VMware version): <a href="http://download.cloud.com/templates/4.2/systemvmtemplate-4.2-vh7.ova">http://download.cloud.com/templates/4.2/systemvmtemplate-4.2-vh7.ova</a></p>

Hypervisor	Description
	<p>URL (if using 64-bit system VM template):  <a href="http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64.ova">http://download.cloud.com/templates/4.2/64bit/systemvmtemplate64.ova</a></p> <p>Zone: Choose the zone where this hypervisor is used. If your CloudPlatform deployment includes multiple zones running VMware, choose All Zones to make the template available in all the VMware zones.</p> <p>Hypervisor: VMware</p> <p>Format: OVA</p> <p>OS Type: Debian GNU/Linux 7.0 (32-bit) (or the highest Debian release number available in the dropdown)</p> <p>Extractable: no</p> <p>Password Enabled: no</p> <p>Public: no</p> <p>Featured: no</p>

- e. Watch the screen to be sure that the template downloads successfully and enters the READY state. Do not proceed until this is successful
- f. If you use more than one type of hypervisor in your cloud, repeat these steps to download the system VM template for each hypervisor type.



### Warning

If you do not repeat the steps for each hypervisor type, the upgrade will fail.

5. (KVM on RHEL 6.0, 6.1) If your existing CloudPlatform deployment includes one or more clusters of KVM hosts running RHEL 6.0 or RHEL 6.1, you must first upgrade the operating system version on those hosts before upgrading CloudPlatform itself.

Run the following commands on every KVM host.

- a. Download the CloudPlatform 4.2.1 RHEL 6.3 binaries from <https://www.citrix.com/English/ss/downloads/>.
- b. Extract the binaries:

```
# cd /root
# tar xvf CloudPlatform-4.2.1-1-rhel6.3.tar.gz
```

- c. Create a CloudPlatform 4.2.1 qemu repo:

```
# cd CloudPlatform-4.2.1-1-rhel6.3/6.3
```

```
# createrepo .
```

- d. Prepare the yum repo for upgrade. Edit the file `/etc/yum.repos.d/rhel63.repo`. For example:

```
[upgrade]
name=rhel63
baseurl=url-of-your-rhel6.3-repo
enabled=1
gpgcheck=0
[cloudstack]
name=cloudstack
baseurl=file:///root/CloudPlatform-4.2.1-1-rhel6.3/6.3
enabled=1
gpgcheck=0
```

- e. Upgrade the host operating system from RHEL 6.0 to 6.3:

```
yum upgrade
```

6. Stop all Usage Servers if running. Run this on all Usage Server hosts.

```
# service cloud-usage stop
```

7. Stop the Management Servers. Run this on all Management Server hosts.

```
# service cloud-management stop
```

8. On the MySQL master, take a backup of the MySQL databases. We recommend performing this step even in test upgrades. If there is an issue, this will assist with debugging.

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.

```
# mysqldump -u root -p<mysql_password> cloud >> cloud-backup.dmp
# mysqldump -u root -p<mysql_password> cloud_usage > cloud-usage-backup.dmp
```

9. (RHEL/CentOS 5.x) If you are currently running CloudPlatform on RHEL/CentOS 5.x, use the following command to set up an Extra Packages for Enterprise Linux (EPEL) repo:

```
rpm -Uvh http://mirror.pnl.gov/epel/5/i386/epel-release-5-4.noarch.rpm
```

10. Download CloudPlatform 4.2.1 onto the management server host where it will run. Get the software from the following link:

<https://www.citrix.com/English/ss/downloads/>

You need a [My Citrix Account](#)<sup>4</sup>.

11. Upgrade the CloudPlatform packages. You should have a file in the form of “CloudPlatform-4.2.1-N-OSVERSION.tar.gz”. Untar the file, then run the `install.sh` script inside it. Replace the file and directory names below with those you are using:

---

<sup>4</sup> <http://www.citrix.com/lang/English/publicindex.asp?destURL=%2FEnglish%2FmyCitrix%2Findex.asp%3F#>



```
# tar xzf CloudPlatform-4.2.1-N-OSVERSION.tar.gz
# cd CloudPlatform-4.2.1-N-OSVERSION
# ./install.sh
```

You should see a few messages as the installer prepares, followed by a list of choices.

12. Choose "U" to upgrade the package.

```
> U
```

13. If you have made changes to your existing copy of the configuration files `components.xml`, `db.properties`, or `server.xml` in your previous-version CloudPlatform installation, the changes will be preserved in the upgrade. However, you need to do the following steps to place these changes in a new version of the file which is compatible with version 4.2.1.



### Note

How will you know whether you need to do this? If the upgrade output in the previous step included a message like the following, then some custom content was found in your old file, and you need to merge the two files:

```
warning: /etc/cloud.rpmsave/management/components.xml created as /etc/cloudstack/
management/components.xml.rpmnew
```

- a. Make a backup copy of your previous version file. For example: (substitute the file name `components.xml`, `db.properties`, or `server.xml` in these commands as needed)

```
# mv /etc/cloudstack/management/components.xml /etc/cloudstack/management/
components.xml-backup
```

- b. Copy the `*.rpmnew` file to create a new file. For example:

```
# cp -ap /etc/cloudstack/management/components.xml.rpmnew /etc/cloudstack/management/
components.xml
```

- c. Merge your changes from the backup file into the new file. For example:

```
# vi /etc/cloudstack/management/components.xml
```

14. On the management server node, run the following command. It is recommended that you use the command-line flags to provide your own encryption keys. See [Password and Key Encryption](#) in the [Installation Guide](#).

```
# cloudstack-setup-encryption -e <encryption_type> -m <management_server_key> -k
<database_key>
```

When used without arguments, as in the following example, the default encryption type and keys will be used:

## Chapter 4. Upgrade Instructions

---

- (Optional) For `encryption_type`, use file or web to indicate the technique used to pass in the database encryption password. Default: file.
  - (Optional) For `management_server_key`, substitute the default key that is used to encrypt confidential parameters in the properties file. Default: password. It is highly recommended that you replace this with a more secure value
  - (Optional) For `database_key`, substitute the default key that is used to encrypt confidential parameters in the CloudPlatform database. Default: password. It is highly recommended that you replace this with a more secure value.
15. Repeat steps 9 - 14 on every management server node. If you provided your own encryption key in step 14, use the same key on all other management servers.
  16. Start the first Management Server. Do not start any other Management Server nodes yet.

```
# service cloudstack-management start
```

Wait until the databases are upgraded. Ensure that the database upgrade is complete. After confirmation, start the other Management Servers one at a time by running the same command on each node.

17. Start all Usage Servers (if they were running on your previous version). Perform this on each Usage Server host.

```
# service cloudstack-usage start
```

18. (KVM only) Additional steps are required for each KVM host. These steps will not affect running guests in the cloud. These steps are required only for clouds using KVM as hosts and only on the KVM hosts.



### Note

After the software upgrade on a KVM machine, the Ctrl+Alt+Del button on the console view of a VM doesn't work. Use Ctrl+Alt+Insert to log in to the console of the VM.

- a. Copy the CloudPlatform 4.2.1 .tgz download to the host, untar it, and cd into the resulting directory.
- b. Stop the running agent.

```
# service cloud-agent stop
```

- c. Update the agent software.

```
# ./install.sh
```

- d. Choose "U" to update the packages.

- e. Edit `/etc/cloudstack/agent/agent.properties` to change the resource parameter from `com.cloud.agent.resource.computing.LibvirtComputingResource` to `com.cloud.hypervisor.kvm.resource.LibvirtComputingResource`.
- f. Upgrade all the existing bridge names to new bridge names by running this script:

```
# cloudstack-agent-upgrade
```

- g. Install a libvirt hook with the following commands:

```
# mkdir /etc/libvirt/hooks
# cp /usr/share/cloudstack-agent/lib/libvirtqemuhook /etc/libvirt/hooks/qemu
# chmod +x /etc/libvirt/hooks/qemu
```

- h. Restart libvirtd.

```
# service libvirtd restart
```

- i. Start the agent.

```
# service cloudstack-agent start
```

19. Log in to the CloudPlatform UI as admin, and check the status of the hosts. All hosts should come to Up state (except those that you know to be offline). You may need to wait 20 or 30 minutes, depending on the number of hosts.

Do not proceed to the next step until the hosts show in the Up state. If the hosts do not come to the Up state, contact support.

20. (VMware only) Log in to the CloudPlatform UI. Destroy both the Secondary Storage VM (SSVM) and Console Proxy VM (CPVM).

21. (VMware) Run the following script to destroy and re-create all remaining System VMs.

- a. Run the script once on one management server. Substitute your own IP address of the MySQL instance, the MySQL user to connect as, and the password to use for that user. In addition to those parameters, provide the "-n" and "-v" arguments. For example:

```
# nohup cloudstack-sysvmadm -d 192.168.1.5 -u cloud -p password -n -v > sysvm.log
2>&1 &
```

This might take up to an hour or more to run, depending on the number of accounts in the system.

- b. After the script terminates, check the log to verify correct execution:

```
# tail -f sysvm.log
```

The content should be like the following:

```
nohup: ignoring input
Restarting 4 networks...
Done restarting networks.
```

```
Restarting 2 vpcs...
INFO: Restarting vpc with id 2
INFO: Restarting vpc with id 1
INFO: Successfully restarted vpc with id 1
INFO: Successfully restarted vpc with id 2
Done restarting vpcs.
```

22. (XenServer or KVM) Run the following script to stop, then start, all System VMs including Secondary Storage VMs, Console Proxy VMs, and virtual routers.

- a. Run the script once on one management server. Substitute your own IP address of the MySQL instance, the MySQL user to connect as, and the password to use for that user. In addition to those parameters, provide the "-a" argument. For example:

```
# nohup cloudstack-sysvmdm -d 192.168.1.5 -u cloud -p password -a > sysvm.log 2>&1 &
```

This might take up to an hour or more to run, depending on the number of accounts in the system.

- b. After the script terminates, check the log to verify correct execution:

```
# tail -f sysvm.log
```

The content should be like the following:

```
Stopping and starting 1 secondary storage vm(s)...
Done stopping and starting secondary storage vm(s)
Stopping and starting 1 console proxy vm(s)...
Done stopping and starting console proxy vm(s).
Stopping and starting 4 running routing vm(s)...
Done restarting router(s).
```

23. If you would like additional confirmation that the new system VM templates were correctly applied when these system VMs were rebooted, SSH into the System VM and check the version.

Use one of the following techniques, depending on the hypervisor.

### XenServer or KVM:

SSH in by using the link local IP address of the system VM. For example, in the command below, substitute your own path to the private key used to log in to the system VM and your own link local IP.

Run the following commands on the XenServer or KVM host on which the system VM is present:

```
# ssh -i /root/.ssh/id_rsa.cloud <link-local-ip> -p 3922
# cat /etc/cloudstack-release
```

The output should be like the following:

```
Cloudstack Release 4.2.1 Mon Nov 12 15:10:04 PST 2013
```

## ESXi

SSH in using the private IP address of the system VM. For example, in the command below, substitute your own path to the private key used to log in to the system VM and your own private IP.

Run the following commands on the Management Server:

```
# ssh -i /var/cloudstack/management/.ssh/id_rsa <private-ip> -p 3922
# cat /etc/cloudstack-release
```

The output should be like the following:

```
Cloudstack Release 4.2.1 Fri Nov 8 15:10:04 PST 2012
```

24. (XenServer only) If needed, upgrade all Citrix XenServer hypervisor hosts in your cloud to a version supported by CloudPlatform 4.2.1 and apply any required hotfixes. Instructions for upgrading and applying hotfixes can be found in [Section 4.6, "Upgrading and Hotfixing XenServer Hypervisor Hosts"](#).



### Note

(VMware only) After upgrade, whenever you add a new VMware cluster to a zone that was created with a previous version of CloudPlatform, the fields vCenter host, vCenter Username, vCenter Password, and vCenter Datacenter are required. The Add Cluster dialog in the CloudPlatform user interface incorrectly shows them as optional, and will allow you to proceed with adding the cluster even though these important fields are blank. If you do not provide the values, you will see an error message like "Your host and/or path is wrong. Make sure it's of the format http://hostname/path".

## 4.4. Upgrade from 2.1.x to 4.2.1

Direct upgrades from version 2.1.0 - 2.1.10 to 4.2.1 are not supported. CloudPlatform must first be upgraded to version 2.2.14. For information on how to upgrade from 2.1.x to 2.2.14, see the CloudPlatform 2.2.14 Release Notes.

## 4.5. Upgrade CloudPlatform Baremetal Agent on PXE and DHCP Servers

If you installed bare metal clusters using a previous version of CloudPlatform, use the following steps to upgrade the baremetal agent in order to get the latest bug fixes for 4.2.1.

1. Log in as root to the host or virtual machine running the Baremetal PXE server and DHCP server.
2. Download CloudPlatform 4.2.1 onto the PXE or DHCP server. Get the software from the following link:

<https://www.citrix.com/English/ss/downloads/>.

You need a [My Citrix Account](#)<sup>5</sup>.

3. Upgrade the CloudPlatform packages. You should have a file in the form of "CloudPlatform-4.2.1-N-OSVERSION.tar.gz". Untar the file, then run the install.sh script inside it. Replace the file and directory names below with those you are using:

```
# tar xzf CloudPlatform-4.2.1-N-OSVERSION.tar.gz
# cd CloudPlatform-4.2.1-N-OSVERSION
# ./install.sh
```

You should see a few messages as the installer prepares, followed by a list of choices.

4. Choose "U" to upgrade the package

```
>U
```

You should see some output as the upgrade proceeds, ending with a message like "Complete! Done."

5. Run the bare metal setup script:

```
cloudstack-setup-baremetal
```

## 4.6. Upgrading and Hotfixing XenServer Hypervisor Hosts

In CloudPlatform 4.2.1, you can upgrade XenServer hypervisor host software without having to disconnect the XenServer cluster. You can upgrade XenServer 5.6 GA, 5.6 FP1, or 5.6 SP2 to any newer version that is supported by CloudPlatform. The actual upgrade is described in XenServer documentation, but there are some additional steps you must perform before and after the upgrade.

### 4.6.1. Upgrading to a New XenServer Version

To upgrade XenServer hosts when running CloudPlatform 4.2.1:

1. Edit the file /etc/cloudstack/management/environment.properties and add the following line:

```
manage.xenserver.pool.master=false
```

2. Restart the Management Server to put the new setting into effect.

```
# service cloudstack-management start
```

3. Find the hostname of the master host in your XenServer cluster (pool):

- a. Run the following command on any host in the pool, and make a note of the host-uuid of the master host:

```
# xe pool-list
```

---

<sup>5</sup> <http://www.citrix.com/lang/English/publicindex.asp?destURL=%2FEnglish%2FmyCitrix%2Findex.asp%3F#>

- b. Now run the following command, and find the host that has a host-uuid that matches the master host from the previous step. Make a note of this host's hostname. You will need to input it in a later step.

```
# xe host-list
```

4. On CloudPlatform, put the master host into maintenance mode. Use the hostname you discovered in the previous step.



### Note

In the latest XenServer upgrade procedure, even after putting the master host into maintenance mode, the master host continues to stay as master.

Any VMs running on this master will be automatically migrated to other hosts, unless there is only one UP host in the cluster. If there is only one UP host, putting the host into maintenance mode will stop any VMs running on the host.

5. Disconnect the XenServer cluster from CloudPlatform. It will remain disconnected only long enough to upgrade one host.
  - a. Log in to the CloudPlatform UI as root.
  - b. Navigate to the XenServer cluster, and click Actions – Unmanage.
  - c. Watch the cluster status until it shows Unmanaged.
6. Upgrade the XenServer software on the master host:
  - a. Insert the XenServer CD.
  - b. Reboot the host.
  - c. Upgrade to the newer version of XenServer. Use the steps in XenServer documentation.
7. Cancel the maintenance mode on the master host.
8. Reconnect the XenServer cluster to CloudPlatform.
  - a. Log in to the CloudPlatform UI as root.
  - b. Navigate to the XenServer cluster, and click Actions – Manage.
  - c. Watch the status to see that all the hosts come up.
9. Upgrade the slave hosts in the cluster:
  - a. Put a slave host into maintenance mode.  
Wait until all the VMs are migrated to other hosts.
  - b. Upgrade the XenServer software on the slave.
  - c. Cancel maintenance mode for the slave.

- d. Repeat steps [a](#) through [c](#) for each slave host in the XenServer pool.
10. You might need to change the OS type settings for VMs running on the upgraded hosts, if any of the following apply:
    - If you upgraded from XenServer 5.6 GA to XenServer 5.6 SP2, change any VMs that have the OS type CentOS 5.5 (32-bit), Oracle Enterprise Linux 5.5 (32-bit), or Red Hat Enterprise Linux 5.5 (32-bit) to Other Linux (32-bit). Change any VMs that have the 64-bit versions of these same OS types to Other Linux (64-bit).
    - If you upgraded from XenServer 5.6 SP2 to XenServer 6.0.2 or higher, change any VMs that have the OS type CentOS 5.6 (32-bit), CentOS 5.7 (32-bit), Oracle Enterprise Linux 5.6 (32-bit), Oracle Enterprise Linux 5.7 (32-bit), Red Hat Enterprise Linux 5.6 (32-bit), or Red Hat Enterprise Linux 5.7 (32-bit) to Other Linux (32-bit). Change any VMs that have the 64-bit versions of these same OS types to Other Linux (64-bit).
    - If you upgraded from XenServer 5.6 to XenServer 6.0.2 or higher, do all of the above.

### 4.6.2. Applying Hotfixes to a XenServer Cluster

1. Edit the file `/etc/cloudstack/management/environment.properties` and add the following line:

```
manage.xenserver.pool.master=false
```

2. Restart the Management Server to put the new setting into effect.

```
# service cloudstack-management start
```

3. Find the hostname of the master host in your XenServer cluster (pool):

- a. Run the following command on any host in the pool, and make a note of the host-uuid of the master host:

```
# xe pool-list
```

- b. Now run the following command, and find the host that has a host-uuid that matches the master host from the previous step. Make a note of this host's hostname. You will need to input it in a later step.

```
# xe host-list
```

4. On CloudPlatform, put the master host into maintenance mode. Use the hostname you discovered in the previous step.

Any VMs running on this master will be automatically migrated to other hosts, unless there is only one UP host in the cluster. If there is only one UP host, putting the host into maintenance mode will stop any VMs running on the host.

5. Disconnect the XenServer cluster from CloudPlatform. It will remain disconnected only long enough to hotfix one host.
  - a. Log in to the CloudPlatform UI as root.



- b. Navigate to the XenServer cluster, and click Actions – Unmanage.
  - c. Watch the cluster status until it shows Unmanaged.
6. Hotfix the master host:
- a. Add the XenServer hot fixes to the master host.

- i. Assign a UUID to the update file:

```
xe patch-upload file-name=XS602E015.xsupdate
```

The command displays the UUID of the update file:

```
33af688e-d18c-493d-922b-ec51ea23cfe9
```

- ii. Repeat the `xe patch-upload` command for all other XenServer updates: `XS602E004.xsupdate`, `XS602E005.xsupdate`.

Take a note of the UUIDs of the update files. The UUIDs are required in the next step.

- b. Apply XenServer hot fixes to master host:

```
xe patch-apply host-uuid=<master uuid> uuid=<hotfix uuid>
```

- c. Repeat `xe patch-apply` command for all the hot fixes.
- d. Install the required CSP files.

```
xe-install-supplemental-pack <csp-iso-file>
```

- e. Restart the master host.

7. Cancel the maintenance mode on the master host.

8. Reconnect the XenServer cluster to CloudPlatform.

- a. Log in to the CloudPlatform UI as root.
- b. Navigate to the XenServer cluster, and click Actions – Manage.
- c. Watch the status to see that all the hosts come up.

9. Hotfix the slave hosts in the cluster:

- a. Put a slave host into maintenance mode.

Wait until all the VMs are migrated to other hosts.

- b. Apply the XenServer hot fixes to the slave host:

```
xe patch-apply host-uuid=<master uuid> uuid=<hotfix uuid>
```

- c. Repeat Step a through b for each slave host in the XenServer pool.

- d. Install the required CSP files.

```
xe-install-supplemental-pack <csp-iso-file>
```

- e. Restart the slave hosts.

Wait until all the slave hosts are up. It might take several minutes for the hosts to come up.

10. Cancel the maintenance mode on the slave hosts.
11. You might need to change the OS type settings for VMs running on the upgraded hosts, if any of the following apply:
- If you upgraded from XenServer 5.6 SP2 to XenServer 6.0.2, change any VMs that have the OS type CentOS 5.6 (32-bit), CentOS 5.7 (32-bit), Oracle Enterprise Linux 5.6 (32-bit), Oracle Enterprise Linux 5.7 (32-bit), Red Hat Enterprise Linux 5.6 (32-bit) , or Red Hat Enterprise Linux 5.7 (32-bit) to Other Linux (32-bit). Change any VMs that have the 64-bit versions of these same OS types to Other Linux (64-bit).
  - If you upgraded from XenServer 5.6 GA or 5.6 FP1 to XenServer 6.0.2, change any VMs that have the OS type CentOS 5.5 (32-bit), CentOS 5.6 (32-bit), CentOS 5.7 (32-bit), Oracle Enterprise Linux 5.5 (32-bit), Oracle Enterprise Linux 5.6 (32-bit), Oracle Enterprise Linux 5.7 (32-bit), Red Hat Enterprise Linux 5.5 (32-bit), Red Hat Enterprise Linux 5.6 (32-bit) , or Red Hat Enterprise Linux 5.7 (32-bit) to Other Linux (32-bit). Change any VMs that have the 64-bit versions of these same OS types to Other Linux (64-bit).

# Installation

## 5.1. Who Should Read This

These installation instructions are intended for those who are ready to set up a full production deployment. If you only need to set up a trial installation, you will probably find more detail than you need here. Instead, you might want to start with the Trial Installation Guide.

With the following procedures, 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.

## 5.2. Overview of Installation Steps

For anything more than a simple trial installation, you will need guidance for a variety of configuration choices. It is strongly recommended that you read the following:

- [Chapter 13, Choosing a Deployment Architecture](#)
- [Section 5.3.3, “Hypervisor Compatibility Matrix”](#)
- [Chapter 14, Network Setup](#)
- Storage Setup
- Best Practices

### Prepare

1. Make sure you have the required hardware ready
2. (Optional) Fill out the preparation checklists

### Install the CloudPlatform software

3. Install the Management Server (choose single-node or multi-node)
4. Log in to the UI

### Provision your cloud infrastructure

5. Add a zone. Includes the first pod, cluster, and host
6. Add more pods
7. Add more clusters
8. Add more hosts
9. Add more primary storage
10. Add more secondary storage

### Try using the cloud

11. Initialization and testing

## 5.3. Minimum System Requirements

### 5.3.1. Management Server, Database, and Storage System Requirements

The machines that will run the Management Server and MySQL database must meet the following requirements. The same machines can also be used to provide primary and secondary storage, such as via local disk or NFS. The Management Server may be placed on a virtual machine.

- Operating system:
  - Preferred: RHEL 6.2 or 6.3 64-bit (<https://access.redhat.com/downloads>)
  - Also supported: RHEL 5.5 64-bit
  - It is highly recommended that you purchase a RHEL support license. Citrix support can not be responsible for helping fix issues with the underlying OS.
- 64-bit x86 CPU (more cores results in better performance)
- 4 GB of memory
- 50 GB of local disk (when secondary storage is on the same machine with the Management Server, 500GB is recommended)
- At least 1 NIC
- Statically allocated IP address
- Fully qualified domain name as returned by the hostname command
- Use the default user file-creation mode mask (umask). The value is 022.

If the value is not 022, several files might not be accessible to the cloud user, which leads to installation failure.

### 5.3.2. Host/Hypervisor System Requirements

The host is where the cloud services run in the form of guest virtual machines. Each host is one machine that meets the following requirements:

- Must support HVM (Intel-VT or AMD-V enabled).
- 64-bit x86 CPU (more cores results in better performance)
- Hardware virtualization support required
- 4 GB of memory
- 36 GB of local disk
- At least 1 NIC
- Latest hotfixes applied to hypervisor software
- When you deploy CloudPlatform, the hypervisor host must not have any VMs already running

- All hosts within a cluster must be homogenous. The CPUs must be of the same type, count, and feature flags.

Hosts have additional requirements depending on the hypervisor. See the requirements listed at the top of the Installation section for your chosen hypervisor:

- [Chapter 8, Installing XenServer for CloudPlatform](#)
- [Chapter 10, Installing VMware for CloudPlatform](#)
- [Chapter 9, Installing KVM for CloudPlatform](#)
- [Chapter 12, Installing Oracle VM \(OVM\) for CloudPlatform](#)



### Warning

Be sure you fulfill the additional hypervisor requirements and installation steps provided in this Guide. Hypervisor hosts must be properly prepared to work with CloudPlatform.

## 5.3.3. Hypervisor Compatibility Matrix

Find your CloudPlatform version number in the top row of the table, then look down the column to see which hypervisor versions you can use.

You can find an additional presentation of this information on the Citrix Knowledge Base at <http://support.citrix.com/article/CTX134803>.

### 5.3.3.1. CloudPlatform 4.x

	4.2.0
XenServer 6.2 with fresh CloudPlatform installation	Yes
XenServer 6.2 with CloudPlatform upgraded from previous version	No
XenServer 6.1.0	Yes
XenServer 6.0.2	Yes
XenServer 6.0.0	No
XenServer 5.6 SP2	Yes
XenServer 5.6 FP1	Yes
KVM (RHEL 6.2 or 6.3)	Yes
KVM (RHEL 6.0 or 6.1)	No
KVM (RHEL 5.x)	No
VMware ESX 5 and vCenter 5.1	Yes
VMware ESX 5 and vCenter 5.0 (both 5.0.1 Update B)	Yes
VMware ESX 4.1 and vCenter 4.1	No

### 5.3.3.2. CloudPlatform 3.x

	3.0.0	3.0.1	3.0.2	3.0.3	3.0.4	3.0.5	3.0.6	3.0.7
XenServer 5.6	No	No	No	No	No	No	No	No
XenServer 5.6 FP1	No	No	Yes	Yes	Yes	Yes	Yes	Yes
XenServer 5.6 SP2	No	No	Yes	Yes	Yes	Yes	Yes	Yes
XenServer 6.0.0	No	No	No	No	No	No	No	No
XenServer 6.0.2	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
XenServer 6.1	No	No	No	No	No	No	Yes	Yes
XenServer 6.2	No	No	No	No	No	No	No	Yes (3.0.7 Patch C or greater)
KVM (RHEL 6.0, 6.1 or 6.2)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
VMware ESX 4.1 and vCenter 4.1	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
VMware ESX 5 and vCenter 5	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

### 5.3.3.3. CloudPlatform 2.x

	2.1.x	2.2.x
XenServer 5.6	Yes	Yes
XenServer 5.6 FP1	Yes	Yes
XenServer 5.6 SP2	Yes	Yes
XenServer 6.0.0	No	No
XenServer 6.0.2	No	No
XenServer 6.1	No	No
KVM (RHEL 6.0 or 6.1)	Yes	Yes
VMware ESX 4.1 and vCenter 4.1	Yes	Yes

	2.1.x	2.2.x
VMware ESX 5 and vCenter 5	No	No

## 5.4. Management Server Installation

### 5.4.1. Management Server Installation Overview

This section describes installing the Management Server. There are two slightly different installation flows, depending on how many Management Server nodes will be in your cloud:

- A single Management Server node, with MySQL on the same node.
- Multiple Management Server nodes, with MySQL on a node separate from the Management Servers.

In either case, each machine must meet the system requirements described in System Requirements.



#### Warning

For the sake of security, be sure the public Internet can not access port 8096 or port 8250 on the Management Server.

The procedure for installing the Management Server is:

1. Prepare the Operating System
2. Install the First Management Server
3. Install and Configure the MySQL database
4. Prepare NFS Shares
5. Prepare and Start Additional Management Servers (optional)
6. Prepare the System VM Template

### 5.4.2. Prepare the Operating System

The OS must be prepared to host the Management Server using the following steps. These steps must be performed on each Management Server node.

1. Log in to your OS as root.
2. Check for a fully qualified hostname.

```
# hostname --fqdn
```

This should return a fully qualified hostname such as "management1.lab.example.org". If it does not, edit /etc/hosts so that it does.

3. Set SELinux to be permissive by default.
  - a. Check to see whether SELinux is installed on your machine. If not, you can skip to step 4.

In RHEL, SELinux is installed and enabled by default. You can verify this with:

```
# rpm -qa | grep selinux
```

- b. Set the SELINUX variable in `/etc/selinux/config` to “permissive”. This ensures that the permissive setting will be maintained after a system reboot.

```
# vi /etc/selinux/config
```

- c. Then set SELinux to permissive starting immediately, without requiring a system reboot.

```
# setenforce 0
```

4. Make sure that the machine can reach the Internet.

```
# ping www.cloudstack.org
```

5. If you do not have a Red Hat Network account, you need to prepare a local Yum repository.

- a. If you are working with a physical host, insert the RHEL installation CD. If you are using a VM, attach the RHEL ISO.
- b. Mount the CDROM to `/media`.
- c. Create a repo file at `/etc/yum.repos.d/rhel6.repo`. In the file, insert the following lines:

```
[rhel]
name=rhel6
baseurl=file:///media
enabled=1
gpgcheck=0
```

6. Turn on NTP for time synchronization.



### Note

NTP is required to synchronize the clocks of the servers in your cloud.

- a. Install NTP.

```
# yum install ntp
```

- b. Edit the NTP configuration file to point to your NTP server.

```
# vi /etc/ntp.conf
```

Add one or more server lines in this file with the names of the NTP servers you want to use. For example:



```
server 0.xenserver.pool.ntp.org
server 1.xenserver.pool.ntp.org
server 2.xenserver.pool.ntp.org
server 3.xenserver.pool.ntp.org
```

- c. Restart the NTP client.

```
# service ntpd restart
```

- d. Make sure NTP will start again upon reboot.

```
# chkconfig ntpd on
```

7. Repeat all of these steps on every host where the Management Server will be installed.
8. Continue to [Section 5.4.3, “Install the Management Server on the First Host”](#).

### 5.4.3. Install the Management Server on the First Host

The first step in installation, whether you are installing the Management Server on one host or many, is to install the software on a single node.



#### Note

If you are planning to install the Management Server on multiple nodes for high availability, do not proceed to the additional nodes yet. That step will come later.

1. Download the CloudStack Management Server onto the host where it will run. Get the software from the following link.

<https://www.citrix.com/English/ss/downloads/>.

You will need a [MyCitrix account](#)<sup>1</sup>.

2. Install the CloudStack packages. You should have a file in the form of “CloudStack-VERSION-N-OSVERSION.tar.gz”. Untar the file and then run the install.sh script inside it. Replace the file and directory names below with those you are using:

```
# tar xzf CloudStack-VERSION-N-OSVERSION.tar.gz
# cd CloudStack-VERSION-N-OSVERSION
# ./install.sh
```

You should see a few messages as the installer prepares, followed by a list of choices.

3. Choose M to install the Management Server software.

```
> M
```

<sup>1</sup> <http://www.citrix.com/lang/English/publicindex.asp?destURL=%2FEnglish%2FmyCitrix%2Findex.asp%3F>

- When the installation is finished, run the following commands to start essential services:

```
# service rpcbind start
# service nfs start
# chkconfig nfs on
# chkconfig rpcbind on
```

- Continue to [Section 5.4.4, “Install and Configure the Database”](#).

### 5.4.4. Install and Configure the Database

CloudPlatform uses a MySQL database server to store its data. When you are installing the Management Server on a single node, you can install the MySQL server on the same node if desired. When installing the Management Server on multiple nodes, we assume that the MySQL database runs on a separate node.

#### 5.4.4.1. Install the Database on the Management Server Node

This section describes how to install MySQL on the same machine with the Management Server. This technique is intended for a simple deployment that has a single Management Server node. If you have a multi-node Management Server deployment, you will typically use a separate node for MySQL. See [Section 5.4.4.2, “Install the Database on a Separate Node”](#).

- If you already have a version of MySQL installed on the Management Server node, make one of the following choices, depending on what version of MySQL it is. The most recent version tested is 5.1.58.
  - If you already have installed MySQL version 5.1.58 or later, skip to step 4.
  - If you have installed a version of MySQL earlier than 5.1.58, you can either skip to step 4 or uninstall MySQL and proceed to step 2 to install a more recent version.



#### Warning

It is important that you choose the right database version. Never downgrade a MySQL installation.

- On the same computer where you installed the Management Server, re-run `install.sh`.

```
# ./install.sh
```

You should see a few messages as the installer prepares, followed by a list of choices.

- Choose D to install the MySQL server from the distribution's repo.

```
> D
```

Troubleshooting: If you do not see the D option, you already have MySQL installed. Please go back to step 1.

- Edit the MySQL configuration (`/etc/my.cnf` or `/etc/mysql/my.cnf`, depending on your OS) and insert the following lines in the `[mysqld]` section. You can put these lines below the `datadir` line.

The `max_connections` parameter should be set to 350 multiplied by the number of Management Servers you are deploying. This example assumes one Management Server.

```
innodb_rollback_on_timeout=1
innodb_lock_wait_timeout=600
max_connections=350
log-bin=mysql-bin
binlog-format = 'ROW'
```



### Note

The `binlog-format` variable is supported in MySQL versions 5.1 and greater. It is not supported in MySQL 5.0. In some versions of MySQL, an underscore character is used in place of the hyphen in the variable name. For the exact syntax and spelling of each variable, consult the documentation for your version of MySQL.

5. Restart the MySQL service, then invoke MySQL as the root user.

```
# service mysqld restart
# mysql -u root
```

6. **Best Practice:** MySQL does not set a root password by default. It is very strongly recommended that you set a root password as a security precaution. Run the following commands, and substitute your own desired root password.

```
mysql> SET PASSWORD = PASSWORD('password');
```

From now on, start MySQL with `mysql -p` so it will prompt you for the password.

7. To grant access privileges to remote users, perform the following steps.

- a. Run the following commands from the `mysql` prompt:

```
mysql> GRANT ALL PRIVILEGES ON *.* TO 'root'@'%' WITH GRANT OPTION;
mysql> exit
```

- b. Restart the MySQL service.

```
# service mysqld restart
```

- c. Open the MySQL server port (3306) in the firewall to allow remote clients to connect.

```
# iptables -I INPUT -p tcp --dport 3306 -j ACCEPT
```

- d. Edit the `/etc/sysconfig/iptables` file and add the following line at the beginning of the INPUT chain.

```
-A INPUT -p tcp --dport 3306 -j ACCEPT
```

8. Set up the database. The following command creates the cloud user on the database.
  - In `dbpassword`, specify the password to be assigned to the cloud user. You can choose to provide no password.
  - In `deploy-as`, specify the username and password of the user deploying the database. In the following command, it is assumed the root user is deploying the database and creating the cloud user.
  - (Optional) For `encryption_type`, use `file` or `web` to indicate the technique used to pass in the database encryption password. Default: `file`. See [About Password and Key Encryption](#).
  - (Optional) For `management_server_key`, substitute the default key that is used to encrypt confidential parameters in the CloudPlatform properties file. Default: `password`. It is highly recommended that you replace this with a more secure value. See [About Password and Key Encryption](#).
  - (Optional) For `database_key`, substitute the default key that is used to encrypt confidential parameters in the CloudPlatform database. Default: `password`. It is highly recommended that you replace this with a more secure value. See [About Password and Key Encryption](#).

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

9. Now that the database is set up, you can finish configuring the OS for the Management Server. This command will set up iptables, sudoers, and start the Management Server.

```
# cloudstack-setup-management
```

10. Continue to [Section 5.4.7, “Prepare NFS Shares”](#).

### 5.4.4.2. Install the Database on a Separate Node

This section describes how to install MySQL on a standalone machine, separate from the Management Server. This technique is intended for a deployment that includes several Management Server nodes. If you have a single-node Management Server deployment, you will typically use the same node for MySQL. See [Section 5.4.4.1, “Install the Database on the Management Server Node”](#).

1. If you already have a version of MySQL installed, make one of the following choices, depending on what version of MySQL it is. The most recent version tested with CloudPlatform is 5.1.58.
  - If you already have installed MySQL version 5.1.58 or later, skip to step [3](#).
  - If you have installed a version of MySQL earlier than 5.1.58, you can either skip to step [3](#) or uninstall MySQL and proceed to step [2](#) to install a more recent version.



#### Warning

It is important that you choose the right database version. Never downgrade a MySQL installation that is used with CloudPlatform.

2. Log in as root to your Database Node and run the following commands. If you are going to install a replica database, then log in to the master.

```
# yum install mysql-server
# chkconfig --level 35 mysqld on
```

3. Edit the MySQL configuration (/etc/my.cnf or /etc/mysql/my.cnf, depending on your OS) and insert the following lines in the [mysqld] section. You can put these lines below the datadir line. The max\_connections parameter should be set to 350 multiplied by the number of Management Servers you are deploying. This example assumes two Management Servers.

```
innodb_rollback_on_timeout=1
innodb_lock_wait_timeout=600
max_connections=700
log-bin=mysql-bin
binlog-format = 'ROW'
```



### Note

The binlog-format variable is supported in MySQL versions 5.1 and greater. It is not supported in MySQL 5.0. In some versions of MySQL, an underscore character is used in place of the hyphen in the variable name. For the exact syntax and spelling of each variable, consult the documentation for your version of MySQL.

4. Start the MySQL service, then invoke MySQL as the root user.

```
# service mysqld start
# mysql -u root
```

5. MySQL does not set a root password by default. It is very strongly recommended that you set a root password as a security precaution. Run the following command, and substitute your own desired root password for <password>. You can answer "Y" to all questions except "Disallow root login remotely?". Remote root login is required to set up the databases.

```
mysql> SET PASSWORD = PASSWORD('password');
```

From now on, start MySQL with `mysql -p` so it will prompt you for the password.

6. To grant access privileges to remote users, perform the following steps.
  - a. Run the following command from the mysql prompt, then exit MySQL:

```
mysql> GRANT ALL PRIVILEGES ON *.* TO 'root'@'%' WITH GRANT OPTION;
mysql> exit
```

- b. Restart the MySQL service.

```
# service mysqld restart
```

- c. Open the MySQL server port (3306) in the firewall to allow remote clients to connect.

```
# iptables -I INPUT -p tcp --dport 3306 -j ACCEPT
```

- d. Edit the `/etc/sysconfig/iptables` file and add the following lines at the beginning of the INPUT chain.

```
-A INPUT -p tcp --dport 3306 -j ACCEPT
```

7. Return to the root shell on your first Management Server.
8. Set up the database. The following command creates the cloud user on the database.
  - In `dbpassword`, specify the password to be assigned to the cloud user. You can choose to provide no password.
  - In `dbhost`, provide the hostname or IP address of the database node.
  - In `deploy-as`, specify the username and password of the user deploying the database. For example, if you originally installed MySQL with user “root” and password “password”, provide `--deploy-as=root:password`.
  - (Optional) For `encryption_type`, use `file` or `web` to indicate the technique used to pass in the database encryption password. Default: `file`. See [Section 5.4.5, “About Password and Key Encryption”](#).
  - (Optional) For `management_server_key`, substitute the default key that is used to encrypt confidential parameters in the CloudPlatform properties file. Default: `password`. It is highly recommended that you replace this with a more secure value. See [Section 5.4.5, “About Password and Key Encryption”](#).
  - (Optional) For `database_key`, substitute the default key that is used to encrypt confidential parameters in the CloudPlatform database. Default: `password`. It is highly recommended that you replace this with a more secure value. See [Section 5.4.5, “About Password and Key Encryption”](#).

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

9. Now run a script that will set up iptables rules and SELinux for use by the Management Server. It will also `chkconfig` off and start the Management Server.

```
# cloudstack-setup-management
```

10. Continue to [Section 5.4.7, “Prepare NFS Shares”](#).

### 5.4.5. About Password and Key Encryption

CloudPlatform stores several sensitive passwords and secret keys that are used to provide security. These values are always automatically encrypted:

- Database secret key
- Database password
- SSH keys
- Compute node root password

- VPN password
- User API secret key
- VNC password

CloudPlatform uses the Java Simplified Encryption (JASYPT) library. The data values are encrypted and decrypted using a database secret key, which is stored in one of CloudPlatform's internal properties files along with the database password. The other encrypted values listed above, such as SSH keys, are in the CloudPlatform internal database.

Of course, the database secret key itself can not be stored in the open – it must be encrypted. How then does CloudPlatform read it? A second secret key must be provided from an external source during Management Server startup. This key can be provided in one of two ways: loaded from a file or provided by the CloudPlatform administrator. The CloudPlatform database has a configuration setting that lets it know which of these methods will be used. If the encryption type is set to "file," the key must be in a file in a known location. If the encryption type is set to "web," the administrator runs the utility `com.cloud.utils.crypt.EncryptionSecretKeySender`, which relays the key to the Management Server over a known port.

The encryption type, database secret key, and Management Server secret key are set during CloudPlatform installation. They are all parameters to the CloudPlatform database setup script (`cloudstack-setup-databases`). The default values are `file`, `password`, and `password`. It is, of course, highly recommended that you change these to more secure keys.

#### 5.4.6. Changing the Default Password Encryption

Passwords are encoded when creating or updating users. The default preferred encoder is SHA256. It is more secure than MD5 hashing, which was used in CloudPlatform 3.x. If you take no action to customize password encryption and authentication, SHA256 Salt will be used.

If you prefer a different authentication mechanism, CloudPlatform provides a way for you to determine the default encoding and authentication mechanism for admin and user logins. Two configurable lists are provided: `userPasswordEncoders` and `userAuthenticators`. `userPasswordEncoders` allow you to configure the order of preference for encoding passwords, and `userAuthenticator` allows you to configure the order in which authentication schemes are invoked to validate user passwords.

The following method determines what encoding scheme is used to encode the password supplied during user creation or modification.

When a new user is created, the user password is encoded by using the first valid encoder loaded as per the sequence specified in the `UserPasswordEncoders` property in the `ComponentContext.xml` or `nonossComponentContext.xml` files. The order of authentication schemes is determined by the `UserAuthenticators` property in the same files. If Non-OSS components, such as VMware environments, are to be deployed, modify the `UserPasswordEncoders` and `UserAuthenticators` lists in the `nonossComponentContext.xml` file. For OSS environments, such as XenServer or KVM, modify the `ComponentContext.xml` file. It is recommended to make uniform changes across both the files.

When a new authenticator or encoder is added, you can add them to this list. While doing so, ensure that the new authenticator or encoder is specified as a bean in both the files. The administrator can change the ordering of both these properties as desired to change the order of schemes. Modify the following list properties available in `client/tomcatconf/nonossComponentContext.xml.in` or `client/tomcatconf/componentContext.xml.in` as applicable, to the desired order:

```
<property name="UserAuthenticators">
  <list>
```

```
<ref bean="SHA256SaltedUserAuthenticator"/>
<ref bean="MD5UserAuthenticator"/>
<ref bean="LDAPUserAuthenticator"/>
<ref bean="PlainTextUserAuthenticator"/>
</list>
</property>
<property name="UserPasswordEncoders">
  <list>
    <ref bean="SHA256SaltedUserAuthenticator"/>
    <ref bean="MD5UserAuthenticator"/>
    <ref bean="LDAPUserAuthenticator"/>
    <ref bean="PlainTextUserAuthenticator"/>
  </list>
</property>
```

In the above default ordering, SHA256Salt is used first for **UserPasswordEncoders**. If the module is found and encoding returns a valid value, the encoded password is stored in the user table's password column. If it fails for any reason, the MD5UserAuthenticator will be tried next, and the order continues. For **UserAuthenticators**, SHA256Salt authentication is tried first. If it succeeds, the user is logged into the Management server. If it fails, md5 is tried next, and attempts continues until any of them succeeds and the user logs in. If none of them works, the user is returned an invalid credential message.

### 5.4.7. Prepare NFS Shares

CloudPlatform needs a place to keep primary and secondary storage (see [Chapter 3, Cloud Infrastructure Concepts](#)). Both of these can be NFS shares. This section tells how to set up the NFS shares before adding the storage to CloudPlatform.

For primary storage, you can use iSCSI instead.

The requirements for primary and secondary storage are described in:

- [Section 3.6, "About Primary Storage"](#)
- [Section 3.7, "About Secondary Storage"](#)

A production installation typically uses a separate NFS server. See [Section 5.4.7.1, "Using a Separate NFS Server"](#).

You can also use the Management Server node as the NFS server. This is more typical of a trial installation, but is technically possible in a larger deployment. See [Section 5.4.7.2, "Using the Management Server As the NFS Server"](#).

#### 5.4.7.1. Using a Separate NFS Server

This section tells how to set up NFS shares for secondary and (optionally) primary storage on an NFS server running on a separate node from the Management Server.

The exact commands for the following steps may vary depending on your operating system version.



#### Warning

(KVM only) Ensure that no volume is already mounted at your NFS mount point.

1. On the storage server, create an NFS share for secondary storage and, if you are using NFS for primary storage as well, create a second NFS share. For example:



```
# mkdir -p /export/primary
# mkdir -p /export/secondary
```

2. To configure the new directories as NFS exports, edit /etc/exports. Export the NFS share(s) with rw,async,no\_root\_squash. For example:

```
# vi /etc/exports
```

Insert the following line.

```
/export *(rw,async,no_root_squash)
```

3. Export the /export directory.

```
# exportfs -a
```

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

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

5. 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
```

6. If you are setting up multiple Management Server nodes, continue with [Section 5.4.8, “Prepare and Start Additional Management Servers”](#). If you are setting up a single-node deployment, continue with [Section 5.4.10, “Prepare the System VM Template”](#).

### 5.4.7.2. Using the Management Server As the NFS Server

This section tells how to set up NFS shares for primary and secondary storage on the same node with the Management Server. This is more typical of a trial installation, but is technically possible in a larger deployment. It is assumed that you will have less than 16TB of storage on the host.

The exact commands for the following steps may vary depending on your operating system version.

1. On the Management Server host, create two directories that you will use for primary and secondary storage. For example:

```
# mkdir -p /export/primary
# mkdir -p /export/secondary
```

2. To configure the new directories as NFS exports, edit /etc/exports. Export the NFS share(s) with rw,async,no\_root\_squash. For example:

```
# vi /etc/exports
```

Insert the following line.

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---

```
/export *(rw,async,no_root_squash)
```

3. Export the /export directory.

```
# exportfs -a
```

4. Edit the /etc/sysconfig/nfs file.

```
# vi /etc/sysconfig/nfs
```

Uncomment the following lines:

```
LOCKD_TCPPOINT=32803
LOCKD_UDPPOINT=32769
MOUNTD_PORT=892
RQUOTAD_PORT=875
STATD_PORT=662
STATD_OUTGOING_PORT=2020
```

5. Edit the /etc/sysconfig/iptables file.

```
# vi /etc/sysconfig/iptables
```

Add the following lines at the beginning of the INPUT chain:

```
A INPUT -m state --state NEW -p udp --dport 111 -j ACCEPT
A INPUT -m state --state NEW -p tcp --dport 111 -j ACCEPT
A INPUT -m state --state NEW -p tcp --dport 2049 -j ACCEPT
A INPUT -m state --state NEW -p tcp --dport 32803 -j ACCEPT
A INPUT -m state --state NEW -p udp --dport 32769 -j ACCEPT
A INPUT -m state --state NEW -p tcp --dport 892 -j ACCEPT
A INPUT -m state --state NEW -p udp --dport 892 -j ACCEPT
A INPUT -m state --state NEW -p tcp --dport 875 -j ACCEPT
A INPUT -m state --state NEW -p udp --dport 875 -j ACCEPT
A INPUT -m state --state NEW -p tcp --dport 662 -j ACCEPT
A INPUT -m state --state NEW -p udp --dport 662 -j ACCEPT
```

6. Run the following commands:

```
# service iptables restart
# service iptables save
```

7. If NFS v4 communication is used between client and server, add your domain to /etc/idmapd.conf on both the hypervisor host and Management Server.

```
# vi /etc/idmapd.conf
```

Remove the character # from the beginning of the Domain line in idmapd.conf and replace the value in the file with your own domain. In the example below, the domain is company.com.

```
Domain = company.com
```

8. Reboot the Management Server host.

Two NFS shares called /export/primary and /export/secondary are now set up.

9. It is recommended that you test to be sure the previous steps have been successful.
  - a. Log in to the hypervisor host.
  - b. Be sure NFS and rpcbind are running. The commands might be different depending on your OS. For example:

```
# service rpcbind start
# service nfs start
# chkconfig nfs on
# chkconfig rpcbind on
# reboot
```

- c. Log back in to the hypervisor host and try to mount the /export directories. For example (substitute your own management server name):

```
# mkdir /primarymount
# mount -t nfs <management-server-name>:/export/primary /primarymount
# umount /primarymount
# mkdir /secondarymount
# mount -t nfs <management-server-name>:/export/secondary /secondarymount
# umount /secondarymount
```

10. If you are setting up multiple Management Server nodes, continue with [Section 5.4.8, “Prepare and Start Additional Management Servers”](#). If you are setting up a single-node deployment, continue with [Section 5.4.10, “Prepare the System VM Template”](#).

### 5.4.8. Prepare and Start Additional Management Servers

For your second and subsequent Management Servers, you will install the Management Server software, connect it to the database, and set up the OS for the Management Server.

1. Perform the steps in [Section 5.4.2, “Prepare the Operating System”](#).
2. Download the Management Server onto the additional host where it will run. Get the software from the following link.

<https://www.citrix.com/English/ss/downloads/>

You will need a [MyCitrix account](#)<sup>2</sup>.

3. Install the packages. You should have a file in the form of “CloudPlatform-VERSION-N-OSVERSION.tar.gz”. Untar the file and then run the install.sh script inside it. Replace the file and directory names below with those you are using:

<sup>2</sup> <http://www.citrix.com/lang/English/publicindex.asp?destURL=%2FEnglish%2FmyCitrix%2Findex.asp%3F>

```
# tar xzf CloudPlatform-VERSION-N-OSVERSION.tar.gz
# cd CloudPlatform-VERSION-N-OSVERSION
# ./install.sh
```

You should see a few messages as the installer prepares, followed by a list of choices.

4. Choose M to install the Management Server software.

```
> M
```

5. When the installation is finished, run the following commands to start essential services:

```
# service rpcbind start
# service nfs start
# chkconfig nfs on
# chkconfig rpcbind on
```

6. Configure the database client. Note the absence of the `--deploy-as` argument in this case. (For more details about the arguments to this command, see [Section 5.4.4.2, “Install the Database on a Separate Node”](#).)

```
# cloudstack-setup-databases cloud:<dbpassword>@<dbhost> -e <encryption_type> -m
<management_server_key> -k <database_key>
```

7. (Trial installations only) If you are running the hypervisor on the same machine with the Management Server, edit `/etc/sudoers` and add the following line:

```
Defaults:cloud !requiretty
```

8. Configure the OS and start the Management Server:

```
# cloudstack-setup-management
```

The Management Server on this node should now be running.

9. Repeat these steps on each additional Management Server.
10. Be sure to configure a load balancer for the Management Servers. See [Section 5.4.9, “Management Server Load Balancing”](#).
11. Continue with [Section 5.4.10, “Prepare the System VM Template”](#).

### 5.4.9. Management Server Load Balancing

CloudPlatform can use a load balancer to provide a virtual IP for multiple Management Servers. The administrator is responsible for creating the load balancer rules for the Management Servers. The application requires persistence or stickiness across multiple sessions. The following chart lists the ports that should be load balanced and whether or not persistence is required.

Even if persistence is not required, enabling it is permitted.

Source Port	Destination Port	Protocol	Persistence Required?
80 or 443	8080 (or 20400 with AJP)	HTTP (or AJP)	Yes
8250	8250	TCP	Yes
8096	8096	HTTP	No

In addition to above settings, the administrator is responsible for setting the 'host' global config value from the management server IP to load balancer virtual IP address. If the 'host' value is not set to the VIP for Port 8250 and one of your management servers crashes, the UI is still available but the system VMs will not be able to contact the management server.

## 5.4.10. 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 [Section 5.4.5, "About Password and Key Encryption"](#).

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-tmpl -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-tmpl -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-tmpl -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.

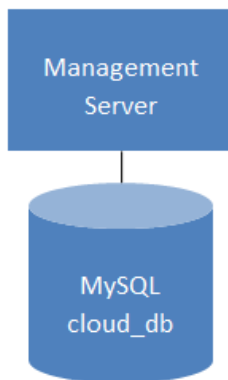
```
# umount /mnt/secondary
# rmdir /mnt/secondary
```

3. Repeat these steps for each secondary storage server.

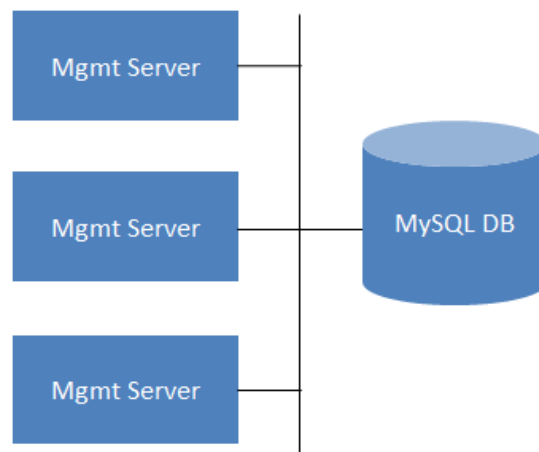
### 5.4.11. Installation Complete! Next Steps

Congratulations! You have now installed CloudPlatform Management Server and the database it uses to persist system data.

#### Single Management Server: Installation Complete!



#### Multiple Management Servers: Installation Complete!



What should you do next?

- Even without adding any cloud infrastructure, you can run the UI to get a feel for what's offered and how you will interact with CloudPlatform on an ongoing basis. See [Log In to the UI](#).
- When you're ready, add the cloud infrastructure and try running some virtual machines on it, so you can watch how CloudPlatform manages the infrastructure. See [Provision Your Cloud Infrastructure](#).

## 5.5. Setting Configuration Parameters

### 5.5.1. 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.
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

Field	Value
	to ha_host. Specify the ha.tag value as a host tag when you add a new host to the cloud.

### 5.5.2. 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.

### 5.5.3. 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.

### 5.5.4. 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.



Field	Field	Value
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 notification threshold, 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 notification threshold, 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 notification threshold, 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 notification threshold, as a value between 0 and 1, of memory utilization above which alerts are sent that the available memory is below the threshold.
cluster	cluster.cpu.allocated.capacity.disable.usage	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.disable.usage	The percentage, as a value between 0 and 1, of memory utilization above which allocators will disable that cluster from further usage.

Field	Field	Value
		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 threshold, 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 because the available storage capacity is below the threshold.
zone	storage.overprovisioning.factor	Used for storage over-provisioning 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.

---

Field	Field	Value
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.



# 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 *Creating VMs in the Administration Guide*.

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/KEQo8wzH2THghZlqQ1QRhIeJG2aissEacF6bGB2oZ7Igm5L14
4KR7OeEToyCLC2k+02UCQQCrniSnWktDVoVqeK/zbB32JhW3Wullv5p5zUEcd
KfEEuzcCUIxtJYTahJlpvlFkQ8anpuxjSEDP8x/18bq3
-----END RSA PRIVATE KEY-----
</privatekey></keypair></createsshkeypairresponse>
```



- 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
QpbSGDIa1lJsc+XNDx2fgRinDsXl/zJYXTKRhSl/LIPHBw/brW8vzxh0lSOrwm7
VvemkkgpAkeAwSeEw394LYZiEVv395ar9MLRVTVLwpo54jC4tsOxQCB1loocK
lYaocpk0yBqqOUSBawfIiDCuLXSdvBo1Xz5ICTM19vgvEp/+kMuECQBzm
nVo8b2Gvyagqt/KEQo8wzH2THghZ1qQ1QRhIeJG2aissEacF6bGB2oZ7Igm5L14
4KR7OeEToyCLC2k+02UCQQCrniSnWktDVoVqeK/zB32JhW3Wullv5p5zUEcd
KfEEuzcCUIxtJYTahJ1pvlFkQ8anpuxjSEdp8x/18bq3
-----END RSA PRIVATE KEY-----
```

- 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`.



# 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\*](#).

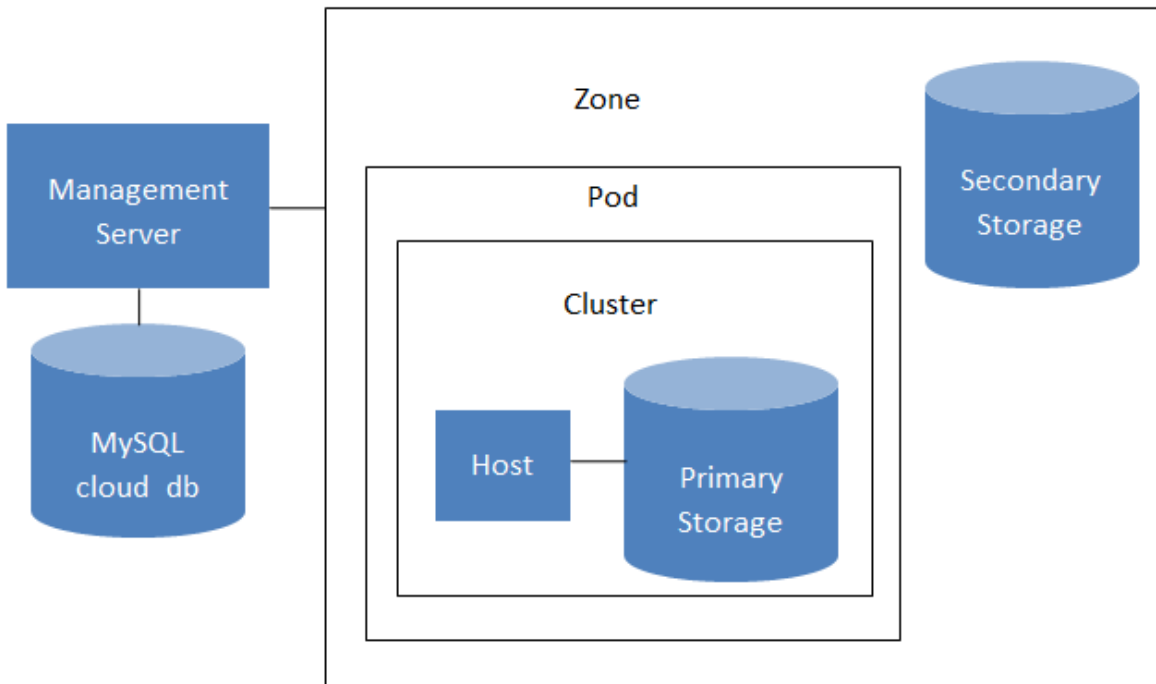
## 7.1. Overview of Provisioning Steps

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 7.2, “\*Adding Regions \(optional\)\*”](#).
2. Add a zone to the region. See [Section 7.3, “\*Adding a Zone\*”](#).
3. Add more pods to the zone (optional). See [Section 7.4, “\*Adding a Pod\*”](#).
4. Add more clusters to the pod (optional). See [Section 7.5, “\*Adding a Cluster\*”](#).
5. Add more hosts to the cluster (optional). See [Section 7.6, “\*Adding a Host\*”](#).
6. Add primary storage to the cluster. See [Section 7.7, “\*Adding Primary Storage\*”](#).
7. Add secondary storage to the zone. See [Section 7.8, “\*Adding Secondary Storage\*”](#).
8. Initialize and test the new cloud. See [Section 7.9, “\*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**

## 7.2. 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”](#).

### 7.2.1. 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.

### 7.2.2. 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.

### 7.2.3. 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.

### 7.2.4. 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.

## 7.3. 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.

### 7.3.1. 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
```

3. Secondary storage must be seeded with a template that is used for CloudPlatform system VMs. Use the steps in [Section 5.4.10, "Prepare the System VM Template"](#). Then return here and continue with adding the zone.

### 7.3.2. 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.

7. The rest of the steps differ depending on whether you chose Basic or Advanced. Continue with the steps that apply to you:

- [Section 7.3.2.1, “Basic Zone Configuration”](#)
- [Section 7.3.2.2, “Advanced Zone Configuration”](#)

### 7.3.2.1. Basic Zone Configuration

1. 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.
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 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 7.5.3, “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.

### 7.3.2.2. 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.

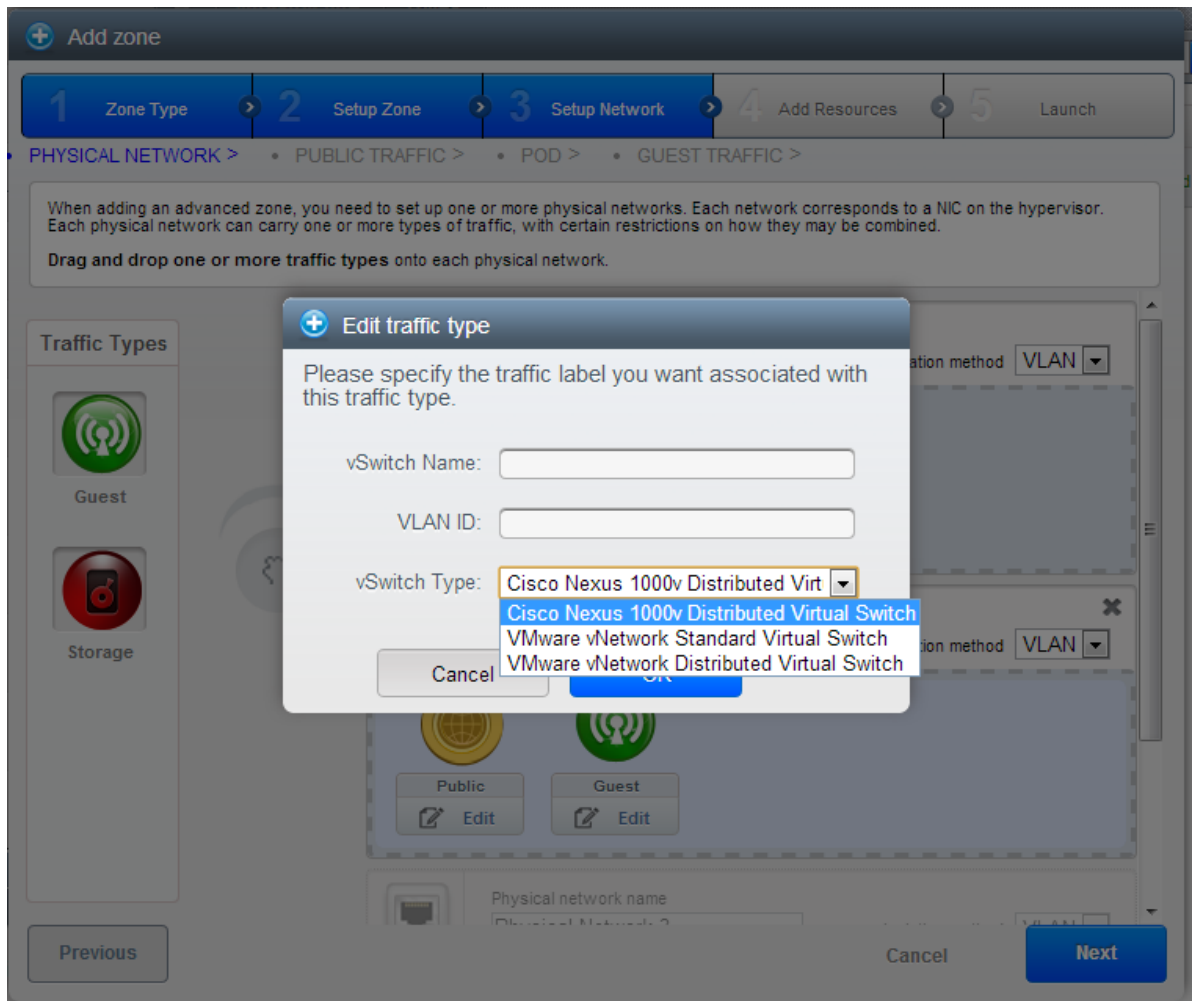
2. Choose which traffic types will be carried by the physical network.

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 7.5.3, “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"> <li>• <b>Server.</b> The IP address or DNS name of the storage device.</li> <li>• <b>Path.</b> The exported path from the server.</li> <li>• <b>Tags (optional).</b> 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.</li> </ul> <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"> <li>• <b>Server.</b> The IP address or DNS name of the storage device.</li> <li>• <b>Target IQN.</b> The IQN of the target. For example, iqn.1986-03.com.sun:02:01ec9bb549-1271378984.</li> <li>• <b>Lun.</b> The LUN number. For example, 3.</li> <li>• <b>Tags (optional).</b> 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.</li> </ul> <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"> <li>• <b>Server.</b> The IP address or DNS name of the storage device.</li> <li>• <b>SR Name-Label.</b> Enter the name-label of the SR that has been set up outside CloudPlatform.</li> <li>• <b>Tags (optional).</b> 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.</li> </ul> <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"> <li>• <b>Path.</b> The path on each host that is where this primary storage is mounted. For example, "/mnt/primary".</li> <li>• <b>Tags (optional).</b> 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.</li> </ul> <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"> <li>• <b>Server.</b> The IP address or DNS name of the vCenter server.</li> <li>• <b>Path.</b> A combination of the datacenter name and the datastore name. The format is "/" datacenter name "/" datastore name. For example, "/cloud.dc.VM/cluster1datastore".</li> <li>• <b>Tags (optional).</b> 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.</li> </ul> <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 7.8, "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.

## 7.4. 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.

## 7.5. 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.

### 7.5.1. 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.

### 7.5.2. 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 7.5.1, "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.

### 7.5.3. 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.

#### 7.5.3.1. 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.



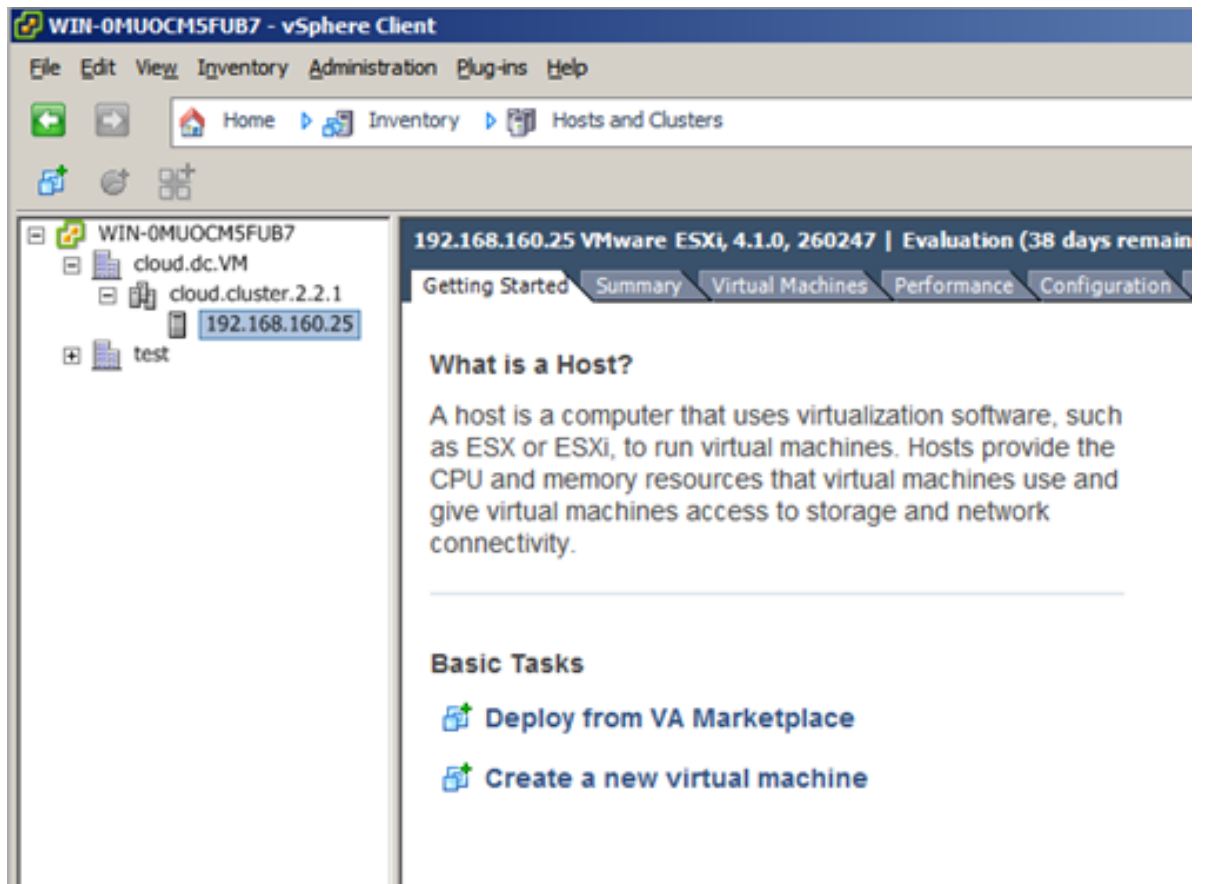
#### Note

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.

#### 7.5.3.2. 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".

## Chapter 7. Steps to Provisioning Your Cloud Infrastructure

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.

**+ Add Cluster**

\* Zone Name:

Hypervisor:

Pod Name:

\* Cluster Name:

Dedicate:

vCenter Host:

vCenter Username:

vCenter Password:

vCenter Datacenter:

Override Public-Traffic:

Public Traffic vSwitch Type:

Public Traffic vSwitch Name:

Override Guest-Traffic:

Guest Traffic vSwitch Type:

Guest Traffic vSwitch Name:

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

## 7.6. 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 7.6.1, “Adding a Host \(XenServer, KVM, or OVM\)”](#)
  - [Section 7.6.2, “Adding a Host \(vSphere\)”](#)

### 7.6.1. Adding a Host (XenServer, KVM, or OVM)

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

#### 7.6.1.1. 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.

##### 7.6.1.1.1. 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
```

### 7.6.1.1.2. 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.

### 7.6.1.1.3. 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/`.

### 7.6.1.2. 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.

### 7.6.2. 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.

## 7.7. 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.

## 7.8. 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. S3 can be used with Amazon Simple Storage Service or any other provider that supports the S3 interface. 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 checkbox 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.

## 7.8.1. 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.

### 7.9. 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.

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.



# Installing XenServer for CloudPlatform

If you want to use the Citrix XenServer hypervisor to run guest virtual machines, install XenServer on the host(s) in your cloud. For an initial installation, follow the steps below. If you have previously installed XenServer and want to upgrade to another version, see [Section 4.6.1, “Upgrading to a New XenServer Version”](#).

## 8.1. System Requirements for XenServer Hosts

- The following versions of XenServer are supported:
  - XenServer 6.2 (with fresh CloudPlatform installs; if you are upgrading from a previous CloudPlatform version, XenServer 6.2 is not supported)
  - XenServer 6.1.0
  - XenServer 6.0.2
  - XenServer 5.6 SP2
  - XenServer 5.6 FP1
- The host must be certified as compatible with the XenServer version you are using. See the Citrix Hardware Compatibility Guide: <http://hcl.xensource.com>
- You must re-install XenServer if you are going to re-use a host from a previous install.
- Must support HVM (Intel-VT or AMD-V enabled)
- Be sure all the hotfixes provided by the hypervisor vendor are applied. Apply patches as soon as possible after they are released. It is essential that your hosts are completely up to date with the provided hypervisor patches.
- All hosts within a cluster must be homogenous. The CPUs must be of the same type, count, and feature flags.
- Must support HVM (Intel-VT or AMD-V enabled in BIOS)
- 64-bit x86 CPU (more cores results in better performance)
- Hardware virtualization support required
- 4 GB of memory
- 36 GB of local disk
- At least 1 NIC
- Statically allocated IP Address
- When you deploy CloudPlatform, the hypervisor host must not have any VMs already running



### Warning

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

### 8.2. XenServer Installation Steps

1. From <https://www.citrix.com/English/ss/downloads/>, download the appropriate version of XenServer for your CloudPlatform version (see [Section 8.1, “System Requirements for XenServer Hosts”](#)). Install it using the Citrix XenServer Installation Guide.
2. After installation, perform the following configuration steps, which are described in the next few sections:

Required	Optional
<a href="#">Section 8.3, “Configure XenServer dom0 Memory”</a>	<a href="#">Section 8.7, “Install CloudPlatform XenServer Support Package (CSP)”</a>
<a href="#">Section 8.4, “Username and Password”</a>	Set up SR if not using NFS, iSCSI, or local disk; see <a href="#">Section 8.8, “Primary Storage Setup for XenServer”</a>
<a href="#">Section 8.5, “Time Synchronization”</a>	<a href="#">Section 8.9, “iSCSI Multipath Setup for XenServer (Optional)”</a>
<a href="#">Section 8.6, “Licensing”</a>	<a href="#">Section 8.10, “Physical Networking Setup for XenServer”</a>

### 8.3. 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 <http://support.citrix.com/article/CTX126531>. The article refers to XenServer 5.6, but the same information applies to XenServer 6.0.

### 8.4. Username and Password

All XenServers in a cluster must have the same username and password as configured in CloudPlatform.

### 8.5. Time Synchronization

The host must be set to use NTP. All hosts in a pod must have the same time.

1. Install NTP.

```
# yum install ntp
```

2. Edit the NTP configuration file to point to your NTP server.

```
# vi /etc/ntp.conf
```

Add one or more server lines in this file with the names of the NTP servers you want to use. For example:

```
server 0.xenserver.pool.ntp.org
server 1.xenserver.pool.ntp.org
server 2.xenserver.pool.ntp.org
server 3.xenserver.pool.ntp.org
```

- Restart the NTP client.

```
# service ntpd restart
```

- Make sure NTP will start again upon reboot.

```
# chkconfig ntpd on
```

## 8.6. Licensing

Citrix XenServer Free version provides 30 days usage without a license. Following the 30 day trial, XenServer requires a free activation and license. You can choose to install a license now or skip this step. If you skip this step, you will need to install a license when you activate and license the XenServer.

### 8.6.1. Getting and Deploying a License

If you choose to install a license now you will need to use the XenCenter to activate and get a license.

- In XenCenter, click Tools > License manager.
- Select your XenServer and select Activate Free XenServer.
- Request a license.

You can install the license with XenCenter or using the xe command line tool.

## 8.7. Install CloudPlatform XenServer Support Package (CSP)

(Optional)

To enable security groups, elastic load balancing, and elastic IP on XenServer, download and install the CloudPlatform XenServer Support Package (CSP). After installing XenServer, perform the following additional steps on each XenServer host.

- If you are using a version prior to XenServer 6.1, perform the following to get the CSP packages. Beginning with XenServer 6.1, the CSP packages are available by default, so you can skip to the next step if you are using one of these more recent versions.
  - Download the CSP software onto the XenServer host from one of the following links:

For XenServer 6.0.2:

<http://download.cloud.com/releases/3.0.1/XS-6.0.2/xenserver-cloud-supp.tgz>

For XenServer 5.6 SP2:

<http://download.cloud.com/releases/2.2.0/xenserver-cloud-supp.tgz>

- Extract the file:

```
# tar xf xenserver-cloud-supp.tgz
```

- Run the following script:

```
# xe-install-supplemental-pack xenserver-cloud-supp.iso
```

2. If the XenServer host is part of a zone that uses basic networking, disable Open vSwitch (OVS):

```
# xe-switch-network-backend bridge
```

Restart the host machine when prompted.

3. If you are using XenServer 6.1 or greater, perform the following:

- a. Run the following commands:

```
echo 1 > /proc/sys/net/bridge/bridge-nf-call-iptables
echo 1 > /proc/sys/net/bridge/bridge-nf-call-arptables
```

- b. To persist the above changes across reboots, set the following values in the `/etc/sysctl.conf` file. Run the following command:

```
sysctl -p /etc/sysctl.conf
```

Set these to 1:

```
net.bridge.bridge-nf-call-iptables = 1
net.bridge.bridge-nf-call-arptables = 1
```

The XenServer host is now ready to be added to CloudPlatform.

## 8.8. Primary Storage Setup for XenServer

CloudPlatform natively supports NFS, iSCSI and local storage. If you are using one of these storage types, there is no need to create the XenServer Storage Repository ("SR").

If, however, you would like to use storage connected via some other technology, such as FiberChannel, you must set up the SR yourself. To do so, perform the following steps. If you have your hosts in a XenServer pool, perform the steps on the master node. If you are working with a single XenServer which is not part of a cluster, perform the steps on that XenServer.

1. Connect FiberChannel cable to all hosts in the cluster and to the FiberChannel storage host.
2. Rescan the SCSI bus. Either use the following command or use XenCenter to perform an HBA rescan.

```
# scsi-rescan
```

3. Repeat step 2 on every host.
4. Check to be sure you see the new SCSI disk.

```
# ls /dev/disk/by-id/scsi-360a98000503365344e6f6177615a516b -l
```

The output should look like this, although the specific file name will be different (`scsi-<scsiID>`):



```
lrwxrwxrwx 1 root root 9 Mar 16 13:47
/dev/disk/by-id/scsi-360a98000503365344e6f6177615a516b -> ../../sdc
```

- Repeat step 4 on every host.
- On the storage server, run this command to get a unique ID for the new SR.

```
# uuidgen
```

The output should look like this, although the specific ID will be different:

```
e6849e96-86c3-4f2c-8fcc-350cc711be3d
```

- Create the FiberChannel SR. In name-label, use the unique ID you just generated.

```
# xe sr-create type=lvmoaha shared=true
device-config:SCSIid=360a98000503365344e6f6177615a516b
name-label="e6849e96-86c3-4f2c-8fcc-350cc711be3d"
```

This command returns a unique ID for the SR, like the following example (your ID will be different):

```
7a143820-e893-6c6a-236e-472da6ee66bf
```

- To create a human-readable description for the SR, use the following command. In uuid, use the SR ID returned by the previous command. In name-description, set whatever friendly text you prefer.

```
# xe sr-param-set uuid=7a143820-e893-6c6a-236e-472da6ee66bf name-description="Fiber
Channel storage repository"
```

Make note of the values you will need when you add this storage to CloudPlatform later (see [Section 7.7, “Adding Primary Storage”](#)). In the Add Primary Storage dialog, in Protocol, you will choose PreSetup. In SR Name-Label, you will enter the name-label you set earlier (in this example, e6849e96-86c3-4f2c-8fcc-350cc711be3d).

- (Optional) If you want to enable multipath I/O on a FiberChannel SAN, refer to the documentation provided by the SAN vendor.

## 8.9. iSCSI Multipath Setup for XenServer (Optional)

When setting up the storage repository on a Citrix XenServer, you can enable multipath I/O, which uses redundant physical components to provide greater reliability in the connection between the server and the SAN. To enable multipathing, use a SAN solution that is supported for Citrix servers and follow the procedures in Citrix documentation. The following links provide a starting point:

- <http://support.citrix.com/article/CTX118791>
- <http://support.citrix.com/article/CTX125403>

You can also ask your SAN vendor for advice about setting up your Citrix repository for multipathing.

Make note of the values you will need when you add this storage to the CloudPlatform later (see [Section 7.7, “Adding Primary Storage”](#)). In the Add Primary Storage dialog, in Protocol, you will choose PreSetup. In SR Name-Label, you will enter the same name used to create the SR.

If you encounter difficulty, address the support team for the SAN provided by your vendor. If they are not able to solve your issue, see [Contacting Support](#).

### 8.10. Physical Networking Setup for XenServer

Once XenServer has been installed, you may need to do some additional network configuration. At this point in the installation, you should have a plan for what NICs the host will have and what traffic each NIC will carry. The NICs should be cabled as necessary to implement your plan.

If you plan on using NIC bonding, the NICs on all hosts in the cluster must be cabled exactly the same. For example, if eth0 is in the private bond on one host in a cluster, then eth0 must be in the private bond on all hosts in the cluster.

The IP address assigned for the management network interface must be static. It can be set on the host itself or obtained via static DHCP.

CloudPlatform configures network traffic of various types to use different NICs or bonds on the XenServer host. You can control this process and provide input to the Management Server through the use of XenServer network name labels. The name labels are placed on physical interfaces or bonds and configured in CloudPlatform. In some simple cases the name labels are not required.

#### 8.10.1. Configuring Public Network with a Dedicated NIC for XenServer (Optional)

CloudPlatform supports the use of a second NIC (or bonded pair of NICs, described in [Section 8.10.4, “NIC Bonding for XenServer \(Optional\)”](#)) for the public network. If bonding is not used, the public network can be on any NIC and can be on different NICs on the hosts in a cluster. For example, the public network can be on eth0 on node A and eth1 on node B. However, the XenServer name-label for the public network must be identical across all hosts. The following examples set the network label to "cloud-public". After the management server is installed and running you must configure it with the name of the chosen network label (e.g. "cloud-public"); this is discussed in [Section 5.4, “Management Server Installation”](#).

If you are using two NICs bonded together to create a public network, see [Section 8.10.4, “NIC Bonding for XenServer \(Optional\)”](#).

If you are using a single dedicated NIC to provide public network access, follow this procedure on each new host that is added to CloudPlatform before adding the host.

1. Run `xe network-list` and find the public network. This is usually attached to the NIC that is public. Once you find the network make note of its UUID. Call this <UUID-Public>.
2. Run the following command.

```
# xe network-param-set name-label=cloud-public uuid=<UUID-Public>
```

#### 8.10.2. Configuring Multiple Guest Networks for XenServer (Optional)

CloudPlatform supports the use of multiple guest networks with the XenServer hypervisor. Each network is assigned a name-label in XenServer. For example, you might have two networks with the

labels "cloud-guest" and "cloud-guest2". After the management server is installed and running, you must add the networks and use these labels so that CloudPlatform is aware of the networks.

Follow this procedure on each new host before adding the host to CloudPlatform:

1. Run `xe network-list` and find one of the guest networks. Once you find the network make note of its UUID. Call this <UUID-Guest>.
2. Run the following command, substituting your own name-label and uuid values.

```
# xe network-param-set name-label=<cloud-guestN> uuid=<UUID-Guest>
```

3. Repeat these steps for each additional guest network, using a different name-label and uuid each time.

### 8.10.3. Separate Storage Network for XenServer (Optional)

You can optionally set up a separate storage network. This should be done first on the host, before implementing the bonding steps below. This can be done using one or two available NICs. With two NICs bonding may be done as above. It is the administrator's responsibility to set up a separate storage network.

Give the storage network a different name-label than what will be given for other networks.

For the separate storage network to work correctly, it must be the only interface that can ping the primary storage device's IP address. For example, if eth0 is the management network NIC, `ping -I eth0 <primary storage device IP>` must fail. In all deployments, secondary storage devices must be pingable from the management network NIC or bond. If a secondary storage device has been placed on the storage network, it must also be pingable via the storage network NIC or bond on the hosts as well.

You can set up two separate storage networks as well. For example, if you intend to implement iSCSI multipath, dedicate two non-bonded NICs to multipath. Each of the two networks needs a unique name-label.

If no bonding is done, the administrator must set up and name-label the separate storage network on all hosts (masters and slaves).

Here is an example to set up eth5 to access a storage network on 172.16.0.0/24.

```
# xe pif-list host-name-label='hostname' device=eth5
uuid(RO): ab0d3dd4-5744-8fae-9693-a022c7a3471d
device (RO): eth5
#xe pif-reconfigure-ip DNS=172.16.3.3 gateway=172.16.0.1 IP=172.16.0.55 mode=static
netmask=255.255.255.0 uuid=ab0d3dd4-5744-8fae-9693-a022c7a3471d
```

### 8.10.4. NIC Bonding for XenServer (Optional)

XenServer supports Source Level Balancing (SLB) NIC bonding. Two NICs can be bonded together to carry public, private, and guest traffic, or some combination of these. Separate storage networks are also possible. Here are some example supported configurations:

- 2 NICs on private, 2 NICs on public, 2 NICs on storage
- 2 NICs on private, 1 NIC on public, storage uses management network

- 2 NICs on private, 2 NICs on public, storage uses management network
- 1 NIC for private, public, and storage

All NIC bonding is optional.

XenServer expects all nodes in a cluster will have the same network cabling and same bonds implemented. In an installation the master will be the first host that was added to the cluster and the slave hosts will be all subsequent hosts added to the cluster. The bonds present on the master set the expectation for hosts added to the cluster later. The procedure to set up bonds on the master and slaves are different, and are described below. There are several important implications of this:

- You must set bonds on the first host added to a cluster. Then you must use `xe` commands as below to establish the same bonds in the second and subsequent hosts added to a cluster.
- Slave hosts in a cluster must be cabled exactly the same as the master. For example, if `eth0` is in the private bond on the master, it must be in the management network for added slave hosts.

### 8.10.4.1. Management Network Bonding

The administrator must bond the management network NICs prior to adding the host to CloudPlatform.

### 8.10.4.2. Creating a Private Bond on the First Host in the Cluster

Use the following steps to create a bond in XenServer. These steps should be run on only the first host in a cluster. This example creates the cloud-private network with two physical NICs (`eth0` and `eth1`) bonded into it.

1. Find the physical NICs that you want to bond together.

```
# xe pif-list host-name-label='hostname' device=eth0
# xe pif-list host-name-label='hostname' device=eth1
```

These command shows the `eth0` and `eth1` NICs and their UUIDs. Substitute the `ethX` devices of your choice. Call the UUID's returned by the above command `slave1-UUID` and `slave2-UUID`.

2. Create a new network for the bond. For example, a new network with name "cloud-private".

**This label is important. CloudPlatform looks for a network by a name you configure. You must use the same name-label for all hosts in the cloud for the management network.**

```
# xe network-create name-label=cloud-private
# xe bond-create network-uuid=[uuid of cloud-private created above]
pif-uuids=[slave1-uuid],[slave2-uuid]
```

Now you have a bonded pair that can be recognized by CloudPlatform as the management network.

### 8.10.4.3. Public Network Bonding

Bonding can be implemented on a separate, public network. The administrator is responsible for creating a bond for the public network if that network will be bonded and will be separate from the management network.

### 8.10.4.4. Creating a Public Bond on the First Host in the Cluster

These steps should be run on only the first host in a cluster. This example creates the cloud-public network with two physical NICs (`eth2` and `eth3`) bonded into it.

1. Find the physical NICs that you want to bond together.

```
#xe pif-list host-name-label='hostname' device=eth2
# xe pif-list host-name-label='hostname' device=eth3
```

These command shows the eth2 and eth3 NICs and their UUIDs. Substitute the ethX devices of your choice. Call the UUID's returned by the above command slave1-UUID and slave2-UUID.

2. Create a new network for the bond. For example, a new network with name "cloud-public".

**This label is important. CloudPlatform looks for a network by a name you configure. You must use the same name-label for all hosts in the cloud for the public network.**

```
# xe network-create name-label=cloud-public
# xe bond-create network-uuid=[uuid of cloud-public created above]
pif-uuids=[slave1-uuid],[slave2-uuid]
```

Now you have a bonded pair that can be recognized by CloudPlatform as the public network.

#### 8.10.4.5. Adding More Hosts to the Cluster

With the bonds (if any) established on the master, you should add additional, slave hosts. Run the following command for all additional hosts to be added to the cluster. This will cause the host to join the master in a single XenServer pool.

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

#### 8.10.4.6. Complete the Bonding Setup Across the Cluster

With all hosts added to the pool, run the cloudstack-setup-bonding script. This script will complete the configuration and set up of the bonds across all hosts in the cluster.

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

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

Now the bonds are set up and configured properly across the cluster.

---

# Installing KVM for CloudPlatform

If you want to use the Linux Kernel Virtual Machine (KVM) hypervisor to run guest virtual machines, install KVM on the host(s) in your cloud. The material in this section doesn't duplicate KVM installation documentation. It provides the CloudPlatform-specific steps that are needed to prepare a KVM host to work with CloudPlatform.

## 9.1. System Requirements for KVM Hypervisor Hosts

### 9.1.1. Supported Operating Systems for KVM Hosts

KVM is included with a variety of Linux-based operating systems. The OS supported for use with CloudPlatform can be downloaded from the following website and installed by following the Installation Guide provided with the operating system.

- RHEL 6.2 or 6.3: <https://access.redhat.com/downloads>
- It is highly recommended that you purchase a RHEL support license. Citrix support can not be responsible for helping fix issues with the underlying OS.



#### Warning

Within a cluster, all KVM hosts must be running the same operating system.

### 9.1.2. System Requirements for KVM Hosts

- Must be certified as compatible with the selected operating system. See the RHEL Hardware Compatibility Guide at <https://hardware.redhat.com/>.
- Must support HVM (Intel-VT or AMD-V enabled)
- All hosts within a cluster must be homogenous. The CPUs must be of the same type, count, and feature flags.
- Within a single cluster, the hosts must be of the same kernel version. For example, if one host is RHEL6.2 64-bit, they must all be RHEL6.2 64-bit..
- 64-bit x86 CPU (more cores results in better performance)
- 4 GB of memory
- 36 GB of local disk
- At least 1 NIC
- Statically allocated IP address
- When you deploy CloudPlatform, the hypervisor host must not have any VMs already running.
- 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.



### Warning

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

## 9.2. Install and configure the Agent

1. Download the operating system that includes KVM (see [Section 9.1, “System Requirements for KVM Hypervisor Hosts”](#)) and install it on the host by following the Installation Guide provided with your chosen operating system.
2. After installation, perform the following configuration tasks, which are described in the next few sections.

Required	Optional
<a href="#">Section 9.3, “Installing the CloudPlatform Agent on a KVM Host”</a>	<a href="#">Section 9.6, “Primary Storage Setup for KVM (Optional)”</a>
<a href="#">Section 9.4, “Physical Network Configuration for KVM”</a>	
<a href="#">Section 9.5, “Time Synchronization for KVM Hosts”</a>	

## 9.3. Installing the CloudPlatform Agent on a KVM Host

Each KVM host must have the CloudPlatform Agent installed on it. This Agent communicates with the Management Server and controls all the instances on the host. Install the CloudPlatform Agent on each host using the following steps.

1. Check for a fully qualified hostname.

```
# hostname --fqdn
```

This should return a fully qualified hostname such as "kvm1.lab.example.org". If it does not, edit /etc/hosts so that it does.

2. Remove qemu-kvm. CloudPlatform provides a patched version.

```
# yum erase qemu-kvm
```

3. If you do not have a Red Hat Network account, you need to prepare a local Yum repository.
  - a. If you are working with a physical host, insert the RHEL installation CD. If you are using a VM, attach the RHEL ISO.
  - b. Mount the CDROM to /media.



- c. Create a repo file at `/etc/yum.repos.d/rhel6.repo`. In the file, insert the following lines:

```
[rhel]
name=rhel6
baseurl=file:///media
enabled=1
gpgcheck=0
```

4. Install the CloudPlatform packages. You should have a file in the form of “CloudPlatform-VERSION-N-OSVERSION.tar.gz”.

Untar the file and then run the `install.sh` script inside it. Replace the file and directory names below with those you are using:

```
# tar xzf CloudPlatform-VERSION-N-OSVERSION.tar.gz
# cd CloudPlatform-VERSION-N-OSVERSION
# ./install.sh
```

You should see a few messages as the installer prepares, followed by a list of choices.

5. Choose “A” to install the Agent software.

```
> A
```

6. When the agent installation is finished, log in to the host as root and run the following commands to start essential services:

```
# service rpcbind start
# service nfs start
# chkconfig nfs on
# chkconfig rpcbind on
```

The CloudPlatform Agent is now installed.

If you find you need to stop or start the Agent, use these commands:

```
# service cloudstack-agent start
# service cloudstack-agent stop
```

## 9.4. Physical Network Configuration for KVM

You should have a plan for how the hosts will be cabled and which physical NICs will carry what types of traffic. By default, CloudPlatform will use the device that is used for the default route. This device will be placed in a CloudPlatform-created bridge.

The following network configuration should be done after installing the CloudPlatform Agent on the host.

If a system has multiple NICs or bonding is desired, the admin may configure the networking on the host. The admin must create a bridge and place the desired device into the bridge. This may be done for each of the public network and the management network. Then edit `/etc/cloudstack/agent/agent.properties` and add values for the following:

- `public.network.device`

- `private.network.device`

These should be set to the name of the bridge that the user created for the respective traffic type. For example:

- `public.network.device=publicbondbr0`

### 9.5. Time Synchronization for KVM Hosts

The host must be set to use NTP. All hosts in a pod must have the same time.

1. Log in to the KVM host as root.
2. Install NTP.

```
# yum install ntp
```

3. Edit the NTP configuration file to point to your NTP server.

```
# vi /etc/ntp.conf
```

Add one or more server lines in this file with the names of the NTP servers you want to use. For example:

```
server 0.xenserver.pool.ntp.org
server 1.xenserver.pool.ntp.org
server 2.xenserver.pool.ntp.org
server 3.xenserver.pool.ntp.org
```

4. Restart the NTP client.

```
# service ntpd restart
```

5. Make sure NTP will start again upon reboot.

```
# chkconfig ntpd on
```

### 9.6. Primary Storage Setup for KVM (Optional)

CloudPlatform allows administrators to set up shared Primary Storage that uses iSCSI or fiber channel. With KVM, the storage is mounted on each host. This is called "SharedMountPoint" storage and is an alternative to NFS. The storage is based on some clustered file system technology, such as OCFS2.



#### Note

The use of the Cluster Logical Volume Manager (CLVM) is not officially supported with CloudPlatform.

With SharedMountPoint storage:

- Each node in the KVM cluster mounts the storage in the same local location (e.g., /mnt/primary)
- A shared clustered file system is used
- The administrator manages the mounting and unmounting of the storage
- If you want to use SharedMountPoint storage you should set it up on the KVM hosts now. Note the mountpoint that you have used on each host; you will use that later to configure CloudPlatform.



# Installing VMware for CloudPlatform

If you want to use the VMware vSphere hypervisor to run guest virtual machines, install vSphere on the host(s) in your cloud.

## 10.1. System Requirements for vSphere Hosts

### 10.1.1. Software requirements

- vSphere and vCenter, both version 5.0 or 5.1.

vSphere Standard is recommended. Note however that customers need to consider the CPU constraints in place with vSphere licensing. See [http://www.vmware.com/files/pdf/vsphere\\_pricing.pdf](http://www.vmware.com/files/pdf/vsphere_pricing.pdf) and discuss with your VMware sales representative.

vCenter Server Standard is recommended.

- 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.



#### Apply All Necessary Hotfixes

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

### 10.1.2. Hardware requirements

- The host must be certified as compatible with the vSphere version you are using. See the VMware Hardware Compatibility Guide at <http://www.vmware.com/resources/compatibility/search.php>.
- All hosts must be 64-bit and must support HVM (Intel-VT or AMD-V enabled).
- All hosts within a cluster must be homogenous. That means the CPUs must be of the same type, count, and feature flags.
- 64-bit x86 CPU (more cores results in better performance)
- Hardware virtualization support required
- 4 GB of memory
- 36 GB of local disk
- At least 1 NIC
- Statically allocated IP Address

### 10.1.3. vCenter Server requirements:

- Processor - 2 CPUs 2.0GHz or higher Intel or AMD x86 processors. Processor requirements may be higher if the database runs on the same machine.
- Memory - 3GB RAM. RAM requirements may be higher if your database runs on the same machine.
- Disk storage - 2GB. Disk requirements may be higher if your database runs on the same machine.
- Microsoft SQL Server 2005 Express disk requirements. The bundled database requires up to 2GB free disk space to decompress the installation archive.
- Networking - 1Gbit or 10Gbit.

For more information, see "vCenter Server and the vSphere Client Hardware Requirements" at [http://pubs.vmware.com/vsp40/wwhelp/wwhimpl/js/html/wwhelp.htm#href=install/c\\_vc\\_hw.html](http://pubs.vmware.com/vsp40/wwhelp/wwhimpl/js/html/wwhelp.htm#href=install/c_vc_hw.html).

### 10.1.4. Other requirements:

- VMware vCenter Standard Edition must be installed and available to manage the vSphere hosts.
- vCenter must be configured to use the standard port 443 so that it can communicate with the CloudPlatform Management Server.
- You must re-install VMware ESXi if you are going to re-use a host from a previous install.
- CloudPlatform requires VMware vSphere 5.0 or 5.1. VMware vSphere 4.0 and 4.1 are not supported.
- All hosts must be 64-bit and must support HVM (Intel-VT or AMD-V enabled). All hosts within a cluster must be homogenous. That means the CPUs must be of the same type, count, and feature flags.
- The CloudPlatform management network must not be configured as a separate virtual network. The CloudPlatform management network is the same as the vCenter management network, and will inherit its configuration. See [Section 10.5.2, "Configure vCenter Management Network"](#).
- CloudPlatform requires ESXi. ESX is not supported.
- All resources used for CloudPlatform must be used for CloudPlatform only. CloudPlatform cannot share instance of ESXi or storage with other management consoles. Do not share the same storage volumes that will be used by CloudPlatform with a different set of ESXi servers that are not managed by CloudPlatform.
- Put all target ESXi hypervisors in a cluster in a separate Datacenter in vCenter.
- The cluster that will be managed by CloudPlatform should not contain any VMs. Do not run the management server, vCenter or any other VMs on the cluster that is designated for CloudPlatform use. Create a separate cluster for use of CloudPlatform and make sure that they are no VMs in this cluster.
- All the required VLANS must be trunked into all network switches that are connected to the ESXi hypervisor hosts. These would include the VLANS for Management, Storage, vMotion, and guest VLANS. The guest VLAN (used in Advanced Networking; see Network Setup) is a contiguous range of VLANS that will be managed by CloudPlatform.

## 10.2. Preparation Checklist for VMware

For a smoother installation, gather the following information before you start:

- Information listed in [Section 10.2.1, “vCenter Checklist”](#)
- Information listed in [Section 10.2.2, “Networking Checklist for VMware”](#)

### 10.2.1. vCenter Checklist

You will need the following information about vCenter.

vCenter Requirement	Value	Notes
vCenter User		This user must have admin privileges.
vCenter User Password		Password for the above user.
vCenter Datacenter Name		Name of the datacenter.
vCenter Cluster Name		Name of the cluster.

### 10.2.2. Networking Checklist for VMware

You will need the following information about the VLAN.

VLAN Information	Value	Notes
ESXi VLAN		VLAN on which all your ESXi hypervisors reside.
ESXi VLAN IP Address		IP Address Range in the ESXi VLAN. One address per Virtual Router is used from this range.
ESXi VLAN IP Gateway		
ESXi VLAN Netmask		
Management Server VLAN		VLAN on which the CloudPlatform Management server is installed.
Public VLAN		VLAN for the Public Network.
Public VLAN Gateway		
Public VLAN Netmask		
Public VLAN IP Address Range		Range of Public IP Addresses available for CloudPlatform use. These addresses will be used for virtual router on CloudPlatform to route private traffic to external networks.
VLAN Range for Customer use		A contiguous range of non-routable VLANs. One VLAN will be assigned for each customer.

## 10.3. vSphere Installation Steps

1. If you haven't already, you'll need to download and purchase vSphere from the VMware Website (<https://www.vmware.com/tryvmware/index.php?p=vmware-vsphere&lp=1>) and install it by following the VMware vSphere Installation Guide.
2. Following installation, perform the following configuration steps, which are described in the next few sections:

Required	Optional
ESXi host setup	NIC bonding
Configure host physical networking, virtual switch, vCenter Management Network, and extended port range	Multipath storage
Prepare storage for iSCSI	
Configure clusters in vCenter and add hosts to them, or add hosts without clusters to vCenter	

## 10.4. ESXi Host setup

All ESXi hosts should enable CPU hardware virtualization support in BIOS. Please note hardware virtualization support is not enabled by default on most servers.

## 10.5. Physical Host Networking

You should have a plan for cabling the vSphere hosts. Proper network configuration is required before adding a vSphere host to CloudPlatform. To configure an ESXi host, you can use vClient to add it as standalone host to vCenter first. Once you see the host appearing in the vCenter inventory tree, click the host node in the inventory tree, and navigate to the Configuration tab.

In the host configuration tab, click the "Hardware/Networking" link to bring up the networking configuration page as above.

### 10.5.1. Configure Virtual Switch

A default virtual switch vSwitch0 is created. CloudPlatform requires all ESXi hosts in the cloud to use the same set of virtual switch names. If you change the default virtual switch name, you will need to configure one or more CloudPlatform configuration variables as well.

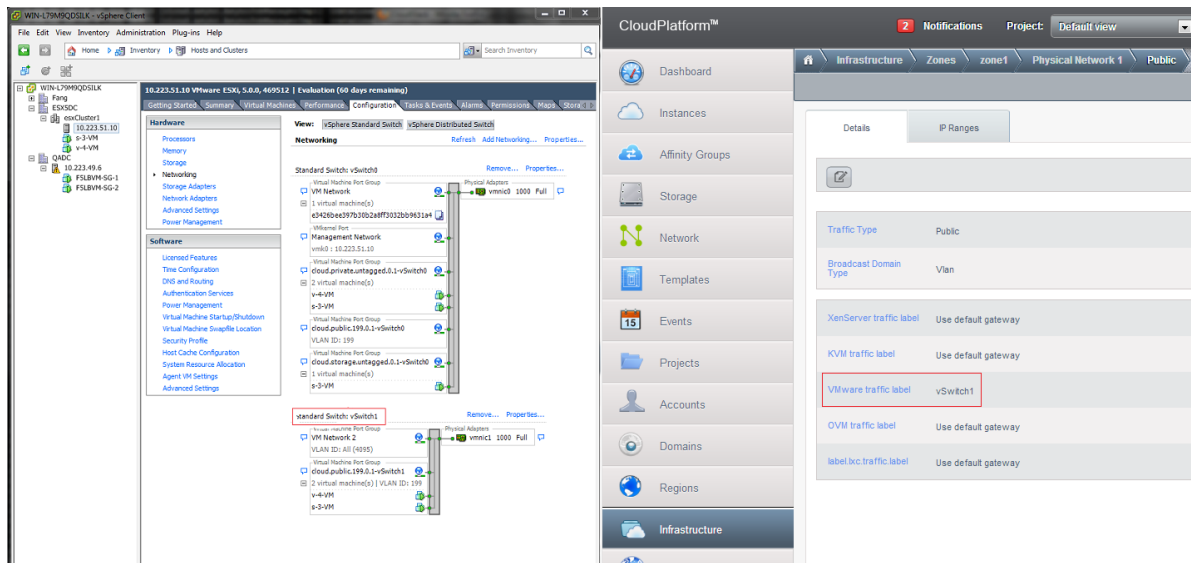
#### 10.5.1.1. Separating Traffic

CloudPlatform allows you to use vCenter to configure three separate networks per ESXi host. These networks are identified by the name of the vSwitch they are connected to. The allowed networks for configuration are public (for traffic to/from the public internet), guest (for guest-guest traffic), and private (for management and usually storage traffic). You can use the default virtual switch for all three, or create one or two other vSwitches for those traffic types.

If you want to separate traffic in this way you should first create and configure vSwitches in vCenter according to the vCenter instructions. Take note of the vSwitch names you have used for each traffic type. You will configure CloudPlatform to use these vSwitches.

For example, in the following figure, you can see that the Standard vSwitch name is used in CloudPlatform as the VMware traffic label.





### 10.5.1.2. Increasing Ports

By default a virtual switch on ESXi hosts is created with 56 ports. We recommend setting it to 4088, the maximum number of ports allowed. To do that, click the "Properties..." link for virtual switch (note this is not the Properties link for Networking).

In vSwitch properties dialog, select the vSwitch and click Edit.

In the dialog, you can change the number of switch ports. After you have done that, ESXi hosts are required to reboot in order for the setting to take effect.

### 10.5.2. Configure vCenter Management Network

In the vSwitch properties dialog box, you may see a vCenter management network. This same network will also be used as the CloudPlatform management network. CloudPlatform requires the vCenter management network to be configured properly. Select the management network item in the dialog, then click Edit.

Make sure the following values are set:

- VLAN ID set to the desired ID
- vMotion enabled.
- Management traffic enabled.

If the ESXi hosts have multiple VMKernel ports, and ESXi is not using the default value "Management Network" as the management network name, you must follow these guidelines to configure the management network port group so that CloudPlatform can find it:

- Use one label for the management network port across all ESXi hosts.
- In the CloudPlatform UI, go to Global Settings and set `vmware.management.portgroup` to the management network label from the ESXi hosts.

### 10.5.3. Configure NIC Bonding for vSphere

NIC bonding on vSphere hosts may be done according to the vSphere installation guide.

## 10.6. Configuring a vSphere Cluster with Nexus 1000v Virtual Switch

CloudPlatform supports Cisco Nexus 1000v dvSwitch (Distributed Virtual Switch) for virtual network configuration in a VMware vSphere environment. This section helps you configure a vSphere cluster with Nexus 1000v virtual switch in a VMware vCenter environment. For information on creating a vSphere cluster, see [Chapter 10, Installing VMware for CloudPlatform](#)

### 10.6.1. About Cisco Nexus 1000v Distributed Virtual Switch

The Cisco Nexus 1000V virtual switch is a software-based virtual machine access switch for VMware vSphere environments. It can span multiple hosts running VMware ESXi 4.0 and later. A Nexus virtual switch consists of two components: the Virtual Supervisor Module (VSM) and the Virtual Ethernet Module (VEM). The VSM is a virtual appliance that acts as the switch's supervisor. It controls multiple VEMs as a single network device. The VSM is installed independent of the VEM and is deployed in redundancy mode as pairs or as a standalone appliance. The VEM is installed on each VMware ESXi server to provide packet-forwarding capability. It provides each virtual machine with dedicated switch ports. This VSM-VEM architecture is analogous to a physical Cisco switch's supervisor (standalone or configured in high-availability mode) and multiple linecards architecture.

Nexus 1000v switch uses vEthernet port profiles to simplify network provisioning for virtual machines. There are two types of port profiles: Ethernet port profile and vEthernet port profile. The Ethernet port profile is applied to the physical uplink ports—the NIC ports of the physical NIC adapter on an ESXi server. The vEthernet port profile is associated with the virtual NIC (vNIC) that is plumbed on a guest VM on the ESXi server. The port profiles help the network administrators define network policies which can be reused for new virtual machines. The Ethernet port profiles are created on the VSM and are represented as port groups on the vCenter server.

### 10.6.2. Prerequisites and Guidelines

This section discusses prerequisites and guidelines for using Nexus virtual switch in CloudPlatform. Before configuring Nexus virtual switch, ensure that your system meets the following requirements:

- A cluster of servers (ESXi 4.1 or later) is configured in the vCenter.
- Each cluster managed by CloudPlatform is the only cluster in its vCenter datacenter.
- A Cisco Nexus 1000v virtual switch is installed to serve the datacenter that contains the vCenter cluster. This ensures that CloudPlatform doesn't have to deal with dynamic migration of virtual adapters or networks across other existing virtual switches. See [Cisco Nexus 1000V Installation and Upgrade Guide](#)<sup>1</sup> for guidelines on how to install the Nexus 1000v VSM and VEM modules.
- The Nexus 1000v VSM is not deployed on a vSphere host that is managed by CloudPlatform.
- When the maximum number of VEM modules per VSM instance is reached, an additional VSM instance is created before introducing any more ESXi hosts. The limit is 64 VEM modules for each VSM instance.
- CloudPlatform expects that the Management Network of the ESXi host is configured on the standard vSwitch and searches for it in the standard vSwitch. Therefore, ensure that you do not migrate the management network to Nexus 1000v virtual switch during configuration.

---

<sup>1</sup> [http://www.cisco.com/en/US/docs/switches/datacenter/nexus1000/sw/4\\_2\\_1\\_s\\_v\\_1\\_5\\_1/install\\_upgrade/vsm\\_vem/guide/n1000v\\_installupgrade.html](http://www.cisco.com/en/US/docs/switches/datacenter/nexus1000/sw/4_2_1_s_v_1_5_1/install_upgrade/vsm_vem/guide/n1000v_installupgrade.html)

- All information given in [Section 10.6.3, “Nexus 1000v Virtual Switch Preconfiguration”](#)

## 10.6.3. Nexus 1000v Virtual Switch Preconfiguration

### 10.6.3.1. Preparation Checklist

For a smoother configuration of Nexus 1000v switch, gather the following information before you start:

- vCenter Credentials
- Nexus 1000v VSM IP address
- Nexus 1000v VSM Credentials
- Ethernet port profile names

#### 10.6.3.1.1. vCenter Credentials Checklist

You will need the following information about vCenter:

Nexus vSwitch Requirements	Value	Notes
vCenter IP		The IP address of the vCenter.
Secure HTTP Port Number	443	Port 443 is configured by default; however, you can change the port if needed.
vCenter User ID		The vCenter user with administrator-level privileges. The vCenter User ID is required when you configure the virtual switch in CloudPlatform.
vCenter Password		The password for the vCenter user specified above. The password for this vCenter user is required when you configure the switch in CloudPlatform.

#### 10.6.3.1.2. Network Configuration Checklist

The following information specified in the Nexus Configure Networking screen is displayed in the Details tab of the Nexus dvSwitch in the CloudPlatform UI:

Network Requirements	Value	Notes
Control Port Group VLAN ID		The VLAN ID of the Control Port Group. The control VLAN is used for communication between the VSM and the VEMs.
Management Port Group VLAN ID		The VLAN ID of the Management Port Group. The management VLAN corresponds to the mgmt0 interface that is used to

Network Requirements	Value	Notes
		establish and maintain the connection between the VSM and VMware vCenter Server.
Packet Port Group VLAN ID		The VLAN ID of the Packet Port Group. The packet VLAN forwards relevant data packets from the VEMs to the VSM.



**Note**

The VLANs used for control, packet, and management port groups can be the same.

For more information, see [Cisco Nexus 1000V Getting Started Guide<sup>2</sup>](#).

**10.6.3.1.3. VSM Configuration Checklist**

You will need the following information about network configuration:

VSM Configuration Parameters Value Notes	Value	Notes
Admin Name and Password		The admin name and password to connect to the VSM appliance. You must specify these credentials while configuring Nexus virtual switch.
Management IP Address		This is the IP address of the VSM appliance. This is the IP address you specify in the virtual switch IP Address field while configuring Nexus virtual switch.
SSL	Enable	Always enable SSL. SSH is usually enabled by default during the VSM installation. However, check whether the SSH connection to the VSM is working, without which CloudPlatform fails to connect to the VSM.

**10.6.3.2. Creating a Port Profile**

- Whether you create a Basic or Advanced zone configuration, ensure that you always create an Ethernet port profile on the VSM after you install it and before you create the zone.

<sup>2</sup> [http://www.cisco.com/en/US/docs/switches/datacenter/nexus1000/sw/4\\_2\\_1\\_s\\_v\\_1\\_4\\_b/getting\\_started/configuration/guide/n1000v\\_gsg.pdf](http://www.cisco.com/en/US/docs/switches/datacenter/nexus1000/sw/4_2_1_s_v_1_4_b/getting_started/configuration/guide/n1000v_gsg.pdf)

- The Ethernet port profile created to represent the physical network or networks used by an Advanced zone configuration trunk all the VLANs including guest VLANs, the VLANs that serve the native VLAN, and the packet/control/data/management VLANs of the VSM.
- The Ethernet port profile created for a Basic zone configuration does not trunk the guest VLANs because the guest VMs do not get their own VLANs provisioned on their network interfaces in a Basic zone.
- An Ethernet port profile configured on the Nexus 1000v virtual switch should not use in its set of system VLANs, or any of the VLANs configured or intended to be configured for use towards VMs or VM resources in the CloudPlatform environment.
- You do not have to create any vEthernet port profiles – CloudPlatform does that during VM deployment.
- Ensure that you create required port profiles to be used by CloudPlatform for different traffic types of CloudPlatform, such as Management traffic, Guest traffic, Storage traffic, and Public traffic. The physical networks configured during zone creation should have a one-to-one relation with the Ethernet port profiles.

For information on creating a port profile, see [Cisco Nexus 1000V Port Profile Configuration Guide](#)<sup>3</sup>.

### 10.6.3.3. Assigning Physical NIC Adapters

Assign ESXi host's physical NIC adapters, which correspond to each physical network, to the port profiles. In each ESXi host that is part of the vCenter cluster, observe the physical networks assigned to each port profile and note down the names of the port profile for future use. This mapping information helps you when configuring physical networks during the zone configuration on CloudPlatform. These Ethernet port profile names are later specified as VMware Traffic Labels for different traffic types when configuring physical networks during the zone configuration. For more information on configuring physical networks, see [Section 10.6, "Configuring a vSphere Cluster with Nexus 1000v Virtual Switch"](#).

### 10.6.3.4. Adding VLAN Ranges

Determine the public VLAN, System VLAN, and Guest VLANs to be used by the CloudPlatform. Ensure that you add them to the port profile database. Corresponding to each physical network, add the VLAN range to port profiles. In the VSM command prompt, run the `switchport trunk allowed vlan<range>` command to add the VLAN ranges to the port profile.

For example:

```
switchport trunk allowed vlan 1,140-147,196-203
```

In this example, the allowed VLANs added are 1, 140-147, and 196-203

You must also add all the public and private VLANs or VLAN ranges to the switch. This range is the VLAN range you specify in your zone.

<sup>3</sup> [http://www.cisco.com/en/US/docs/switches/datacenter/nexus1000/sw/4\\_2\\_1\\_s\\_v\\_1\\_4\\_a/port\\_profile/configuration/guide/n1000v\\_port\\_profile.html](http://www.cisco.com/en/US/docs/switches/datacenter/nexus1000/sw/4_2_1_s_v_1_4_a/port_profile/configuration/guide/n1000v_port_profile.html)



### Note

Before you run the vlan command, ensure that the configuration mode is enabled in Nexus 1000v virtual switch.

For example:

If you want the VLAN 200 to be used on the switch, run the following command:

```
vlan 200
```

If you want the VLAN range 1350-1750 to be used on the switch, run the following command:

```
vlan 1350-1750
```

Refer to Cisco Nexus 1000V Command Reference of specific product version.

### 10.6.4. Enabling Nexus Virtual Switch in CloudPlatform

To make a CloudPlatform deployment Nexus enabled, you must set the `vmware.use.nexus.vswitch` parameter true by using the Global Settings page in the CloudPlatform UI. Unless this parameter is set to "true" and restart the management server, you cannot see any UI options specific to Nexus virtual switch, and CloudPlatform ignores the Nexus virtual switch specific parameters specified in the `AddTrafficTypeCmd`, `UpdateTrafficTypeCmd`, and `AddClusterCmd` API calls.

Unless the CloudPlatform global parameter "vmware.use.nexus.vswitch" is set to "true", CloudPlatform by default uses VMware standard vSwitch for virtual network infrastructure. In this release, CloudPlatform doesn't support configuring virtual networks in a deployment with a mix of standard vSwitch and Nexus 1000v virtual switch. The deployment can have either standard vSwitch or Nexus 1000v virtual switch.

### 10.6.5. Configuring Nexus 1000v Virtual Switch in CloudPlatform

You can configure Nexus dvSwitch by adding the necessary resources while the zone is being created.


After the zone is created, if you want to create an additional cluster along with Nexus 1000v virtual switch in the existing zone, use the Add Cluster option. For information on creating a cluster, see [Section 7.5.3, "Add Cluster: vSphere"](#).

In both these cases, you must specify the following parameters to configure Nexus virtual switch:

Parameters	Description
Cluster Name	Enter the name of the cluster you created in vCenter. For example, "cloud.cluster".
vCenter Host	Enter the host name or the IP address of the vCenter host where you have deployed the Nexus virtual switch.
vCenter User name	Enter the username that CloudPlatform should use to connect to vCenter. This user must have all administrative privileges.

Parameters	Description
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".
Nexus dvSwitch IP Address	The IP address of the VSM component of the Nexus 1000v virtual switch.
Nexus dvSwitch Username	The admin name to connect to the VSM appliance.
Nexus dvSwitch Password	The corresponding password for the admin user specified above.

### 10.6.6. Removing Nexus Virtual Switch

1. In the vCenter datacenter that is served by the Nexus virtual switch, ensure that you delete all the hosts in the corresponding cluster.
2. Log in with Admin permissions to the CloudPlatform administrator UI.
3. In the left navigation bar, select Infrastructure.
4. In the Infrastructure page, click View all under Clusters.
5. Select the cluster where you want to remove the virtual switch.
6. In the dvSwitch tab, click the name of the virtual switch.
7. In the Details page, click Delete Nexus dvSwitch icon. 

Click Yes in the confirmation dialog box.

### 10.6.7. Configuring a VMware Datacenter with VMware Distributed Virtual Switch

CloudPlatform supports VMware vNetwork Distributed Switch (VDS) for virtual network configuration in a VMware vSphere environment. This section helps you configure VMware VDS in a CloudPlatform deployment. Each vCenter server instance can support up to 128 VDS instances and each VDS instance can manage up to 500 VMware hosts.

#### 10.6.7.1. About VMware Distributed Virtual Switch

VMware VDS is an aggregation of host-level virtual switches on a VMware vCenter server. VDS abstracts the configuration of individual virtual switches that span across a large number of hosts, and enables centralized provisioning, administration, and monitoring for your entire datacenter from a centralized interface. In effect, a VDS acts as a single virtual switch at the datacenter level and manages networking for a number of hosts in a datacenter from a centralized VMware vCenter server. Each VDS maintains network runtime state for VMs as they move across multiple hosts, enabling inline monitoring and centralized firewall services. A VDS can be deployed with or without Virtual Standard Switch and a Nexus 1000V virtual switch.

#### 10.6.7.2. Prerequisites and Guidelines

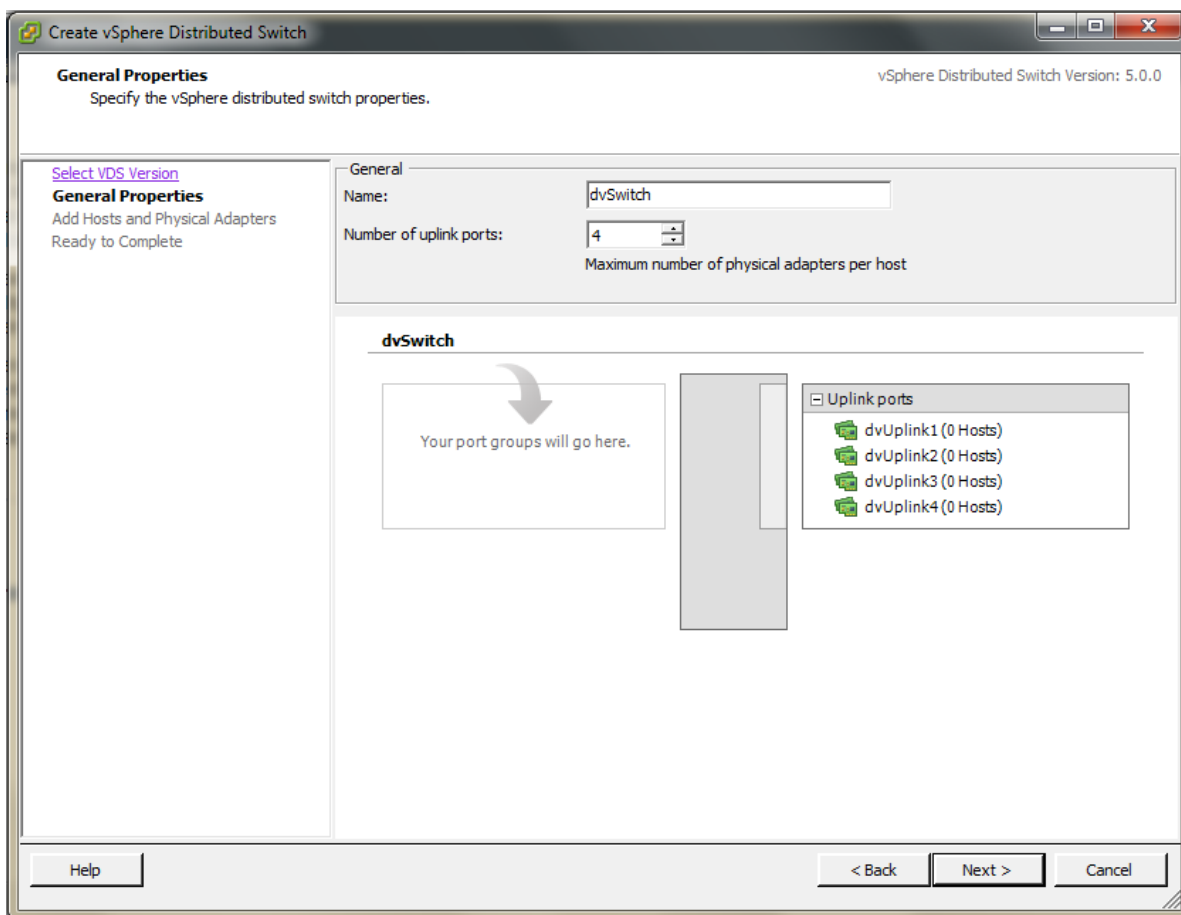
- VMware VDS is supported only on Public and Guest traffic in CloudPlatform.

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- VMware VDS does not support multiple VDS per traffic type. If a user has many VDS switches, only one can be used for Guest traffic and another one for Public traffic.
- Additional switches of any type can be added for each cluster in the same zone. While adding the clusters with different switch type, traffic labels is overridden at the cluster level.
- Management and Storage network does not support VDS. Therefore, use Standard Switch for these networks.
- When you remove a guest network, the corresponding dvportgroup will not be removed on the vCenter. You must manually delete them on the vCenter.

### 10.6.7.3. Preparation Checklist

For a smoother configuration of VMware VDS, note down the VDS name you have added in the datacenter before you start:

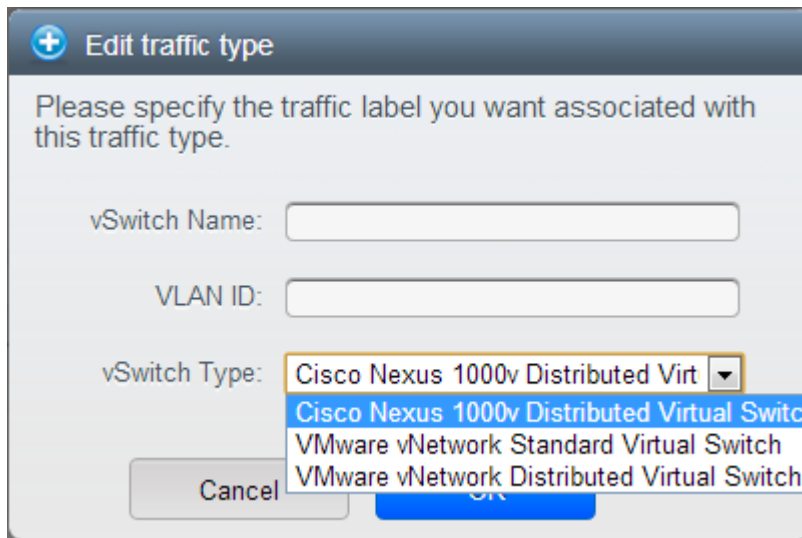


Use this VDS name in the following:

- The switch name in the Edit traffic label dialog while configuring a public and guest traffic during zone creation.

During a zone creation, ensure that you select VMware vNetwork Distributed Virtual Switch when you configure guest and public traffic type.





- The Public Traffic vSwitch Type field when you add a VMware VDS-enabled cluster.
- The switch name in the traffic label while updating the switch type in a zone.

Traffic label format in the last case is [{"Name of vSwitch/dvSwitch/EthernetPortProfile"}[,"VLAN ID"[,"vSwitch Type"]]]

The possible values for traffic labels are:

- empty string
- dvSwitch0
- dvSwitch0,200
- dvSwitch1,300,vmwaredvs
- myEthernetPortProfile,,nexusdvs
- dvSwitch0,,vmwaredvs

Fields	Name	Description
1	Represents the name of the virtual / distributed virtual switch at vCenter.	The default value depends on the type of virtual switch:  <b>vSwitch0:</b> If type of virtual switch is VMware vNetwork Standard virtual switch  <b>dvSwitch0:</b> If type of virtual switch is VMware vNetwork Distributed virtual switch  <b>epp0:</b> If type of virtual switch is Cisco Nexus 1000v Distributed virtual switch
2	VLAN ID to be used for this traffic wherever applicable.	This field would be used for only public traffic as of now. In case of guest traffic this field

Fields	Name	Description
		<p>would be ignored and could be left empty for guest traffic. By default empty string would be assumed which translates to untagged VLAN for that specific traffic type.</p>
3	<p>Type of virtual switch. Specified as string.</p>	<p>Possible valid values are <code>vmwaredvs</code>, <code>vmwaresvs</code>, <code>nexusdvs</code>.</p> <p><b>vmwaresvs:</b> Represents VMware vNetwork Standard virtual switch</p> <p><b>vmwaredvs:</b> Represents VMware vNetwork distributed virtual switch</p> <p><b>nexusdvs:</b> Represents Cisco Nexus 1000v distributed virtual switch.</p> <p>If nothing specified (left empty), zone-level default virtual switch would be defaulted, based on the value of global parameter you specify.</p> <p>Following are the global configuration parameters:</p> <p><b>vmware.use.dvswitch:</b> Set to true to enable any kind (VMware DVS and Cisco Nexus 1000v) of distributed virtual switch in a CloudPlatform deployment. If set to false, the virtual switch that can be used in that CloudPlatform deployment is Standard virtual switch.</p> <p><b>vmware.use.nexus.vswitch:</b> This parameter is ignored if <code>vmware.use.dvswitch</code> is set to false. Set to true to enable Cisco Nexus 1000v distributed virtual switch in a CloudPlatform deployment.</p>

#### 10.6.7.4. Enabling Virtual Distributed Switch in CloudPlatform

To make a CloudPlatform deployment VDS enabled, set the `vmware.use.dvswitch` parameter to true by using the Global Settings page in the CloudPlatform UI and restart the Management Server. Unless

you enable the `vmware.use.dvswitch` parameter, you cannot see any UI options specific to VDS, and CloudPlatform ignores the VDS-specific parameters that you specify. Additionally, CloudPlatform uses VDS for virtual network infrastructure if the value of `vmware.use.dvswitch` parameter is true and the value of `vmware.use.nexus.dvswitch` parameter is false. Another global parameter that defines VDS configuration is `vmware.ports.per.dvportgroup`. This is the default number of ports per VMware dvPortGroup in a VMware environment. Default value is 256. This number directly associated with the number of guest network you can create.

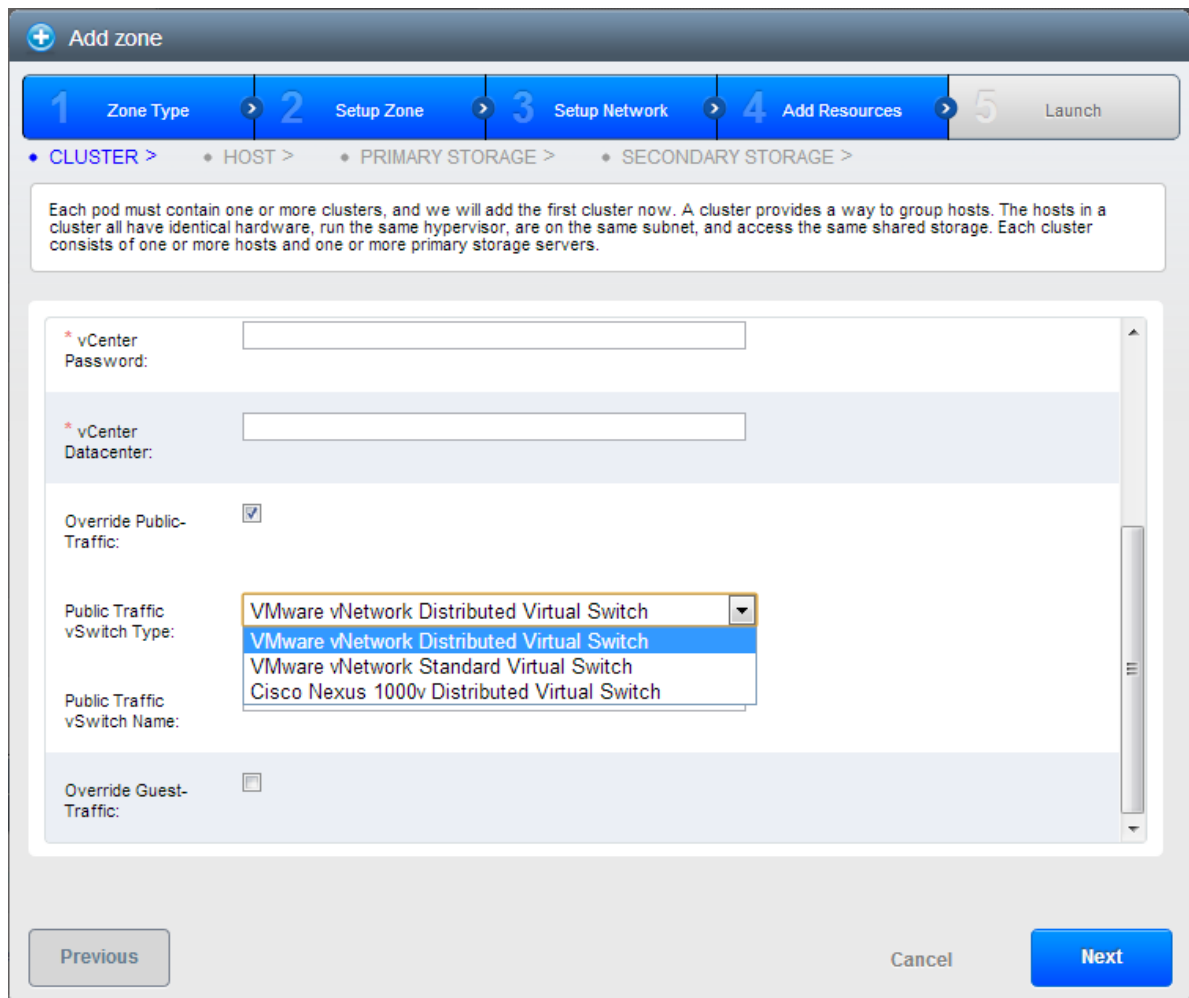
CloudPlatform supports orchestration of virtual networks in a deployment with a mix of Virtual Distributed Switch, Standard Virtual Switch and Nexus 1000v Virtual Switch.

### 10.6.7.5. Configuring Distributed Virtual Switch in CloudPlatform

You can configure VDS by adding the necessary resources while a zone is created.

Alternatively, at the cluster level, you can create an additional cluster with VDS enabled in the existing zone. Use the Add Cluster option. For information as given in [Section 7.5.3, "Add Cluster: vSphere"](#).

In both these cases, you must specify the following parameters to configure VDS:



Parameters	Description
Cluster Name	Enter the name of the cluster you created in vCenter. For example, "cloudcluster".
vCenter Host	Enter the name or the IP address of the vCenter host where you have deployed the VMware VDS.

Parameters	Description
vCenter User name	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, "cloudcVM".
Override Public Traffic	Enable this option to override the zone-wide public traffic for the cluster you are creating.
Public Traffic vSwitch Type	This option is displayed only if you enable the Override Public Traffic option. Select VMware vNetwork Distributed Virtual Switch.  If the vmware.use.dvswitch global parameter is true, the default option will be VMware vNetwork Distributed Virtual Switch.
Public Traffic vSwitch Name	Name of virtual switch to be used for the public traffic.
Override Guest Traffic	Enable the option to override the zone-wide guest traffic for the cluster you are creating.
Guest Traffic vSwitch Type	This option is displayed only if you enable the Override Guest Traffic option. Select VMware vNetwork Distributed Virtual Switch.  If the vmware.use.dvswitch global parameter is true, the default option will be VMware vNetwork Distributed Virtual Switch.
Guest Traffic vSwitch Name	Name of virtual switch to be used for guest traffic.

## 10.7. Storage Preparation for vSphere (iSCSI only)

Use of iSCSI requires preparatory work in vCenter. You must add an iSCSI target and create an iSCSI datastore.

If you are using NFS, skip this section.

### 10.7.1. Enable iSCSI initiator for ESXi hosts

1. In vCenter, go to hosts and Clusters/Configuration, and click Storage Adapters link.
2. Select iSCSI software adapter and click Properties.
3. Click the Configure... button.
4. Check Enabled to enable the initiator.
5. Click OK to save.

### 10.7.2. Add iSCSI target

Under the properties dialog, add the iSCSI target info.

Repeat these steps for all ESXi hosts in the cluster.

### 10.7.3. Create an iSCSI datastore

You should now create a VMFS datastore. Follow these steps to do so:

1. Select Home/Inventory/Datastores.
2. Right click on the datacenter node.
3. Choose Add Datastore... command.
4. Follow the wizard to create a iSCSI datastore.

This procedure should be done on one host in the cluster. It is not necessary to do this on all hosts.

### 10.7.4. Multipathing for vSphere (Optional)

Storage multipathing on vSphere nodes may be done according to the vSphere installation guide.

## 10.8. Add Hosts or Configure Clusters (vSphere)

Use vCenter to create a vCenter cluster and add your desired hosts to the cluster. You will later add the entire cluster to CloudPlatform. (see [Section 7.5.3, "Add Cluster: vSphere"](#)).



# Bare Metal Installation

You can set up bare metal hosts in a CloudPlatform cloud and manage them with the Management Server. Bare metal hosts do not run hypervisor software. You do not install the operating system – that is done using PXE when an instance is created from the bare metal template which you are going to create as part of this Installation procedure. Bare metal hosts use basic networking. A cloud can contain a mix of bare metal instances and virtual machine instances.

CloudPlatform 4.2 supports the kick start installation method for RPM-based Linux operating systems on baremetal hosts in basic zones. Users can provision a baremetal host managed by CloudPlatform as long as they have the kick start file and corresponding OS installation ISO ready.

## 11.1. Bare Metal Host System Requirements

Bare metal hosts can run any of the following operating systems. The hardware must meet the requirements published by the OS vendor. Please consult the OS documentation for details. Bare metal kick start installation is tested on CentOS 5.5, CentOS 6.2, CentOS 6.3, Fedora 17, and Ubuntu 12.04.

Aside from the requirements of the selected OS, bare metal hosts additionally must meet the following requirements:

- All hosts within a cluster must be homogenous. The CPUs must be of the same type, count, and feature flags.
- 32-bit or 64-bit x86 CPU (more cores results in better performance)
- 4 GB of memory
- 36 GB of local disk
- At least 1 NIC

## 11.2. About Bare Metal Kickstart Installation

Kickstart installation eliminates manual intervention during OS installation. It uses a text file as a script to automate installation. The kickstart file contains responses to all the user input prompts that are displayed when you install an operating system. With kickstart installation, you can automate the installation of operating system software on large numbers of hosts.

Support for kickstart is provided by the anaconda installer. You can find out more at <http://fedoraproject.org/wiki/Anaconda/Kickstart>. Anaconda is used by the various Linux distributions supported for CloudPlatform bare metal hosts (see [Section 11.1, “Bare Metal Host System Requirements”](#)). A complete description of kickstart files is outside the scope of this documentation. Luckily, there is plentiful documentation available. We have also provided some example kickstart files later in this document.

- Red Hat / CentOS

Docs: [http://www.centos.org/docs/6/html/Installation\\_Guide-en-US/ch-kickstart2.html](http://www.centos.org/docs/6/html/Installation_Guide-en-US/ch-kickstart2.html)

Example: [Section 11.3.18, “Example CentOS 6.x Kickstart File”](#)

- Fedora

Docs: [http://docs.fedoraproject.org/en-US/Fedora/17/html/Installation\\_Guide/ch-kickstart2.html](http://docs.fedoraproject.org/en-US/Fedora/17/html/Installation_Guide/ch-kickstart2.html)

Example: [Section 11.3.18, “Example CentOS 6.x Kickstart File”](#)

- Ubuntu

Docs: <https://help.ubuntu.com/lts/installation-guide/i386/automatic-install.html>

Example: [Section 11.3.20, “Example Ubuntu 12.04 Kickstart File”](#)

### 11.2.1. Limitations of Kickstart Baremetal Installation

When this feature is used, the following are not supported:

- Use in advanced zones is not supported. Use in basic zones only.
- CloudPlatform storage concepts: primary storage, secondary storage, volume, snapshot
- System VMs: SSVm, CPVM, VR
- Template copy or template download
- VM migration
- Multiple NICs
- Using host tag for allocating host, capacity (cpu, memory) specifying in service offering
- A stopped VM (the OS running on host) can only start on the host it was most recently on

## 11.3. Provisioning a Bare Metal Host with Kickstart

Follow the steps in all the following sections in order.

### 11.3.1. Download the Software

You will need the following:

- Citrix software installation file CloudPlatform-VERSION-N-OSVERSION.tar.gz. Available at <https://www.citrix.com/English/ss/downloads/>.

You will need a [MyCitrix account](#)<sup>1</sup>.

- PXE bootable kernel and initrd for each OS you want to make available for use on bare metal hosts
- NFS server
- (Optional) If using security groups, get [http://download.cloud.com/support/samsung/security\\_group\\_agent-1.0-1.noarch.rpm](http://download.cloud.com/support/samsung/security_group_agent-1.0-1.noarch.rpm) and the packages it depends on: python-cherrypy, ipset, and libmnl. For more information, see [Section 11.3.9, “Set Up the Security Group Agent \(Optional\)”](#).

### 11.3.2. Set Up IPMI

The procedure to access IPMI settings varies depending on the type of hardware. Consult your manufacturer's documentation if you do not already know how to display the IPMI settings screen.

---

<sup>1</sup> <http://www.citrix.com/lang/English/publicindex.asp?destURL=%2FEnglish%2FmyCitrix%2Findex.asp%3F>



Once you are there, set the following:

- IP address of IPMI NIC
- Netmask
- Gateway
- Username and password for IPMI NIC

CloudPlatform uses `ipmitool` to control the lifecycle of baremetal hosts. By default, `ipmitool` uses the interface 'lan' to issue ipmi commands. Depending on your motherboard, the interface may need to be 'lanplus'. Consult your hardware documentation to find out if this is the case. If so, modify the script `/usr/lib64/cloud/agent/scripts/util/ipmi.py`.

```
# vi /usr/lib64/cloud/agent/scripts/util/ipmi.py
```

Modify all lines calling `ipmitool`. For example:

```
// Change this:
o = ipmitool("-H", hostname, "-U", username, "-P", password, "chassis", "power", "status")

// To this:
o = ipmitool("-H", hostname, "-I", "lanplus", "-U", username, "-P", password, "chassis",
"power", "status")
```

You do not have to restart the CloudPlatform Management Server for this to take effect.

### 11.3.3. Enable PXE on the Bare Metal Host

The bare metal host needs to use PXE to boot over the network. Access the BIOS setup screen (or equivalent for your hardware) and do the following:

1. Set hard disk as the first priority device in the boot order.
2. Make sure the connected NIC on the bare metal machine is PXE-enabled.
3. Make a note of the MAC address of the PXE-enabled NIC. You will need it later.

### 11.3.4. Install the PXE and DHCP Servers

Each bare metal host must be able to reach a PXE server and a DHCP server. The PXE and DHCP servers must be installed on a separate machine, or a virtual machine, residing in the same L2 network with the baremetal hosts.

1. Log in as root to a host or virtual machine running RHEL or CentOS v6.2 or 6.3.
2. You should have access to a file in the form of "CloudPlatform-VERSION-N-OSVERSION.tar.gz." Copy that file to the machine. (The same file is used for either RHEL or CentOS installation.)
3. Untar the file and then run the `install.sh` script inside it. Replace the file and directory names below with those you are using:

```
# tar xzf CloudPlatform-VERSION-N-OSVERSION.tar.gz
# cd CloudPlatform-VERSION-N-OSVERSION
# ./install.sh
```

You should see a few messages as the installer prepares, followed by a list of choices.

4. Choose "B" to install the software that is needed for bare metal.

```
> B
```

5. Run the bare metal setup script.

```
# cloudstack-setup-baremetal
```

6. Make note of the TFTP root directory that is displayed by this script. You will need it later.

### 11.3.5. Set Up a File Server

The kickstart bare metal image and kickstart file will be stored on an NFS file server. The following steps tell how to set up the NFS server for use with CloudPlatform bare metal hosts.



#### Note

This short step-by-step section doesn't attempt to cover all the intricacies of setting up an NFS server. As you go through these steps, keep in mind that this is just a quick checklist. If at any point you find yourself thinking "there ought to be more options available" or "I wonder if wildcards are allowed," please check the Internet and the documentation for the particular type of NFS server you are using.

1. Set up the NFS configuration file `/etc/exports`. This file contains list of entries that describe the shared directories. Each entry specifies which hosts can access the directory, and under what conditions.

The entry for a shared directory follows one of these formats:

```
# Simple listing of hosts, with no options. Default settings are used.
directory host1 host2

# Options are specified to override access permissions and other settings.
directory host1(option1, option2) host2(option3, option4)
```

- `directory` - the directory to be shared; for example, `Share\Baremetal_Backup`
- `host1, host2` - clients that have access to the directory, listed by fully qualified domain name, hostname, or IP address
- `option1, option2, etc.` - the conditions that restrict the hosts's access to the directory (all are optional)
  - `ro`: read only access to directory
  - `rw`: read and write access to directory
  - `no_root_squash`: root on client have same level of access to files as root on server
  - `no_subtree_check`: only part of volume is exported

- sync: exportfs notify client when file write is complete instead of async notify



### Warning

Be careful with space characters in these NFS configuration files. They must be used exactly as shown in the syntax.

2. In `/etc/hosts.deny`, list the clients that are not permitted access to the NFS server by default. For example, you might want to start by denying access to everyone:

```
portmap:ALL
```

In the next step, you'll override this to allow specific hosts.

3. In `/etc/hosts.allow`, list the clients that are allowed to access the NFS server. This list takes precedence over the list in `/etc/hosts.deny`. For example (note the placement of space characters):

```
portmap: host1 , host2
```



### Note

Clients that are not listed in either file are allowed access to the NFS server.

4. Verify that NFS is running on the NFS server:

```
# rpcinfo -p
```

The output should show the following services running:

```
portmapper
rquotad
mountd
nfs
nlockmgr
status
```

If so, then you are finished setting up the NFS server.

5. If the services are not already running, you need to start the following NFS daemons on the NFS server:
  - `rpc.portmap`
  - `rpc.mountd`
  - `rpc.nfsd`
  - `rpc.statd`

- rpc.lockd
- rpc.rquotad

### 11.3.6. Create a Bare Metal Image

Create an image which can be installed on bare metal hosts later, when bare metal instances are provisioned in your cloud. On the NFS file server, create a folder and put a PXE bootable kernel and initrd in it. For example:

```
# mkdir -p /home/centos63
# cp iso_mount_path_to_centos63/images/pxeboot/{ initrd.img, vmlinuz } /home/centos63
```

For Ubuntu:

```
iso_mount_path_to_ubuntu/install/netboot/ubuntu-installer/amd64/
```


### 11.3.7. Create a Bare Metal Compute Offering

1. Log in as admin to the CloudPlatform UI at the URL below. Substitute the IP address of your own Management Server:

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

2. In the left navigation bar, click Service Offerings.
3. In Select Offering, choose Compute Offerings.
4. Click Add compute offering.
5. In the dialog box, fill in these values:
  - Name. Any desired name for the service offering.
  - Description. A short description of the offering that can be displayed to users.
  - Storage Type. Shared.
  - # of CPU Cores. Use the same value as when you added the host.
  - CPU (in MHZ). Use the same value as when you added the host.
  - Memory (in MB). Use the same value as when you added the host.
  - Offer HA. Unchecked. High availability services are not supported for bare metal hosts.
  - Storage Tags.
  - Host Tags. Any tags that you want to use to organize your hosts. For example, "large"
  - Public? Yes.
6. Click OK.

### 11.3.8. Create a Bare Metal Network Offering

1. Log in as admin 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: You can give the offering any desired name. For example, Baremetal.
  - Guest Type: Shared
  - Supported Services:
    - DHCP checkbox: checked
    - DHCP Provider: Baremetal
    - User Data checkbox: checked
    - User Data Provider: Baremetal
    - Security Groups: checked
    - BaremetalPxeServer: checked
  - Additional choices in this dialog are described in "Creating a New Network Offering" in the Administrator's Guide.
6. Click OK.
7. Verify:
  - a. In the left navigation bar, click Service Offerings.
  - b. In the Select Offering dropdown, choose Network Offerings.
  - c. Click the name of the offering you just created, and check the details. In State, be sure the offering is Enabled. If not, click the Enable button. 

### 11.3.9. Set Up the Security Group Agent (Optional)

If you are not using security groups, you can skip this section. Continue with [Section 11.3.11, "Add a Bare Metal Zone"](#).

If you plan to use security groups to control traffic to bare metal instances, you need to install security group agent software on each bare metal host. This involves downloading the software, making it available in an accessible repository, and modifying the kickstart file to go get this software during installation.

1. Download the agent software from the following link:

[http://download.cloud.com/support/samsung/security\\_group\\_agent-1.0-1.noarch.rpm](http://download.cloud.com/support/samsung/security_group_agent-1.0-1.noarch.rpm)

The agent software depends on several other RPMs:

- `python-cherrypy`: A Python HTTP server which is distributed by default with most Linux distributions. For example, both CentOS and Ubuntu have this package.
  - `ipset`: An iptables tool which provides ipset match. In Ubuntu, ipset is provided by default. In Cent OS, it is not provided by default; you need to download it from a third party. For example: <http://www.wandin.net/dotclear/index.php?post/2012/05/26/Installing-ipset-on-CentOS-6>
  - `libmnl`: ipset dependent library. it's usually available with ipset rpm for downloading
2. Place the RPMs in a directory that is accessible by browser through HTTP.
  3. Create a repo where the kickstart installer can find the security group agent when it's time to install. Run the following command:

```
# createrepo <path_to_rpms>
```

For example, if the RPMs are in the following directory:

```
/var/www/html/securitygroupagent/
```

The command would be:

```
createrepo /var/www/html/securitygroupagent/
```

The repo file will be created in `/var/www/html/securitygroupagent/`.

4. Add the security group agent package to the kickstart file that you are using for your bare metal template. Make the following modifications in the kickstart file:
  - a. Add the repo that you created in the previous step. Insert the following command above the `%package` section, before `reboot`. Substitute the desired repo name, IP address, and the directory in the base URL (if you didn't use the name `securitygroupagent` in the previous step).

```
repo --name=<repo_name> --baseurl=http://<ip_address>/securitygroupagent/
```

- b. In the `%package` section of the kickstart file, add all the RPMs. For example:

```
%package
libmnl
ipset
python-cherrypy
security_group_agent
```

- c. In the `%post` section, add the following:

```
%post
chkconfig iptables off
chkconfig cs-sgagent on
service cs-sgagent start
```

This will close iptables to flush the default iptables rules set by the OS (CloudPlatform does not need them), then set the security group agent to "on" and immediately start the agent.

### 11.3.10. (Optional) Set Bare Metal Configuration Parameters

1. Log in as admin to the CloudPlatform UI. Click Global Settings. Make any desired modifications to the bare metal configuration parameters.
  - `enable.baremetal.securitygroup.agent.echo` (default: false)
  - `external.baremetal.resource.classname`
  - `external.baremetal.system.url`
  - `interval.baremetal.securitygroup.agent.echo` (default: 10)
  - `timeout.baremetal.securitygroup.agent.echo` (default: 3600)
  - `ucs.sync.blade.interval` (default: 3600) tells how often CloudPlatform should sync with UCS to get information about changes such as added or removed blades
2. Restart the CloudPlatform Management Server to put the new settings into effect.

### 11.3.11. Add a Bare Metal Zone

Your cluster(s) of bare metal hosts must be organized into a zone. This zone can contain only bare metal hosts. You can have one or more bare metal zones in your cloud.

1. Log in as admin to the CloudPlatform UI.
2. In the left navigation, choose Infrastructure.
3. On Zones, click View More.
4. Click Add Zone. The Zone creation wizard will appear.
5. In Zone Type, choose Basic. This is for AWS-style networking. It provides a single network where each 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).
6. Click Next.
7. You will be asked to enter the following details.
  - Name. A name for the zone.
  - DNS 1 and 2. These are DNS servers for use by guests 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.
  - Hypervisor. Choose Baremetal.
  - Network Offering. Choose the network offering you created in [Section 11.3.8, "Create a Bare Metal Network Offering"](#).
  - 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 use this zone.
8. Click Next.

9. In a new zone, CloudPlatform adds the first pod for you. You can always add more pods later.

To configure the first pod, enter the following:


- 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.

10. Click Next, or OK.

The UI will show a progress indicator.

**Troubleshooting:** After a few moments, if this indicator does not finish, click Refresh in the browser.

11. Be sure the zone is enabled:

- a. In the left navigation bar, click Infrastructure.
- b. In Zones, click View All.
- c. Click the name of the zone you just created, and check the details. In Allocation State, be sure the zone is Enabled. If not, click the Enable button. 

### 11.3.12. Add a Bare Metal Cluster

1. Log in as admin 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 cluster.
3. Click the Compute and Storage tab. In the Pods node, click View All. Select the pod where you want to add the cluster.
4. Click View Clusters, then click Add Cluster.

The Add Cluster dialog will appear.

5. In Hypervisor, choose BareMetal.
6. In Cluster Name, enter a name for the cluster. This can be any text you like.
7. Click OK.

### 11.3.13. Add a Bare Metal Host

1. Log in as admin to the CloudPlatform UI.
2. In the left navigation, click Infrastructure. In Zones, click View All, then click the name of the bare metal zone you added earlier.



3. Click the Compute and Storage tab. In Clusters, click View All, then click the name of the bare metal cluster you added earlier.
4. Click View Hosts.
5. Click the Add Host button.

The Add Host dialog will appear.

6. In the Add Host dialog, make the following choices:
  - Host name. The IPMI IP address of the machine.
  - Username. User name you set for IPMI.
  - Password. Password you set for IPMI.
  - # CPU Cores. Number of CPUs on the machine.
  - CPU (in MHz). Frequency of CPU.
  - Memory (in MB). Memory capacity of the new host.
  - Host MAC. MAC address of the PXE NIC.
  - Host Tags. Set to large. You will use this tag later when you create the service offering.

It may take a minute for the host to be provisioned. It should automatically display in the UI.

Repeat for additional bare metal hosts.

### 11.3.14. Add the PXE Server and DHCP Server to Your Deployment

As part of describing your deployment to CloudPlatform, you will need to add the PXE server and DHCP server that you created in [Section 11.3.4, “Install the PXE and DHCP Servers”](#).

1. Log in as admin 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 Bare metal PXE / DHCP server.
3. Click the Physical Network tab. Click the Physical Network entry.
4. In the Network node, click Network Service Providers Configure.
5. In the list of Network service providers, click Baremetal PXE. In the Details node, click Add Baremetal PXE Device.

The Add Baremetal PXE Device dialog will appear.

6. In the Add Baremetal PXE Device dialog, make the following choices:
  - URL: `http://<PXE DHCP server IP address>`
  - Username: login username
  - Password: password
  - Tftp root directory: `/var/lib/tftpboot`

7. In the list of Network service providers, click Baremetal DHCP. In the Details node, click Add Baremetal DHCP Device button. The Add Baremetal DHCP Device dialog will appear.
8. In the Add Baremetal DHCP Device dialog:
  - URL: `http://<PXE DHCP server IP address>`
  - Username: login username
  - Password: password

### 11.3.15. Create a Bare Metal Template

In these steps, it is assumed you already have a directory on your NFS server containing the image for the bare metal instance, as well as the kickstart file. See [Section 11.3.6, “Create a Bare Metal Image”](#) and [Section 11.2, “About Bare Metal Kickstart Installation”](#).

1. Log into the UI as either an end user or administrator.
2. In the left navigation bar, click Templates.
3. Click Create Template.
4. In the dialog box, enter the following values.
  - Name. Short name for the template.
  - Display Text. Description of the template.
  - URL. The location of the image file on your NFS server in the format:

```
ks=<http_link_to_kickstart_file>;kernel=<nfs_path_to_pxe_bootable_kernel>;initrd=<nfs_path_to_pxe_initrd>
```

For example:

```
ks=http://nfs1.lab.vmops.com/baremetal/ubuntu.ks;kernel=10.223.110.231:/var/www/html/baremetal/linux;initrd=10.223.110.231:/var/www/html/baremetal/initrd.gz
```



#### Note

The kickstart file is located on an HTTP server. We use the link to it here.

- Zone. All Zones.
- OS Type. Select the OS type of the ISO image. Choose other if the OS Type of the ISO is not listed or if the ISO is not bootable.
- Hypervisor. BareMetal.
- Format. BareMetal.
- Password Enabled. No.
- Public. No.

- **Featured.** Choose Yes if you would like this template to be more prominent for users to select. Only administrators may make templates featured.

### 11.3.16. Provision a Bare Metal Instance

Deploy one bare metal instance per host using these steps.

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. Click Template.
6. Click Next.
7. Select the template that you created earlier, in [Section 11.3.15, “Create a Bare Metal Template”](#), and click Next.
8. Select the compute offering you created earlier, in [Section 11.3.7, “Create a Bare Metal Compute Offering”](#), and click Next.
9. Click Launch, and the instance will be created.
10. Set up security groups with ingress and egress rules to control inbound and outbound network traffic. Follow the steps in [Using Security Groups in the Administrator's Guide](#). If you want to allow inbound network traffic to the bare metal instances through public IPs, set up public IPs and port forwarding rules. Follow the steps in [How to Set Up Port Forwarding in the Administrator's Guide](#).

### 11.3.17. Test Bare Metal Installation

In the navigation bar of your browser, specify the IPMI address of the bare metal host, and launch the virtual console. The bare metal host should be PXE booted to the specified installation.

### 11.3.18. Example CentOS 6.x Kickstart File

```
# centos 6.x based kickstart file. Disk layout assumes a 4GB sda
install
url --url=http://10.223.110.231/baremetal/centos62/
lang en_US.UTF-8
keyboard us

network --bootproto=dhcp --onboot=yes --hostname=baremetal-test --noipv6

#network --bootproto=dhcp --device=eth0 --onboot=no --noipv6
#network --bootproto=dhcp --device=eth1 --onboot=no --noipv6
#network --bootproto=dhcp --device=eth2 --onboot=yes --hostname=baremetal-test --noipv6
#network --bootproto=dhcp --device=eth3 --onboot=no --noipv6
#network --bootproto=dhcp --device=eth4 --onboot=no --noipv6
#network --bootproto=dhcp --device=eth5 --onboot=no --noipv6

firewall --enabled --port=22:tcp
services --disabled ip6tables
rootpw password
authconfig --enablshadow --enablemd5
autopart
```

```
selinux --permissive
timezone --utc Europe/London
bootloader --location=mbr --driveorder=sda
clearpart --initlabel --linux --drives=sda
part /boot --fstype ext3 --size=500 --ondisk=sda
part pv.2 --size=1 --grow --ondisk=sda
volgroup vg00 --pesize=32768 pv.2
logvol swap --fstype swap --name=swap00 --vgname=vg00 --size=1024
logvol / --fstype ext3 --name=lv00 --vgname=vg00 --size=2560
#repo --name=epel --baseurl=http://download.fedoraproject.org/pub/epel/6/x86_64/
repo --name=cs-scurity --baseurl=http://nfs1.lab.vmops.com/baremetal/securitygroupagentrepo/
reboot

%packages --ignoremissing
@base
@core
libmnl
wget
cloud-baremetal-securitygroup-agent
%post

#really disable ipv6

echo "install ipv6 /bin/true" > /etc/modprobe.d/blacklist-ipv6.conf

echo "blacklist ipv6" >> /etc/modprobe.d/blacklist-ipv6.conf

yum -y install libmnl
```

### 11.3.19. Example Fedora 17 Kickstart File

```
# install, not upgrade
install

# Install from a friendly mirror and add updates
url --url=http://10.223.110.231/baremetal/fedora17/

repo --name=updates

# Language and keyboard setup

lang en_US.UTF-8

keyboard us

# Configure DHCP networking w/optional IPv6, firewall on

# network --onboot yes --device eth0 --bootproto dhcp --ipv6 auto --hostname fedora.local

network --bootproto=dhcp --onboot=yes --hostname=baremetal-test --noipv6

firewall --service=ssh

# Set timezone

timezone --utc Etc/UTC

# Authentication

rootpw password

authconfig --enablesshadow --passalgo=sha512

autopart
```

```
# SELinux
#selinux --enforcing

selinux --permissive

# Services running at boot
services --enabled network,sshd
services --disabled sendmail

# Disable anything graphical

skipx

text

# Set up the disk

zerombr

clearpart --all

part / --fstype=ext4 --grow --size=1024 --asprimary

#part swap --size=512 # lets do no swap partition for now

bootloader --location=mbr --timeout=5

# Shut down when the kickstart is done

reboot

# Minimal package set

%packages --excludedocs --nobase

@Core

%end

# Nothing for now.

#%post

#%end
```

### 11.3.20. Example Ubuntu 12.04 Kickstart File

```
#!/var/lib/cobbler/kickstarts/lucid.ks

#System language

lang en_US

#Language modules to install

langsupport en_US

#System keyboard

keyboard us

#System mouse
```

```
mouse

#System timezone

timezone America/New_York

#Root password

rootpw --iscrypted password

#Initial user

user --disabled

#Reboot after installation

reboot

#Use text mode install

text

#Install OS instead of upgrade

install
# Use network installation

url --url=http://10.223.110.231/baremetal/ubuntu1204

#System bootloader configuration

bootloader --location=mbr

#Clear the Master Boot Record

zerombr yes

#Partition clearing information

clearpart --all --initlabel

autopart

#Disk partitioning information

part swap --size 512

part / --fstype ext3 --size 1 --grow

#System authorization information

auth --useshadow --enablemd5

#Network information

network --bootproto=dhcp --device=eth0 --hostname=baremetal-test --noipv6

#Firewall configuration

firewall --enabled --trust=eth0 --ssh

#Do not configure the X Window System

skipx
```

```
%pre
#services
services --enabled=ntpd,nscd,puppet
#Package install information
%packages
ubuntu-standard
man-db
wget
postfix
openssh-server
sysstat
nfs-common
nscd
postfix
quota
ntp
%post
```

## 11.4. 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. 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 [1](#).
4. Provision the blade as a bare metal host as described in [Section 11.3, "Provisioning a Bare Metal Host with Kickstart"](#).

### 11.4.1. 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.

### 11.4.2. 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.

### 11.4.3. Associating a Profile with a UCS Blade


Before associating a profile with a UCS blade, you must first do the steps in [Section 11.4.2, "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.

#### 11.4.4. 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.

### 11.4.5. 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.

# Installing Oracle VM (OVM) for CloudPlatform

If you want to use the Oracle VM Server (OVM) hypervisor to run guest virtual machines, install OVM on the host(s) in your cloud.

## 12.1. System Requirements for OVM Hosts

CloudPlatform works with the following version:

- OVM Server 2.2.1

The OVM hosts must follow these restrictions:

- All hosts must be 64-bit and must support HVM (Intel-VT or AMD-V enabled). All Hosts within a Cluster must be homogenous. That means the CPUs must be of the same type, count, and feature flags.
- Within a single cluster, the hosts must be of the same kernel version. For example, if one Host is OVM 2.2 64 bit, they must all be OVM 2.2 64 bit.
- 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.



### Warning

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

## 12.2. OVM Installation Overview

Certain essential CloudPlatform software components can not run on OVM, so your OVM Zone will need to include at least two clusters: one cluster containing the OVM hosts, and another cluster with a different hypervisor (KVM, XenServer, or VMWare), where the CloudPlatform system VMs will run.

## 12.3. Installing OVM on the Host(s)

1. Download the OVM template from the Oracle website (<http://www.oracle.com/virtualization>) and install it using the OVM Installation Guide. The software download should be a .zip file that contains two files, an image (.img) file and vm.cfg. You need only the .img file. The default template password is ovsroot.
2. Unzip the file and copy the .img file to your HTTP server.
3. Follow the instructions in the OVM Installation Guide to install OVM on each host. During installation, you will be prompted to set an agent password and a root password. You can specify any desired text or accept the default. Make a note of these passwords – you will need them later.

- Repeat for any additional hosts that will be part of the OVM cluster.



### Note

After ISO installation, the installer reboots into the operating system. Due to a known issue in OVM Server, 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.

## 12.4. Primary Storage Setup for OVM

CloudPlatform natively supports NFS, iSCSI and local storage. Each iSCSI LUN can be assigned to exactly one OVM cluster as the cluster's primary storage device. Following is a summary of the steps that you need to do. For details, see Oracle documentation on preparing storage repositories at [http://download.oracle.com/docs/cd/E15458\\_01/doc.22/e15444/storage.htm#sthref65](http://download.oracle.com/docs/cd/E15458_01/doc.22/e15444/storage.htm#sthref65).

- Map your iSCSI device to the OVM host's local device. The exact steps to use depend on your system's peculiarities.
- On every host in the cluster, create the same softlink name so CloudPlatform can use a consistent path to refer to the iSCSI LUN from any host. For example, if the softlink name is `/dev/ovm-iscsi0`:

```
ln -s /dev/disk/by-path/<output of previous command> /dev/ovm-iscsi0
```

Make a note of your softlink name. You will need it later.

- Exactly once on any ONE host in the OVM cluster, format the OCFS2 file system on the iSCSI device.

## 12.5. Set Up Host(s) for System VMs

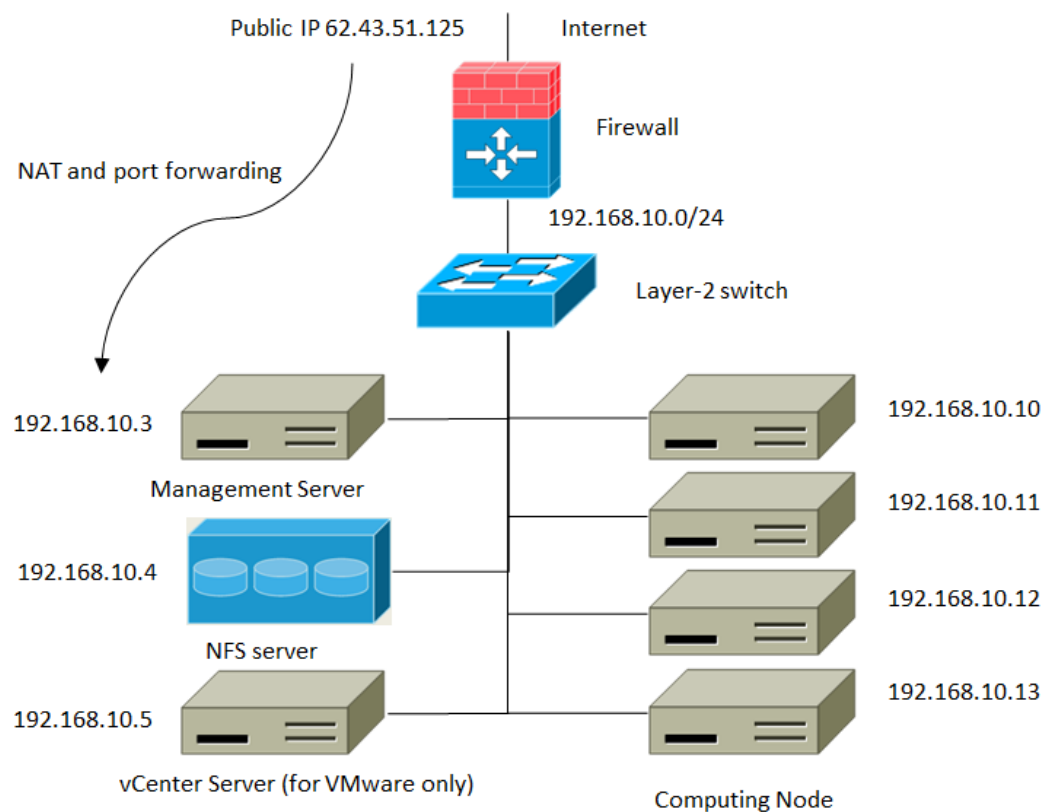
Before proceeding to install the CloudPlatform Management Server, you need to install a non-OVM hypervisor on at least one host that will run the CloudPlatform System VMs (which are not supported by OVM).

- Install the non-OVM hypervisor on at least one host by following one of the instructions below, depending on which hypervisor you want to use:
  - [Chapter 8, Installing XenServer for CloudPlatform](#)
  - [Chapter 9, Installing KVM for CloudPlatform](#)
  - [Chapter 10, Installing VMware for CloudPlatform](#)
- When you set up the pod that will contain the OVM cluster, remember to include this non-OVM host in its own cluster along with the OVM cluster in the same pod.

# Choosing a Deployment Architecture

The architecture used in a deployment will vary depending on the size and purpose of the deployment. This section contains examples of deployment architecture, including a small-scale deployment useful for test and trial deployments and a fully-redundant large-scale setup for production deployments.

## 13.1. Small-Scale Deployment

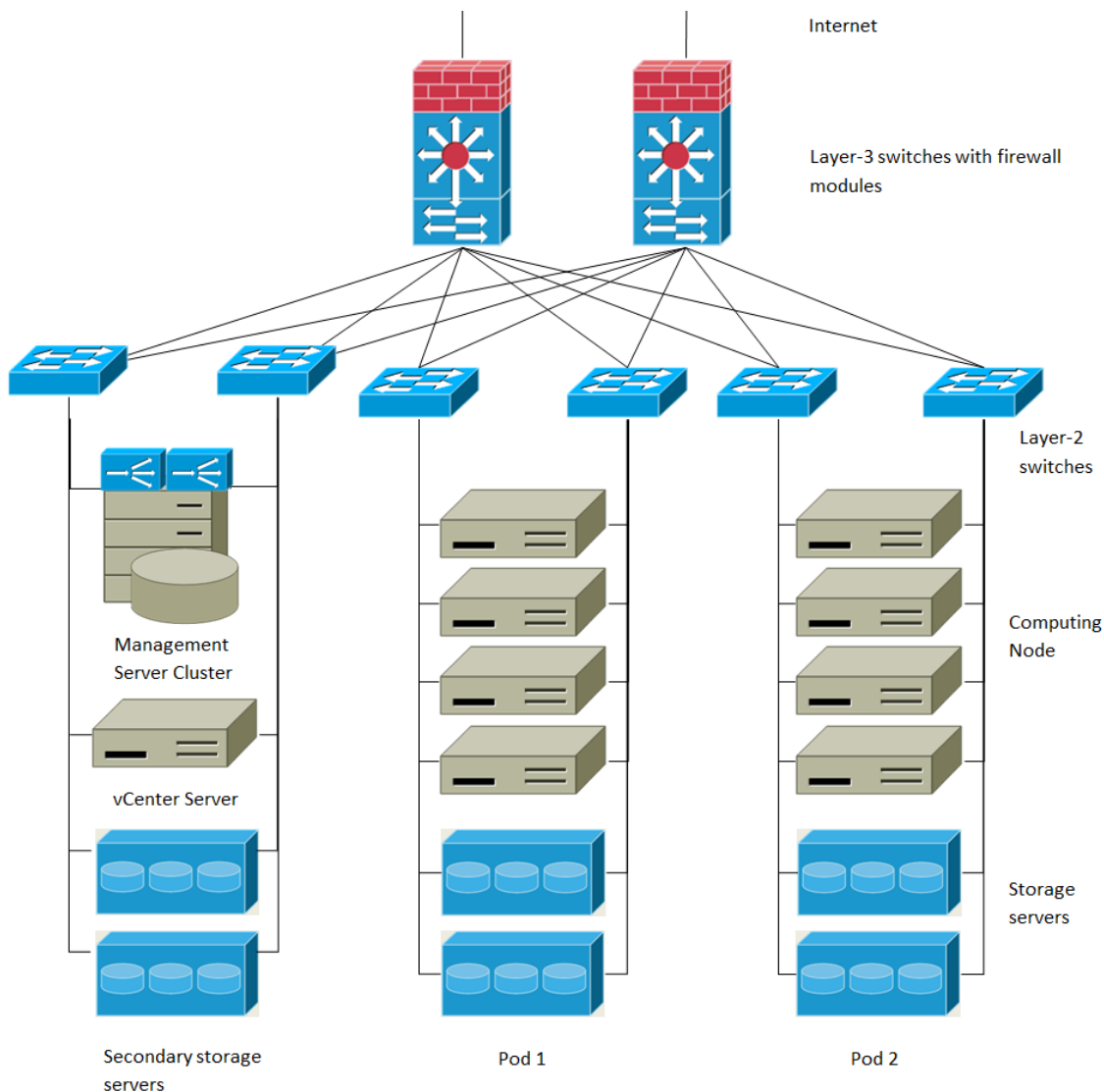


**Small-Scale Deployment**

This diagram illustrates the network architecture of a small-scale CloudPlatform deployment.

- A firewall provides a connection to the Internet. The firewall is configured in NAT mode. The firewall forwards HTTP requests and API calls from the Internet to the Management Server. The Management Server resides on the management network.
- A layer-2 switch connects all physical servers and storage.
- A single NFS server functions as both the primary and secondary storage.
- The Management Server is connected to the management network.

## 13.2. Large-Scale Redundant Setup



**Large-Scale Redundant Deployment**

This diagram illustrates the network architecture of a large-scale CloudPlatform deployment.

- A layer-3 switching layer is at the core of the data center. A router redundancy protocol like VRRP should be deployed. Typically high-end core switches also include firewall modules. Separate firewall appliances may also be used if the layer-3 switch does not have integrated firewall capabilities. The firewalls are configured in NAT mode. The firewalls provide the following functions:
  - Forwards HTTP requests and API calls from the Internet to the Management Server. The Management Server resides on the management network.
  - When the cloud spans multiple zones, the firewalls should enable site-to-site VPN such that servers in different zones can directly reach each other.
- A layer-2 access switch layer is established for each pod. Multiple switches can be stacked to increase port count. In either case, redundant pairs of layer-2 switches should be deployed.

- The Management Server cluster (including front-end load balancers, Management Server nodes, and the MySQL database) is connected to the management network through a pair of load balancers.
- Secondary storage servers are connected to the management network.
- Each pod contains storage and computing servers. Each storage and computing server should have redundant NICs connected to separate layer-2 access switches.

### 13.3. Separate Storage Network

In the large-scale redundant setup described in the previous section, storage traffic can overload the management network. A separate storage network is optional for deployments. Storage protocols such as iSCSI are sensitive to network delays. A separate storage network ensures guest network traffic contention does not impact storage performance.

### 13.4. Multi-Node Management Server

The CloudPlatform Management Server is deployed on one or more front-end servers connected to a single MySQL database. Optionally a pair of hardware load balancers distributes requests from the web. A backup management server set may be deployed using MySQL replication at a remote site to add DR capabilities.

The administrator must decide the following.

- Whether or not load balancers will be used.
- How many Management Servers will be deployed.
- Whether MySQL replication will be deployed to enable disaster recovery.

### 13.5. Multi-Site Deployment

The CloudPlatform platform scales well into multiple sites through the use of zones.

There are two ways to configure the storage network:

- Bonded NIC and redundant switches can be deployed for NFS. In NFS deployments, redundant switches and bonded NICs still result in one network (one CIDR block+ default gateway address).
- iSCSI can take advantage of two separate storage networks (two CIDR blocks each with its own default gateway). Multipath iSCSI client can failover and load balance between separate storage networks.





# Network Setup

Achieving the correct networking setup is crucial to a successful CloudPlatform installation. This section contains information to help you make decisions and follow the right procedures to get your network set up correctly.

## 14.1. Basic and Advanced Networking

CloudPlatform provides two styles of networking:.

### 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, but requires more configuration steps than basic networking.

Each zone has either basic or advanced networking. Once the choice of networking model for a zone has been made and configured in CloudPlatform, it can not be changed. A zone is either basic or advanced for its entire lifetime.

The following table compares the networking features in the two networking models.

Networking Feature	Basic Network	Advanced Network
Number of networks	Single network	Multiple networks
Firewall type	Physical	Physical and Virtual
Load balancer	Physical	Physical and Virtual
Isolation type	Layer 3	Layer 2 and Layer 3
VPN support	No	Yes
Port forwarding	Physical	Physical and Virtual
1:1 NAT	Physical	Physical and Virtual
Source NAT	No	Physical and Virtual
Userdata	Yes	Yes
Network usage monitoring	sFlow / netFlow at physical router	Hypervisor and Virtual Router
DNS and DHCP	Yes	Yes

The two types of networking may be in use in the same cloud. However, a given zone must use either Basic Networking or Advanced Networking.

Different types of network traffic can be segmented on the same physical network. Guest traffic can also be segmented by account. To isolate traffic, you can use separate VLANs. If you are using separate VLANs on a single physical network, make sure the VLAN tags are in separate numerical ranges.

## 14.2. 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	

## 14.3. Example Hardware Configuration

This section contains an example configuration of specific switch models for zone-level layer-3 switching. It assumes VLAN management protocols, such as VTP or GVRP, have been disabled. The example scripts must be changed appropriately if you choose to use VTP or GVRP.

### 14.3.1. Dell 62xx

The following steps show how a Dell 62xx is configured for zone-level layer-3 switching. These steps assume VLAN 201 is used to route untagged private IPs for pod 1, and pod 1's layer-2 switch is connected to Ethernet port 1/g1.

The Dell 62xx Series switch supports up to 1024 VLANs.

1. Configure all the VLANs in the database.

```
vlan database
vlan 200-999
exit
```

2. Configure Ethernet port 1/g1.

```
interface ethernet 1/g1
switchport mode general
switchport general pvid 201
switchport general allowed vlan add 201 untagged
switchport general allowed vlan add 300-999 tagged
exit
```

The statements configure Ethernet port 1/g1 as follows:

- VLAN 201 is the native untagged VLAN for port 1/g1.

- All VLANs (300-999) are passed to all the pod-level layer-2 switches.

### 14.3.2. Cisco 3750

The following steps show how a Cisco 3750 is configured for zone-level layer-3 switching. These steps assume VLAN 201 is used to route untagged private IPs for pod 1, and pod 1's layer-2 switch is connected to GigabitEthernet1/0/1.

1. Setting VTP mode to transparent allows us to utilize VLAN IDs above 1000. Since we only use VLANs up to 999, vtp transparent mode is not strictly required.

```
vtp mode transparent
vlan 200-999
exit
```

2. Configure GigabitEthernet1/0/1.

```
interface GigabitEthernet1/0/1
switchport trunk encapsulation dot1q
switchport mode trunk
switchport trunk native vlan 201
exit
```

The statements configure GigabitEthernet1/0/1 as follows:

- VLAN 201 is the native untagged VLAN for port GigabitEthernet1/0/1.
- Cisco passes all VLANs by default. As a result, all VLANs (300-999) are passed to all the pod-level layer-2 switches.

## 14.4. Layer-2 Switch

The layer-2 switch is the access switching layer inside the pod.

- It should trunk all VLANs into every computing host.
- It should switch traffic for the management network containing computing and storage hosts. The layer-3 switch will serve as the gateway for the management network.

### Example Configurations

This section contains example configurations for specific switch models for pod-level layer-2 switching. It assumes VLAN management protocols such as VTP or GVRP have been disabled. The scripts must be changed appropriately if you choose to use VTP or GVRP.

#### 14.4.1. Dell 62xx

The following steps show how a Dell 62xx is configured for pod-level layer-2 switching.

1. Configure all the VLANs in the database.

```
vlan database
vlan 300-999
exit
```

2. VLAN 201 is used to route untagged private IP addresses for pod 1, and pod 1 is connected to this layer-2 switch.

```
interface range ethernet all
switchport mode general
switchport general allowed vlan add 300-999 tagged
exit
```

The statements configure all Ethernet ports to function as follows:

- All ports are configured the same way.
- All VLANs (300-999) are passed through all the ports of the layer-2 switch.

### 14.4.2. Cisco 3750

The following steps show how a Cisco 3750 is configured for pod-level layer-2 switching.

1. Setting VTP mode to transparent allows us to utilize VLAN IDs above 1000. Since we only use VLANs up to 999, vtp transparent mode is not strictly required.

```
vtp mode transparent
vlan 300-999
exit
```

2. Configure all ports to dot1q and set 201 as the native VLAN.

```
interface range GigabitEthernet 1/0/1-24
switchport trunk encapsulation dot1q
switchport mode trunk
switchport trunk native vlan 201
exit
```

By default, Cisco passes all VLANs. Cisco switches complain if the native VLAN IDs are different when 2 ports are connected together. That's why you must specify VLAN 201 as the native VLAN on the layer-2 switch.

## 14.5. Hardware Firewall

All deployments should have a firewall protecting the management server; see [Generic Firewall Provisions](#). Optionally, some deployments may also have a Juniper SRX firewall that will be the default gateway for the guest networks; see [Section 14.5.2, “External Guest Firewall Integration for Juniper SRX \(Optional\)”](#).

### 14.5.1. Generic Firewall Provisions

The hardware firewall is required to serve two purposes:

- Protect the Management Servers. NAT and port forwarding should be configured to direct traffic from the public Internet to the Management Servers.
- Route management network traffic between multiple zones. Site-to-site VPN should be configured between multiple zones.

To achieve the above purposes you must set up fixed configurations for the firewall. Firewall rules and policies need not change as users are provisioned into the cloud. Any brand of hardware firewall that supports NAT and site-to-site VPN can be used.

## 14.5.2. External Guest Firewall Integration for Juniper SRX (Optional)



### Note

Available only for guests using advanced networking, both shared and isolated.

CloudPlatform provides for direct management of the Juniper SRX series of firewalls. This enables CloudPlatform to establish static NAT mappings from public IPs to guest VMs, and to use the Juniper device in place of the virtual router for firewall services. You can have only one Juniper SRX device per zone. This feature is optional. If Juniper integration is not provisioned, CloudPlatform will use the virtual router for these services.

The Juniper SRX can optionally be used in conjunction with an external load balancer. External Network elements can be deployed in a side-by-side or inline configuration.

For more information, see the Administration Guide.

CloudPlatform requires the Juniper to be configured as follows:



### Note

Supported SRX software version is 10.3 or higher.

1. Install your SRX appliance according to the vendor's instructions.
2. Connect one interface to the management network and one interface to the public network. Alternatively, you can connect the same interface to both networks and use a VLAN for the public network.
3. Make sure "vlan-tagging" is enabled on the private interface.
4. Record the public and private interface names. If you used a VLAN for the public interface, add a ".[VLAN TAG]" after the interface name. For example, if you are using ge-0/0/3 for your public interface and VLAN tag 301, your public interface name would be "ge-0/0/3.301". Your private interface name should always be untagged because the CloudPlatform software automatically creates tagged logical interfaces.
5. Create a public security zone and a private security zone. By default, these already exist and are called "untrust" and "trust" zones. Add the public interface to the public zone. CloudPlatform automatically adds the private interface to private zone (trusted zone). Note down the security zone names.
6. Make sure there is a security policy from the private zone to the public zone that allows all traffic.
7. Note the username and password of the account you want the CloudPlatform software to log in to when it is programming rules.

8. Make sure the "ssh" and "xnm-clear-text" system services are enabled.
9. If traffic metering is desired:
  - a. a. Create an incoming firewall filter and an outgoing firewall filter. These filters should be the same names as your public security zone name and private security zone name respectively. The filters should be set to be "interface-specific". For example, here is the configuration where the public zone is "untrust" and the private zone is "trust":

```
root@cloud-srx# show firewall
filter trust {
    interface-specific;
}
filter untrust {
    interface-specific;
}
```

- b. Add the firewall filters to your public interface. For example, a sample configuration output (for public interface ge-0/0/3.0, public security zone untrust, and private security zone trust) is:

```
ge-0/0/3 {
    unit 0 {
        family inet {
            filter {
                input untrust;
                output trust;
            }
            address 172.25.0.252/16;
        }
    }
}
```

10. Make sure all VLANs are brought to the private interface of the SRX.
11. After the CloudPlatform Management Server is installed, log in to the CloudPlatform UI as administrator.
12. In the left navigation bar, click Infrastructure.
13. In Zones, click View All.
14. Choose the zone you want to work with.
15. Click the Physical Network tab.
16. In the Network Service Providers node of the diagram, click Configure. (You might have to scroll down to see this.)
17. Click SRX.
18. Click the Add New SRX button (+) and provide the following:
  - IP Address: The IP address of the SRX.
  - Username: The user name of the account on the SRX that CloudPlatform should use.
  - Password: The password of the account.

- **Public Interface.** The name of the public interface on the SRX. For example, ge-0/0/2. A ".x" at the end of the interface indicates the VLAN that is in use.
- **Private Interface:** The name of the private interface on the SRX. For example, ge-0/0/1.
- **Number of Retries:** The number of times to attempt a command on the SRX before failing. The default value is 2.
- **Timeout (seconds):** The time to wait for a command on the SRX before considering it failed. Default is 300 seconds.
- **Public Network:** The name of the public network on the SRX. For example, trust.
- **Private Network:** The name of the private network on the SRX. For example, untrust.
- **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.

19. Click OK.

20. Click Global Settings. Set the parameter `external.network.stats.interval` to indicate how often you want CloudPlatform to fetch network usage statistics from the Juniper SRX. If you are not using the SRX to gather network usage statistics, set to 0.

### 14.5.3. External Guest Firewall Integration for Cisco VNMC (Optional)

Cisco Virtual Network Management Center (VNMC) provides centralized multi-device and policy management for Cisco Network Virtual Services. You can integrate Cisco VNMC with CloudPlatform to leverage the firewall and NAT service offered by ASA 1000v Cloud Firewall. Use it in a Cisco Nexus 1000v dvSwitch-enabled cluster in CloudPlatform. In such a deployment, you will be able to:

- Configure Cisco ASA 1000v firewalls. You can configure one per guest network.
- Use Cisco ASA 1000v firewalls to create and apply security profiles that contain ACL policy sets for both ingress and egress traffic.
- Use Cisco ASA 1000v firewalls to create and apply Source NAT, Port Forwarding, and Static NAT policy sets.

CloudPlatform supports Cisco VNMC on Cisco Nexus 1000v dvSwitch-enabled VMware hypervisors.

#### 14.5.3.1. Using Cisco ASA 1000v Firewall, Cisco Nexus 1000v dvSwitch, and Cisco VNMC in a Deployment

##### 14.5.3.1.1. Guidelines

- Cisco ASA 1000v firewall is supported only in Isolated Guest Networks.
- Cisco ASA 1000v firewall is not supported on VPC.
- Cisco ASA 1000v firewall is not supported for load balancing.

- When a guest network is created with Cisco VNMC firewall provider, an additional public IP is acquired along with the Source NAT IP. The Source NAT IP is used for the rules, whereas the additional IP is used to for the ASA outside interface. Ensure that this additional public IP is not released. You can identify this IP as soon as the network is in implemented state and before acquiring any further public IPs. The additional IP is the one that is not marked as Source NAT. You can find the IP used for the ASA outside interface by looking at the Cisco VNMC used in your guest network.
- Use the public IP address range from a single subnet. You cannot add IP addresses from different subnets.
- Only one ASA instance per VLAN is allowed because multiple VLANS cannot be trunked to ASA ports. Therefore, you can use only one ASA instance in a guest network.
- Only one Cisco VNMC per zone is allowed.
- Supported only in Inline mode deployment with load balancer.
- The ASA firewall rule is applicable to all the public IPs in the guest network. Unlike the firewall rules created on virtual router, a rule created on the ASA device is not tied to a specific public IP.
- Use a version of Cisco Nexus 1000v dvSwitch that support the vservice command. For example:  
nexus-1000v.4.2.1.SV1.5.2b.bin

Cisco VNMC requires the vservice command to be available on the Nexus switch to create a guest network in CloudPlatform.

### 14.5.3.1.2. Prerequisites

1. Configure Cisco Nexus 1000v dvSwitch in a vCenter environment.

Create Port profiles for both internal and external network interfaces on Cisco Nexus 1000v dvSwitch. Note down the inside port profile, which needs to be provided while adding the ASA appliance to CloudPlatform.

For information on configuration, see [Section 10.6, “Configuring a vSphere Cluster with Nexus 1000v Virtual Switch”](#).

2. Deploy and configure Cisco VNMC.

For more information, see [Installing Cisco Virtual Network Management Center<sup>1</sup>](#) and [Configuring Cisco Virtual Network Management Center<sup>2</sup>](#).

3. Register Cisco Nexus 1000v dvSwitch with Cisco VNMC.

For more information, see [Registering a Cisco Nexus 1000V with Cisco VNMC<sup>3</sup>](#).

4. Create Inside and Outside port profiles in Cisco Nexus 1000v dvSwitch.

---

<sup>1</sup> [http://www.cisco.com/en/US/docs/switches/datacenter/vsg/sw/4\\_2\\_1\\_VSG\\_2\\_1\\_1/install\\_upgrade/guide/b\\_Cisco\\_VSG\\_for\\_VMware\\_vSphere\\_Rel\\_4\\_2\\_1\\_VSG\\_2\\_1\\_1\\_and\\_Cisco\\_VNMC\\_Rel\\_2\\_1\\_Installation\\_and\\_Upgrade\\_Guide\\_chapter\\_011.html](http://www.cisco.com/en/US/docs/switches/datacenter/vsg/sw/4_2_1_VSG_2_1_1/install_upgrade/guide/b_Cisco_VSG_for_VMware_vSphere_Rel_4_2_1_VSG_2_1_1_and_Cisco_VNMC_Rel_2_1_Installation_and_Upgrade_Guide_chapter_011.html)

<sup>2</sup> [http://www.cisco.com/en/US/docs/unified\\_computing/vnmc/sw/1.2/VNMC\\_GUI\\_Configuration/b\\_VNMC\\_GUI\\_Configuration\\_Guide\\_1\\_2\\_chapter\\_010.html](http://www.cisco.com/en/US/docs/unified_computing/vnmc/sw/1.2/VNMC_GUI_Configuration/b_VNMC_GUI_Configuration_Guide_1_2_chapter_010.html)

<sup>3</sup> [http://www.cisco.com/en/US/docs/switches/datacenter/vsg/sw/4\\_2\\_1\\_VSG\\_1\\_2/vnmc\\_and\\_vsg\\_qi/guide/vnmc\\_vsg\\_install\\_5register.html#wp1064301](http://www.cisco.com/en/US/docs/switches/datacenter/vsg/sw/4_2_1_VSG_1_2/vnmc_and_vsg_qi/guide/vnmc_vsg_install_5register.html#wp1064301)



For more information, see [Section 10.6, “Configuring a vSphere Cluster with Nexus 1000v Virtual Switch”](#).

5. Deploy and Cisco ASA 1000v appliance.

For more information, see [Setting Up the ASA 1000V Using VNMC<sup>4</sup>](#).

Typically, you create a pool of ASA 1000v appliances and register them with CloudPlatform.

Specify the following while setting up a Cisco ASA 1000v instance:

- VNMC host IP.
  - Ensure that you add ASA appliance in VNMC mode.
  - Port profiles for the Management and HA network interfaces. This need to be pre-created on Cisco Nexus 1000v dvSwitch.
  - Internal and external port profiles.
  - The Management IP for Cisco ASA 1000v appliance. Specify the gateway such that the VNMC IP is reachable.
  - Administrator credentials
  - VNMC credentials
6. Register Cisco ASA 1000v with VNMC.

After Cisco ASA 1000v instance is powered on, register VNMC from the ASA console.

#### 14.5.3.1.3. Using Cisco ASA 1000v Services

1. Ensure that all the prerequisites are met.

See [Section 14.5.3.1.2, “Prerequisites”](#).

2. Add a VNMC instance.

See [Section 14.5.3.2, “Adding a VNMC Instance”](#).

3. Add a ASA 1000v instance.

See [Section 14.5.3.3, “Adding an ASA 1000v Instance”](#).

4. Create a Network Offering and use Cisco VNMC as the service provider for desired services.

See [Section 14.5.3.4, “Creating a Network Offering Using Cisco ASA 1000v”](#).

5. Create an Isolated Guest Network by using the network offering you just created.

#### 14.5.3.2. Adding a VNMC Instance

1. Log in to the CloudPlatform UI as administrator.

---

<sup>4</sup> [http://www.cisco.com/en/US/docs/security/asa/quick\\_start/asa1000V/setup\\_vnmc.html](http://www.cisco.com/en/US/docs/security/asa/quick_start/asa1000V/setup_vnmc.html)

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.
6. In the Network Service Providers node of the diagram, click Configure.  
You might have to scroll down to see this.
7. Click Cisco VNMC.
8. Click View VNMC Devices.
9. Click the Add VNMC Device and provide the following:
  - Host: The IP address of the VNMC instance.
  - Username: The user name of the account on the VNMC instance that CloudPlatform should use.
  - Password: The password of the account.
10. Click OK.

### 14.5.3.3. Adding an ASA 1000v Instance

1. Log in to the CloudPlatform UI as administrator.
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.
6. In the Network Service Providers node of the diagram, click Configure.  
You might have to scroll down to see this.
7. Click Cisco VNMC.
8. Click View ASA 1000v.
9. Click the Add CiscoASA1000v Resource and provide the following:
  - **Host:** The management IP address of the ASA 1000v instance. The IP address is used to connect to ASA 1000V.
  - **Inside Port Profile:** The Inside Port Profile configured on Cisco Nexus1000v dvSwitch.
  - **Cluster:** The VMware cluster to which you are adding the ASA 1000v instance.  
Ensure that the cluster is Cisco Nexus 1000v dvSwitch enabled.
10. Click OK.

### 14.5.3.4. Creating a Network Offering Using Cisco ASA 1000v

To have Cisco ASA 1000v support for a guest network, 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.
  - **Specify VLAN:** (Isolated guest networks only) Indicate whether a VLAN should be specified when this offering is used.
  - **Supported Services:** Use Cisco VNMC as the service provider for Firewall, Source NAT, Port Forwarding, and Static NAT to create an Isolated guest network offering.
  - **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

The network offering is created.

### 14.5.3.5. Reusing ASA 1000v Appliance in new Guest Networks

You can reuse an ASA 1000v appliance in a new guest network after the necessary cleanup. Typically, ASA 1000v is cleaned up when the logical edge firewall is cleaned up in VNMC. If this cleanup does not happen, you need to reset the appliance to its factory settings for use in new guest networks. As part of this, enable SSH on the appliance and store the SSH credentials by registering on VNMC.

1. Open a command line on the ASA appliance:
  - a. Run the following:

```
ASA1000V(config)# reload
```

You are prompted with the following message:

```
System config has been modified. Save? [Y]es/[N]o:"
```

- b. Enter N.

You will get the following confirmation message:

```
"Proceed with reload? [confirm]"
```

- c. Restart the appliance.

2. Register the ASA 1000v appliance with the VNMC:

```
ASA1000V(config)# vnmcc policy-agent
ASA1000V(config-vnmcc-policy-agent)# registration host vnmcc_ip_address
ASA1000V(config-vnmcc-policy-agent)# shared-secret key where key is the shared secret for
authentication of the ASA 1000V connection to the Cisco VNMC
```

### 14.6. External Guest Load Balancer Integration (Optional)

CloudPlatform can optionally use a Citrix NetScaler or BigIP F5 load balancer to provide load balancing services to guests. If these devices are not installed, or if they are not selected in the network offering, CloudPlatform will use the software load balancer in the virtual router.

1. Set up the appliance according to the vendor's directions.
2. Connect it to the networks carrying public traffic and management traffic (these could be the same network).
3. Record the IP address, username, password, public interface name, and private interface name. On a NetScaler, the interface names will be something like "1/1" or "1/4". On an F5, the interface names will be something like "1.1" or "1.2".
4. Make sure that the VLANs are trunked to the management network interface.
5. After the CloudPlatform Management Server is installed, log in as administrator to the CloudPlatform UI.
6. In the left navigation bar, click Infrastructure.
7. In Zones, click View More.
8. Choose the zone you want to work with.
9. Click Physical Network and select the network you want to work with.
10. In the Network Service Providers node of the diagram, click Configure. (You might have to scroll down to see this.)
11. Click NetScaler or F5.
12. Click the Add button (+) and provide the following:

For NetScaler:

- IP Address: The IP address of the NetScaler.
- 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 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.
- 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 network. When Dedicated is checked, the value in the Capacity field has no significance implicitly, its value is 1.
- GSLB service: (Optional) Select this option if you want to enable GSLB. See Global Server Load Balancing in the Administration Guide.
- 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.

13. Click OK.

The installation and provisioning of the external load balancer is finished. You can proceed to add VMs and NAT or load balancing rules.

## 14.7. Topology Requirements

### 14.7.1. Security Requirements

The public Internet must not be able to access port 8096 or port 8250 on the Management Server.

### 14.7.2. Runtime Internal Communications Requirements

- The Management Servers communicate with each other to coordinate tasks. This communication uses TCP on ports 8250 and 9090.
- The console proxy VMs connect to all hosts in the zone over the management traffic network. Therefore the management traffic network of any given pod in the zone must have connectivity to the management traffic network of all other pods in the zone.
- The secondary storage VMs and console proxy VMs connect to the Management Server on port 8250. If you are using multiple Management Servers, the load balanced IP address of the Management Servers on port 8250 must be reachable.

### 14.7.3. Storage Network Topology Requirements

The secondary storage NFS export is mounted by the secondary storage VM. Secondary storage traffic goes over the management traffic network, even if there is a separate storage network. Primary storage traffic goes over the storage network, if available. If you choose to place secondary storage NFS servers on the storage network, you must make sure there is a route from the management traffic network to the storage network.

### 14.7.4. External Firewall Topology Requirements

When external firewall integration is in place, the public IP VLAN must still be trunked to the Hosts. This is required to support the Secondary Storage VM and Console Proxy VM.

### 14.7.5. Advanced Zone Topology Requirements

With Advanced Networking, separate subnets must be used for private and public networks.

### 14.7.6. XenServer Topology Requirements

The Management Servers communicate with XenServer hosts on ports 22 (ssh), 80 (HTTP), and 443 (HTTPs).

### 14.7.7. VMware Topology Requirements

- The Management Server and secondary storage VMs must be able to access vCenter and all ESXi hosts in the zone. To allow the necessary access through the firewall, keep port 443 open.
- The Management Servers communicate with VMware vCenter servers on port 443 (HTTPs).
- The Management Servers communicate with the System VMs on port 3922 (ssh) on the management traffic network.

### 14.7.8. KVM Topology Requirements

The Management Servers communicate with KVM hosts on port 22 (ssh).

## 14.8. Guest Network Usage Integration for Traffic Sentinel

To collect usage data for a guest network, CloudPlatform needs to pull the data from an external network statistics collector installed on the network. Metering statistics for guest networks are available through CloudPlatform's integration with inMon Traffic Sentinel.

Traffic Sentinel is a network traffic usage data collection package. CloudPlatform can feed statistics from Traffic Sentinel into its own usage records, providing a basis for billing users of cloud infrastructure. Traffic Sentinel uses the traffic monitoring protocol  $\sigma\Phi\lambda\omicron\omega$ ®. Routers and switches generate sFlow records and provide them for collection by Traffic Sentinel, then CloudPlatform queries the Traffic Sentinel database to obtain this information

To construct the query, CloudPlatform determines what guest IPs were in use during the current query interval. This includes both newly assigned IPs and IPs that were assigned in a previous time period and continued to be in use. CloudPlatform queries Traffic Sentinel for network statistics that apply to these IPs during the time period they remained allocated in CloudPlatform. The returned data is correlated with the customer account that owned each IP and the timestamps when IPs were assigned and released in order to create billable metering records in CloudPlatform. When the Usage Server runs, it collects this data.

To set up the integration between CloudPlatform and Traffic Sentinel:

1. On your network infrastructure, install Traffic Sentinel and configure it to gather traffic data. For installation and configuration steps, see inMon documentation at [Traffic Sentinel Documentation](#)<sup>5</sup>.
2. In the Traffic Sentinel UI, configure Traffic Sentinel to accept script querying from guest users. CloudPlatform will be the guest user performing the remote queries to gather network usage for one or more IP addresses.

Click File > Users > Access Control > Reports Query, then select Guest from the drop-down list.

3. On CloudPlatform, add the Traffic Sentinel host by calling the CloudPlatform API command `addTrafficMonitor`. Pass in the URL of the Traffic Sentinel as protocol + host + port (optional); for example, `http://10.147.28.100:8080`. For the `addTrafficMonitor` command syntax, see the API Reference at [API Documentation](#)<sup>6</sup>.

For information about how to call the CloudPlatform API, see the Developer's Guide at [CloudStack API Developer's Guide](#)<sup>7</sup>.

4. Log in to the CloudPlatform UI as administrator.
5. Select Configuration from the Global Settings page, and set the following:

`direct.network.stats.interval`: How often you want CloudPlatform to query Traffic Sentinel.

## 14.9. Setting Zone VLAN and Running VM Maximums

In the external networking case, every VM in a zone must have a unique guest IP address. There are two variables that you need to consider in determining how to configure CloudPlatform to support this: how many Zone VLANs do you expect to have and how many VMs do you expect to have running in the Zone at any one time.

Use the following table to determine how to configure CloudPlatform for your deployment.

guest.vlan.bits	Maximum Running VMs per Zone	Maximum Zone VLANs
12	4096	4094
11	8192	2048
10	16384	1024
10	32768	512

Based on your deployment's needs, choose the appropriate value of `guest.vlan.bits`. Set it as described in Edit the Global Configuration Settings (Optional) section and restart the Management Server.

<sup>5</sup> <http://inmon.com>.

<sup>6</sup> <http://incubator.apache.org/cloudstack/docs/api/index.html>

<sup>7</sup> [http://incubator.apache.org/cloudstack/docs/en-US/Apache\\_CloudStack/4.0.0-incubating/html/API\\_Developers\\_Guide/index.html](http://incubator.apache.org/cloudstack/docs/en-US/Apache_CloudStack/4.0.0-incubating/html/API_Developers_Guide/index.html)





# Amazon Web Service Interface

## 15.1. Amazon Web Services EC2 Compatible Interface

CloudPlatform can translate Amazon Web Services (AWS) API calls to native CloudPlatform API calls so that users can continue using existing AWS-compatible tools. This translation service runs as a separate web application in the same tomcat server as the management server of CloudPlatform, listening on the same port. This Amazon EC2-compatible API is accessible through a SOAP web service and the AWS Query API. The AWS Java SDK and AWS PHP SDK are both supported by the Query API.

### Limitations:

- Supported only in zones that use basic networking.
- Available in fresh installations of CloudPlatform 3.0.3 and newer. Not available through upgrade of previous versions.
- If you need to support features such as elastic IP, set up a Citrix NetScaler to provide this service. The commands such as `ec2-associate-address` will not work without EIP setup. Users running VMs in this zone will be using the NetScaler-enabled network offering (`DefaultSharedNetscalerEIP` and `ELBNetworkOffering`).

## 15.2. System Requirements

- This interface complies with Amazon's WDSL version dated August 15, 2012, available at <http://ec2.amazonaws.com/doc/2012-08-15/>.
- Compatible with the EC2 command-line tools *EC2 tools v. 1.6.2.0*, which can be downloaded at <http://s3.amazonaws.com/ec2-downloads/ec2-api-tools-1.6.2.0.zip>.

## 15.3. Enabling the AWS API Compatible Interface

The software that provides AWS API compatibility is installed along with CloudPlatform. However, you must enable the feature and perform some setup steps.

1. Set the global configuration parameter `enable.ec2.api` to true. See [Section 5.5, "Setting Configuration Parameters"](#).
2. Create a set of CloudPlatform service offerings with names that match the Amazon service offerings. You can do this through the CloudPlatform UI as described in the Administration Guide.



### Warning

Be sure you have included the Amazon default service offering, `m1.small`.

3. If you did not already do so when you set the configuration parameter in step 1, restart the Management Server.

```
# service cloudstack-management restart
```

4. (Optional) The AWS API listens for requests on port 7080. If you prefer AWS API to listen on another port, you can change it as follows:
  - a. Edit the files `/etc/cloudstack/management/server.xml`, `/etc/cloudstack/management/server-nonssl.xml`, and `/etc/cloudstack/management/server-ssl.xml`.
  - b. In each file, find the tag `<Service name="Catalina7080">`. Under this tag, locate `<Connector executor="tomcatThreadPool-internal" port= ... >`.
  - c. Change the port to whatever port you want to use, then save the files.
  - d. Restart the Management Server.



### Note

If you re-install CloudPlatform, you will have to make these changes again.

## 15.4. AWS API User Setup Steps (SOAP Only)

In general, users need not be aware that they are using a translation service provided by CloudPlatform. They need only send AWS API calls to CloudPlatform's endpoint, and it will translate the calls to the native API. Users of the Amazon EC2 compatible interface will be able to keep their existing EC2 tools and scripts and use them with their CloudPlatform deployment, by specifying the endpoint of the management server and using the proper user credentials. In order to do this, each user must perform the following configuration steps:

- Generate user credentials and register with the service.
- Set up the environment variables for the EC2 command-line tools.
- For SOAP access, use the endpoint `http://CloudPlatform-management-server:7080/awsapi`. The `CloudPlatform-management-server` can be specified by a fully-qualified domain name or IP address.

### 15.4.1. AWS API User Registration

Each user must perform a one-time registration. The user follows these steps:

1. Obtain the following by looking in the CloudPlatform UI, using the API, or asking the cloud administrator:
  - The CloudPlatform server's publicly available DNS name or IP address
  - The user account's API key and Secret key
2. Generate a private key and a self-signed X.509 certificate. The user substitutes their own desired storage location for `/path/to/...` below.

```
$ openssl req -x509 -nodes -days 365 -newkey rsa:2048 -keyout /path/to/private_key.pem -  
out /path/to/cert.pem
```

3. Register the mapping from the X.509 certificate to the API/Secret keys. Download the following script from <http://download.cloud.com/releases/3.0.6/cloudstack-aws-api-register> and run it. Substitute the values that were obtained in step 1 in the URL below.

```
$ cloudstack-aws-api-register --apikey=User's CloudPlatform API key --
secretkey=User's CloudPlatform Secret key --cert=/path/to/cert.pem --
url=http://CloudPlatform.server:7080/awsapi
```



### Note

A user with an existing AWS certificate could choose to use the same certificate with CloudPlatform, but the public key would be uploaded to the CloudPlatform management server database.

## 15.4.2. AWS API Command-Line Tools Setup

To use the EC2 command-line tools, the user must perform these steps:

1. Be sure you have the right version of EC2 Tools. The supported version is available at <http://s3.amazonaws.com/ec2-downloads/ec2-api-tools-1.6.2.0.zip>.
2. Set up the environment variables that will direct the tools to the server. As a best practice, you may wish to place these commands in a script that may be sourced before using the AWS API translation feature.

```
$ export EC2_CERT=/path/to/cert.pem
$ export EC2_PRIVATE_KEY=/path/to/private_key.pem
$ export EC2_URL=http://CloudPlatform.server:7080/awsapi
$ export EC2_HOME=/path/to/EC2_tools_directory
```

## 15.5. Supported AWS API Calls

The following Amazon EC2 commands are supported by CloudPlatform when the AWS API compatibility feature is enabled. For a few commands, there are differences between the CloudPlatform and Amazon EC2 versions, and these differences are noted. The underlying SOAP / REST call for each command is also given, for those who have built tools using those calls.

Table 15.1. Elastic IP

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-allocate-address	AllocateAddress	associateIpAddress
ec2-associate-address	AssociateAddress	enableStaticNat
ec2-describe-addresses	DescribeAddresses	listPublicIpAddresses
ec2-disassociate-address	DisassociateAddress	disableStaticNat
ec2-release-address	ReleaseAddress	disassociateIpAddress

Table 15.2. Availability Zone

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-describe-availability-zones	DescribeAvailabilityZones	listZones

Table 15.3. Images

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-create-image	CreateImage	createTemplate

EC2 command	SOAP / REST call	CloudPlatform API call
The noReboot parameter is not supported.		
ec2-deregister	DeregisterImage	DeleteTemplate
ec2-describe-images	DescribeImages	listTemplates
ec2-register For the optional parameter <b>architecture</b> , use the CloudPlatform format rather than the EC2 format. The CloudPlatform format includes the template format, zone, OS type, hypervisorm and required parameters. For example, architecture='VHD:basiczone1:Centos 5.3 (64-bit):xenserver'.	RegisterImage	registerTemplate

Table 15.4. Image Attributes

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-describe-image-attribute	DescribeImageAttribute	listTemplatePermissions
ec2-modify-image-attribute	ModifyImageAttribute	updateTemplatePermissions
ec2-reset-image-attribute	ResetImageAttribute	updateTemplatePermissions

Table 15.5. Instances

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-describe-instances In addition to the EC2 VM states, can also return a CloudPlatform error state.  Known issue: The CloudPlatform device ID of 0, which represents a root volume, does not map to any EC2 device name to be returned in the command response.	DescribeInstances	listVirtualMachines
ec2-reboot-instances	RebootInstances	rebootVirtualMachine
ec2-run-instances	RunInstances	deployVirtualMachine
ec2-start-instances	StartInstances	startVirtualMachine
ec2-stop-instances	StopInstances	stopVirtualMachine
ec2-terminate-instances	TerminateInstances	destroyVirtualMachine

Table 15.6. Instance Attributes

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-describe-instance-attribute In addition to the EC2 VM states, can also return a CloudPlatform error state.	DescribeInstanceAttribute	listVirtualMachines

EC2 command	SOAP / REST call	CloudPlatform API call
Known issue: The CloudPlatform device ID of 0, which represents a root volume, does not map to any EC2 device name to be returned in the command response.		

Table 15.7. Keys Pairs

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-add-keypair	CreateKeyPair	createSSHKeyPair
ec2-delete-keypair	DeleteKeyPair	deleteSSHKeyPair
ec2-describe-keypairs	DescribeKeyPairs	listSSHKeyPairs
ec2-import-keypair	ImportKeyPair	registerSSHKeyPair

Table 15.8. Passwords

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-get-password	GetPasswordData	getVMPassWord

Table 15.9. Security Groups

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-authorize	AuthorizeSecurityGroupIngress	authorizeSecurityGroupIngress
ec2-add-group	CreateSecurityGroup	createSecurityGroup
ec2-delete-group	DeleteSecurityGroup	deleteSecurityGroup
ec2-describe-group	DescribeSecurityGroups	listSecurityGroups
ec2-revoke	RevokeSecurityGroupIngress	revokeSecurityGroupIngress

Table 15.10. Snapshots

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-create-snapshot	CreateSnapshot	createSnapshot
ec2-delete-snapshot	DeleteSnapshot	deleteSnapshot
ec2-describe-snapshots	DescribeSnapshots	listSnapshots

Table 15.11. Volumes

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-attach-volume	AttachVolume	attachVolume
ec2-create-volume	CreateVolume	createVolume
ec2-delete-volume	DeleteVolume	deleteVolume
ec2-describe-volume	DescribeVolumes	listVolumes
ec2-detach-volume	DetachVolume	detachVolume

Table 15.12. Resource Tags

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-create-tags	CreateTags	Add tags to one or more resources.

EC2 command	SOAP / REST call	CloudPlatform API call
ec2-delete-tags	DeleteTags	Remove tags from one or more resources.
ec2-describe-tags	DescribeTags	Show currently defined tags.

# Additional Installation Options

The next few sections describe CloudPlatform features above and beyond the basic deployment options.

## 16.1. Setting a Random System VM Password

You can log in to system virtual machines, just like any other VM, by using the procedure in Accessing VMs in the Administration Guide. 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.

## 16.2. Installing the Usage Server (Optional)

You can optionally install the Usage Server once the Management Server is configured properly. The Usage Server takes data from the events in the system and enables usage-based billing for accounts.

When multiple Management Servers are present, the Usage Server may be installed on any number of them. The Usage Servers will coordinate usage processing. A site that is concerned about availability should install Usage Servers on at least two Management Servers.

### 16.2.1. Requirements for Installing the Usage Server

- The Management Server must be running when the Usage Server is installed.
- The Usage Server must be installed on the same server as a Management Server.

### 16.2.2. Steps to Install the Usage Server

1. If you are on RHEL/CentOS 5.x, use the following command to set up an Extra Packages for Enterprise Linux (EPEL) repo:

```
# rpm -Uvh http://mirror.pnl.gov/epel/5/i386/epel-release-5-4.noarch.rpm
```

2. Run `./install.sh`.

```
# ./install.sh
```

You should see a few messages as the installer prepares, followed by a list of choices.

3. Choose "S" to install the Usage Server.

```
> S
```

4. Once installed, start the Usage Server with the following command.

```
# service cloudstack-usage start
```

The Administration Guide discusses further configuration of the Usage Server.

### 16.3. SSL (Optional)

CloudPlatform provides HTTP access in its default installation. There are a number of technologies and sites which choose to implement SSL. As a result, we have left CloudPlatform to expose HTTP under the assumption that a site will implement its typical practice.

CloudPlatform uses Tomcat as its servlet container. For sites that would like CloudPlatform to terminate the SSL session, Tomcat's SSL access may be enabled. Tomcat SSL configuration is described at <http://tomcat.apache.org/tomcat-6.0-doc/ssl-howto.html>.

### 16.4. Database Replication (Optional)

CloudPlatform supports database replication from one MySQL node to another. This is achieved using standard MySQL replication. You may want to do this as insurance against MySQL server or storage loss. MySQL replication is implemented using a master/slave model. The master is the node that the Management Servers are configured to use. The slave is a standby node that receives all write operations from the master and applies them to a local, redundant copy of the database. The following steps are a guide to implementing MySQL replication.



#### Note

Creating a replica is not a backup solution. You should develop a backup procedure for the MySQL data that is distinct from replication.

1. Ensure that this is a fresh install with no data in the master.
2. Edit my.cnf on the master and add the following in the [mysqld] section below datadir.

```
log_bin=mysql-bin  
server_id=1
```

The server\_id must be unique with respect to other servers. The recommended way to achieve this is to give the master an ID of 1 and each slave a sequential number greater than 1, so that the servers are numbered 1, 2, 3, etc.

3. Restart the MySQL service:

```
# service mysqld restart
```



4. Create a replication account on the master and give it privileges. We will use the "cloud-repl" user with the password "password". This assumes that master and slave run on the 172.16.1.0/24 network.

```
# mysql -u root
mysql> create user 'cloud-repl'@'172.16.1.%' identified by 'password';
mysql> grant replication slave on *.* TO 'cloud-repl'@'172.16.1.%';
mysql> flush privileges;
mysql> flush tables with read lock;
```

5. Leave the current MySQL session running.
6. In a new shell start a second MySQL session.
7. Retrieve the current position of the database.

```
# mysql -u root
mysql> show master status;
+-----+-----+-----+-----+
| File          | Position | Binlog_Do_DB | Binlog_Ignore_DB |
+-----+-----+-----+-----+
| mysql-bin.000001 |      412 |              |                   |
+-----+-----+-----+-----+
```

8. Note the file and the position that are returned by your instance.
9. Exit from this session.
10. Complete the master setup. Returning to your first session on the master, release the locks and exit MySQL.

```
mysql> unlock tables;
```

11. Install and configure the slave. On the slave server, run the following commands.

```
# yum install mysql-server
# chkconfig mysqld on
```

12. Edit my.cnf and add the following lines in the [mysqld] section below datadir.

```
server_id=2
innodb_rollback_on_timeout=1
innodb_lock_wait_timeout=600
```

13. Restart MySQL.

```
# service mysqld restart
```

14. Instruct the slave to connect to and replicate from the master. Replace the IP address, password, log file, and position with the values you have used in the previous steps.

```
mysql> change master to
-> master_host='172.16.1.217',
-> master_user='cloud-repl',
-> master_password='password',
-> master_log_file='mysql-bin.000001',
-> master_log_pos=412;
```

15. Then start replication on the slave.

```
mysql> start slave;
```

16. Optionally, open port 3306 on the slave as was done on the master earlier.

This is not required for replication to work. But if you choose not to do this, you will need to do it when failover to the replica occurs.

### 16.4.1. Failover

This will provide for a replicated database that can be used to implement manual failover for the Management Servers. CloudPlatform failover from one MySQL instance to another is performed by the administrator. In the event of a database failure you should:

1. Stop the Management Servers (via service cloudstack-management stop).
2. Change the replica's configuration to be a master and restart it.
3. Ensure that the replica's port 3306 is open to the Management Servers.
4. Make a change so that the Management Server uses the new database. The simplest process here is to put the IP address of the new database server into each Management Server's /etc/cloudstack/management/db.properties.
5. Restart the Management Servers:

```
# service cloudstack-management start
```